



# Case Information – Additional Info – YSP Job Aid

The Additional Info screen contains additional demographic information for the Household Members not stored on the Household screen. This additional information includes addresses, phone numbers, and email addresses.

## Case Involvement – Additional Info screen

**Case Summary**

\*Denotes Required Fields \*\*Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Program: Youth Support Partners

Case ID	Case Name *	Case Status *	Case Open Date	Assignment Category	Assigned Worker
180	NOVEMBER	Open	12/18/2015	HFW-JPT	Amber Knight

**Additional Info**

Member Name	Gender	Birth Date	Relationship to HOH/Youth
OCTOBER NOVEMBER	Female	05/01/1999	Self (Youth)
September October	Male	02/03/1999	Youth's Other Relation Member

Address | Phone | Other

**Add Address**

Address Type	Address Summary	Primary Address	Validated?
<a href="#">Home</a>	123 N Main St Pittsburgh,PA, 15215-2018	No	Yes

Show 10 entries

First Previous 1 Next Last

[Validate](#) [Delete](#)

## Accessing the Additional Info 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** → **Additional Info**

## Additional Info pane

▼ **Additional Info**

Member Name	Gender	Birth Date	Relationship to HOH/Youth
OCTOBER NOVEMBER	Female	05/01/1999	Self (Youth)
September October	Male	02/03/1999	Youth's Other Relation Member

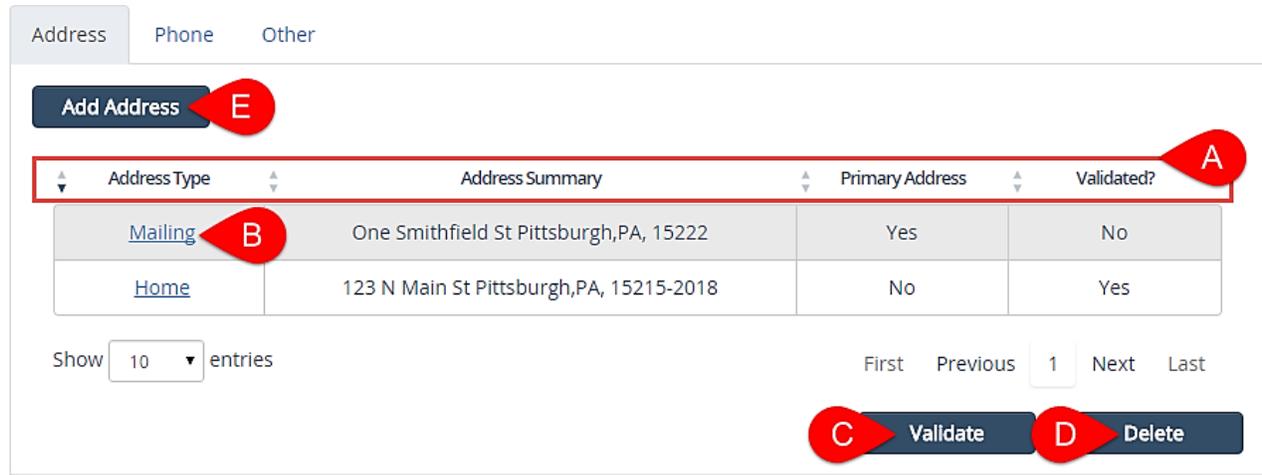
**Address** | Phone | Other

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1. The **Additional Info** pane allows staff to view, edit, or add: addresses, phone numbers, and email addresses for Household Members.
  - a. Select the desired Household Member from the grid. The selected individual's line in the grid will turn grey.
  - b. Select the *Address*, *Phone*, or *Other* tab to continue.

**Note:** Addresses that are received through referrals from the KIDS system are not editable.

## Address tab



Address Type	Address Summary	Primary Address	Validated?
<a href="#">Mailing</a> (B)	One Smithfield St Pittsburgh, PA, 15222	Yes	No
<a href="#">Home</a>	123 N Main St Pittsburgh, PA, 15215-2018	No	Yes

1. The *Address* tab allows staff to view, edit, or add addresses.
  - a. The *Address* grid can be sorted on any of the header titles. The *Address* grid lists whether or not an address is the Household Member's primary address and if the address has been validated.
  - b. To view or edit an address click on the *Address Type* hyperlink in the grid. The *Demographics - Address* pop-up will appear.
  - c. To validate an address, click on the desired address in the grid and click the [Validate](#) button at the bottom of the tab.
  - d. To delete an address, click on the desired address in the grid and click the [Delete](#) button at the bottom of the grid.
    - a. A confirmation pop-up will appear:

Delete selected address information?

[Yes](#)      [No](#)

Click [Yes](#) to delete. Click [No](#) to close the pop-up without deleting the address.

- e. To add a new address click the [Add Address](#) button above the grid. The *Demographics - Address* pop-up will appear.



2. Using the *Demographics – Address* pop-up.

Demographics - Address

Address Type *	Address 1 *	Address 2	Primary Address	County
Mailing	One Smithfield St		Yes	Allegheny
City	Neighbourhood/Municipality	State *	Zip Code *	Extension
Pittsburgh	-Select-	Pennsylvania	15222	

Save Cancel

- Enter all known address information in the pop-up. Note that *Address type*, *Address 1*, *State*, and *Zip Code* are mandatory. Select whether or not the address is the household member's primary address.
- To save the entered information click .
- To close the pop-up without saving changes click .
- When an address has been successfully added or changed "Address added successfully" will appear below the *Address* grid.



