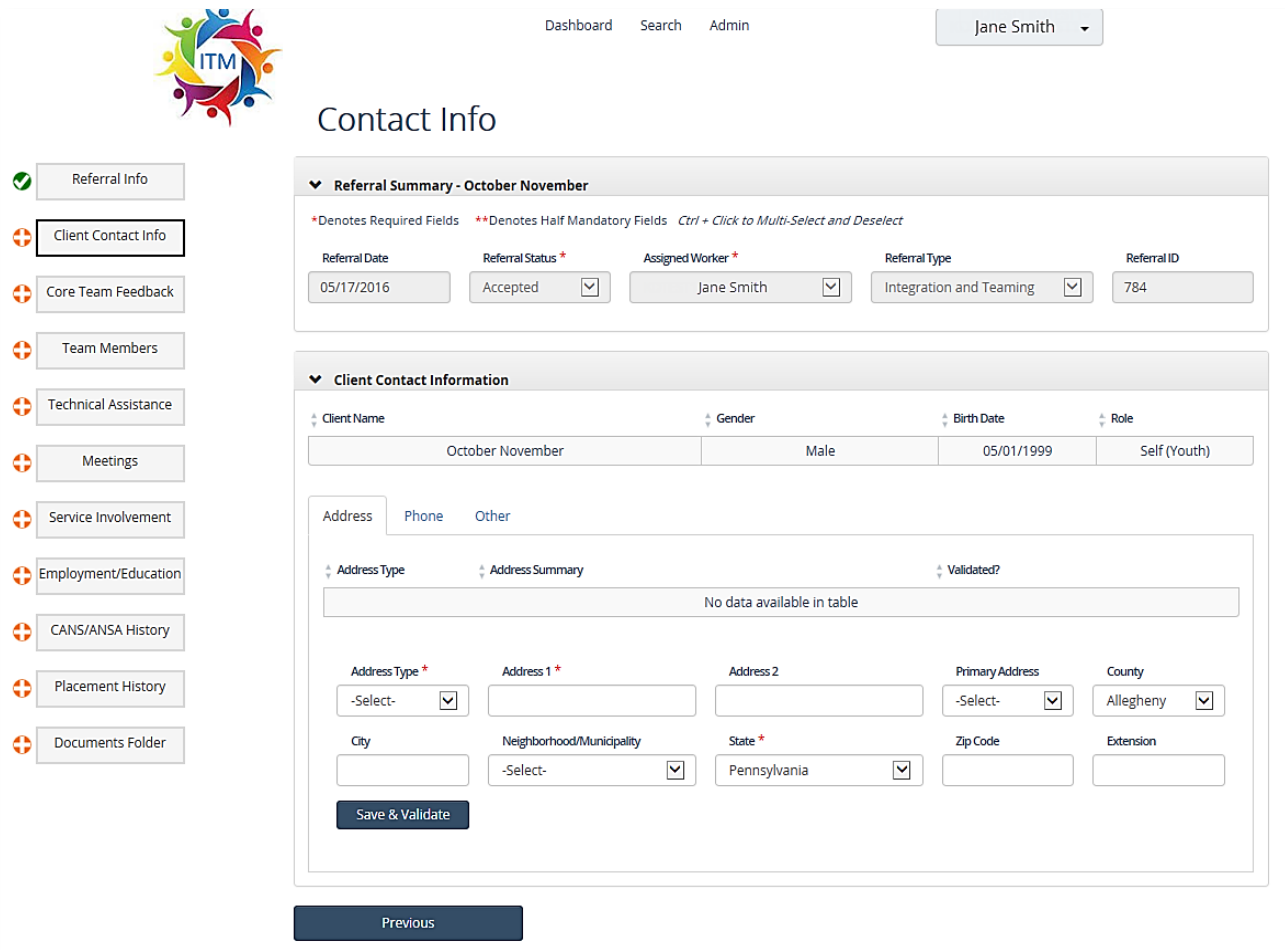
Client Contact Info – ITM Job Aid

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

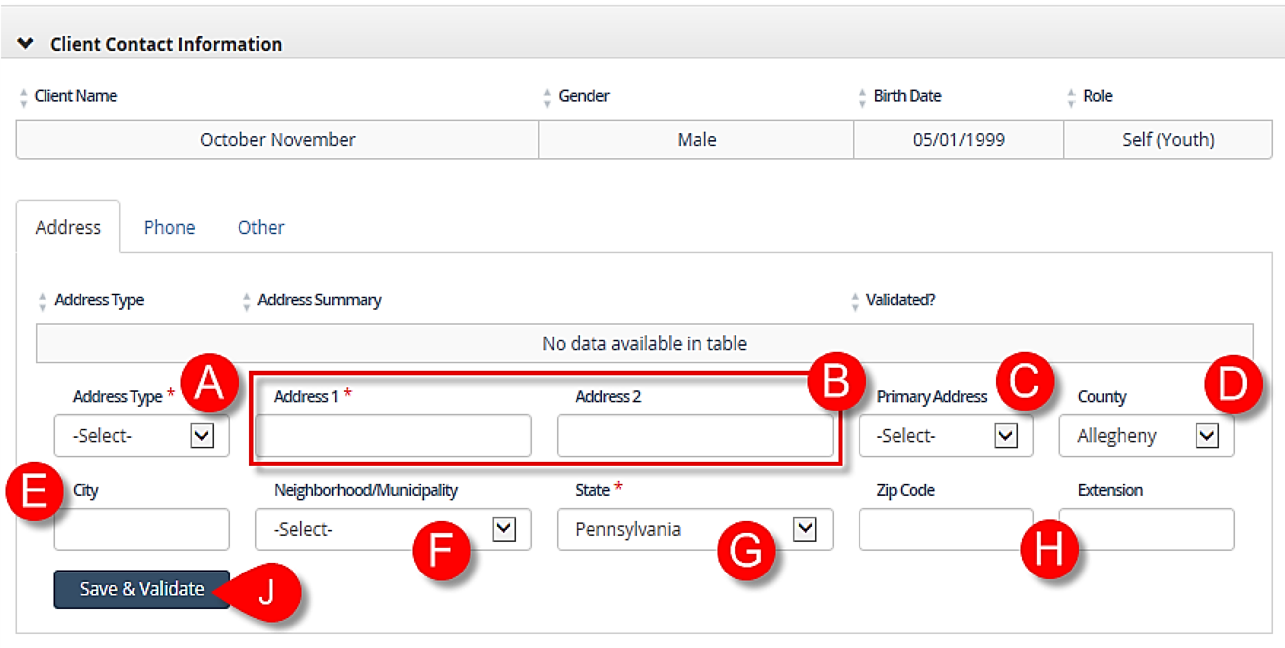


Technical Assistance

1. 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.



