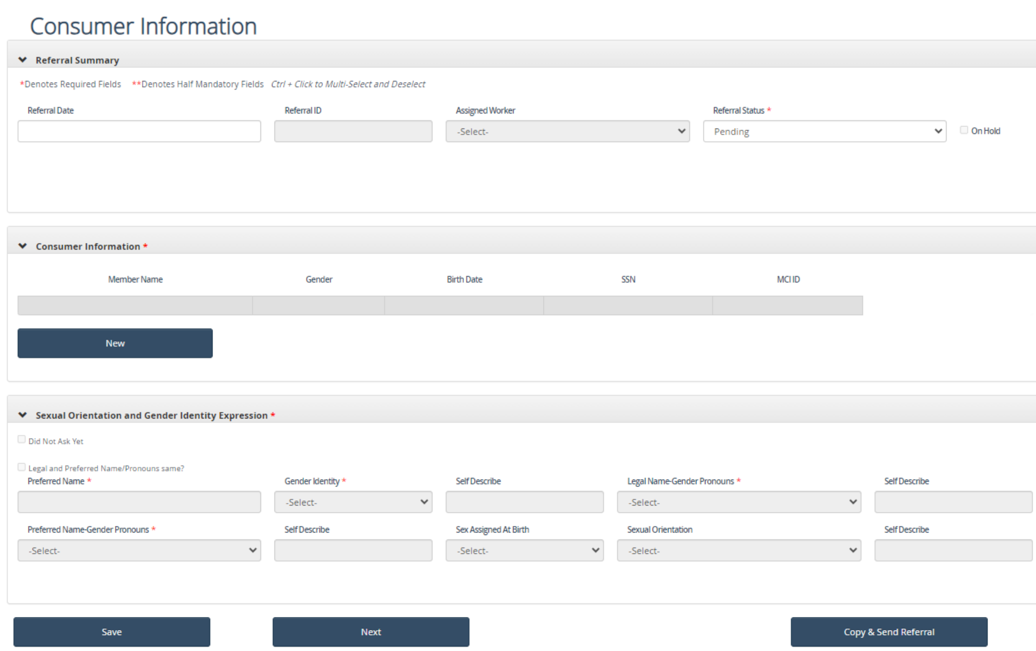
Consumer Information – Dragonfly Job Aid

The *Consumer Information* screen is the first screen that appears when navigating to a specific Referral. This screen contains basic demographic information on the Consumer.

Consumer Information



Navigation

1. To access an existing Referral (Pending or Active): On the Dashboard, locate the desired Pending or Active Referral in Pending Referrals or Active Referrals panes and click on the *Referral ID*. This will open the **Consumer Information** screen.

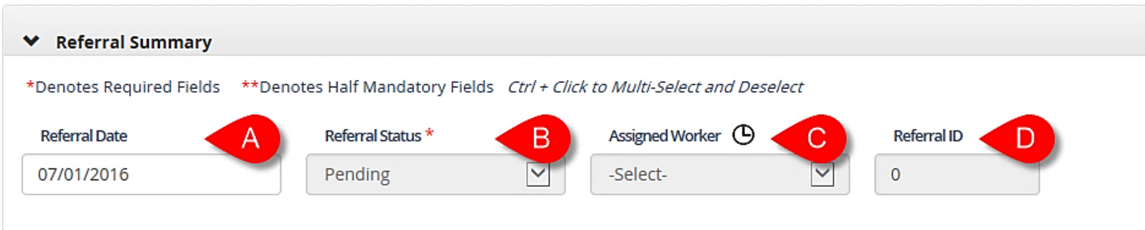
2. To create a new Referral: On the Dashboard, click Create New Referral located within the Actions pane. This will open a blank **Consumer Information** screen.

3. The Previous and Next buttons can be used to navigate up or down one screen within the Left Navigation tiles.

4. Mandatory screens will have an ❌ next to the Left Navigation tile for that screen. Once a screen has been completed this icon will change to a ✅ which indicates that the screen is either complete or has information entered.

