



Household Info – FSC Job Aid

The *Household Info* screen is the first screen that appears after creating a new Case and contains basic demographic information on the Family as well as information on the Household Members' involvements with other DHS programs.

Household Info

Household Members

☒ Active members ☐ All members

Member Name	Legal Sex	Birth Date	SSN	Relationship to HOH	Involved in Program?	Active?	MCI ID or Client ID	Source	
Ben Smith	Male	03/04/1990		Self	Yes	Y	1000610045	FSC	

Show entries

First Previous 1 Next Last

DHS Involvement

System	Open Date	Last Updated Date	Referral/Case ID	Worker	Worker Email

Show entries

First Previous 1 Next Last

Navigation

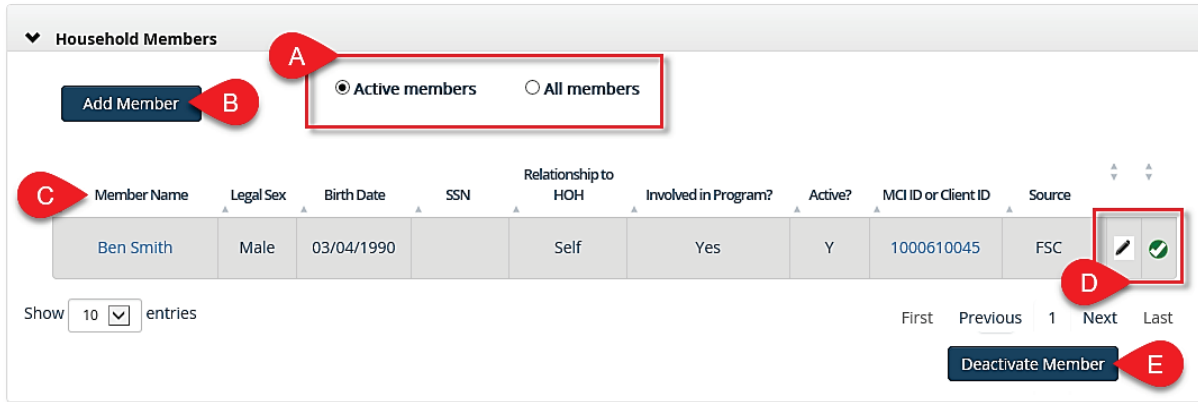
- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - Click on the **Case Information** tile. Then click on the **Household Info** tile.

Synergy Definitions:

An **Active Member** refers to whether or not the individual is currently in the Household. This is separate from whether or not the individual is involved (enrolled) in the Family Support Center. Example: A woman is involved with the Family Support Center, participates in classes, and receives services. Her boyfriend resides with her but does not participate in the Support Center's programs and services. He would still be documented as an Active Member of the Household.

Household Members

- The **Household Members** pane allows users to review, edit, MCI clear, add, or deactivate/activate Household Members as well as change a Household Member to a Support.



The screenshot shows the 'Household Members' pane. Callout A points to the 'Active members' radio button. Callout B points to the 'Add Member' button. Callout C points to the 'Member Name' column header. Callout D points to the edit and MCI icons in the 'Source' column. Callout E points to the 'Deactivate Member' button.

Member Name	Legal Sex	Birth Date	SSN	Relationship to HOH	Involved in Program?	Active?	MCI ID or Client ID	Source
Ben Smith	Male	03/04/1990		Self	Yes	Y	1000610045	FSC

Show 10 entries

First Previous 1 Next Last

Deactivate Member

- The list will default to *Active Members*. To view both active and deactivated Household Members select the *All Members* radio button.
- To add a new Household Member click **Add Member**.
- The *Household* grid contains basic information about the Household Members including their *Name, Legal Sex, Birthdate, SSN, Relationship to HoH (Head of Household), Involved in Program?, Active, MCI or Client ID* and system *Source*.
- Editing Household Member information and MCI Clearance:
 - To edit the individual's information click on the Edit Icon [] to the right of the individual in the *Household Members* grid. This will open the *Household Members* pop-up. Clicking on the individual's name will also open this pop-up.
 - The icon to the right of the MCI number in the *Household Information* grid indicates whether or an MCI clearance has been performed.
 - A  indicates that an MCI clearance has not been performed.
 - A  indicates that an MCI clearance has been performed.
 - To clear or re-clear an MCI click on the  or the .
 - Clicking on the MCI ID for an individual will open Client View and display the individual's information in Client View.

See **Page 7** of this Job Aid for instructions on how to MCI Clear an individual.



