



Case: Supports – YSP Job Aid

The *Supports* screen allows users to view, edit, or add Supports to the case. Supports are individuals who support the Youth either in a professional or natural/community support capacity.

Supports

Supports

Support Category *

-Select- ▼

Support Type *

-Select- ▼

Business Name

Prefix

First Name *

Middle Name

Last Name

Birth Date

Gender *

-Select- ▼

SSN

Notes

Email

Active *

Yes ▼

Address

Phone

Address Type

Address Summary

Primary

Validated

Primary Address

Address Type *

Address 1 *

Address 2

City

New

County

Neighborhood/Municipality

State

Zip Code *

Extension

Validate Address

Save Support

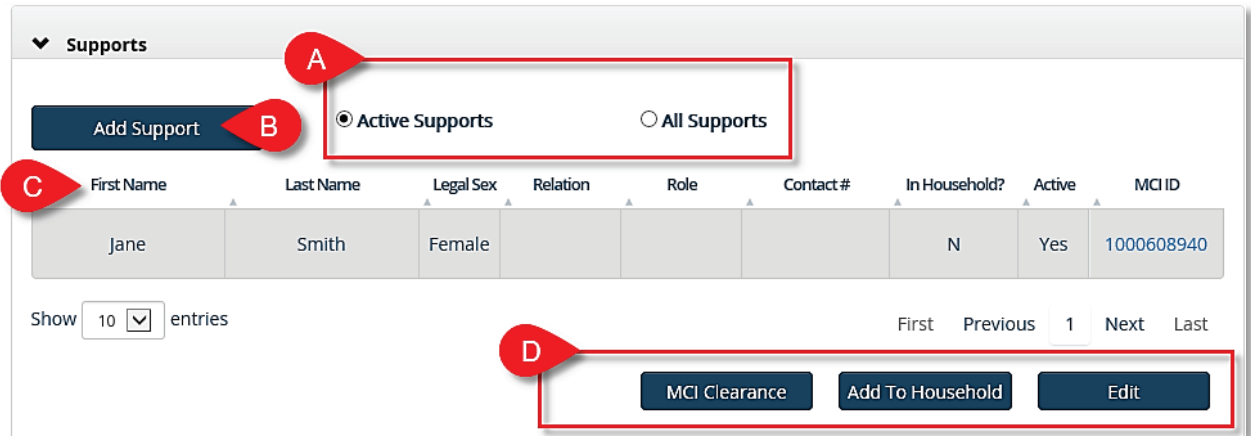
Cancel

Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - Click on the **Case Information** tile. Then click on the **Supports** tile.

Supports

- The **Supports** pane allows users to review, edit, MCI clear, add, or deactivate/activate Supports as well as change a Support to a Household Member.



The screenshot shows the 'Supports' pane with the following elements:

- A:** A red box highlights the 'Active Supports' and 'All Supports' radio buttons.
- B:** A red arrow points to the 'Add Support' button.
- C:** A red arrow points to the 'First Name' column header of the grid.
- D:** A red box highlights the 'MCI Clearance', 'Add To Household', and 'Edit' buttons at the bottom right.

First Name	Last Name	Legal Sex	Relation	Role	Contact #	In Household?	Active	MCI ID
Jane	Smith	Female				N	Yes	1000608940

Below the grid, there is a 'Show 10 entries' dropdown and pagination controls: 'First', 'Previous', '1', 'Next', 'Last'.

- The list will default to *Active Supports*. To view both active and deactivated Supports select the ☒ *All Supports* radio button.
- To add a new Support, click **Add Support**.
- The *Supports* grid contains basic information about the Supports including their *Name*, *Legal Sex*, *Relation* (to the Head of Household), *Role*, *Contact #*, *In Household?* (Y/N), *Active* (Yes/No), and *MCI ID* (if the Support has been MCI Cleared).
- These buttons can be used to run an MCI Clearance on a Support, edit the Support's information, or move a Support to the Household.
 - To use the buttons in this section first select the desired Support from the grid by clicking on that line in the grid.

See **Page 8** of this Job Aid for instructions on how to MCI Clear a Support.