Referral Summary

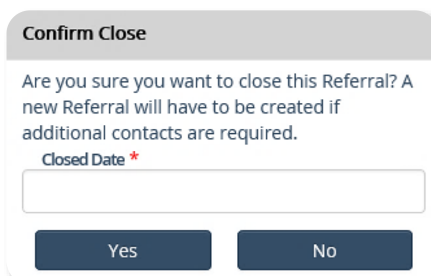
1. [Referral Summary] pane: This pane will be displayed at the top of every Referral screen and contains the following information:



   a. *Referral Date*: Enter the date the Referral started.

   b. *Referral Status*: The statuses are: "Pending", "Open", or "Closed". The *Referral Status* defaults to "Pending" on all new referrals. Once the **Consumer Information** screen has been saved the status will change automatically to "Open".

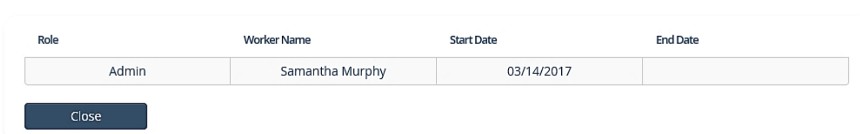
      i. To close a Referral, select "Closed" from the *Referral Status* drop-down and click [Save] at the bottom of the screen. The *Confirm Close* pop-up will open.



      Enter the *Closed Date* and click [Yes] to close the Referral. Clicking [No] will close the pop-up without closing the Referral.

   c. *Assigned Worker*: When creating a new Referral the *Assigned Worker* will default to the user who created the new Referral but this can be updated.

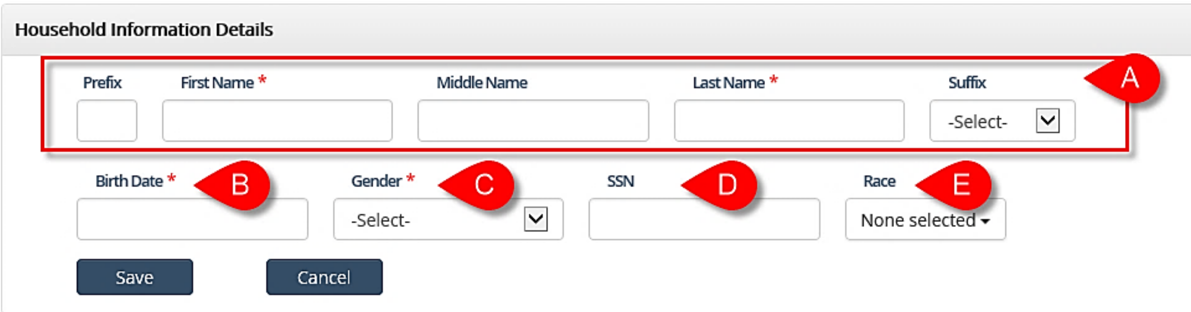
      i. Click the History Icon [◷] next to the *Assigned Worker* drop-down to open a pop-up containing the history of all assignments to the Referral including the *Start Date* and *End Date* of each assignment episode and the *Role* of the worker.



   d. *Referral ID*: Once the **Consumer Information** screen has been saved for the first time a *Referral ID* will be generated. The *Referral ID* cannot be changed.