- e. Deactivating a Household Member: To deactivate a Household Member, click on that individual's line in the grid and click the **Deactivate Member** button below the grid.
- i. The only Household Member that cannot be deactivated or moved to Support is the Head of Household. This individual's *Relationship to HoH* will always be "Self". Only one Household Member may have the relationship of "Self" at any given time.

DHS Involvement

1. **DHS Involvement**: This pane contains information on the individual's involvement in other Family Support Center cases or other systems in Synergy.

Household Members
Add Member ☒ Active members ☐ All members

Member Name	Legal Sex	Birth Date	SSN	Relationship to HOH	Involved in Program?	Active?	MCI ID or Client ID	Source		
Ben Smith	Male	03/04/1990		Self	Yes	Y	1000610045	FSC		

Show 10 entries First Previous 1 Next Last

Deactivate Member

DHS Involvement

System	Open Date	Last Updated Date	Referral/Case ID	Worker	Worker Email

Show 10 entries First Previous 1 Next Last

- a. Clicking on an individual's line in the Household Members grid will display that person's DHS involvement(s).
- b. The *DHS Involvement* grid contains the name of the *System*, *Open Date*, *Last Updated Date*, *Referral/Case ID* within that System, *Worker* name, and *Worker Email*.



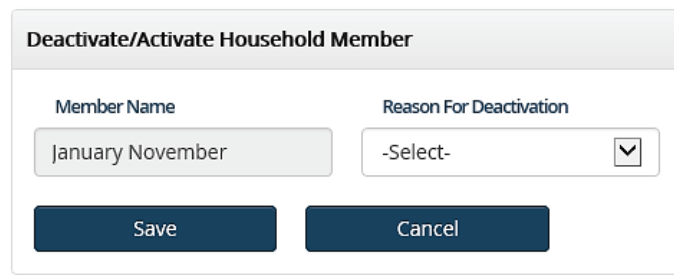
Editing, Deactivating, or Activating a Household Member

1. Editing a Household Member

- Click on the desired Household Member's name or click on the Edit Icon [] to the right of the individual in the *Household Members* grid to open the *Household Members* pop-up.
- Update the person's information in the *Household Members* pop-up and click .
- To close the *Household Members* pop-up without saving changes click .

2. Deactivating a Household Member:

- Select the Household Member to deactivate from the grid and click . Note that the Head of Household (HoH) cannot be deactivated.
- In the pop-up select the *Reason for Deactivation* and click .
- To close the pop-up without saving changes click .



The form is titled "Deactivate/Activate Household Member". It contains two input fields: "Member Name" with the text "January November" and "Reason For Deactivation" with a dropdown menu showing "-Select-". Below these fields are two buttons: "Save" and "Cancel".

If the *Reason for Deactivation* is "Member is now a Support" that individual will be added to the **Supports** screen. Only MCI Cleared Household Members can be moved from Household to Support.

Important Note: This feature will be available with the June 2017 update of the Synergy Family Support Center application. The Member is now a Support" option should not be used until that time.

3. Activating a Household Member:

- Select the *All Members* radio button above the grid.
- Select the desired deactivated Household Member from the grid by clicking on that individual's name. The *Household Members* pop-up will open.
- In the *Involved in Program?* drop-down select "yes" and click . This Household Member will now appear in the *Active Members* filtered grid.



Adding a new Household Member

1. To add a new Household Member, click **Add Member**.

The screenshot shows the 'Household Members' form with the following fields and callouts:

- A** points to the **Prefix**, **First Name ***, **Middle Name**, **Last Name ***, and **Suffix** fields.
- B** points to the **Birth Date **** and **Approximate Age **** fields.
- C** points to the **Legal Sex *** field.
- D** points to the **Relationship to HOH *** field.
- E** points to the **SSN** field.
- F** points to the **Race** field.
- G** points to the **Ethnicity** field.
- H** points to the **Role *** field.
- I** points to the **Involved in Program?** field.
- J** points to the **Pregnant?** field.
- K** points to the **Marital Status** field.
- L** points to the **Primary Language**, **Need Interpreter?**, and **Secondary Language** fields.

Below the form are **Search** and **Cancel** buttons. The **Search Results** section contains a table with columns: MCI ID, Client ID, First, Last, Gender, DOB, SSN, and % Match. At the bottom are **Add to Case** and **Create Client** buttons.

