



Demographics – FSC Job Aid

The *Demographics* screen allows users to document Household Member's income, insurance, and housing information.

Demographics

Household Member List

Member Name	Legal Sex	Birth Date	Relationship to HOH	Source
Sally Sunshine	Female	05/31/2015	Self	FSC
Sam Sunset	Male	02/03/1995	Brother	FSC

Show 10 entries

First Previous 1 Next Last

Demographics

Income Insurance Housing

Add Income

Income Source	Income Amount	Frequency	Location	Start Date	End Date	
Earned Income(i.e. employment income)	300.00	Monthly	Walmart	1/2/2017		

Show 10 entries

First Previous 1 Next Last

Total Household Yearly Income \$ 3600.00

Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - Click on the **Case Information** tile. Then click on the **Demographics** tile.



Demographics – Income 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.

The screenshot shows the 'Household Member List' and 'Demographics' sections of the system. In the 'Household Member List' table, the row for 'Sally Sunshine' is highlighted in grey, indicating it is selected. The table has columns for Member Name, Legal Sex, Birth Date, Relationship to HOH, and Source. Below the table is a 'Show 10 entries' dropdown and pagination controls (First, Previous, 1, Next, Last). The 'Demographics' section has tabs for Income, Insurance, and Housing. The 'Income' tab is active, showing an 'Add Income' button and a table with columns for Income Source, Income Amount, Frequency, Location, Start Date, and End Date. A single entry is shown: 'Earned Income(i.e. employment income)' with an amount of 300.00, frequency of Monthly, location of Walmart, and start date of 1/2/2017. Below the table is another 'Show 10 entries' dropdown and pagination controls. At the bottom, a 'Total Household Yearly Income \$' field displays 3600.00.

Member Name	Legal Sex	Birth Date	Relationship to HOH	Source
Sally Sunshine	Female	05/31/2015	Self	FSC
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Show 10 entries First Previous 1 Next Last

Demographics

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Income Source	Income Amount	Frequency	Location	Start Date	End Date
Earned Income(i.e. employment income)	300.00	Monthly	Walmart	1/2/2017	

Show 10 entries First Previous 1 Next Last

Total Household Yearly Income \$ 3600.00

2. In the **Income** tab below the *Household Member* grid, update or document the individual's income information:
 - a. To view or edit existing income information click on the *Income Source* link in the grid.
 - b. Click **Add Income** to add an income source record.
 - c. To delete an Income Source, click the Delete Icon [] to the right of the *Income Source* in the *Income* grid. A *Confirm Delete* pop-up will appear:

The 'Confirm Delete' dialog box is a grey-bordered box with a title bar that says 'Confirm Delete'. Inside, it asks 'Delete Selected income information?' in blue text. At the bottom, there are two buttons: 'Yes' and 'No'.

Confirm Delete

Delete Selected income information?

Yes No

Clicking **Yes** will delete the *Income Source*.

Clicking **No** will cancel the action and the *Income Source* will not be deleted.

3. The *Total Household Yearly Income \$* will be calculated automatically. Synergy calculates this based on the start and end dates of all of the income documented and the amount(s) entered.



4. Completing the *Demographics – Income* pop-up:

Demographics - Income

Location **A**

Start Date End Date **B**

Income Source * Other Income Source Non-Cash Benefit Type **C**

-Select- -Select- -Select-

Income Amount **D** Frequency * **E**

0 -Select-

Save Cancel

- Location:** If applicable, enter the location from which the income is received.
- Start Date and End Date:** Enter the start date for this income source. If applicable, enter the End date for this income source.
- Income Source:** Select the type of income being documented from the drop-down. If the type selected is "Other source" enter the type of income in the *Other Income Source* field. If the type selected is "Non-Cash Benefit" enter the type in the *Non-Cash Benefit Type* field.
- Income Amount:** Enter the Income amount for this income source within the latest 30 day period.
- Income Frequency:** Select the frequency of the income from the drop-down. For example, if an individual's paycheck is \$400 and they receive the paycheck once a month the *Income Amount* would be \$400 and the *Frequency* would be "Monthly".

Frequency	Definition	Example
Bi-Monthly	Income is received twice per month, for a total of 24 payments in a year.	The person is paid on the 1st and 15th of the month.
Bi-Weekly	Income is received every other week, for a total of 26 payments in a year.	The person is paid every other Friday.
Monthly	Income is received once per month, for a total of 12 payments in a year.	The person is paid on the last day of each Month.
Weekly	Income is received every week, for a total of 52 payments in a year.	The person is paid every Friday.

- Click **Save** to add the Income Source to the *Income Information* grid.
- Click **Cancel** to close the pop-up without saving any information or changes.



Demographics – Insurance 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.

Click on the **Insurance** tab to update or document the selected individual's insurance information:

- a. To view or edit existing insurance information click on the *Insurance Type* link in the grid.
- b. Click **Add Insurance** to add an insurance type record.
- c. To delete an *Insurance Type*, click the Delete Icon [] to the right of the *Insurance Type* in the *Insurance* grid. A *Confirm Delete* pop-up will appear:

Clicking **Yes** will delete the *Insurance Type*.

Clicking **No** will cancel the action and the *Insurance Type* will not be deleted.



2. Completing the *Demographics – Insurance* pop-up:

Demographics - Insurance

Insurance Type * **A**

Notes **B**

C **D**

- Insurance Type*: Select the type of insurance the individual has.
- Notes*: If applicable, enter notes about the individual's insurance. The *Notes* narrative will become mandatory if the Insurance Type selected is "Other".
- Click to add the Insurance Information to the *Insurance Information* grid.
- Click to close the pop-up without saving any information or changes.

Demographics – Housing tab

- 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.
Click on the tab to update or document the selected individual's housing information:

Add Housing

Housing Status	Housing Type	Length of time in current residence	Moved in last year?	# of Moves	Children enrolled in different school district?
Emergency shelter	Other	Less than 1 year	Yes	3	Yes

Show entries

First Previous **1** Next Last

- To view or edit existing Housing information click on the *Housing Status* link in the grid.
- Click to add a housing record.

- c. To delete a housing record, click the Delete Icon [] to the right of the housing record in the *Housing* grid. A *Confirm Delete* pop-up will appear:

Confirm Delete

Delete selected Housing information?

Yes
No

Clicking Yes will delete the housing record.

Clicking No will cancel the action and the housing record will not be deleted.

3. Completing the *Demographics – Housing* pop-up:

Additional Information - Housing

Housing Status * A -Select- ▼	Housing Type * B -Select- ▼	Length of time in current residence C -Select- ▼
Moved in last year? D -Select- ▼	# of Moves E 	Children enrolled in different school district? F -Select- ▼
Save G Cancel H		

- a. *Housing Status*: Select the housing status of the individual.
- b. *Housing Type*: Select the type of housing for the individual.
- c. *Lengths of time in current residence*: Select the approximate length of time the individual has been living in their current residence.
- d. *Moved in last year?*: Indicate whether or not the individual has moved within the last year by selecting "Yes" or "No" from the drop-down.
- e. *# of Moves*: If the individual has moved in the last year, document the number of moves in this field.
- f. *Children enrolled in different school district?*: If applicable, indicate whether or not the child(ren) are enrolled in a different school district by selecting "Yes" or "No" from the drop-down.

For more information...

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

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

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