



Contact Info – IL Job Aid

The *Contact Info* screen allows users to document the Youth's contact information including address, phone number, and email. Gender and Sexuality information for the Youth as well as Communications preferences are also documented on this screen.

Contact Info

Client Contact Information

Client Name	Gender	Birth Date	Role
Susie Sunshine		01/02/2001	Self (Youth)

Address

Phone

Other

Gender and Sexuality

Communications

☒ All☐ Current

Address Type	Address Summary	Primary Address?	Validated?	Agency	Facility	
Home	123 N Main St Pittsburgh,PA, 15215-2018		YES			

Address Type *

Start Date

End Date

Agency

Facility

-Select-

Address 1 *

Address 2

Primary Address

County

-Select-

Allegheny

City *

Neighborhood/Municipality

State *

Zip Code

Extension

-Select-

Pennsylvania

New

Save & Validate

Import Info

Navigation

- From the **Dashboard** : Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
 - Click on the **Contact Info** tile.
- The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.



Contact Info: Address

1. Address tab:

The screenshot shows the 'Address' tab of a contact information form. At the top, there are tabs for 'Address', 'Phone', 'Other', 'Gender and Sexuality', and 'Communications'. Below the tabs, there are two radio buttons: 'All' (selected) and 'Current'. A table below shows a single address entry with columns: Address Type (Home), Address Summary (123 N Main St, Pittsburgh, PA, 15215-2018), Primary Address? (empty), Validated? (YES), Agency (empty), Facility (empty), and a delete icon. Below the table, there are several input fields and dropdown menus: Address Type (dropdown), Start Date and End Date (text boxes), Agency and Facility (text boxes), Address 1 and Address 2 (text boxes), Primary Address (dropdown), County (dropdown), City (text box), Neighborhood/Municipality (dropdown), State (dropdown), Zip Code (text box), and Extension (text box). At the bottom, there are three buttons: 'New', 'Save & Validate', and 'Import Info'. Red callout letters A through K point to various elements: A points to the radio buttons, B points to the Address Type dropdown, C points to the End Date text box, D points to the Facility text box, E points to the Address 1 text box, F points to the Primary Address dropdown, G points to the County dropdown, H points to the City text box, I points to the Neighborhood/Municipality dropdown, J points to the State dropdown, K points to the Zip Code text box.

- The ☐ *All* and ☐ *Current* radio buttons can be used to filter the *Address* grid to display All addresses (including end dated ones) for the Youth or only Current addresses (addresses without end dates) for the Youth.
- Address Type*: Select the type of address being documented from the drop-down.
- Start Date* and *End Date*: If known, enter the Start Date of the address and (if applicable) the End Date.
- Agency* and *Facility*: If the Youth is in placement in the KIDS system, the placement address will appear in the Address grid. The Agency and Facility will be listed on that address entry.
- Address 1* and *Address 2*: Enter the Address line 1 and Address Line 2 (if applicable).
- Primary Address*: Select "Yes" or "No" from the drop-down. Only one active address can be the Primary Address at a time.
- County*: Select the County from the drop-down. This drop-down will default to "Allegheny".
- City*: Enter the City.



- i. *Neighborhood/Municipality*: If known, select the Neighborhood/Municipality from the drop-down.
 - j. *State*: Select the State from the drop-down. This drop-down will default to "Pennsylvania".
 - k. *Zip Code* and *Extension*: Enter the Zip Code and Extension (if known).
2. Saving and Validating the address: When an address is validated, Synergy compares the entered information to the postal code address list and generates a list of possible addresses formatted properly.
- a. Click **Save & Validate** to open the *Address Validation* pop-up. The *Search Result* grid will already be populated with the possible search results.

