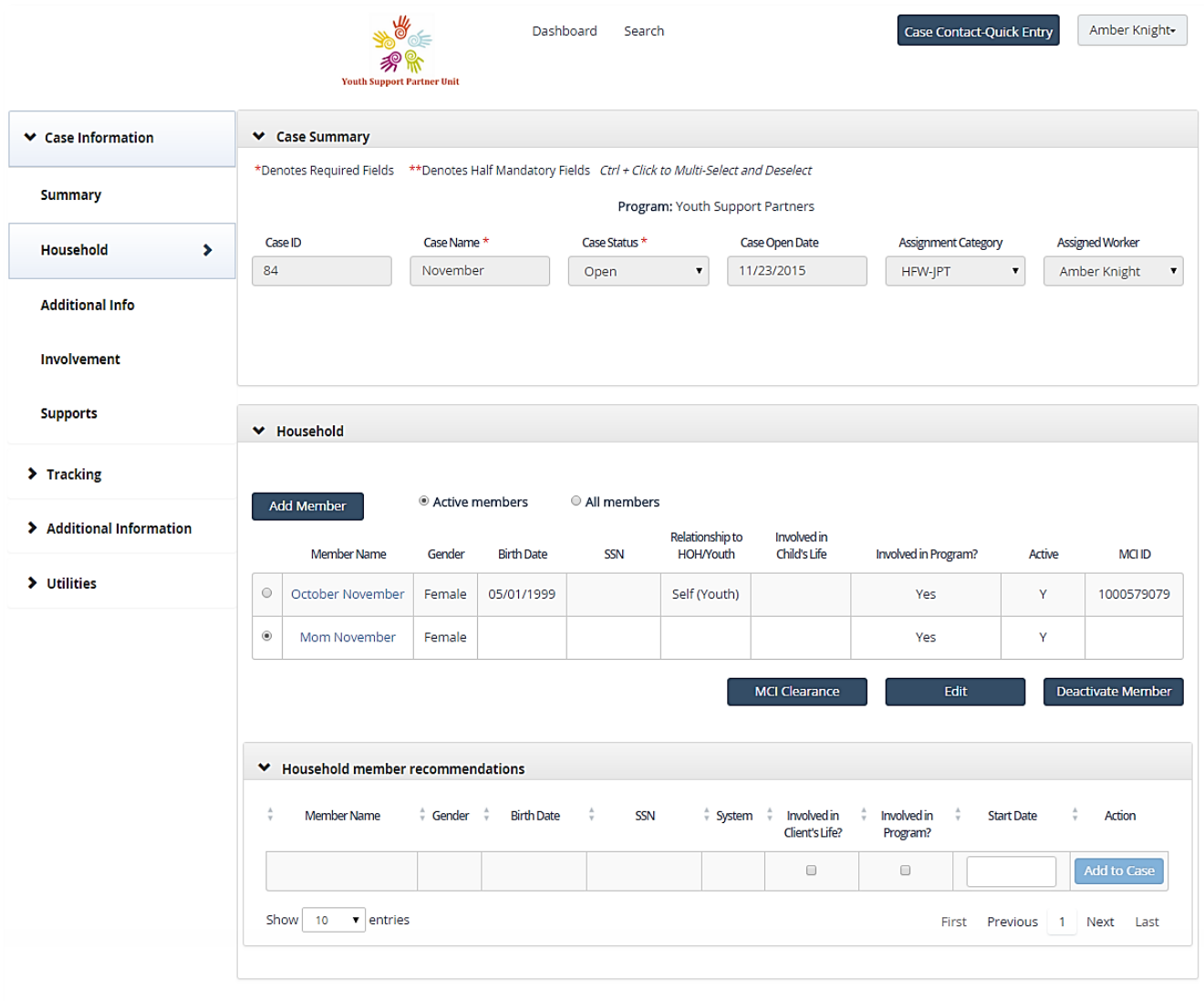




Case Information – Household – YSP Job Aid

The Case – Household screen contains all of the current, former, and potential Household Members (Clients). Potential Household Members come from the KIDS clients who are related to the Youth on the case.