   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".

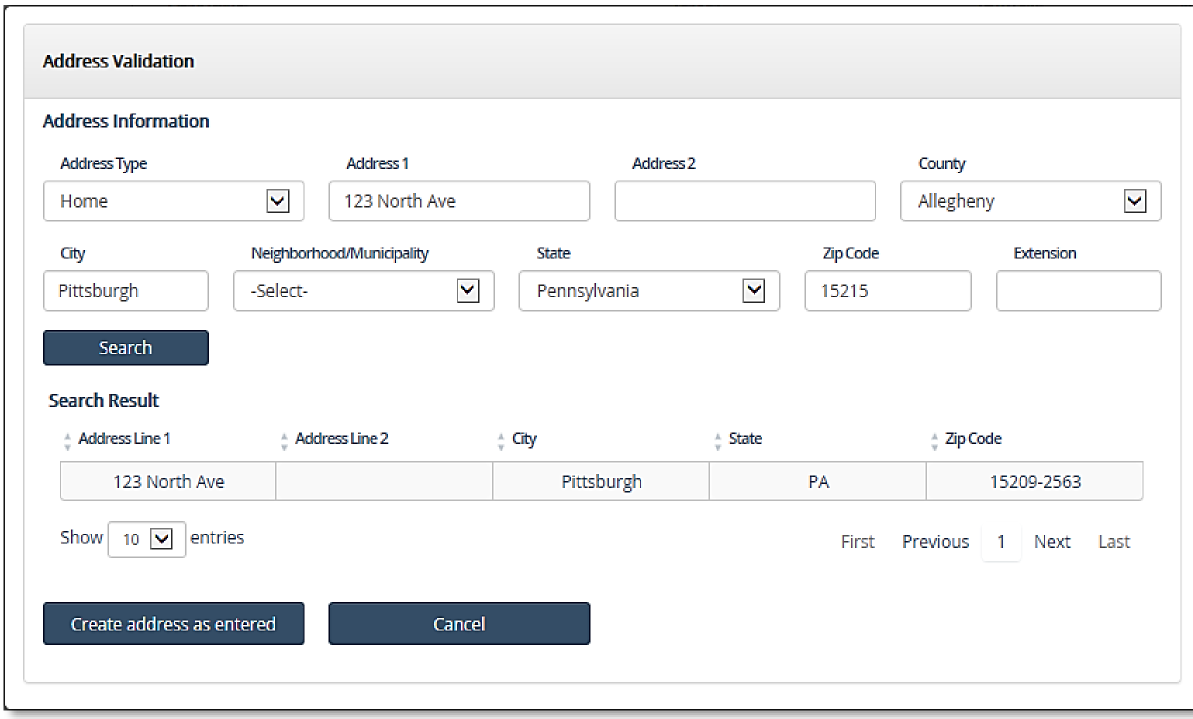
   e. *City*: Enter the City

   f. *Neighborhood/Municipality*: If known, select the Neighborhood/Municipality from the drop-down.

