



Case: Supports – HCM Job Aid

The *Supports* screen allows users to view, edit, or add Supports to the case. Supports are individuals who support the family either in a professional or natural/community support capacity.

Supports

Support Category *	Support	Type *	Business Name		Prefix	
Select-	-Select-	\checkmark				
first Name *	Middle N	lame	Last Name		Birth Date	
Gender *	SSN		Notes			P
Select-						
imail	Active *					
	Yes	\checkmark				
Address Phone Address Type	A	address Summary	Primary		Validated	
Address Phone Address Type	A	uddress Summary	Primary		Validated	
Address Phone Address Type	A	uddress Summary	Primary		Validated	>
Address Phone Address Type	Address Type *	Address 1 *	Primary Address 2	City	Validated	>
Address Phone Address Type	Address Type *	Address 1 *	Primary Address 2	City	Validated	>
Address Phone Address Type	Address Type * -Select-	Address Summary Address 1 *	Primary Address 2 Zip Code *	City	Validated	>

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 Supports tile.





Supports

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

Add Support	B Active	e Supports	⊖ All Suppo	rts			
First Name	Last Name	Legal Sex Relation	Role	Contact#	In Household?	Active	MCI ID
Jane	Smith	Female			Ν	Yes	1000608940
Iow 10 ♥ entries First Previous 1 Next Last							

- a. The list will default to *Active Supports*. To view both active and deactivated Supports select the *All Supports* radio button.
- b. To add a new Support, click Add Support
- c. The *Supports* grid contains basic information about the Supports including their *Name, Legal Sex, Relation* (to the Head of Household), *Role, Contact #, In Household?* (Y/N), *Active* (Yes/No), and *MCI ID* (if the Support has been MCI Cleared).
- d. These buttons can be used to run an MCI Clearance on a Support, edit the Support's information, or move a Support to the Household.
 - i. To use the buttons in this section first select the desired Support from the grid by clicking on that line in the grid.



- 2. To view or edit a Support's information, click on the individual's line in the grid and click

 Edit
 - a. To close the *Supports* pop-up without making any changes click Cancel





Creating a New Support

1. To create a new Support, click the

button.

2. The *Search Supports* pop-up will appear:

Search Team Members							
First Name *	Last Name * Sunset	Gender * Female	Birth Dat	e A	Search Loca	ation B	
Search Search Result	C						
🗘 MCLID 🇘	First Name	Last Name	🗘 Gender 🍦	SupportCategoryNa	me 🗘 Busi	iness Name 🍦	Contact#
1000862694	Sally	Sunset	Female				
Show 10 entries					First	Previous 1	Next Last
Client Information	Contact Informatio	n Notes					
Name	Busin	ess Name	Support	Category	s	upport Type	
Sally Sunset							
SSN	Gend	er	Birth Dat	e		/ICI ID	
534157100	Fema	le	5/6/199	0 12:00:00 AM	1	000862694	
Add To Referral	Create Support	Close					

Add Support

- a. Enter the *First Name, Last Name, Gender,* and *Birth Date* (if known). **Note:** Do not enter birth dates for Professional Supports.
- b. *Synergy Location*: This drop-down defaults to "Synergy". Supports can be searched for in all of Synergy or only in a specific program such as YSP, HCM, or ITM.
- c. Click the Search button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid. Click on a line in the grid to view that individual's information.
- d. Review the results including the information on the *Client Information, Contact Information,* and *Notes* tabs.
 - i. If there is a match in the *Search Result* grid, click the desired person's line in the *Search Result* grid and then click Add to Case.
 - ii. If none of the results match the person being added, click Create Support without selecting anyone from the *Search Results* grid.
- e. To close the Search Support pop-up without adding a support click



1.