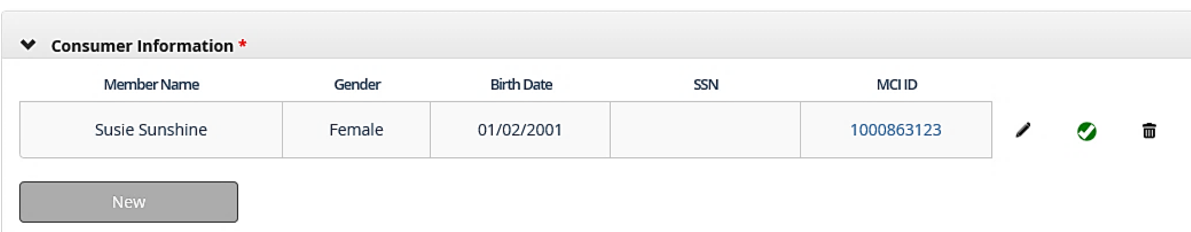
Consumer Information

1. Completing the *Household Information Details* pop-up:



   a. *Prefix, First Name, Middle Name, Last Name* and *Suffix*: Enter the Consumer's *First Name* and *Last Name*. If applicable also enter the Consumer's *Prefix, Middle Name,* and *Suffix*.
   b. *Birth Date*: Enter the Consumer's date of birth.
   c. *Gender:* Select the Consumer's gender from the drop-down.
   d. *SSN:* Enter the Consumer's Social Security Number (SSN).
   e. *Race:* This is a multi-select drop-down, select all that apply.
   f. Click **Save** to save the information that was entered and close the pop-up. Clicking **Cancel** will close the pop-up without saving any of the information entered.

2. Consumer Information: This pane contains basic demographic information for the Consumer.

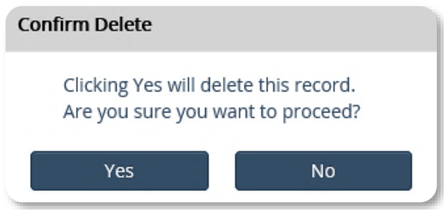


   a. Editing a Consumer's information: If the Consumer has already been entered, click the Edit Icon [ ] to the right of the Consumer in the *Consumer Information* grid. This will open the *Household Information Details* pop-up.

   b. The icon to the right of the MCI number in the *Consumer Information* grid indicates whether or an MCI clearance has been performed.
      i. indicates that an MCI clearance has not been performed.
      ii. indicates that an MCI clearance has been performed.
      iii. To clear or re-clear an MCI click on or to the right of the grid.
      iv. Clicking on the MCI ID for an individual will open the ***Client View*** application and display the individual's information within ***Client View***.

c. If this is a new Referral and a Consumer has not yet been entered, click **New** to open the *Household Information Details* pop-up and enter the Consumer's information. There can only be one Consumer per Referral. After one Consumer is entered in the grid the **New** button will be disabled.

d. Deleting a Consumer: A Consumer can be deleted from a Referral by clicking the trash icon **[ ]** to the right of the *Consumer Details* grid. A *Confirm Delete* pop-up will appear:



Clicking **Yes** will delete the Consumer.
Clicking **No** will cancel the action and the Consumer will not be deleted.

3. Click **Save** at the bottom of the screen before navigating away from the **Consumer Info** screen otherwise any information that has been entered or updated will not be saved. The screen cannot be saved unless all of the mandatory **[*]** information has been entered.

4. The **Next** button at the bottom of the screen can be used to navigate to the next screen within the Left Navigation tiles.