Case Summary Screen



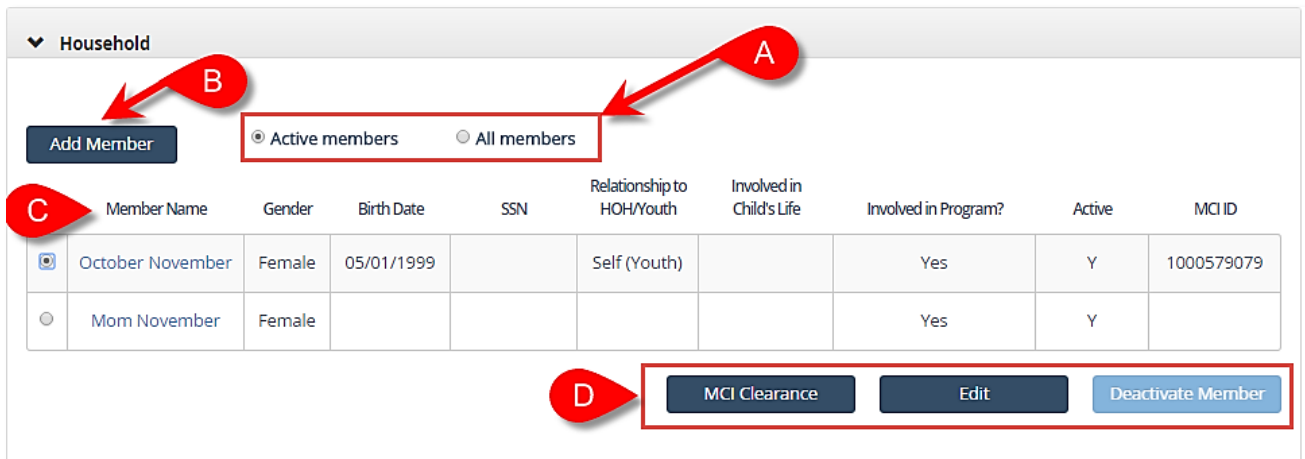
The screenshot shows the 'Case Summary' screen for a case. The left sidebar contains navigation links: Case Information, Summary, Household (selected), Additional Info, Involvement, Supports, Tracking, Additional Information, and Utilities. The main content area is titled 'Case Summary' and includes a 'Program: Youth Support Partners' label. Below this, there are fields for Case ID (84), Case Name (November), Case Status (Open), Case Open Date (11/23/2015), Assignment Category (HFW-JPT), and Assigned Worker (Amber Knight). A 'Household' section follows, with an 'Add Member' button and radio buttons for 'Active members' (selected) and 'All members'. A table lists household members: 'October November' (Female, 05/01/1999, Self (Youth), Yes, Y, 1000579079) and 'Mom November' (Female, Yes, Y). Below the table are buttons for 'MCI Clearance', 'Edit', and 'Deactivate Member'. A 'Household member recommendations' section at the bottom includes a table with columns for Member Name, Gender, Birth Date, SSN, System, Involved in Client's Life?, Involved in Program?, Start Date, and Action. The table is currently empty, and there is an 'Add to Case' button. A pagination bar at the bottom shows 'Show 10 entries' and navigation links: First, Previous, 1, Next, Last.

Accessing the Summary Screen

1. From the **Dashboard**: Locate the desired case and click on the Case ID to navigate to the case.
 - a. Navigating from within the case: **Case Information** → **Household**



