Department of Human Services Allegheny County, Pennsylvania

Jail Collaborative – Provider Adding Collateral

A Provider can add collateral for a Jail Client and send notes to active collateral.

Completing the Collateral

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- 1. Bring the Jail Client into focus.
- 2. Navigate to the *Collateral/Significant Other Information* screen.
 - a. Jail Collab. > Collateral
- 3. The *Collateral/Significant Other Information* screen appears with the Collateral grid at the top of the page.
 - a. If there are no collateral entered, enter information directly into the blank fields at the bottom of the page.
 - b. If collateral already exists, the grid displays all collateral entered. The fields on the tabs populate with the information for the collateral highlighted.
 - c. Click the **[New]** button to add new collateral. The fields clear to allow for a new entry.
- 4. Complete the *Collateral Details* section.
 - a. Select the Collateral Category.
 - b. Select the Relationship to Client.
 - c. Enter the Start Date and End Date.

TIP: A situation in which you might enter a start date would be if you were

entering a Teacher as collateral. You would enter the school year start and end dates in these fields.

- 5. Complete the *Demographics* tab.
 - a. Enter the collateral's first name in the First field.
 - b. Enter the collateral's last name in the Last field.
 - c. Select a Gender.
 - d. Enter the SSN (Social Security Number).
 - e. Select the Date of Birth.
- 6. Complete the *Contact Info* tab.
 - a. Once the *Demographic* information is entered, select the *Contact Info* tab to bring this tab to the front.

Address	Home Phone	Work Phone	Extn
	Cell Phone	TTY Number	Fax Number
÷.	Email Address		

- 7. Enter an address for the collateral in the *Address* field.
 - TIP: To add an address, click **[Edit]** beneath the Address field. Select the type of address and information and click **[Search]**. The application verifies the address entered with Postal records to show possible alternatives. Select the correct address and click **[OK]**. If correct address does not appear as an option, select the box next to Save Without Verification and click **[OK]**.
 - a. Enter the telephone numbers in the Home Phone, Work Phone and Extn, and Cell Phone fields.
 - b. Enter the TTY Number.
 - c. Enter the Fax Number.
 - d. Enter an *Email Address*.

NOTE: To send notes to collateral, there must be a valid email address entered in this screen.

8. Click **[Save]** at the bottom of the screen. The collateral created will appear in the grid.

For more information...

For assistance, please contact the Allegheny County Service Desk at <u>servicedesk@alleghenycounty.us</u> or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to <u>http://servicedesk.alleghenycounty.us</u>.

This Job Aid and additional user materials are located on the DHS Amazon site at http://dhswbt.s3.amazonaws.com/KIDSJobAids/index.html.