

Contact Info – FSC Job Aid

The *Contact Info* screen allows users to document Household Member's contact information including addresses, phone numbers, email, gender and sexuality, and communication preferences.

Contact Info

A v	Å V	Legal Sex	≜ Birth Date	Relationship to HOH	Source
Susie Sunshine		Female	01/06/2015	Self	FSC
Sally Sunshine		Female		Sister	FSC
Show 10 v entries				First	Previous 1 Next Last
✓ Contact Info					
✔ Contact Info					
Contact Info Address Phone C	Dther Geno	ler and Sexuality	Communications		
 ✓ Contact Info Address Phone C Add Address 	Dther Geno	ler and Sexuality	Communications		
 ✓ Contact Info Address Phone C Add Address 	Dther Geno	ler and Sexuality Address Summary	Communications	ddress +	Validated?
✓ Contact Info Address Phone C Add Address ↓ Address Type	Dther Geno +	der and Sexuality Address Summary No da	Communications	ddress Å	Validated?
 ✓ Contact Info Address Phone C Add Address Add ress Type Show 10 ♥ entries 	Dther Geno ÷	ier and Sexuality Address Summary No da	Communications Primary A ata available in table	ddress ÷ First Pre	Validated? vious Next Last

Navigation

- 1. From the Dashboard : Locate the desired Case and click on the Case ID to bring the Case into focus.
 - a. Click on the Case Information tile. Then click on the Contact Info > tile.





Contact Info – Address tab

1. Select an individual by clicking on that individual's name in the *Household Member List.* That individual's line in the grid will turn grey to show that it has been selected.

	Member Name		↓ Legal Sex	¢ Birth Date	Relationship to HOH	Source
	Susie Sunshine	Ф	Female	01/06/2015	Self	FSC
	Sally Sunshine	_	Female		Sister	FSC
v 10	entries				First	Previous 1 Next La
Conta	act Info					
Conta	act Info Address Phone	Other G	Gender and Sexuality	Communications		
Conta	Address Phone Add Address	Other G	Gender and Sexuality	Communications		
Conta	Address Phone Address Address Address Type	Other G	Gender and Sexuality Address Summary	Communications	ry Address	Validated?
Conta	Address Phone Add Address Add Address Type	Other G	Gender and Sexuality Address Summary No da	Communications † Prima ata available in table	ry Address	Validated?
Conta	Address Phone Add Address Address Type Show 10 v entries	Other G	Gender and Sexuality Address Summary No da	Communications $\frac{1}{2}$ Prima ata available in table	ryAddress ∳ First Pre	Validated?

- a. In the Address tab below the Household Member grid, update or document the individual's address information:
- b. Click Add Address to add a new address.
- c. To view or edit an existing address click on the Address Type of the desired address in the grid.
- d. To Validate or Delete an address, click on the desired address' line in the grid.
 - i. Click Validate to validate the address selected in the grid.
 - ii. Click Delete to delete the address selected in the grid.



2. Completing the *Contact Information – Address* pop-up:

Contact Information - Add	ress			
A Same as Head of H	lousehold?			
Address Type * B	Address 1 *	Address 2	Primary Address	County
-Select- 🔽			-Select- 🔽	Allegheny 🔽
City F	Neighborhood/Municipality	State	Zip Code	Extension
	-Select-	Pennsylvania 🔽		
Save	Cancel			

- a. Using the Same as Head of Household? checkbox: Once the address of the Head of Household (the individual with a *Relationship to HOH* that is listed as "Self") has been saved and validated this checkbox can be used on other Household Member's address tabs to copy over the Participant's address. The Validate button will still need to be used in order to save the information to the Address tab.
- b. *Address Type*: Select the type of address being documented from the drop-down.
- c. *Address 1* and *Address 2*: Enter the Address line 1 and Address Line 2 (if applicable).
- d. *Primary Address*: Select "Yes" or "No" from the drop-down. Only one active address can be the Primary Address at a time.
- e. *County*: Select the County from the drop-down. This drop-down will default to "Allegheny".
- f. *City*: Enter the City.
- g. *Neighborhood/Municipality*: If known, select the Neighborhood/Municipality from the dropdown.
- h. State: Select the State from the drop-down. This drop-down will default to "Pennsylvania".
- i. *Zip Code* and *Extension*: Enter the Zip Code and Extension (if known).
- j. Click Save to save the information entered and close the pop-up.
 Clicking Cancel will close the pop-up without saving any information that was entered or edited.