Completing the Supports pop-up

apporto					
Support Category *		Support Type *	Business N	lame	Prefix
-Select-		-Select-			
First Name *		Middle Name	Last Name		Birth Date
9					
Gender *		SSN	Notes		
-Select-	~				
Email		Active *			
		Yes			
Address Phone					
				Primary	Validated
Address Type		Address Summary		,	
Address Type		Address Summary			
Address Type		Address Summary			
Address Type	Address Typ	Address Summary	Address 2	City	
Address Type	Address Typ -Select-	e * Address 1 *	Address 2	Gity	N
Address Type Address Primary Address -Select- County	Address Typ -Select- Neighborhoo	Address Summary	Address 2	City	

- 2. Enter all of the relevant information for this Support in the *Supports* pop-up.
 - a. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the Active drop-down.
 - b. Support Category, Support Type, First Name, Legal Sex and Active are all required in order to save a Support entry.
- Save Support 3. When the entire *Supports* pop-up has completed click at the bottom of the pop-up to save the information entered or changed.
- Cancel at the bottom of the pop-up will close the pop-up without saving any of the 4. Clicking information that was entered or changed.





3. *Address* tab: Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.

Address Phor	ne						
Address Typ	e		Address	Summary		Primary	Validated
Home			1972 Clayton Ave Perry Sou	th Pittsburgh,PA, 15	214-3808	No	Yes 💼
<							>
Primary Address	Addr	ess Type *	Address 1 *	Address 2	City		
-Select-	Hom	ne 🗸	123 N Main St				New
County	Neigh	nborhood/Mun	icipality State	Zip Code *	Extension		
-Select-	-Sele	ect- 🔽	-Select-	15215		Validat	te Address
earch Result							
Address Line 1	ļ	Address Line 2	Municipality	City	State		Zip Code
123 N Main St			Sharpsburg Borough	Pittsburgh	PA		15215-2018
		ĥ					
Select	Cre	eate address	s as entered				

- a. To enter a new address:
 - i. Select whether or not the address is the individual's *Primary Address, s*elect the *Address Type*, and enter all of the known address information.
- b. Click Validate Address; the Search Result list will then appear.
- c. If the *Search Result* list includes the desired address, click on the correct address in the grid and Click Select.
 - If the Correct address is not in the Search Result list, the Address Information can be updated and searched for again. To do so, edit the Address Information and click Validate Address
 - ii. If, after searching again, the address cannot be located in the Search Result list, the address can still be saved without validation by clicking Create address as entered. The address will appear in the Address grid with a "No" in the Validated? column to indicate that the Address has not been validated.
- d. If an address has been added in error, click the Delete Icon [$\overline{\mathbf{m}}$] to the right of the address in the *Address* grid to delete.
- e. To add a new address, click

New



4. *Phone* tab: Multiple phone numbers can be entered for the Support. The Support can also be saved without entering a phone number.

Addre	Phon	e					
	Phone Typ	e	Phone#		Primary Phone	Phone Notes	
	<u>Cell</u>		(555) 555-555	5	Yes	Call after 7pm.	b
Phone -Sele	e Type * ect- 🔽	Phone#*	Phone Notes	Prima -Sele	ry Phone? ect- V Save	BNew	C

- a. To add a new phone number, click on the Phone tab:
 - i. *Phone Type*: Select the type of phone number being entered.
 - ii. *Phone Number*: Enter the 10-digit phone number.
 - iii. *Phone Notes*: If applicable, enter notes about the phone number.
 - iv. *Primary Phone?*: Use the drop-down to indicate whether or not this phone number is the primary phone number for this Support. Note that only one phone number can be marked as primary at any given time.
- b. Click **Save** to add this phone number to the *Phone* grid.
 - i. To edit an existing phone number, click on the desired number in the grid.
- c. To enter additional phone numbers, click
- d. If a phone number has been added in error, click the Delete Icon [$\overline{\mathbf{m}}$] to the right of the phone number in the *Phone* grid to delete it.
- 5. Click Save Support at the bottom of the pop-up in order to save the information entered.
 Clicking Cancel will close the pop-up without saving any of the information entered or edited.

Supports Recommendations

1. Supports Recommendations sub-pane: These recommendations come from the KIDS System when a Referral originates in KIDS.

*	✓ Supports recommendations									
	First Name	Last Name	Gender	Contact#	System	MCIID	Action			
	Janet	Jones	Female	555-555-5555	KIDS	123456789	Add to Case			
							·			

a. Click the Add to Case button to the right of the desired individual's line in the grid to add this person as a Support.