Address Validation

Address Information

Address Type: Home | Address 1: 123 N Main St | Address 2: | County: Allegheny

City: Pittsburgh | Neighborhood/Municipality: -Select- | State: Pennsylvania | Zip Code: 15215 | Extension:

Search

Search Result

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

Show 10 entries | First Previous 1 Next Last

Create address as entered **Cancel**

- i. If the *Search Result* list includes the desired address, click on the correct address in the grid. The *Address Validation* pop-up will close and the selected address will appear in the *Address* grid with a "Yes" in the *Validated?* column to indicate that the Address has been validated.
- ii. If the correct address is not in the *Search Result* list, the *Address Information* can be updated and searched again. To do so, edit the *Address Information* and click **Search**.
- iii. If, after searching again, the address cannot be located in the *Search Result* list the address can still be saved without validation. To do so, click **Create address as entered**. The *Address Validation* pop-up will close and the address will appear in the *Address* grid with a "No" in the *Validated?* column to indicate that the Address has not been validated.
- iv. Clicking **Cancel** will close the *Validate Address* pop-up without validating or changing any information.



3. Editing or Deleting an Address:

Address Type	Address Summary	Primary Address?	Validated?	Agency	Facility	
Home	123 N Main St Pittsburgh,PA, 15215-2018		YES			

- To edit an address that has already been entered in the *Address* grid click on the address in the *Address* grid, update the information below the *Address* grid and click **Save & Validate**. The *Validate Address* pop-up will then open to allow the edited information to be searched and validated.
- To delete an address, click the Delete Icon [] to the right of the address in the *Address* grid. A *Confirm Delete* pop-up will appear:

Confirm Delete
Are you sure you want to delete this record?
Yes **No**

Clicking **Yes** will delete the address.

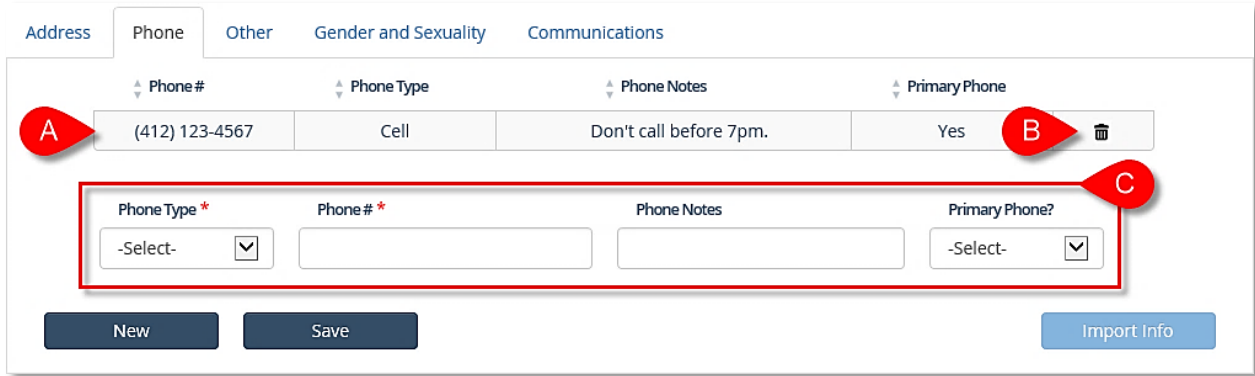
Clicking **No** will cancel the action and the address will not be deleted.

Import Info

- At the bottom of the *Address*, *Phone*, and *Other* tab is an **Import Info** button. Synergy checks to see if the Youth's contact information has been updated in another connected system. If the information has been updated and is different from what has been entered on this screen the **Import Info** button will turn dark blue. As long as the information available to import remains different from what is entered in IL this button will remain dark blue.
 - Clicking the **Import Info** button will open the *Import Info* pop-up where the updated address, phone or email will be listed. To import the information in to IL, select the desired address, phone number or email from the *Import Info* grid by checking the ☒ *Include?* checkbox.
 - Click **Save** to import the information.
 - Clicking **Cancel** will close the *Import Info* pop-up without importing any information.

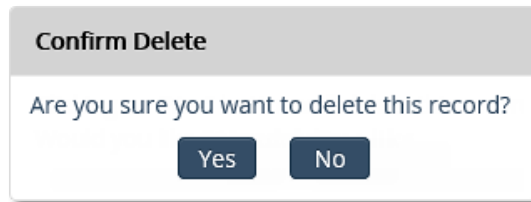
Contact Info: Phone

1. Phone:



The screenshot shows the 'Phone' tab of a contact information form. At the top, there are tabs for 'Address', 'Phone', 'Other', 'Gender and Sexuality', and 'Communications'. Below the tabs is a grid of existing phone numbers. The first row shows a phone number '(412) 123-4567', the type 'Cell', the note 'Don't call before 7pm.', and the primary status 'Yes'. To the right of the primary status is a delete icon. Below the grid is a section for adding a new phone number, which includes fields for 'Phone Type', 'Phone #', 'Phone Notes', and 'Primary Phone?'. At the bottom of the form are buttons for 'New', 'Save', and 'Import Info'.