Household pane



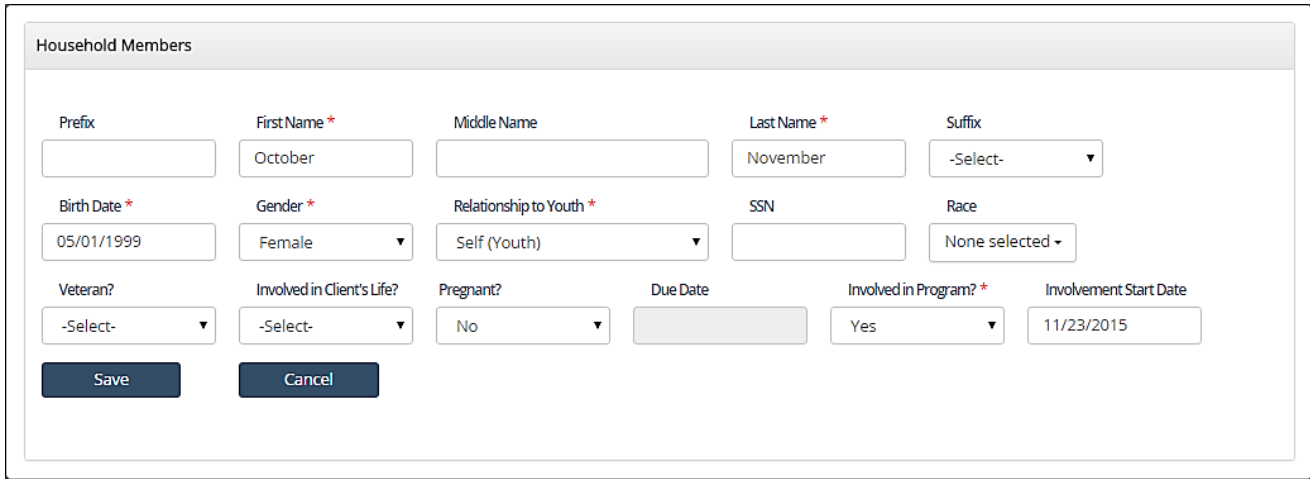
The screenshot shows the 'Household' pane in a software application. At the top, there is a dropdown menu labeled 'Household'. Below it, there is a button labeled 'Add Member' (callout B) and two radio buttons: 'Active members' (selected, callout A) and 'All members'. Below the radio buttons is a table with columns: Member Name, Gender, Birth Date, SSN, Relationship to HOH/Youth, Involved in Child's Life, Involved in Program?, Active, and MCI ID. The table contains two rows: one for 'October November' (Female, 05/01/1999, Self (Youth), Yes, Y, 1000579079) and one for 'Mom November' (Female, Yes, Y). At the bottom of the pane, there are three buttons: 'MCI Clearance' (callout D), 'Edit', and 'Deactivate Member'.

Member Name	Gender	Birth Date	SSN	Relationship to HOH/Youth	Involved in Child's Life	Involved in Program?	Active	MCI ID
October November	Female	05/01/1999		Self (Youth)		Yes	Y	1000579079
Mom November	Female					Yes	Y	

- The **Household** pane allows staff to review, edit, MCI clear, add, or deactivate Household Members.
 - The list will default to *Active Members*. To view both active and deactivated Household Members select the *All Members* radio button.
 - To add a new Household Member click **Add Member**.
 - The Household Member grid contains basic information about the Household Members including their *Name*, *Gender*, *Birthdate*, *SSN*, *Relationship to HoH/Youth*, *Involved in Child's life?*, *Involved in Program?*, *Active*, and their *MCI ID* (if the Household Member has been MCI Cleared).
 - These buttons can be used to run an MCI Clearance on a Household Member, edit the Household Member's information or deactivate the Household Member.
 - The only Household Member that cannot be deactivated is the Youth. The Youth's *Relationship to HOH/Youth* will always be "Self (Youth)". Only one Household Member may have the relationship of "Self(Youth)" at any given time.
 - To use the buttons in this section first select the desired Household Member from the grid by using the radio buttons to the left of the person's name.
- To view a Household Member's information click on the Household Member's name in the grid.
 - To close the pop-up click **Cancel**.



Editing, Activating and Deactivating Household Members



Household Members

Prefix: First Name *: Middle Name: Last Name *: Suffix:

Birth Date *: Gender *: Relationship to Youth *: SSN: Race:

Veteran?: Involved in Client's Life?: Pregnant?: Due Date: Involved in Program? *: Involvement Start Date:

1. Editing a Household Member:

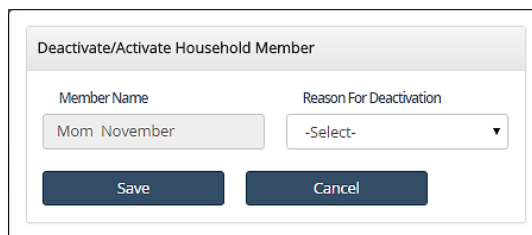
- Select the desired Household Member from the grid.
- Click .
- Update the person's information in the *Household Members* pop-up and click .
- To close the Household Members pop-up without saving changes click .

2. Reactivating a Household Member:

- Select the *All Members* radio button above the grid.
- Select the Household Member to reactivate.
- In the *Involved in Program?* drop-down select "yes" and click . This Household Member will now appear in the *Active Members* filtered grid.

3. Deactivating a Household Member:

- Select the Household Member to deactivate and click . Remember that the Youth cannot be deactivated.
- In the pop-up select the *Reason for Deactivation* and click .
- To close the pop-up without saving changes click .



Deactivate/Activate Household Member

Member Name: Reason For Deactivation:

- The message "Household Member deactivated successfully" will appear below the grid.



