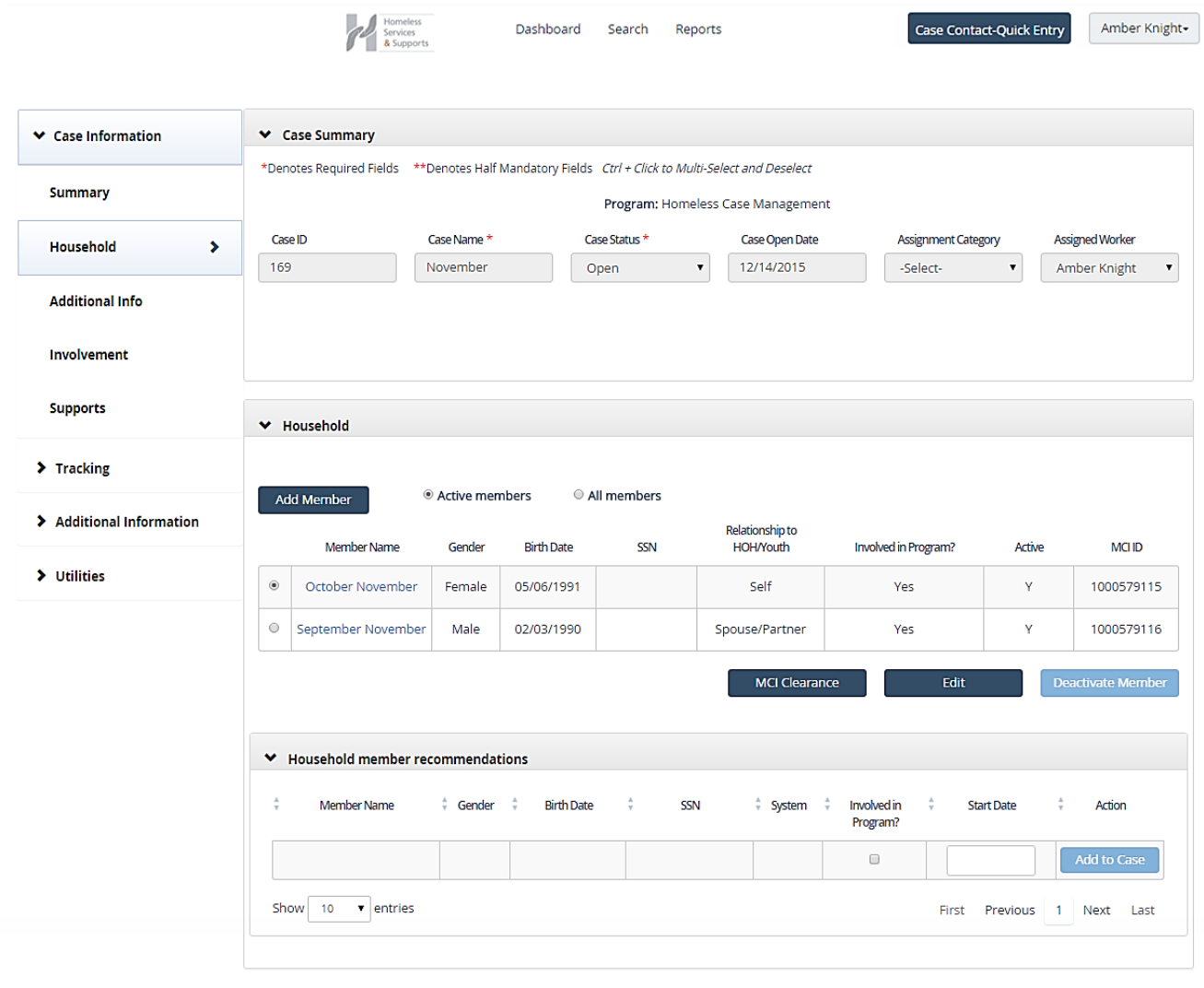




## Case Information –Household – HCM Job Aid

The Case – Household screen contains all of the current, former, and potential Household Members (Clients). Potential Household Members come from the LINK clients who are related to the Head of Household on the case.