- To view or edit a phone number click on the desired phone number in the *Phone* grid. The information will appear below the grid.
- To delete a phone number, click the delete icon [] to the right of the phone number in the *Phone* grid. A *Confirm Delete* pop-up will appear:



The 'Confirm Delete' dialog box is a small window with a title bar that says 'Confirm Delete'. Below the title bar is a question: 'Are you sure you want to delete this record?'. At the bottom of the dialog are two buttons: 'Yes' and 'No'.

Clicking  will delete the phone number.

Clicking  will cancel the action and the phone number will not be deleted.

- Entering the phone information:
 - Phone Type*: Select the type of phone from the drop-down.
 - Phone #*: Enter the 10-digit phone number.
 - Phone Notes*: Enter notes about the phone number (if needed) such as: "Don't call before 7pm."
 - Primary Phone?*: Select "Yes" or "No" from the drop-down. Only one phone number can be listed as Primary at a time.

Click  to add the entered information to the *Phone* tab.

- To add another phone number, click the  button at the bottom of the tab.



Contact Info: Other

1. Other:

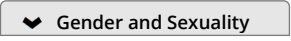
The screenshot shows the 'Other' tab selected in a contact information form. The form has five tabs: Address, Phone, Other, Gender and Sexuality, and Communications. The 'Other' tab is active, displaying three input fields: 'Email Address' (a text box), 'Best Way To Communicate With You?' (a dropdown menu showing '-Select-'), and 'Best Time To Communicate With You?' (a dropdown menu showing '-Select-'). Below these fields are two buttons: a dark blue 'Save' button and a light blue 'Import Info' button.

- Email Address*: Enter an email address for the Youth (if known).
- Best Way To Communicate With You?*: Select the best way to communicate with the Youth from the drop-down.
- Best Time To Communicate with You?*: Select the best time to reach the Youth from the drop-down.
- Click  to save the entered or edited information.

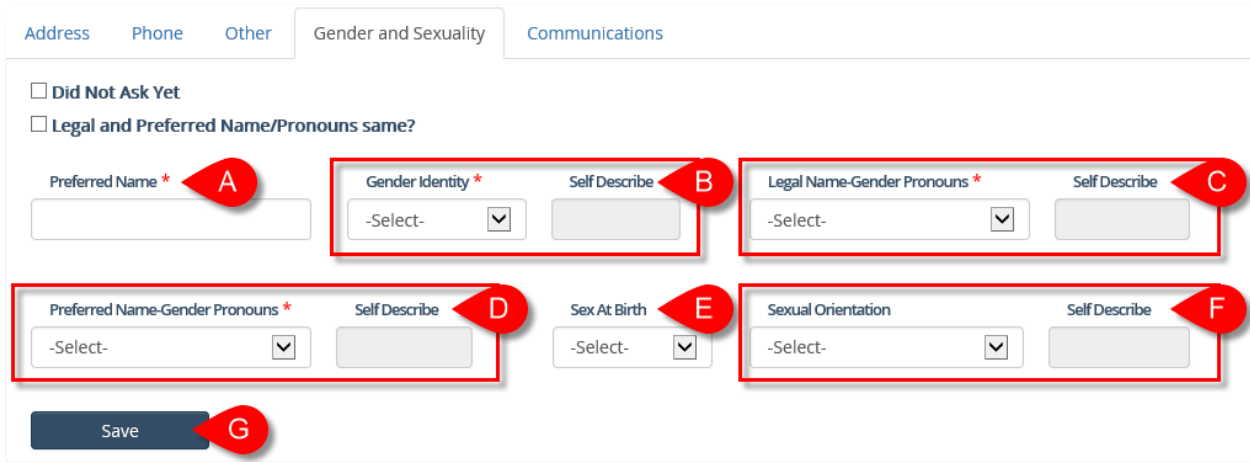
Contact Info: Gender and Sexuality

1. Gender and Sexuality – checkboxes:

The screenshot shows the 'Gender and Sexuality' tab selected in the contact information form. The form has five tabs: Address, Phone, Other, Gender and Sexuality, and Communications. The 'Gender and Sexuality' tab is active, displaying two checkboxes: 'Did Not Ask Yet' and 'Legal and Preferred Name/Pronouns same?'. The 'Gender and Sexuality' tab is highlighted with a grey background.

