



Case Information – Additional Info – HCM Job Aid

The Additional Info screen contains additional demographic information for the Household Members not stored on the Household screen. This additional information includes addresses, phone numbers, and email addresses.

Case Involvement – Additional Info screen

The screenshot shows the 'Case Involvement – Additional Info' screen. On the left is a sidebar with navigation links: Case Information (selected), Household, Additional Info (with a right arrow), Involvement, Supports, Tracking, Additional Information, and Utilities. The main content area has a top navigation bar with 'Dashboard', 'Search', and 'Reports'. Below this is a 'Case Contact-Quick Entry' button and a user profile for 'Amber Knight'. The main content is divided into two sections: 'Case Summary' and 'Additional Info'. The 'Case Summary' section includes a legend for required fields and a table with case details: Case ID (169), Case Name (November), Case Status (Open), Case Open Date (12/14/2015), Assignment Category (-Select-), and Assigned Worker (Amber Knight). The 'Additional Info' section contains a table of household members and an 'Add Address' section. The household members table has columns for Member Name, Gender, Birth Date, and Relationship to HOH/Youth. The 'Add Address' section includes a table for address entries with columns for Address Type, Address Summary, Primary Address, and Validated?.

Member Name	Gender	Birth Date	Relationship to HOH/Youth
October November	Female	05/06/1991	Self
September November	Male	02/03/1990	Spouse/Partner

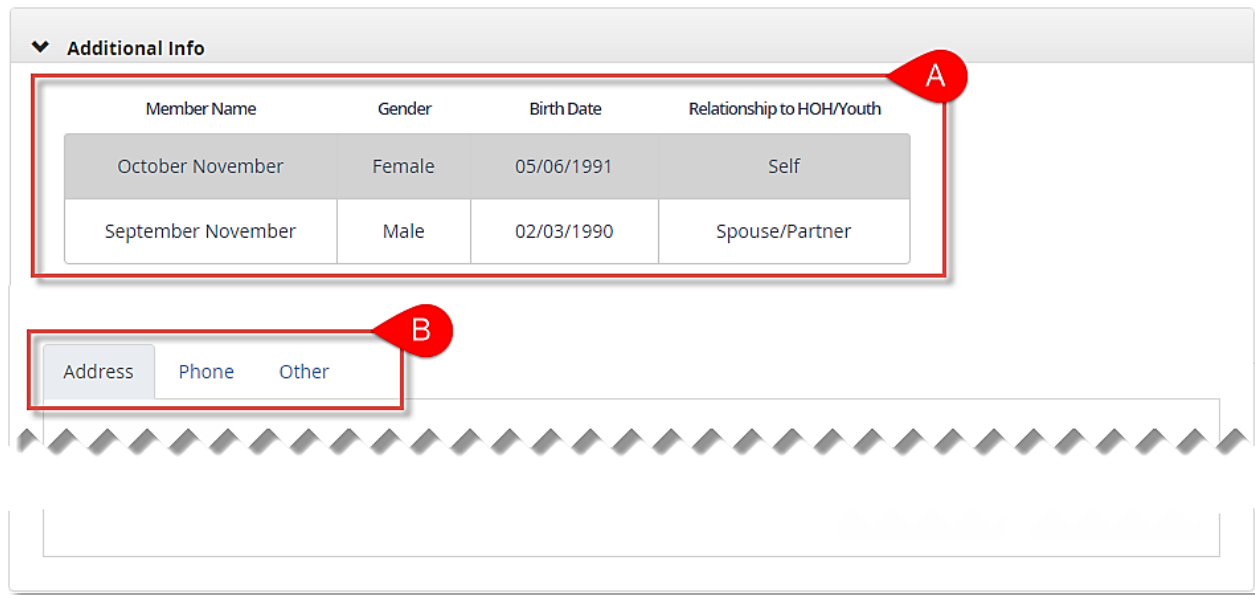
Address Type	Address Summary	Primary Address	Validated?
Home	123 N Main St Pittsburgh, PA, 15215-2018	No	Yes

Accessing the Additional Info 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** → **Additional Info**