3. 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. Select the address to validate from the grid by clicking on the address' line in the grid.
  - b. Click **Validate** to open the *Address Validation* pop-up. The *Search Result* list will already be populated with the possible search results.

Address Validation

Address Information

Address Type	Address 1	Address 2	City	County
Home ▼	123 N Main St		Pittsburgh	Allegheny ▼
Neighbourhood/Municipality	State	Zip Code	Extension	
-Select- ▼	Pennsylvania ▼	15215		

**Search**

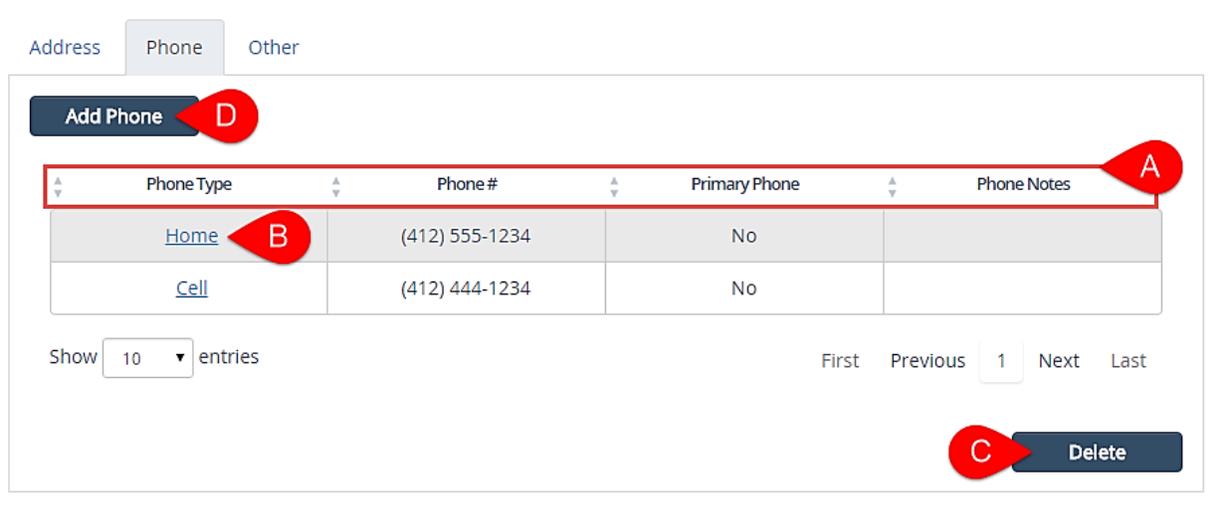
Search Result

Address Line 1	Address Line 2	City	State	Zip Code
123 N Main St		Pittsburgh	PA	15215-2018

**Select**      **Cancel**

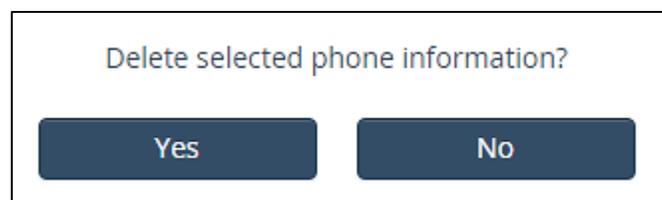
- i. If the Search Result list includes the desired address, click on the correct address in the grid and click **Select**.
- ii. The address information can be updated and searched again. To do so, edit the address information and click **Search**.
- iii. To close the Validate Address pop-up without selecting any of the Search Result addresses click **Cancel**. The address will not be changed.

## Phone tab



Phone Type	Phone#	Primary Phone	Phone Notes
<a href="#">Home</a> (B)	(412) 555-1234	No	
<a href="#">Cell</a>	(412) 444-1234	No	

1. The *Phone* tab allows staff to view, edit, or add phone numbers.
  - a. The *Phone* grid can be sorted on any of the header titles. The *Phone* grid lists whether or not a phone is the Household Member's primary phone as well as any notes that have been entered about that phone number.
  - b. To view or edit a phone number click on the *Phone Type* hyperlink in the grid. The *Demographics – Phone* pop-up will appear.
  - c. To delete a phone number, click on the desired phone number in the grid and click the **Delete** button at the bottom of the grid.
    - a. A confirmation pop-up will appear:



Click **Yes** to delete. Click **No** to close the pop-up without deleting the phone number.

- d. To add a new phone click the **Add Phone** button above the grid. The *Demographics – phone* pop-up will appear.



4. Using the *Demographics – Phone* pop-up.

- a. Select the *Phone Type*.
- b. Enter the *Phone #*.
- c. If there is information that is needed about the phone number enter that information in the *Phone Notes*.

**Examples:** *If the phone number has an extension the extension can be added here.*

*If the Household Member has limited minutes and prefers to receive texts that information can also be entered here.*

- d. Select whether or not this is the *Primary Phone* for the Household Member.
- e. To save the entered information click .
- f. To close the pop-up without saving changes click .
- g. When an address has been successfully added or changed "Phone added successfully" will appear below the *Phone* grid.



## Other tab

Address Phone Other

Email Address **A**

Best Way To Communicate With You? **B**

Best Time To Communicate With You? **C**

Save **D**

1. The *Other* tab allows staff to view, edit, or add an email address as well as note information on preferred communication methods and times.
  - a. Enter an *Email Address* for the Household Member (if known).
  - b. Select the best way to communicate with the Household Member from the *Best Way To Communicate With You?* drop-down.
  - c. Select the best time to reach the Household Member from the *Best Time To Communicate with You?* drop-down.
  - d. Click **Save** to save the entered or edited information.

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