- If the Youth has not yet been asked about their Gender and Sexuality, check the ☒ *Did Not Ask Yet* checkbox. This will disable the  tab. To re-enable the tab, uncheck this checkbox.
- If the Youth has discussed their Gender and Sexuality and has indicated that their Legal Name/Pronouns and Preferred Name/Pronouns are the same, check the ☒ *Legal and Preferred Name/Pronouns same?* checkbox. This will automatically fill in the Gender and Sexuality tab with the youth's Legal name.

2. Gender and Sexuality:



The screenshot shows a web form titled "Gender and Sexuality" with tabs for "Address", "Phone", "Other", "Gender and Sexuality", and "Communications". The form includes several sections with red callout letters A through G:

- A:** Points to the "Preferred Name *" text input field.
- B:** Points to the "Self Describe" text input field next to the "Gender Identity *" dropdown menu.
- C:** Points to the "Self Describe" text input field next to the "Legal Name-Gender Pronouns *" dropdown menu.
- D:** Points to the "Self Describe" text input field next to the "Preferred Name-Gender Pronouns *" dropdown menu.
- E:** Points to the "Sex At Birth" dropdown menu.
- F:** Points to the "Self Describe" text input field next to the "Sexual Orientation" dropdown menu.
- G:** Points to the "Save" button at the bottom left.

At the top of the form, there are two checkboxes: "Did Not Ask Yet" and "Legal and Preferred Name/Pronouns same?".

- Preferred Name:** If the Youth's preferred first name differs from their legal first name, enter the preferred name here.
- Gender Identity:** Select the gender identity identified by the Youth from the drop-down. If the Youth's gender identity is not listed in the drop-down, select "Self-describe" and enter the Youth's gender identity in the *Specify* field.
- Legal Name-Gender Pronouns:** Select the pronouns that are associated with the Youth's legal sex. If the Youth's legal pronouns are not listed in the drop-down, select "Self-describe" and enter the legal pronouns in the *Specify* field.
- Preferred Name-Gender Pronouns:** Select the pronouns that the Youth prefers to use from the drop-down. If the Youth's preferred pronouns are not listed in the drop-down, select "Self-describe" and enter the Youth's preferred pronouns in the *Specify* field.
- Sex At Birth:** Select the sex the Youth was assigned at birth.
- Sexual Orientation:** Select the Youth's sexual orientation from the drop-down, If the Youth's sexual orientation is not listed in the drop-down, select "Self-describe" and enter the Youth's sexual orientation in the *Specify* field.
- Click **Save** to save the entered or edited information.



Contact Info: Communications

1. **Communications:** If the Youth's Preferred Name is different than their Legal Name this tab can be used to document which name the Youth wants to be used in communications. Use the checkboxes to select Legal Name or Preferred Name for each item in the list.

Address Phone Other Gender and Sexuality **Communications**

Checklist for when to use Legal vs. Preferred Name

A ☐ Legal Name **B** ☐ Preferred Name

Court	☐	☐
Drug and Alcohol Provider	☐	☐
Employer	☐	☐
Family	☐	☐
Human Services Provider (other)	☐	☐
Landlord	☐	☐
Mailings to Home Address	☐	☐
Medical Providers	☐	☐
Mental Health Provider	☐	☐
Natural Supports (other)	☐	☐
Residential Provider	☐	☐
School	☐	☐
Service Coordinator	☐	☐
Service Plans and Assessments	☐	☐

C Save

- a. If the Youth has indicated that their Preferred Name should be used in all communications, check the ☒ **Legal Name** checkbox above the grid.
- b. If the Youth has indicated that their Preferred Name should be used in all communications, check the ☒ **Preferred Name** checkbox above the grid.
- c. 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 or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

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