### Case Summary Screen



**Case Summary**

\*Denotes Required Fields \*\*Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Program: Homeless Case Management

Case ID	Case Name *	Case Status *	Case Open Date	Assignment Category	Assigned Worker
169	November	Open	12/14/2015	-Select-	Amber Knight

**Household**

☒ Active members ☐ All members

Member Name	Gender	Birth Date	SSN	Relationship to HOH/Youth	Involved in Program?	Active	MCI ID
<input checked="" type="radio"/> October November	Female	05/06/1991		Self	Yes	Y	1000579115
<input type="radio"/> September November	Male	02/03/1990		Spouse/Partner	Yes	Y	1000579116

**Household member recommendations**

Member Name	Gender	Birth Date	SSN	System	Involved in Program?	Start Date	Action
					<input type="checkbox"/>		<input type="button" value="Add to Case"/>

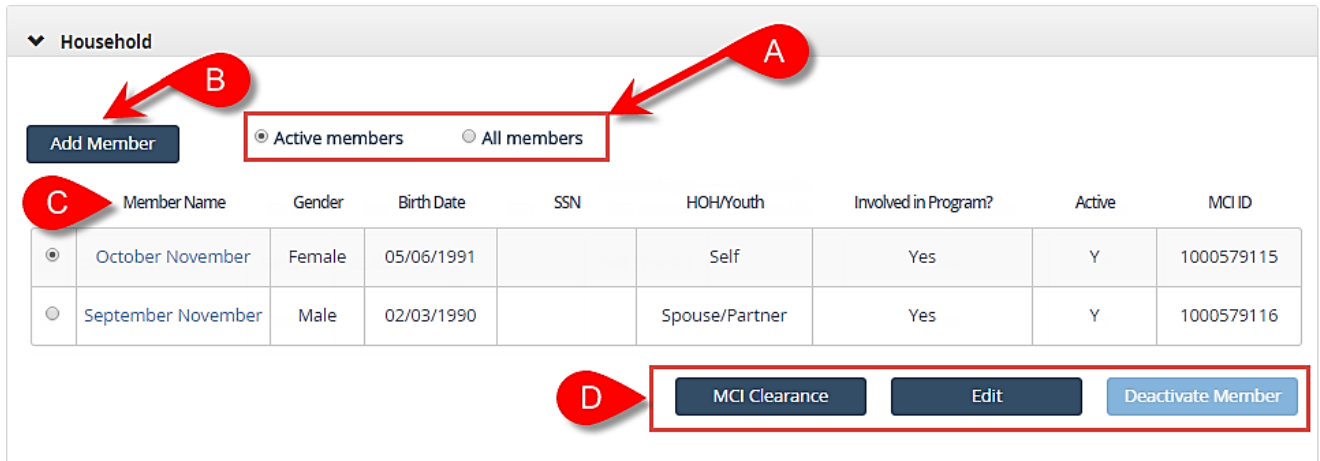
Show 10 entries First Previous 1 Next Last

### Accessing the Summary Screen

- From the **Dashboard**: Locate the desired case and click on the *Case ID* to navigate to the case.
  - Navigating from within the case: **Case Information** → **Household**



## Household pane



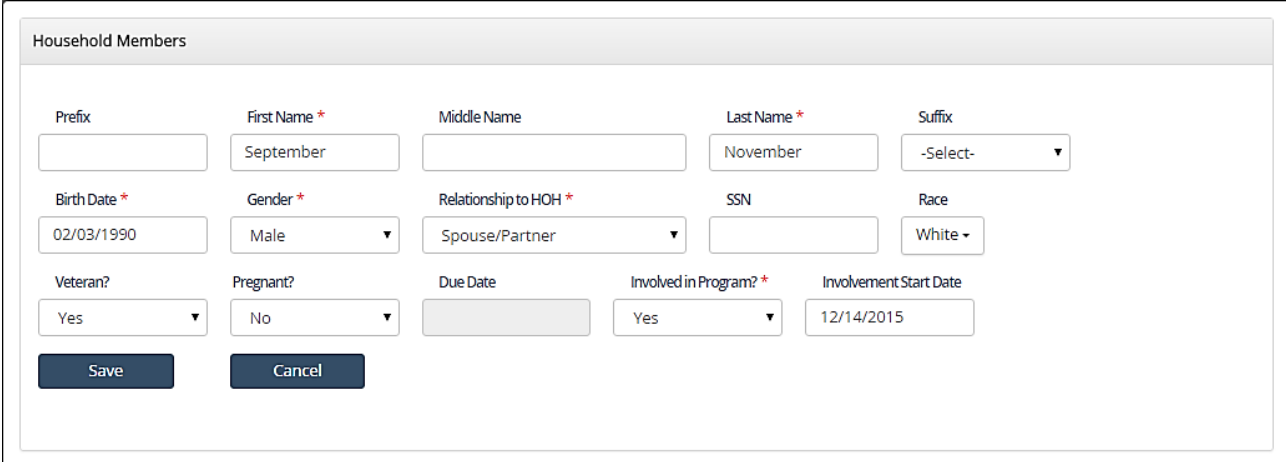
The screenshot shows the 'Household' pane in a software application. At the top, there is a dropdown menu labeled 'Household'. Below it, there is an 'Add Member' button (callout B) and two radio buttons: 'Active members' (selected, callout A) and 'All members'. Below the radio buttons is a table with columns: Member Name, Gender, Birth Date, SSN, HOH/Youth, Involved in Program?, Active, and MCI ID. The table contains two rows: one for 'October November' (Female, 05/06/1991, Self, Yes, Y, 1000579115) and one for 'September November' (Male, 02/03/1990, Spouse/Partner, Yes, Y, 1000579116). Callout C points to the 'Member Name' column. Below the table, there are three buttons: 'MCI Clearance' (callout D), 'Edit', and 'Deactivate Member'.