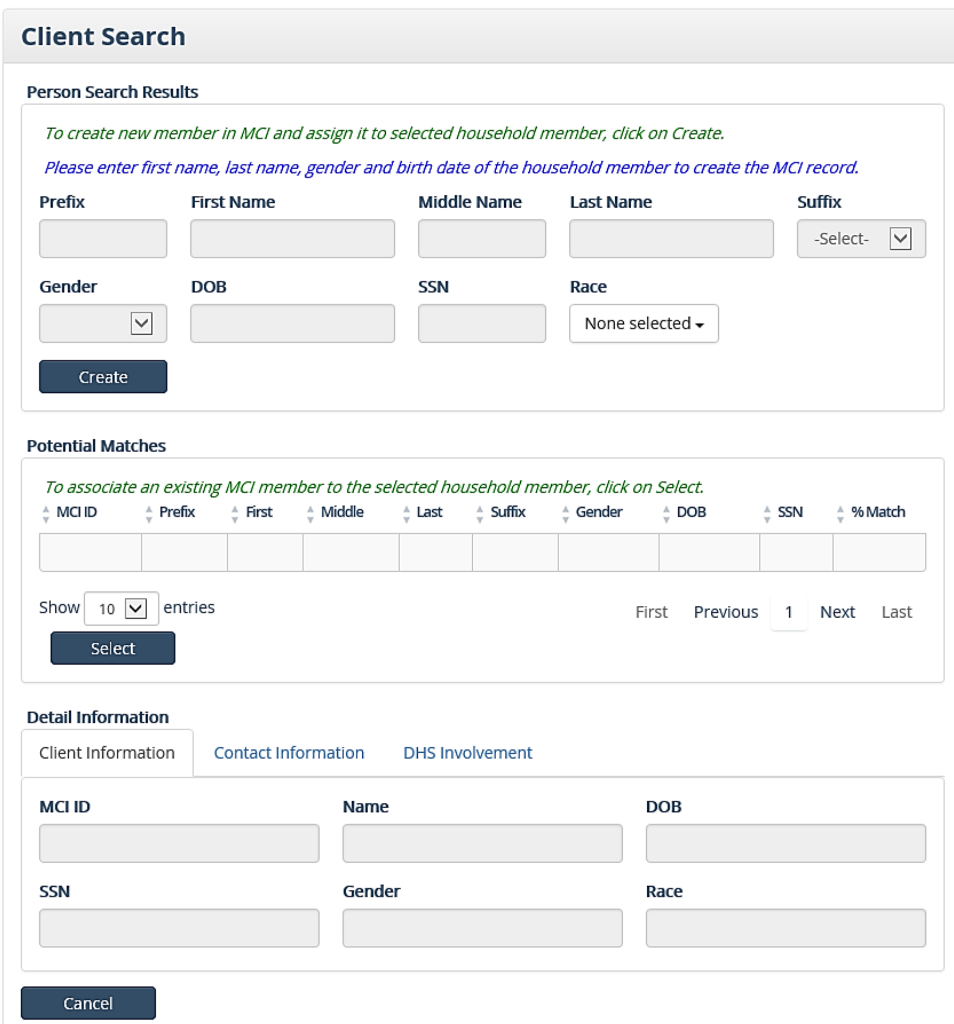
NOTE: *If the Client has not been MCI Cleared the user will not be able to access any screens beyond the Referral Information screen or use the* Copy & Send Referral *function.*

MCI (Master Client Index) Clearing

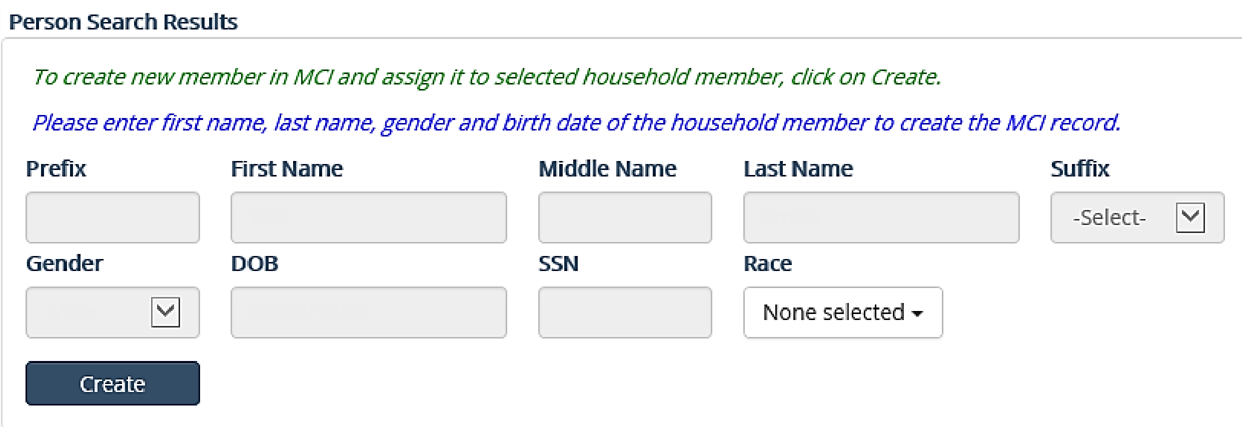
DHS' goal is to ensure that all services, connections, and information for an individual are connected to one ID, the Master Client Index ID (MCI ID).