Additional Info pane



Member Name	Gender	Birth Date	Relationship to HOH/Youth
October November	Female	05/06/1991	Self
September November	Male	02/03/1990	Spouse/Partner

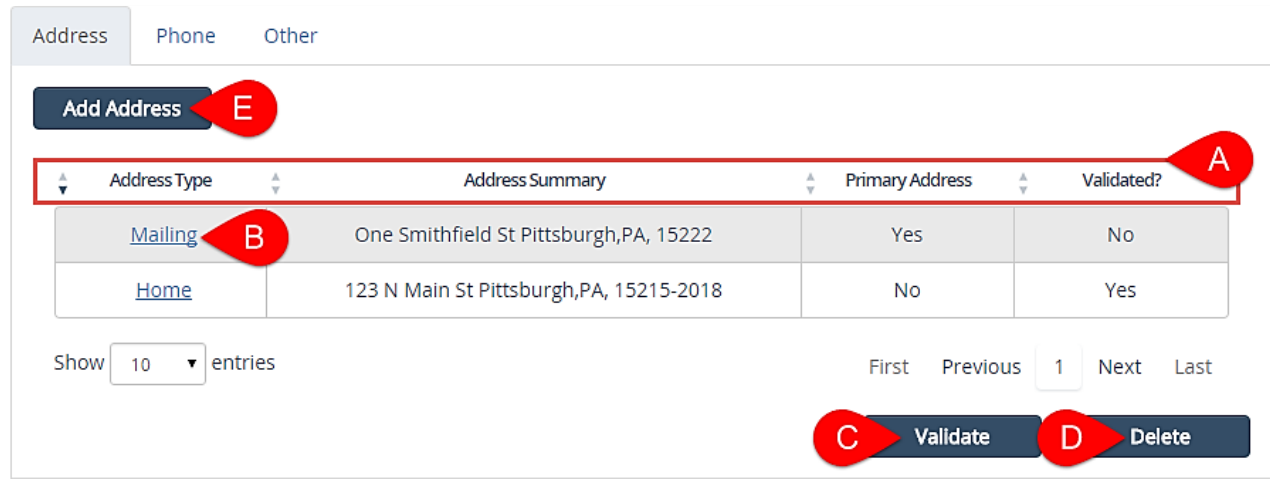
Address Phone Other

1. The **Additional Info** pane allows staff to view, edit, or add: addresses, phone numbers, and email addresses for Household Members.
 - a. Select the desired Household Member from the grid. The selected individual's line in the grid will turn grey.
 - b. Select the *Address*, *Phone*, or *Other* tab to continue.

Note: Addresses that are received through referrals from the Link system are not editable.



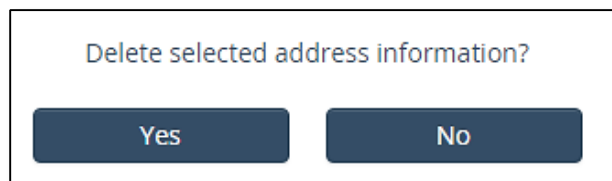
Address tab



The screenshot shows the 'Address' tab interface. At the top are three tabs: 'Address', 'Phone', and 'Other'. Below them is an 'Add Address' button (callout E). A table (callout A) lists addresses with columns: Address Type, Address Summary, Primary Address, and Validated?. The first row is 'Mailing' (callout B) for 'One Smithfield St Pittsburgh, PA, 15222', marked as the Primary Address (Yes) and Validated (No). The second row is 'Home' for '123 N Main St Pittsburgh, PA, 15215-2018', marked as Primary Address (No) and Validated (Yes). Below the table is a 'Show 10 entries' dropdown and pagination controls (First, Previous, 1, Next, Last). At the bottom right are 'Validate' (callout C) and 'Delete' (callout D) buttons.