   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. 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 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 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		

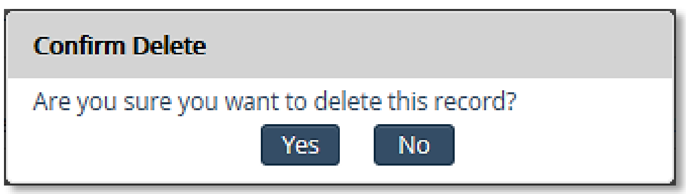
a. To Edit an address that has already been entered in the *Address* grid the user can either:

   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 ✓ / ✗ in the *Address* grid to the right of the address to be edited.

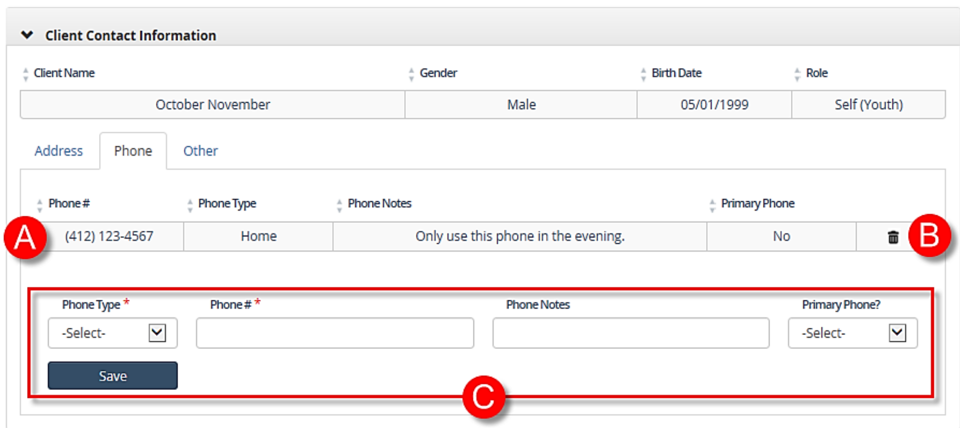
   Both options will open the *Address Validation* pop-up where the user can either select from the list of *Search Result* list or **Update address as entered**.

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 **No** will cancel the action and the address will not be deleted.



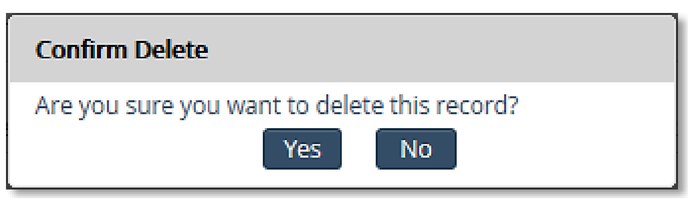
Client Contact Info – Phone tab

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.



   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 **No** will cancel the action and the phone number will not be deleted.

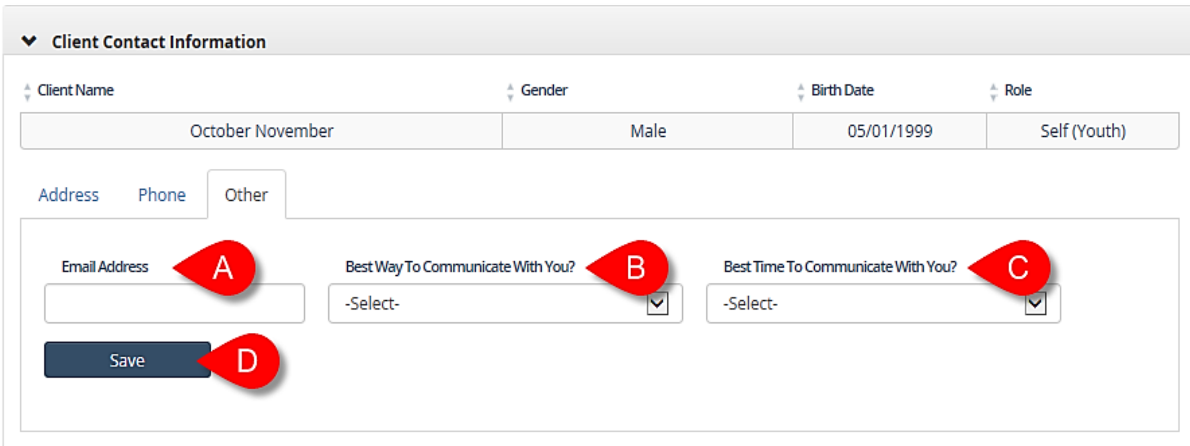


   c. Entering or updating a new phone number enter or update the following information:
      i. *Phone Type*: Select the type of phone from the drop-down.
      ii. *Phone #*: Enter the 10 digit phone number.
      iii. *Phone Notes*: Enter notes about the phone number (if needed) such as: "Only use this 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.



   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 drop-down.

   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 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