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

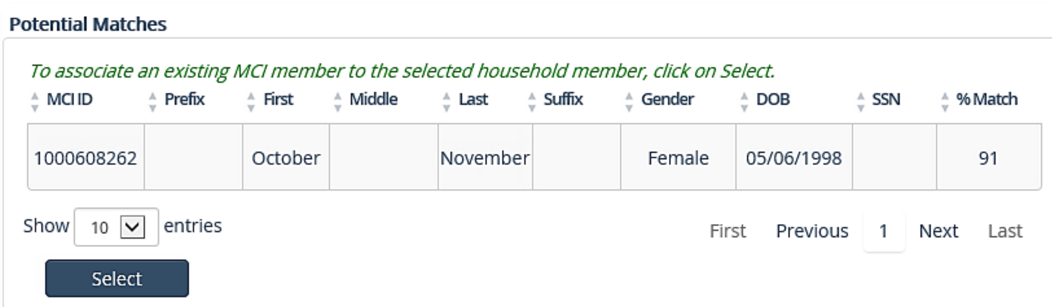
1. Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared. Individuals can be re-cleared if new information is entered. To open the MCI Clearance pop-up (*Client Search*), select the desired individual and click on the MCI Clearance Icon [or].



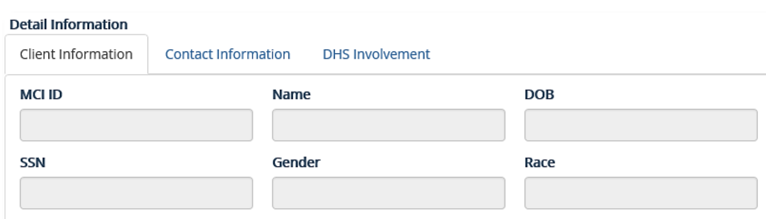
2. The *Person Search Results* section contains the information that has been entered in this Case for this individual. Compare this information to the *Potential Matches* section.

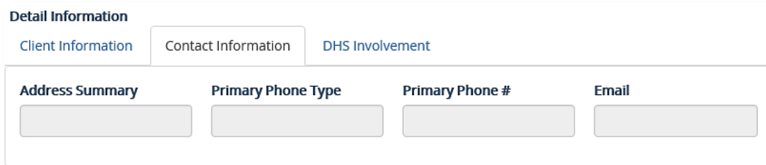


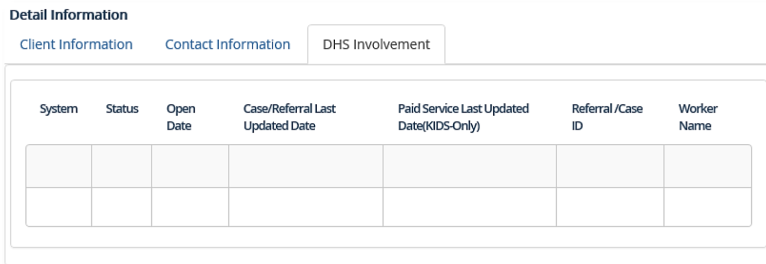
   a. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that the desired individual is this person based on the demographic data entered.



      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.







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**.