- b. The *Supports* pop-up will appear. Enter all of the relevant information for the Support and click Save Support
- c. To close the Supports pop-up without adding the individual, click ^{Cancel} within the Supports pop-up.

Adding a Support to the Household

- 1. Adding a Support to Household Members: Use this option if a Support has now become a Household Member.
 - a. Select the Support from the grid and click Add to Household. The individual will be moved from the *Supports* screen to the *Household Info* screen.



- 2. Adding a Household Member to Supports: Use this option if a Household Member has now become a Support.
 - a. On the **Household Info** screen select the individual and click Deactivate Member
 - b. The Deactivate/Activate Household Member pop-up will appear. Select "Member is now a support" from the Reason for Deactivation drop-down and click Save.

Deactivate/Activate Household Member					
Member Name	Reason For Deactivation				
Suo Ghamer	Member is now a support 🔽				
Save	Cancel				

c. The individual will be moved from the *Household Info* screen to the *Supports* screen.





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. Individuals can be re-cleared if new information is entered. To open the MCI Clearance pop-up

(*Client Search*), select the desired individual and click MCI Clearance below the *Supports* grid.

Client Search								
Person Search Result	is							
To create new men	nber in MCI and	l assign it to s	selected h	ousehold n	nember, click	on Create.		
Please enter first na	ame, last name,	, gender and	birth date	of the hou	isehold men	ber to create	the MCI re	cord.
Prefix	First Name		Middle Name		Last Nam	e	Suf	fix
							-9	Select- 🗸
Gender	DOB		SSN		Race			
					None se	elected 🗸		
Create								
Potential Matches								
To associate an exis	sting MCI mem	ber to the se	lected hou	sehold me	mber, click o	n Select.		
💠 MCI ID 🔶 Prefi	x 🖕 First	🖞 Middle	🛔 Last	🖞 Suffix	🖕 Gender	÷ DOB	🛔 SSN	🝦 % Match
Show 10 v ent	ries					irst Proviou	. 1	Novt Last
Select					Г	iist Pieviot		NEXL LASI
Sciele								
Detail Information								
Client Information	Contact Info	ormation	DHS Invo	lvement				
MCI ID		Name				DOB		
SSN		Gende	r			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 Res	ults			
To create new me	ember in MCI and assign	n it to selected household m	ember, click on Create.	
Please enter first	name, last name, gende	er and birth date of the hou	sehold member to create t	the MCI record.
Prefix	First Name	Middle Name	Last Name	Suffix
	Ben		Smith	-Select- 💙
Gender	DOB	SSN	Race	
	02004/1990		None selected 🗸	
Create				

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.

otential Match	ies								
To associate a	an existing	MCI memb	er to the se	elected house	hold mei	mber, click on S	Select.		
MCI ID	🕴 Prefix	🗍 First	🛔 Middle	🛓 Last	≜ Suffix	🖕 Gender	÷ DOB	🛔 SSN	🖕 % Match
1000608262		October		November	-	Female	05/06/1998		91
how 10 🔽	entries					Fi	rst Previous	1	lext Last
Select									

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			



DEPARTMENT OF HUMAN SERVICES Allegheny County, Pennsylvania



ary	Pri	mary Phone	Туре	Primary Phon	e #	Email	
		Primary Phone Type		Primary Phone #		Email	
n							
ient Information Contact Information		formation	DHS Involv	/ement			
atus Op Da	ien ite	Case/Referra Updated Da	al Last te	Paid Service Last U Date(KIDS-Only)	pdated Ri ID	eferral /Case)	Worker Name
	n Co atus Op Da	n Contact Inf atus Open Date	n Contact Information	n DHS Involv atus Open Case/Referral Last Date Updated Date	n Contact Information DHS Involvement atus Open Case/Referral Last Paid Service Last U Date Updated Date Date(KIDS-Only)	n DHS Involvement	n Contact Information DHS Involvement atus Open Case/Referral Last Paid Service Last Updated Date Updated Date (IdDS-Only) ID

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



- b. If the desired individual is NOT one of the potential matches, click ^{Create} to create a new MCI ID for this individual.
- c. 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 <u>ServiceDesk@AlleghenyCounty.US</u> or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

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

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