Member Name	Gender	Birth Date	SSN	HOH/Youth	Involved in Program?	Active	MCI ID
October November	Female	05/06/1991		Self	Yes	Y	1000579115
September November	Male	02/03/1990		Spouse/Partner	Yes	Y	1000579116

- The **Household** pane allows staff to review, edit, MCI clear, add, or deactivate Household Members.
  - 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 Member grid contains basic information about the Household Members including their *Name*, *Gender*, *Birthdate*, *SSN*, *HOH/Youth*, *Involved in Program?*, *Active*, and their *MCI ID* (if the Household Member has been MCI Cleared).
  - These buttons can be used to run an MCI Clearance on a Household Member, edit the Household Member's information or deactivate the Household Member.
    - The only Household Member that cannot be deactivated is the Head of Household. The Head of Household's *Relationship to HOH/Head of Household* will always be "Self". Only one Household Member may have the relationship of "Self" at any given time.
    - To use the buttons in this section first select the desired Household Member from the grid by using the radio buttons to the left of the person's name.
- To view a Household Member's information click on the Household Member's name in the grid.
  - To close the pop-up click **Cancel**.



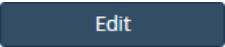

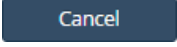
## Editing, Activating and Deactivating Household Members




The form is titled "Household Members". It contains the following fields and controls:

- Prefix: Text input
- First Name \*: Text input (value: September)
- Middle Name: Text input
- Last Name \*: Text input (value: November)
- Suffix: Dropdown menu (value: -Select-)
- Birth Date \*: Text input (value: 02/03/1990)
- Gender \*: Dropdown menu (value: Male)
- Relationship to HOH \*: Dropdown menu (value: Spouse/Partner)
- SSN: Text input
- Race: Dropdown menu (value: White)
- Veteran?: Dropdown menu (value: Yes)
- Pregnant?: Dropdown menu (value: No)
- Due Date: Text input
- Involved in Program? \*: Dropdown menu (value: Yes)
- Involvement Start Date: Text input (value: 12/14/2015)
- Buttons: Save, Cancel

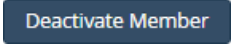

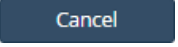
### 1. Editing a Household Member:

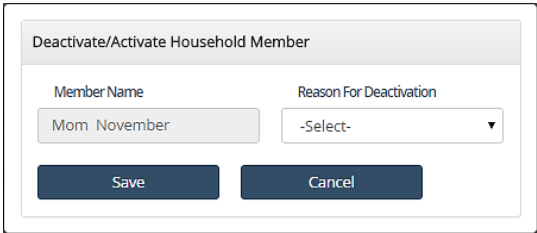
- Select the desired Household Member from the grid.
- Click .
- Update the person's information in the *Household Members* pop-up and click .
- To close the Household Members pop-up without saving changes click .

### 2. Reactivating a Household Member:

- Select the *All Members* radio button above the grid.
- Select the Household Member to reactivate.
- In the *Involved in Program?* drop-down select "yes" and click . This Household Member will now appear in the *Active Members* filtered grid.

### 3. Deactivating a Household Member:

- Select the Household Member to deactivate and click . Remember that the Head of Household 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 the following fields and controls:

- Member Name: Text input (value: Mom November)
- Reason For Deactivation: Dropdown menu (value: -Select-)
- Buttons: Save, Cancel

- The message "Household Member deactivated successfully" will appear below the grid.



## MCI (Master Client Index) Clearing Household Members

### 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
<input type="text"/>	<input type="text" value="October"/>	<input type="text"/>	<input type="text" value="November"/>	<input type="text" value="-Select"/>
Gender	DOB	SSN	Race	
<input type="text" value="Female"/>	<input type="text" value="05/01/1999"/>	<input type="text"/>	<input type="text" value="None selected"/>	

**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
1000579079		October		November		Female	05/01/1999		91
1000579115		October	J	November		Female	05/06/1991		72

Show  entries

First Previous  Next Last

**Detail Information**

MCI ID	Name	DOB
<input type="text" value="1000579079"/>	<input type="text" value="October November"/>	<input type="text" value="05/01/1999"/>
SSN	Gender	Race
<input type="text"/>	<input type="text" value="Female"/>	<input type="text"/>

Household Members who have an MCI (Master Client Index) ID in the grid have already been cleared. These Household Members can be re-cleared if necessary. To open the MCI Clearance Client Search pop-up click .