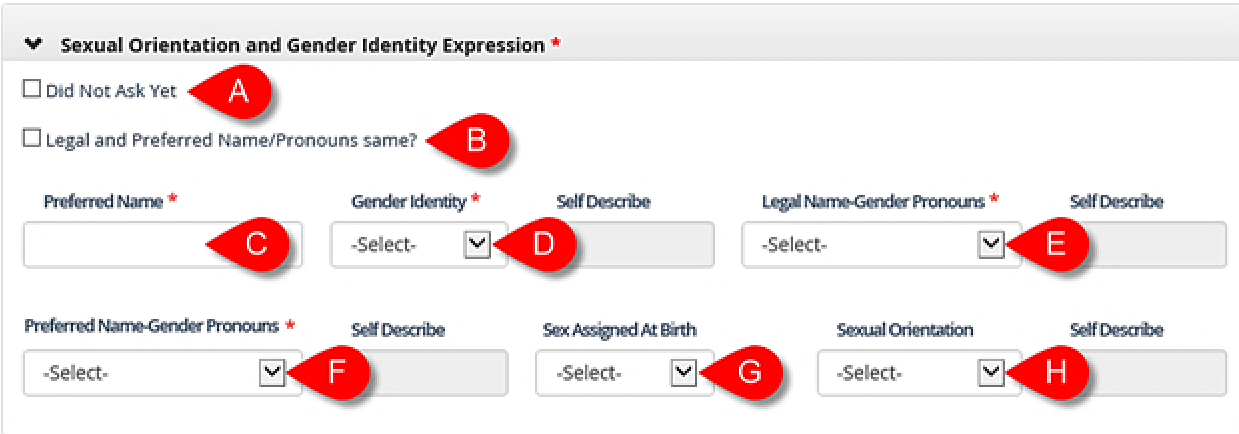
> ***Note:*** *If there is a Potential Match with a % Match of 95% or higher in the Person Search Results that Potential Match must be selected in order to MCI Clear the individual. Synergy will not allow a new MCI ID to be created.*

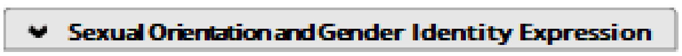
   b. If the desired individual is NOT one of the potential matches, click **Create** to create a new MCI ID for this individual.

   c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID, click **Cancel**.

4. Before the **Sexual Orientation and Gender Identity Expression** pane can be edited the *Consumer Information* screen must be saved first. Click **Save** at the bottom of the screen. Once **Save** has been clicked for the first time the **Sexual Orientation and Gender Identity Expression** pane will become editable.

Sexual Orientation and Gender Identity Expression (SOGIE)



1. 

: In this pane complete or update the Sexual Orientation and Gender Identity Expression (SOGIE) information for the Consumer.

   a. If you have not yet asked about the Consumer's SOGIE information, check the ☑*Did Not Ask Yet* box. Doing so will cause the rest of the SOGIE fields to become read only. When you are ready to document this information you can uncheck the ☐*Did Not Ask Yet* checkbox and all of the SOGIE fields will be enabled again.
   b. If the Consumer has indicated that their preferred first name and Pronouns are the same as their Legal Name and Pronouns check the ☑*Legal and Preferred Name/Pronouns same?* Checkbox. Checking this box will update the *Preferred Name* field with the Consumer's first name as it appears in the *Individual Information* grid.
   c. *Preferred Name*: Enter the Consumer's preferred name here.
   d. *Gender Identity*: Select the Gender Identity that the Consumer identifies as from the drop-down. If their Gender Identity is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Gender Identity here.
   e. *Legal Name-Gender Pronouns*: Select the Consumer's Legal Gender Pronouns from the drop-down. If their Legal Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Legal Gender Pronouns here.
   f. *Preferred Name-Gender Pronouns*: Select the Consumer's Preferred Gender Pronouns from the drop-down. If their Preferred Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Preferred Gender Pronouns here.
   g. *Sex Assigned at Birth*: Select the Consumer's sex assigned at birth from the drop-down.
   h. *Sexual Orientation*: Select the Consumer's Sexual Orientation Sexual Orientation from the drop-down. If their Sexual Orientation is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Sexual Orientation here.

For more information…

For assistance, please contact the Allegheny County DHS Service Desk at 412-350-HELP (4357), option 2 for the DHS Service Desk.