



## Supports – IL Job Aid

The *Supports* screen allows users to view, edit, or add Supports to the Referral. Supports are individuals who work with the Youth either in a Professional, Natural, or Caregiver support capacity.

### Supports

### Supports

▼ Referral Summary - Susie Sunshine

Referral Date

01/27/2017

Referral ID

55293

Referral Status

Open

Referral Category

Independent Living

Transition Planner

Sanfilippo, Mela

Educational Liaison

-Select-

412 Youth Zone

-Select-

Owner of Plan

412 YouthZone

Enrollment Status

Not Enrolled

School Name

School Grade

Placement Agency

Placement Facility

▼ Supports

Supports :  
Support Category :

☒ Active  
☐ Professional

☐ All  
☐ Natural

☐ Caregivers

Add Support

First Name

Last Name

Gender

Support Type

Support Category

Is Active

MCI

No data available in table

Show

10

entries

First

Previous

Next

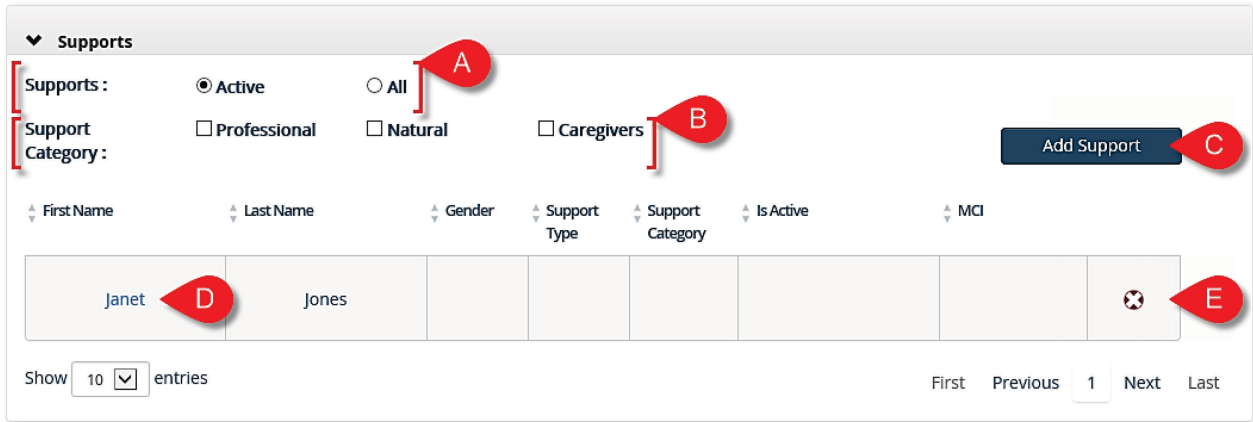
Last

### Navigation

- From the **Dashboard** : Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
  - Click on the **Supports** tile.
- The **Previous** and **Next** buttons at the bottom of the screen can be used to navigate up or down one screen within the Left Navigation tiles.

## Supports pane

- The **Supports** pane allows users to review, edit, MCI clear, add, or deactivate/activate Supports.







The screenshot shows the 'Supports' pane with the following elements:

- Callout A:** Points to the 'Supports' radio buttons: 'Active' (selected) and 'All'.
- Callout B:** Points to the 'Support Category' checkboxes: 'Professional', 'Natural', and 'Caregivers'.
- Callout C:** Points to the 'Add Support' button.
- Callout D:** Points to the first name 'Janet' in the grid.
- Callout E:** Points to the MCI icon (a circle with an 'X') in the grid.

The grid has columns: First Name, Last Name, Gender, Support Type, Support Category, Is Active, and MCI. The first row shows 'Janet Jones' with an 'X' in the MCI column.

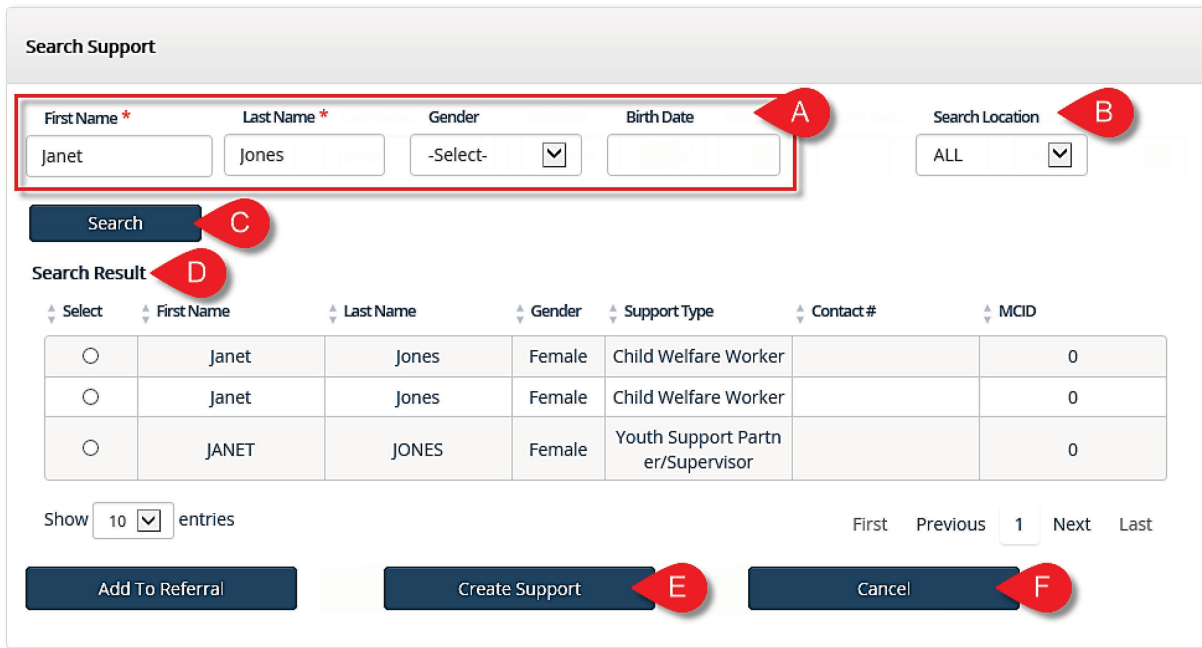
At the bottom, there is a 'Show 10 entries' dropdown and pagination links: 'First', 'Previous', '1', 'Next', 'Last'.

- Supports radio buttons:** The *Supports* grid defaults to displaying active Supports. To view both active and inactive Supports select the *All* radio button. To view only active Supports, select the *Active* radio button.
- Support Category checkbox filters:** These checkboxes can be used to filter the *Supports* list to display any combination of *Professional* Supports, *Natural* Supports, and/or *Caregivers* by clicking the checkboxes next to the relevant category or categories. The list defaults to displaying all Support Categories.
- To add a new Support, click the **Add Support** button.
- To view or edit the information entered for a Support click on the desired individual's first name in the *Supports Information* grid. That individual's *Team Member* pop-up will appear.
  - To close the *Supports* pop-up without making any changes click **Cancel**.
  - If changes have been made, click **Save**.
- The icon to the right of the MCI number in the *Supports* 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  for the desired individual.  
**See page 7 of this Job Aid to learn how to complete an MCI Clearance.**
  - Clicking on the MCI number for a Support will open Client View and display the individual's information in Client View.



## Creating a New Support

1. To create a new Support, click the **Add Support** button. The *Search Support* pop-up will appear:



**Search Support**

First Name \* Last Name \* Gender Birth Date Search Location

Janet Jones -Select- ALL

**Search**

**Search Result**

Select	First Name	Last Name	Gender	Support Type	Contact #	MCID
<input type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0
<input type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0
<input type="radio"/>	JANET	JONES	Female	Youth Support Partner/Supervisor		0

Show 10 entries First Previous 1 Next Last

**Add To Referral** **Create Support** **Cancel**

- a. Enter the *First Name* and *Last Name*. For Natural Supports enter (if known) *Gender* and *Birth Date*.
- b. Select the *Search Location*. Supports can be searched for in all of Synergy (Enterprise) or only in a specific program such as DHSSSP, YSP or HCM. The location defaults to "ALL".
- c. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid.
- d. Review the results to determine whether the Support is one of the individuals in the *Search Result* grid.



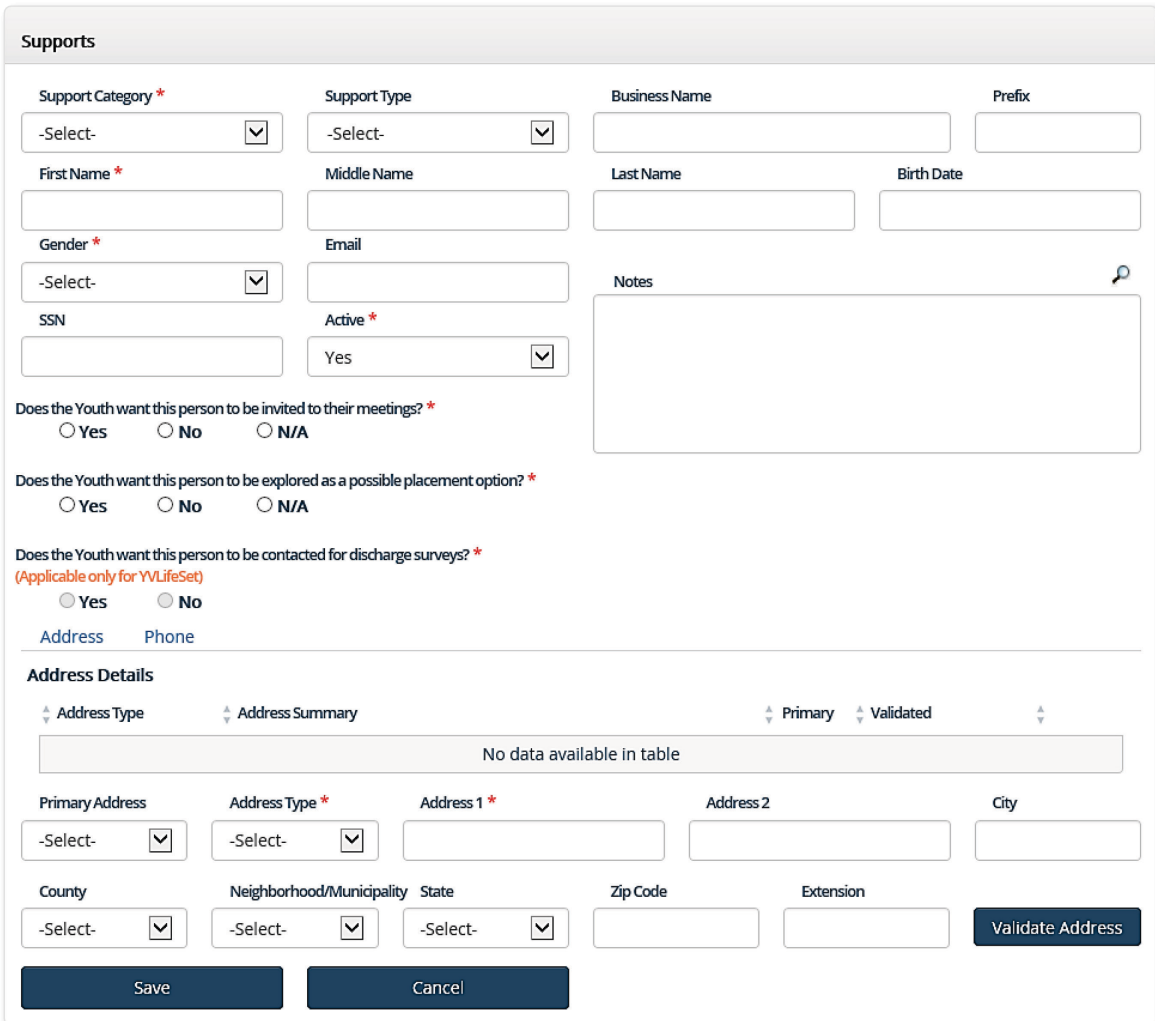
Select	First Name	Last Name	Gender	Support Type	Contact #	MCID
<input type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0
<input type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0

- i. If there is a match in the *Search Results* grid click the radio button next to the desired person's name in the *Search Results* grid and then click **Add to Referral**.
- e. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Results* grid.
  - f. To close the *Search Supports* pop-up without adding a support click **Cancel**.



## Completing the Support pop-up

1. When **Create Support** or **Add to Referral** is clicked the *Supports* pop-up will appear.



**Supports**

Support Category \*  Support Type  Business Name  Prefix

First Name \*  Middle Name  Last Name  Birth Date

Gender \*  Email

SSN  Active \*

Does the Youth want this person to be invited to their meetings? \*  
☐ Yes ☐ No ☐ N/A

Does the Youth want this person to be explored as a possible placement option? \*  
☐ Yes ☐ No ☐ N/A

Does the Youth want this person to be contacted for discharge surveys? \*  
(Applicable only for YVLifeSet)  
☐ Yes ☐ No

Notes

Address Phone

**Address Details**

Address Type	Address Summary	Primary	Validated
No data available in table			

Primary Address  Address Type \*  Address 1 \*  Address 2  City

County  Neighborhood/Municipality  State  Zip Code  Extension

**Validate Address**

**Save** **Cancel**

2. Enter all of the relevant information for this Support in the *Supports* pop-up.
- The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.
  - Does the Youth want this person to be contacted for discharge surveys?* is only mandatory when the user entering the Support is a YVLifeSet user.
3. When the entire *Supports* pop-up is completed click **Save** at the bottom of the pop-up to save the information entered or changed.
4. Clicking **Cancel** at the bottom of the pop-up will close the pop-up without saving any information entered or changed.

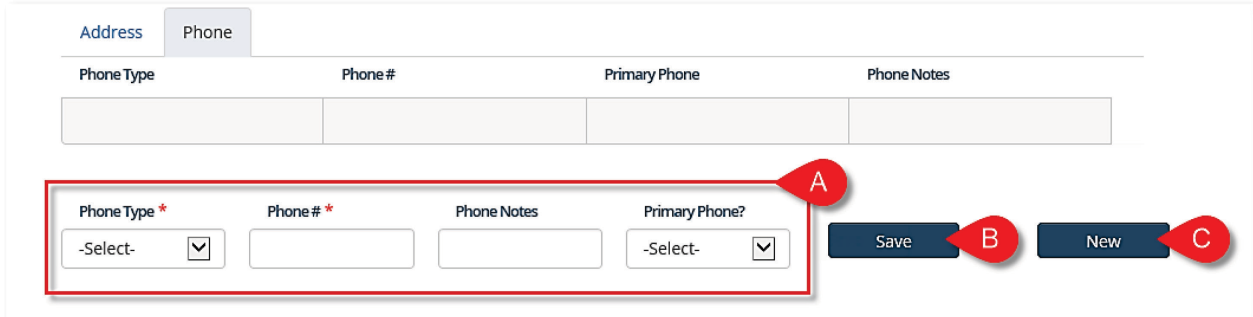



5. Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.

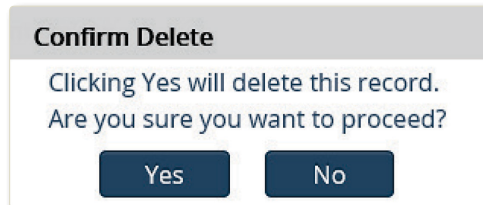
The screenshot shows the 'Address' tab of a web application. At the top, there are tabs for 'Address' and 'Phone'. Below is the 'Address Details' section with a table showing an existing address: Business, 1972 Clayton Ave Pittsburgh, PA, No (Primary), No (Validated), and a delete icon (callout D). Below this is a form for adding a new address (callout A). The form includes fields for Primary Address (checkbox), Address Type (dropdown, set to Home), Address 1 (text, 123 N Main St), Address 2 (text), City (text), County (dropdown), Neighborhood/Municipality (dropdown), State (dropdown), Zip Code (text, 15215), and Extension (text). A 'Validate Address' button is to the right (callout B). Below the form is the 'Search Result' section (callout C) with a table showing the search results for '123 N Main St', 'Pittsburgh', 'PA', and '15215-2018'. At the bottom are 'Select' and 'Create address as entered' buttons.

- a. To enter a new address:
  - i. Select whether or not the address is the individual's *Primary Address*, select the *Address Type*, and enter all of the known address information.
- b. Click **Validate Address**.
- c. If the *Search Result* list includes the desired address, click on the correct address in the grid and Click **Select**.
  - i. If the Correct address is not in the Search Result list, the *Address Information* can be updated and searched 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 [ ] to the right of the address in the *Address* grid.
  - i. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the entry. Clicking **No** will cancel the action and the entry will not be deleted.

6. Multiple phone numbers can be entered for the Support as well. The Support can also be saved without entering a phone number.



- To add a new phone number, click on the *Phone* tab, enter all of the known phone information and click **Save** to add this phone number to the *Phone* grid.
  - To edit an existing phone number, click on the *Phone Type* for the desired number in the grid.
  - To enter additional phone numbers, click **New**.
7. If a phone number has been added in error, click the Delete Icon [  ] to the right of the phone number in the *Phone* grid. A *Confirm Delete* pop-up will appear:



Clicking **Yes** will delete the entry.

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

**Note:** Only one Address and only one Phone number can be marked as Primary at a time.





## MCI (Master Client Index) Clearing Supports

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.

**Important Note:** Only Natural Supports should be MCI cleared. Users should **never** search or attempt to view a Professional Support's Client View information.

1. Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared, however they can be re-cleared if necessary. To open the *Client Search* (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 support, click on Create.

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

Prefix	First Name	Middle Name	Last Name	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-Select- <input type="button" value="v"/>
Gender	DOB	SSN	Race	
<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	-Select- <input type="button" value="v"/>	

**Potential Matches**

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

MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Show  entries

First Previous  Next Last

**Detail Information**

Client Information Contact Information

MCI ID	Name	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>
SSN	Gender	Race
<input type="text"/>	<input type="text"/>	<input type="text"/>





2. The *Person Search Results* section contains the information that has been entered in this Referral 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
<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"/>	

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

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 will update to include that person's information.

Detail Information

Client 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

Client Information



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





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 .

**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.*

- b. If the desired individual is NOT one of the potential matches click  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 .

### 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 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>