- 3. Saving and Validating the address: When an address is validated, Synergy compares the entered information to the postal code address list and generates a list of possible addresses formatted properly.
 - a. Click Validate to open the *Address Validation* pop-up. The *Search Result* grid will already be populated with the possible search results.

ome	Address I		Address 2		Allegheny	
ity	Neighborhood/Municipality	State		Zip Code	E	extension
ttsburgh	-Select-	Pennsylv	vania	15215		
Search arch Result						
Search arch Result Address Line 1	Address Line 2	🖕 City	≜ Stat	2	≜ Zip Code	
Search arch Result Address Line 1 123 N Main S	↓ Address Line 2 St	↓ City	+ Stat	PA	∳ Zip Code	15-2018

- i. If the *Search Result* list includes the desired address, click on the correct address in the grid. The *Address Validation* pop-up will close and the selected address will appear in the *Address* grid with a "Yes" in the *Validated*? column to indicate that the Address has been validated.
- ii. If the correct address is not in the *Search Result* list, the *Address Information* can be updated and searched again. To do so, edit the *Address Information* and click Search
- iii. If, after searching again, the address cannot be located in the Search Result list the address can still be saved without validation. To do so, click
 Create address as entered
 The Address Validation pop-up will close and the address will appear in the Address grid with a "No" in the Validated? column to indicate that the Address has not been validated.
- iv. Clicking Cancel will close the *Validate Address* pop-up without validating or changing any information.



4. Editing or Deleting an Address:

Address Type	🛓 Address Summary	Primary Address?	Validated?	4 Agency	🖕 Facility	
Home	123 N Main St Pittsburgh,PA, 15215- 2018		YES			ŵ

a. To edit an address that has already been entered in the *Address* grid click on the address in

the *Address* grid, update the information below the *Address* grid and click Save & Validate The Validate Address pop-up will then open to allow the edited information to be searched and validated.

b. To delete an address, click the Delete Icon [🔟] to the right of the address in the *Address* grid. A *Confirm Delete* pop-up will appear:

	Confirm Delete
	Are you sure you want to delete this record?
Clicking Yes will	delete the address.
Clicking No will	cancel the action and the address will not be deleted.

Contact Info – Phone tab

- 1. Select an individual from the *Contact Info* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.
- 2. Click on the **Phone** tab below the *Contact Info* grid to update or document the individual's phone number information:

Address	Phone	Other Gender	and Sexuality Cor	nmunications				
Add Pl	none							
🛔 Phone Typ	e	Phone #	Emergency Contact?	🛔 First Name	÷	Last Name		
Ho	ome	(555) 555-5555	Yes	Jane			Smith	
Show 10	entrie	25			First	Previous	1 Net	xt Last elete



- a. To view or edit an existing phone number click on the *Phone Type* of the desired number.
- b. Click Add Phone to add a new phone number.
- c. Click Delete to delete the highlighted phone number.
- 3. When entering or updating a new phone number: enter or update the following information in the *Contact Information Phone* pop-up:

Contact Information - Ph	none		
Phone Type *	Phone Number *	Phone Notes	Primary Phone? -Select-
Emergency Contact	First Name	Last Name	Relationship -Select-
Save	Cancel		

- a. Complete the following information:
 - i. *Phone Type*: Select the type of phone from the drop-down.
 - ii. *Phone #*: Enter the 10-digit phone number.
 - iii. *Phone Notes*: Enter notes about the phone number (if needed) such as: "Only use this phone number after 7PM."
 - iv. *Primary Phone?*: Select "Yes" or "No" from the drop-down.
 - v. *Emergency Contact*: If this is a phone number of an Emergency Contact, select "Yes" from the drop-down and then enter the Emergency Contact's *First Name*, *Last Name*, and *Relationship* to the Household Member. If this is not an emergency contact, select "No" and leave the rest of the fields blank.
 - vi. *First Name*: If applicable, enter the first name of the Emergency Contact.
 - vii. Last Name: If applicable, enter the Last name of the Emergency Contact.
 - viii. *Relationship*: If applicable, select the relationship of the Emergency Contact to the Household Member.
- b. Click Save

to save the information entered and close the pop-up.

c. Clicking **Cancel** will close the pop-up without saving any information that was entered or edited.