- Prefix, First Name, Middle Name, Last Name* and *Suffix*: Enter the individual's *First Name* and *Last Name*. If applicable also enter the individual's *Prefix*, *Middle Name*, and *Suffix*.
- Birth Date* and *Approximate Age*: Enter either the date of birth or the individual's approximate age.
- Legal Sex*: Select the individual's legal sex from the drop-down.
- Relationship to HOH*: Select the individual's relationship to the Head of Household from the drop-down. If the individual is the Head of Household select "self" from the drop-down.
- SSN*: If known, enter the individual's Social Security Number (SSN).
- Race*: This is a multi-select drop-down, select all that apply.
- Ethnicity*: Select the individual's ethnicity from the drop-down.
- Role*: Select what role the individual holds in the Case from the drop-down.
- Involved in Program?*: If the individual is enrolled in the program select "Yes" from the drop-down. Note that this drop-down defaults to "Yes" but can be changed.



- j. *Pregnant?*: Indicate whether or not the individual is pregnant using the drop-down.
 - k. *Marital Status*: Select the individual's Marital Status from the drop-down.
 - l. *Primary Language, Need Interpreter?*, and *Secondary Language*: Select the Individual's *Primary Language* from the drop-down. Indicate whether or not the individual needs an interpreter using the *Need Interpreter?* drop-down. If the individual speaks another language select that language from the *Secondary Language* drop-down.
2. Once all of the fields have been filled out click [Search](#) to review possible MCI ID matches for the Household Member.
 3. Review the *Search Results* to determine whether the Household Member is one of the individuals in the *Search Results* grid.

Search Results							
MCIID	Client ID	First	Last	Gender	DOB	SSN	% Match
1000578721	19881	ADAM	KENNEDY	Male	01/01/1999		91
Show 10 entries First Previous 1 Next Last							

- a. If the person is one of the individuals in the *Search Results*, select that individual by clicking their line in the grid and clicking [Add to Case](#).
- b. If the person is NOT one of the individuals in the *Search Results* click [Create Client](#).
- c. Note that if no date is entered, the *Involvement Start Date* will default to the date the Household Member was entered on Case in the system.



MCI (Master Client Index) Clearing

DHS' goal is to ensure that all services, connections, and information for an individual are connected to one ID, the Master Client Index ID (MCI ID).

The MCI Clearance process assists in this by helping to minimize the possibility of duplicate MCI IDs within DHS applications.

1. Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared but they can be re-cleared if necessary. To open the MCI Clearance pop-up, select the desired individual and click on the MCI Clearance Icon [ or ].

Client Search

Person Search Results

To create new member in MCI and assign it to selected household member, click on Create.

Please enter first name, last name, gender and birth date of the household member to create the MCI record.

Prefix	First Name	Middle Name	Last Name	Suffix
				-Select- v
Gender	DOB	SSN	Race	
v			None selected v	

Create

Potential Matches

To associate an existing MCI member to the selected household member, click on Select.

MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match

Show entries

First Previous 1 Next Last

Select

Detail Information

Client Information

Contact Information

DHS Involvement

MCI ID	Name	DOB
SSN	Gender	Race

Cancel



2. The *Person Search Results* section contains the information that has been entered in this Case for this individual. Compare this information to the *Potential Matches* section.

Person Search Results

To create new member in MCI and assign it to selected household member, click on Create.

Please enter first name, last name, gender and birth date of the household member to create the MCI record.

Prefix	First Name	Middle Name	Last Name	Suffix
				-Select- v
Gender	DOB	SSN	Race	
v			None selected v	

- a. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that the desired individual is this person based on the demographic data entered.

Potential Matches

To associate an existing MCI member to the selected household member, click on Select.

MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match
1000608262		October		November		Female	05/06/1998		91

Show entries

First Previous Next Last

- i. To view more information on the Potential Match, click on the person's name in the grid. The *Detail Information* tabs (*Client Information*, *Contact Information* and *DHS Involvement*) will update to include that person's information.

Detail Information

Client Information **Contact Information** DHS Involvement

MCI ID	Name	DOB
SSN	Gender	Race



Detail Information

Client Information Contact Information DHS Involvement

Address Summary	Primary Phone Type	Primary Phone #	Email

Detail Information

Client Information Contact Information DHS Involvement

System	Status	Open Date	Case/Referral Last Updated Date	Paid Service Last Updated Date(KIDS-Only)	Referral /Case ID	Worker Name

3. After reviewing the *Person Search Results*, determine whether the individual is one of the potential matches.
- If the desired individual is one of the potential matches, select that Potential Match in the grid and click **Select**.

Note: If there is a Potential Match with a % Match of 95% or higher in the Person Search Results that Potential Match must be selected in order to MCI Clear the individual. Synergy will not allow a new MCI ID to be created.

- If the desired individual is NOT one of the potential matches click **Create** to create a new MCI ID for this individual.
- To close the MCI *Client Search* pop-up without creating or selecting an MCI ID, click **Cancel**.

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 iService, go to: <https://servicedesk.alleghenycounty.us>

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