Address Type	Address Summary	Primary Address	Validated?
Mailing	One Smithfield St Pittsburgh, PA, 15222	Yes	No
Home	123 N Main St Pittsburgh, PA, 15215-2018	No	Yes

1. The *Address* tab allows staff to view, edit, or add addresses.
 - a. The *Address* grid can be sorted on any of the header titles. The *Address* grid lists whether or not an address is the Household Member's primary address and if the address has been validated.
 - b. To view or edit an address click on the *Address Type* hyperlink in the grid. The *Demographics – Address* pop-up will appear.
 - c. To validate an address, click on the desired address in the grid and click the **Validate** button at the bottom of the tab.
 - d. To delete an address, click on the desired address in the grid and click the **Delete** button at the bottom of the grid.
 - a. A confirmation pop-up will appear:



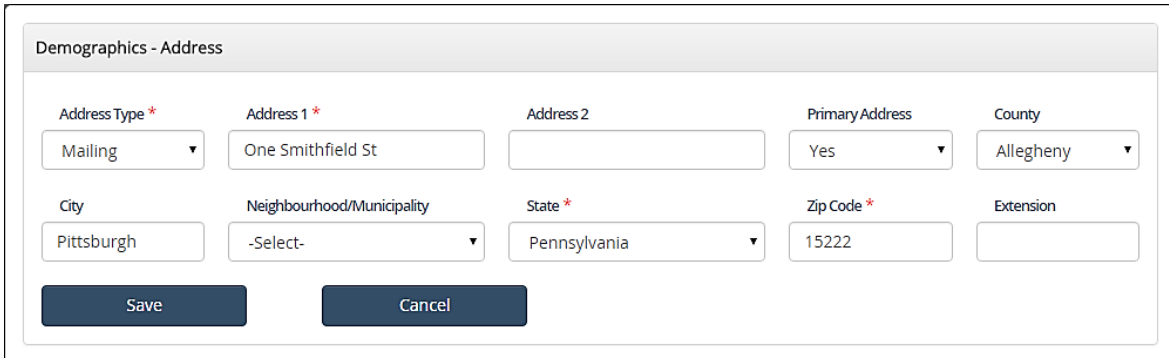
A confirmation pop-up dialog with the title 'Delete selected address information?'. It contains two buttons: 'Yes' and 'No'.

Click **Yes** to delete. Click **No** to close the pop-up without deleting the address.

- e. To add a new address click the **Add Address** button above the grid. The *Demographics – Address* pop-up will appear.





2. Using the *Demographics – Address* pop-up.



Demographics - Address

Address Type *	Address 1 *	Address 2	Primary Address	County
Mailing ▼	One Smithfield St		Yes ▼	Allegheny ▼
City	Neighbourhood/Municipality	State *	Zip Code *	Extension
Pittsburgh	-Select- ▼	Pennsylvania ▼	15222	

Save Cancel

- Enter all known address information in the pop-up. Note that *Address type*, *Address 1*, *State*, and *Zip Code* are mandatory.
Select whether or not the address is the household member's primary address.
- To save the entered information click .
- To close the pop-up without saving changes click .
- When an address has been successfully added or changed "Address added successfully" will appear below the *Address* grid.



3. Validating the address. When an address is validated Synergy compares the entered information to a postal code address list and generates a list of possible addresses formatted properly for mailing purposes.
 - a. Select the address to validate from the grid by clicking on the address' line in the grid.
 - b. Click **Validate** to open the *Address Validation* pop-up. The *Search Result* list will already be populated with the possible search results.

Address Validation

Address Information

Address Type

Home ▾

Address 1

123 N Main St

Address 2

City

Pittsburgh

County

Allegheny ▾

Neighbourhood/Municipality

-Select- ▾

State

Pennsylvania ▾

Zip Code

15215

Extension

Search

Search Result

Address Line 1	Address Line 2	City	State	Zip Code
123 N Main St		Pittsburgh	PA	15215-2018