- To view or edit a Support's information, click on the individual's line in the grid and click

Edit

- To close the *Supports* pop-up without making any changes click

Cancel



Creating a New Support

1. To create a new Support, click the **Add Support** button.
2. The *Search Supports* pop-up will appear:

Search Team Members

First Name * Last Name * Gender * Birth Date Search Location

Sally Sunset Female ALL

Search

Search Result

MCI ID	First Name	Last Name	Gender	SupportCategoryName	Business Name	Contact #
1000862694	Sally	Sunset	Female			

Show 10 entries First Previous 1 Next Last

Client Information Contact Information Notes

Name Business Name Support Category Support Type

Sally Sunset

SSN Gender Birth Date MCI ID

Female 5/6/1990 12:00:00 AM 1000862694

Add To Referral Create Support Close

- a. Enter the *First Name*, *Last Name*, *Gender*, and *Birth Date* (if known). **Note:** Do not enter birth dates for Professional Supports.
- b. *Synergy Location*: This drop-down defaults to "Synergy". Supports can be searched for in all of Synergy or only in a specific program such as YSP, HCM, or ITM.
- c. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid. Click on a line in the grid to view that individual's information.
- d. Review the results including the information on the *Client Information*, *Contact Information*, and *Notes* tabs.
 - i. If there is a match in the *Search Result* grid, click the desired person's line in the *Search Result* grid and then click **Add to Case**.
 - ii. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Results* grid.
- e. To close the *Search Support* pop-up without adding a support click **Close**.



Completing the Supports pop-up

1. When **Create Support** or **Add to Case** is clicked the *Supports* pop-up will appear.

The screenshot shows the 'Supports' pop-up form. It contains several sections: a top section with 'Support Category', 'Support Type', 'Business Name', and 'Prefix'; a middle section with 'First Name', 'Middle Name', 'Last Name', 'Birth Date', 'Gender', 'SSN', and 'Notes'; a bottom section with 'Email' and 'Active' (Yes/No). Below these is a table with columns 'Address Type', 'Address Summary', 'Primary', and 'Validated'. At the bottom, there are fields for 'Primary Address', 'Address Type', 'Address 1', 'Address 2', 'City', 'County', 'Neighborhood/Municipality', 'State', 'Zip Code', and 'Extension'. There are also buttons for 'New', 'Validate Address', 'Save Support', and 'Cancel'.

2. Enter all of the relevant information for this Support in the *Supports* pop-up.
 - a. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.
 - b. *Support Category*, *Support Type*, *First Name*, *Legal Sex* and *Active* are all required in order to save a Support entry.
3. When the entire *Supports* pop-up has completed click **Save Support** at the bottom of the pop-up to save the information entered or changed.
4. Clicking **Cancel** at the bottom of the pop-up will close the pop-up without saving any of the information that was entered or changed.



3. **Address tab:** Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.

Address Type	Address Summary	Primary	Validated
Home	1972 Clayton Ave Perry South Pittsburgh,PA, 15214-3808	No	Yes

Primary Address	Address Type *	Address 1 *	Address 2	City
-Select-	Home	123 N Main St		
County	Neighborhood/Municipality	State	Zip Code *	Extension
-Select-	-Select-	-Select-	15215	

New

Validate Address

Search Result

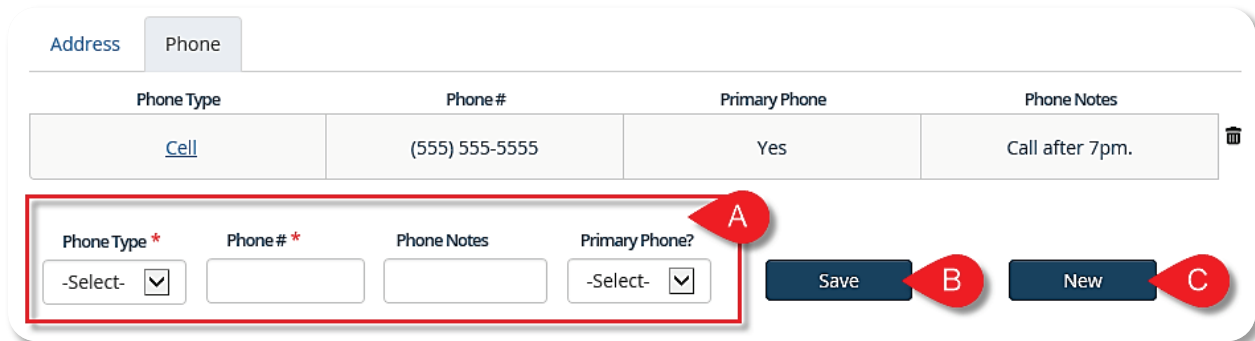
Address Line 1	Address Line 2	Municipality	City	State	Zip Code
123 N Main St		Sharpsburg Borough	Pittsburgh	PA	15215-2018

Select

Create address as entered

- To enter a new address:
 - Select whether or not the address is the individual's *Primary Address*, select the *Address Type*, and enter all of the known address information.
- Click **Validate Address**; the *Search Result* list will then appear.
- If the *Search Result* list includes the desired address, click on the correct address in the grid and Click **Select**.
 - If the Correct address is not in the Search Result list, the *Address Information* can be updated and searched for again. To do so, edit the *Address Information* and click **Validate Address**.
 - If, after searching again, the address cannot be located in the *Search Result* list, the address can still be saved without validation by clicking **Create address as entered**. The address will appear in the *Address* grid with a "No" in the *Validated?* column to indicate that the Address has not been validated.
- If an address has been added in error, click the Delete Icon [] to the right of the address in the *Address* grid to delete.
- To add a new address, click **New**

4. **Phone tab:** Multiple phone numbers can be entered for the Support. The Support can also be saved without entering a phone number.