MCI (Master Client Index) Clearing Household Members

Client Search

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
	October		November	-Select
Gender	DOB	SSN	Race	
Female	05/01/1999		None selected	

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	05/06/1999		72

Show entries

First Previous Next Last

Detail Information

MCI ID	Name	DOB
1000579079	October November	05/01/1999
SSN	Gender	Race
	Female	

Household Members who have an MCI (Master Client Index) ID in the grid have already been cleared. These Household Members can be re-cleared if necessary. To open the MCI Clearance Client Search pop-up click .



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
	October		November	-Select
Gender	DOB	SSN	Race	
Female	05/01/1999		None selected	

1. The *Person Search Results* section contains the information that has been entered in this Case (or received from the Referral) for the Household Member. Compare this information to the information of the individuals in the *Potential Matches* section.

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

- 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 your Household Member is this person based on the demographic data entered.
 - 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
1000579079	October November	05/01/1999
SSN	Gender	Race
	Female	

Detail Information

Client Information

Address Summary	Primary Phone Type	Primary Phone #	Email



2. After reviewing the *Person Search Results*, determine whether the Household Member is one of the potential matches.
 - a. If the Household Member is one of the potential matches select that Potential Match in the grid and click **Select**.
 - b. If the Household Member is NOT one of the potential matches click **Create** to create a new MCI ID for this Household Member.
 - c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID click **Cancel**.

Adding a new Household Member

Household Members

Prefix

First Name *

Middle Name

Last Name *

Suffix

-Select-

Birth Date *

Gender *

Relationship to Youth *

SSN

Race

-Select-

-Select-

None selected

Veteran?

Involved in Client's Life?

Pregnant?

Due Date

Involved in Program? *

Involvement Start Date

-Select-

-Select-

-Select-

-Select-

Search

Cancel

Search Results

Select	MCI ID	Client ID	First	Last	Gender	DOB	SSN	% Match

Add to Case

Create Client

1. Click **Add Member** to bring up the Household Members pop-up.
2. Enter all known information for the client.
 - a. Remember that only one Household Member may have the relationship of "Self(Youth)" at any given time.
 - b. Race is a multi-select drop-down menu. Select all applicable races using the check boxes within the drop-down.
3. Once all of the fields have been filled out click **Search** to review possible MCI ID matches for the Household Member.



Household Members

Prefix

First Name *

Middle Name

Last Name *

Suffix

Adam

Kennedy

-Select-

Birth Date *

Gender *

Relationship to Youth *

SSN

Race

01/01/1999

Male

Other: non-relation member

None selected

Veteran?

Involved in Client's Life?

Pregnant?

Due Date

Involved in Program? *

Involvement Start Date

-Select-

-Select-

-Select-

Yes

Search

Cancel

Search Results

Select	MCI ID	Client ID	First	Last	Gender	DOB	SSN	% Match
☐	1000578721	19881	ADAM	KENNEDY	Male	01/01/1999		91

Show

10

entries

First

Previous

1

Next

Last

Add to Case

Create Client

4. Review the *Search Results* to determine whether the Household Member is one of the individuals in the *Search Results* grid.
 - a. If the person is one of the individuals in the Search Results select that individual by clicking the Select radio button next to their MCI ID in the grid.
 - i. Then click

Add to Case

.
 - b. If the person is NOT one of the individuals in the Search Results click

Create Client

.
 - c. Note that if no date is entered, the *Involvement Start Date* will default to the date the Household Member was entered on Case in the system.



Household member recommendations

Household member recommendations								
Member Name	Gender	Birth Date	SSN	System	Involved in Client's Life?	Involved in Program?	Start Date	Action
ADAM KENNEDY	Male	01/01/1999		KIDS	☐	☐		Add to Case
BRIAN KENNEDY	Male	01/01/2000		KIDS	☐	☐		Add to Case
ROSE KENNEDY	Female	09/01/1950		KIDS	☐	☐		Add to Case

Show 10 entries First Previous 1 Next Last

1. *Household Member Recommendations* are transmitted from the KIDS system when the YSP referral is made. These recommendations include clients who are related in some way to the Youth on the Case.
 - a. To add a Household Member from the Recommendations list indicate whether the person is involved in the client's life and/or involved in the YSP program by checking the relevant check boxes in the grid.
 - b. Enter the Start Date for the Household Member.
 - c. Click **Add to Case** to move this recommended Household Member to the *Household* grid.

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>