4. To delete a phone number, click in the desired phone number's line in the *Phone* grid and click Delete . A Delete Confirmation pop-up will appear:

Are you sur	e you want to delete th	is record
	Voc	

Clicking **Yes** will delete the phone number.

Clicking will cancel the action and the phone number will not be deleted.

Contact Info – Other tab

- 1. Select an individual from the *Contact Info* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.
- 2. Click on the other tab below the *Contact Info* grid to update or document the individual's email address and detail how the individual was made aware of or referred to this program.

Address	Phone	Other	Gender and Sexuality	Communications		
Email Add	dress		How was the client made as	vare of/referred to this program?	Specify	
Sa	ve					

- a. *Email Address*: Enter an *Email Address* for the individual (if known).
- b. *How was the client made aware of/referred to this program*?: Answer this question by selecting from the drop-down options.
- c. *Specify*: If "Other (specify)" is selected from the *How was the client made aware of/referred to this program*? drop-down, enter the specific information here.
- d. Click Save to save the entered or edited information.





Contact Info – Gender and Sexuality tab

- 1. Select an individual from the *Contact Info* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.
- 2. Click on the Gender and Sexuality tab below the *Contact Info* grid to update or document the individual's Sexual Orientation and Gender Identity Expression (SOGIE) information for the selected individual.

Did Not Ask Yet	A				
Legal and Prefe	rred Name/Pronot	uns same?			
Preferred Name *		Gender Identity *	Self Describe	Legal Name-Gender Pronouns	* Self Describe
	C	-Select-	D	-Select-	
Preferred Name-G	iender Pronouns *	Self Describe	Sex At Birth	Sexual Orientation	Self Describe
-Select-			-Select-	G -select-	

- a. If you have not yet asked about the individual's SOGIE information, check the *✓ Did Not Ask Yet* box. Doing so will cause the rest of the SOGIE fields to become read only. When you are ready to document this information you can uncheck the *□ Did Not Ask Yet* checkbox and all of the SOGIE fields will be enabled again.
- b. If the individual has indicated that their preferred first name and Pronouns are the same as their Legal Name and Pronouns check the ✓ Legal and Preferred Name/Pronouns same? Checkbox. Checking this box will update the Preferred Name field with the individual's first name as it appears in the Household Information grid.
- c. *Preferred Name*: Enter the individual's preferred name here.
- d. *Gender Identity*: Select the Gender Identity that the individual identifies as from the drop-down. If their Gender Identity is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Gender Identity here.
- e. *Legal Name-Gender Pronouns*: Select the individual's Legal Gender Pronouns from the drop-down. If their Legal Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Legal Gender Pronouns here.





- f. *Preferred Name-Gender Pronouns*: Select the individual's Preferred Gender Pronouns from the drop-down. If their Preferred Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Preferred Gender Pronouns here.
- g. *Sex At Birth*: Select the individual's sex at birth from the drop-down.
- h. *Sexual Orientation*: Select the individual's Sexual Orientation Sexual Orientation from the drop-down. If their Sexual Orientation is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Sexual Orientation here.
- 3. Click Save to save the entered or edited information.





Contact Info – Communications tab

- 1. Select an individual from the *Contact Info* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.
- 2. Click on the <u>Communications</u> tab below the *Contact Info* grid to update or document the individual's Communications preferences. If the individual's Preferred Name is different than their Legal Name this tab can be used to document which name the individual wants to be used in communications. Use the checkboxes to select Legal Name or Preferred Name for each item in the list.

ecklist for when to use Legal vs. Preferred Na	ame 🗛 🗆 Legal Name	B Preferred Name
Court		
Drug and Alcohol Provider		
Employer		
Family		
Human Services Provider (other)		
Landlord		
Mailings to Home Address		
Medical Providers		
Mental Health Provider		
Natural Supports (other)		
Residential Provider		
School		
Service Coordinator		
Service Plans and Assessments		

- a. If the Youth has indicated that their Preferred Name should be used in all communications, check the *I Legal Name* checkbox above the grid.
- b. If the Youth has indicated that their Preferred Name should be used in all communications, check the **✓** *Preferred Name* checkbox above the grid.
- c. Click Save to save the entered or edited information.

For more information...

For assistance, please contact the Allegheny County Service Desk at <u>ServiceDesk@AlleghenyCounty.US</u> or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <u>https://servicedesk.alleghenycounty.us</u>

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm