

Client Contact Info – ITM Job Aid

The Client's contact information, including address, phone number and email can be documented and viewed on the *Client Contact Info* screen.

Client Contact Info screen

Referral Info	♥ Referral Summary -	October November			
Client Contact Info	*Denotes Required Fields	**Denotes Half Mandatory Fields Co	trl + Click to Multi-Select and D	eselect	
	Referral Date	Referral Status * Assigned	Worker *	Referral Type	Referral ID
Core Team Feedback	05/17/2016	Accepted 🔽	Jane Smith 🕑	Integration and Teaming	784
Team Members	An olivert Contract Infor				
Technical Assistance	 Client Contact Infor 	mation			
	🛓 Client Name		4 Gender	A Birth Date	* Role
Meetings	Oc	ctober November	Male	05/01/1999	Self (Youth)
Service Involvement	Address Phone	Other			
mployment/Education	🗍 Address Type	🛓 Address Summary		+ Validated?	
1.9			No data available in table		
CANS/ANSA History					
	Address Type *	Address 1 *	Address 2	Primary Address	County
Placement History	-Select-			-Select-	Allegheny 🔽
Documents Folder	City	Neighborhood/Municipality	State *	Zip Code	Extension
Documents rolder				-p cone	

Technical Assistance

- From the Dashboard : Locate the desired Referral and click on the Referral ID to bring the Referral into focus.
 a. Click on the Client Contact Info tile.
- 2. From the Referral Info tile: Click Next at the bottom of the screen.



Client Contact Info – Address tab

1. The Client's address or addresses are documented on the *Address* tab. If the Referral was received from KIDS there may already be an address or addresses documented for this Client. Users can edit or add more addresses to the *Address* grid.

Client Contact Informa	tion			
Client Name		🖕 Gender	🖕 Birth Date	🕆 Role
Octob	er November	Male	05/01/1999	Self (Youth)
Address Phone O	ther Address Summary		↓ Validated?	
		No data available in table		
Address Type * A	Address 1 *	Address 2	Primary Address	County
City Save & Validate	Neighborhood/Municipality -Select-	State * Pennsylvania	Zip Code	Extension

- a. *Address Type*: Select the type of address being documented from the drop-down.
- b. *Address 1* and *Address 2*: Enter the Address line 1 and Address Line 2 (if applicable).
- c. *Primary Address*: Select Yes or No from the drop-down. Only one address can be the Primary Address at a time.
- d. *County*: Select the County from the drop-down. This drop-down will default to "Allegheny".
- e. *City*: Enter the City
- f. *Neighborhood/Municipality*: If known, select the Neighborhood/Municipality from the dropdown.
- g. State: Select the State from the drop-down. This drop-down will default to "Pennsylvania".
- h. *Zip Code* and *Extension*: Enter the Zip Code and Extension (if known).



- 2. 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. Click Save & Validate to open the *Address Validation* pop-up. The *Search Result* list will already be populated with the possible search results.

	I						
Address Type		Address 1		Address 2		County	
Home	~	123 North Ave				Allegheny	~
City	Neighborho	ood/Municipality	State		Zip Code	Extensio	n
Pittsburgh	-Select-		 Pennsylva 	ania 💌	15215		
				≜ State		🛔 Zip Code	
🛓 Address Line 1	÷ Addr	ress Line 2	ç City	v			
+ Address Line 1	÷ Addr	ress Line 2	ç cıty Pittsbu	ırgh	PA	15209-256	i3

- i. If the *Search Result* list includes the desired address, click on the correct address in the grid. The *Address Validation* pop-up will close and the selected address will appear in the *Address* grid with a \checkmark to indicate that the Address has been validated.
- ii. 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
 Search
- iii. If, after searching again the address cannot be located in the Search Result list the address can still be saved without validation. To do so, click
 Create address as entered
 The Address Validation pop-up will close and the

selected address will appear in the Address grid with an \bigotimes to indicate that the Address has not been validated.

iv. Clicking **Cancel** will close the *Validate Address* pop-up without validating or changing any information.



3. Editing, Validating or Deleting an Address:

🖕 Address Type	Address Summary	+ Validated?			
Home	123 North Ave Pittsburgh,PA, 15209-2563	YES	0	Î	

a. To Edit an address that has already been entered in the *Address* grid the user can either:i. Click on the address in the *Address* grid, update the information below the *Address*

grid and click Save & Validate

ii. Or click on the \checkmark / \bigotimes in the *Address* grid to the right of the address to be edited. Both options will open the *Address Validation* pop-up where the user can either select from the list of *Search Result* list or Update address as entered.

b. To delete an address click the to the right of the address in the *Address* grid. A *Delete Confirmation* pop-up will appear: Clicking Yes will delete the address. Clicking will cancel the action and the address will not be deleted.

Confirm Delete	
Are you sure you want to delete this record? Yes No	



Client Contact Info – Phone tab

1. The *Phone* tab allows users to view, edit, or add phone numbers for the Client. The *Phone* grid can be sorted on any of the header titles. The *Phone* grid lists whether or not a phone number is the Client's primary phone as well as any notes that have been entered about that phone number. Click on the *Phone* tab to view or update the client's phone information.

lient Name		🖕 Gender	🖕 Birth Date	🕆 Role
Octo	ber November	Male	05/01/1999	Self (Youth)
Address Phone	Other			
Phone#	+ Phone Type	+ Phone Notes	🝦 Primary Ph	none
(412) 123-4567	Home	Only use this phone in the e	evening.	No 💼
Phone Type *	Phone # *	Phone Notes		Primary Phone?
-Select-				-Select-
Save				

- a. To view or edit a phone number click on the desired phone number in the *Phone* grid. The information will appear below the grid.
- b. To delete a phone number click the to the right of the phone number in the *Phone* grid. A *Delete Confirmation* pop-up will appear: Clicking Yes will delete the phone number. Clicking will cancel the action and the phone number will not be deleted.



- c. Entering or updating a new phone number enter or update the following information:
 - i. *Phone Type*: Select the type of phone from the drop-down.
 - ii. *Phone #*: Enter the 10 digit phone number.
 - iii. *Phone Notes*: Enter notes about the phone number (if needed) such as: "Only use this phone # after 7PM."
 - iv. Primary Phone?: Select "Yes" or "No" from the drop-down.

Click Save to add the entered information to the *Phone* grid.



Client Contact Info – Other tab

1. The *Other* tab allows users to view, edit, or add an email address as well as note information on preferred communication methods and times.

ient Name		÷ Gender		🝦 Birth Date	🔆 Role
October Novem	nber	Male		05/01/1999	Self (Youth)
ddress Phone Other					_
Email Address	Best Way To Communicat	te With You? 🧹 🛛 🖉	Best Time T	o Communicate With You?	C
Email Address	Best Way To Communicat	te With You?	Best Time T -Select-	o Communicate With You?	

- a. *Email Address*: Enter an *Email Address* for the Client (if known).
- b. *Best Way To Communicate With You?*: Select the best way to communicate with the Client from the drop-down.
- c. *Best Time To Communicate with You*?: Select the best time to reach the Client from the dropdown.
- d. Click Save to save the entered or edited information.

Navigation and Status

- 1. Clicking Previous will navigate the user back to the *Referral Information* screen.
- 2. The **Client Info** tile status indicator will display as 🗘 until the at least one tab on the *Client Info* screen has been entered. Then the status indicator will change to 🗹.

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