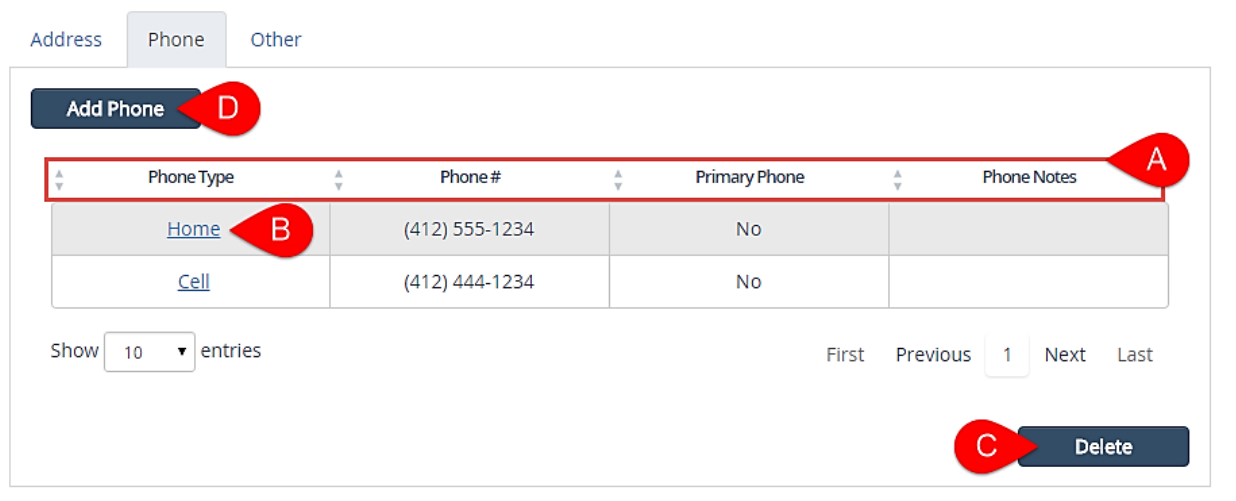
Select

Cancel

- i. If the Search Result list includes the desired address, click on the correct address in the grid and click **Select**.
 - ii. The address information can be updated and searched again. To do so, edit the address information and click **Search**.
 - iii. To close the Validate Address pop-up without selecting any of the Search Result addresses click **Cancel**. The address will not be changed.



Phone tab



The screenshot shows the 'Phone' tab interface. At the top are three tabs: 'Address', 'Phone' (selected), and 'Other'. Below the tabs is an 'Add Phone' button (callout D). Below that is a table with four columns: 'Phone Type', 'Phone #', 'Primary Phone', and 'Phone Notes' (callout A). The table contains two rows: one for 'Home' (callout B) with phone number '(412) 555-1234' and 'No' for primary, and one for 'Cell' with phone number '(412) 444-1234' and 'No' for primary. Below the table is a 'Show 10 entries' dropdown and pagination controls: 'First', 'Previous', '1' (selected), 'Next', and 'Last'. At the bottom right is a 'Delete' button (callout C).

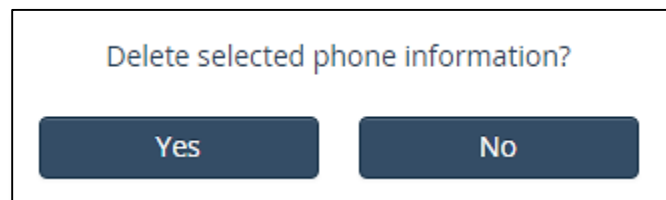
Phone Type	Phone #	Primary Phone	Phone Notes
Home	(412) 555-1234	No	
Cell	(412) 444-1234	No	

Show 10 entries First Previous 1 Next Last

Delete

1. The *Phone* tab allows staff to view, edit, or add phone numbers.
 - a. The *Phone* grid can be sorted on any of the header titles. The *Phone* grid lists whether or not a phone is the Household Member's primary phone as well as any notes that have been entered about that phone number.
 - b. To view or edit a phone number click on the *Phone Type* hyperlink in the grid. The *Demographics – Phone* pop-up will appear.
 - c. To delete a phone number, click on the desired phone number in the grid and click the **Delete** button at the bottom of the grid.