**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
<input type="text"/>	<input type="text" value="October"/>	<input type="text"/>	<input type="text" value="November"/>	<input type="text" value="-Select"/>
Gender	DOB	SSN	Race	
<input type="text" value="Female"/>	<input type="text" value="05/01/1999"/>	<input type="text"/>	<input type="text" value="None selected"/>	

1. The *Person Search Results* section contains the information that has been entered in this Case (or received from the Referral) for the Household Member. Compare this information to the information of the individuals in the *Potential Matches* section.

**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
1000579079		October		November		Female	05/01/1999		91
1000579115		October	J	November		Female	05/06/1991		72

Show  entries

First Previous  Next Last

- 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 your Household Member is this person based on the demographic data entered.
  - i. To view more information on the Potential Match click on the person's name in the grid. The *Detail Information* tabs will update to include that person's information.

**Detail Information**

MCI ID	Name	DOB
<input type="text" value="1000579079"/>	<input type="text" value="October November"/>	<input type="text" value="05/01/1999"/>
SSN	Gender	Race
<input type="text"/>	<input type="text" value="Female"/>	<input type="text"/>

**Detail Information**

Address Summary	Primary Phone Type	Primary Phone #	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



2. After reviewing the *Person Search Results*, determine whether the Household Member is one of the potential matches.
  - a. If the Household Member is one of the potential matches select that Potential Match in the grid and click **Select**.
  - b. If the Household Member is NOT one of the potential matches click **Create** to create a new MCI ID for this Household Member.
  - c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID click **Cancel**.

### Adding a new Household Member

Household Members

Prefix

First Name \*

Middle Name

Last Name \*

Suffix

-Select-

Birth Date \*

Gender \*

-Select-

Relationship to HOH \*

-Select-

SSN

Race

None selected

Veteran?

-Select-

Pregnant?

-Select-

Due Date

Involved in Program? \*

-Select-

Involvement Start Date

Search

Cancel

Search Results

Select	MCI ID	Client ID	First	Last	Gender	DOB	SSN	% Match

Add to Case

Create Client

1. Click **Add Member** to bring up the Household Members pop-up.
2. Enter all known information for the client.
  - a. Remember that only one Household Member may have the relationship of "Self" at any given time.
  - b. Race is a multi-select drop-down menu. Select all applicable races using the check boxes within the drop-down.
3. Once all of the fields have been filled out click **Search** to review possible MCI ID matches for the Household Member.



Household Members

Prefix

First Name \*

Adam

Middle Name

Last Name \*

Kennedy

Suffix

-Select-

Birth Date \*

01/01/1991

Gender \*

Male

Relationship to HOH \*

Cousin

SSN

Race

None selected

Veteran?

-Select-

Pregnant?

-Select-

Due Date

Involved in Program? \*

Yes

Involvement Start Date

Search

Cancel

Search Results

Select	MCI ID	Client ID	First	Last	Gender	DOB	SSN	% Match
<input checked="" type="radio"/>	1000578721	19881	ADAM	KENNEDY	Male	01/01/1999		91

Show

10

entries

First

Previous

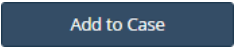
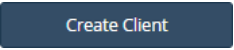
1

Next

Last

Add to Case

Create Client

4. Review the *Search Results* to determine whether the Household Member is one of the individuals in the *Search Results* grid.
  - a. If the person is one of the individuals in the Search Results select that individual by clicking the Select radio button next to their MCI ID in the grid.
    - i. Then click .
  - b. If the person is NOT one of the individuals in the Search Results click .
  - 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.



## Household member recommendations

▼ Household member recommendations

Member Name	Gender	Birth Date	SSN	System	Involved in Program?	Start Date	Action
ADAM KENNEDY	Male	01/01/1999			<input type="checkbox"/>	<input type="text"/>	<button>Add to Case</button>
BRIAN KENNEDY	Male	01/01/2000			<input type="checkbox"/>	<input type="text"/>	<button>Add to Case</button>
ROSE KENNEDY	Female	09/01/1950			<input type="checkbox"/>	<input type="text"/>	<button>Add to Case</button>

Show  entries

First Previous **1** Next Last

1. *Household Member Recommendations* are transmitted from the LINK system when the HCM referral is made. These recommendations include clients who are related in some way to the Head of Household on the Case.
  - a. To add a Household Member from the Recommendations list indicate whether the person is involved in the HCM program by checking the relevant checking that column's check box in the grid.
  - b. Enter the Start Date for the Household Member.
  - c. Click Add to Case to move this recommended Household Member to the *Household* grid.

## For more information...

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

To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>