- To add a new phone number, click on the *Phone* tab:
 - Phone Type*: Select the type of phone number being entered.
 - Phone Number*: Enter the 10-digit phone number.
 - Phone Notes*: If applicable, enter notes about the phone number.
 - Primary Phone?*: Use the drop-down to indicate whether or not this phone number is the primary phone number for this Support. Note that only one phone number can be marked as primary at any given time.
 - Click **Save** to add this phone number to the *Phone* grid.
 - To edit an existing phone number, click on the desired number in the grid.
 - To enter additional phone numbers, click **New**.
 - If a phone number has been added in error, click the Delete Icon [] to the right of the phone number in the *Phone* grid to delete it.
5. Click **Save Support** at the bottom of the pop-up in order to save the information entered. Clicking **Cancel** will close the pop-up without saving any of the information entered or edited.

Supports Recommendations

- ▼ **Supports Recommendations** sub-pane: These recommendations come from the KIDS System when a Referral originates in KIDS.

▼ Supports recommendations						
First Name	Last Name	Gender	Contact #	System	MCID	Action
Janet	Jones	Female	555-555-5555	KIDS	123456789	Add to Case

- Click the **Add to Case** button to the right of the desired individual's line in the grid to add this person as a Support.



- b. The **Supports** pop-up will appear. Enter all of the relevant information for the Support and click **Save Support**.
- c. To close the Supports pop-up without adding the individual, click **Cancel** within the Supports pop-up.

Adding a Support to the Household

1. Adding a Support to Household Members: Use this option if a Support has now become a Household Member.
 - a. Select the Support from the grid and click **Add to Household**. The individual will be moved from the **Supports** screen to the **Household Info** screen.

NOTE: The Support must be MCI Cleared before they can be added to the Household.

2. Adding a Household Member to Supports: Use this option if a Household Member has now become a Support.
 - a. On the **Household Info** screen select the individual and click **Deactivate Member**.
 - b. The Deactivate/Activate Household Member pop-up will appear. Select "Member is now a support" from the Reason for Deactivation drop-down and click **Save**.

Deactivate/Activate Household Member

Member Name

Reason For Deactivation

Member is now a support ☒

Save

Cancel

- c. The individual will be moved from the **Household Info** screen to the **Supports** screen.



MCI (Master Client Index) Clearing

DHS' goal is to ensure that all services, connections, and information for an individual are connected to one ID, the Master Client Index ID (MCI ID).

The MCI Clearance process assists in this by helping to minimize the possibility of duplicate MCI IDs within DHS applications.

1. Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared. Individuals can be re-cleared if new information is entered. To open the MCI Clearance pop-up (*Client Search*), select the desired individual and click **MCI Clearance** below the *Supports* grid.

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
				-Select- v
Gender	DOB	SSN	Race	
v			None selected v	

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

Show entries

First Previous **1** Next Last

Detail Information

Client Information

Contact Information

DHS Involvement

MCI ID	Name	DOB
SSN	Gender	Race



2. The *Person Search Results* section contains the information that has been entered in this Case for this individual. Compare this information to the *Potential Matches* section.

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
				-Select- v
Gender	DOB	SSN	Race	
v			None selected v	

- 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 the desired individual is this person based on the demographic data entered.

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
1000608262		October		November		Female	05/06/1998		91

Show entries

First Previous Next Last

- i. To view more information on the Potential Match, click on the person's name in the grid. The *Detail Information* tabs (*Client Information*, *Contact Information* and *DHS Involvement*) will update to include that person's information.

Detail Information

MCI ID	Name	DOB
SSN	Gender	Race



Detail Information

Client Information Contact Information DHS Involvement

Address Summary Primary Phone Type Primary Phone # Email

Detail Information

Client Information Contact Information DHS Involvement

System	Status	Open Date	Case/Referral Last Updated Date	Paid Service Last Updated Date(KIDS-Only)	Referral/Case ID	Worker Name

3. After reviewing the *Person Search Results*, determine whether the individual is one of the potential matches.
 - a. If the desired individual is one of the potential matches, select that Potential Match in the grid and click **Select**.

Note: If there is a Potential Match with a % Match of 95% or higher in the Person Search Results that Potential Match must be selected in order to MCI Clear the individual. Synergy will not allow a new MCI ID to be created.

- b. If the desired individual is NOT one of the potential matches, click **Create** to create a new MCI ID for this individual.
 - c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID, click **Cancel**.

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 iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>