- a. A confirmation pop-up will appear:



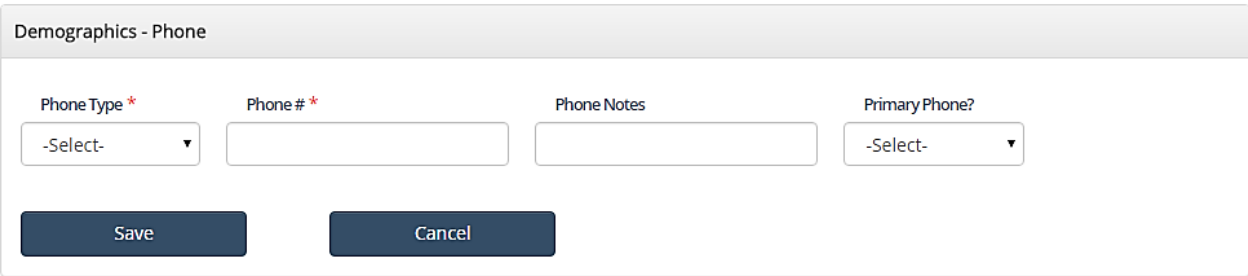
A confirmation pop-up dialog with the title 'Delete selected phone information?'. It contains two buttons: 'Yes' and 'No'.

Click **Yes** to delete. Click **No** to close the pop-up without deleting the phone number.

- d. To add a new phone click the **Add Phone** button above the grid. The *Demographics – phone* pop-up will appear.





4. Using the *Demographics – Phone* pop-up.



- a. Select the *Phone Type*.
- b. Enter the *Phone #*.
- c. If there is information that is needed about the phone number enter that information in the *Phone Notes*.

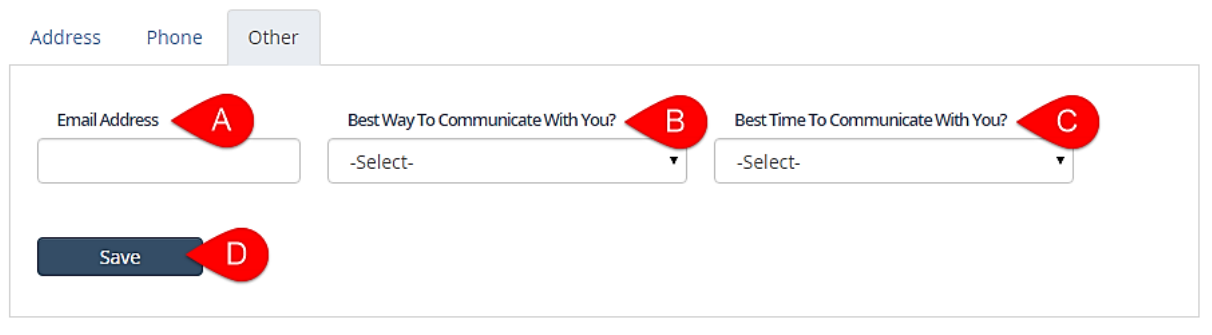
Examples: If the phone number has an extension the extension can be added here.

If the Household Member has limited minutes and prefers to receive texts that information can also be entered here.


- d. Select whether or not this is the *Primary Phone* for the Household Member.
- e. To save the entered information click .
- f. To close the pop-up without saving changes click .
- g. When an address has been successfully added or changed "Phone added successfully" will appear below the *Phone* grid.



Other tab



The screenshot shows the 'Other' tab selected in a form. It contains three input fields: 'Email Address' (A), 'Best Way To Communicate With You?' (B), and 'Best Time To Communicate With You?' (C). Each field has a red callout bubble with a letter. Below these fields is a 'Save' button (D) with a red callout bubble. The 'Address' and 'Phone' tabs are also visible at the top of the form.

1. The *Other* tab allows staff to view, edit, or add an email address as well as note information on preferred communication methods and times.
 - a. Enter an *Email Address* for the Household Member (if known).
 - b. Select the best way to communicate with the Household Member from the *Best Way To Communicate With You?* drop-down.
 - c. Select the best time to reach the Household Member from the *Best Time To Communicate with You?* drop-down.
 - d. Click  to save the entered or edited information.

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