

## How to Search for a Person and Add a New Person

pennsylvania	ncis Pennsylvania individualized Asse	saments UAT	demo (On behalf of Juy, Jason) Organization Unit: Adams County Area Agenc	ry on Aging		Menu	Account
Home M People	i≣ My Lists 🛕 Alerts						
Last Name Kinder	First Name kathy	Preferred Name.	Address.	City,	Zip Code.		
Placement County.							
Persi D.	SSN.	Medicaid #	Person's Phone Number	Date of Birth	Assigned Organization Unit	MCI ID.	
Herm ID:							
Search Clear							Add Person
Person's ID 0 Harmol	ny o Last o First o Preferred	Date Of Placement	0 SSN# 0 Current Medicald 0	MCI © Assigned OU	O Primary Phone O	Current Address	O Ad in is
18892OVAKBZ5110	Kinder Kathy	08/18/1952 Adams	***_ **-0000	Adams County Area / Aging	Agency on	8459 Oak Drive, Gettysburg 17325	View
1. Click	on the People Tab						
2. Comp	olete Optional Fiel	ds with known i	nformation				
3. Click	search						

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- 4. If the individual already has a profile it will appear in a lower screen.
- 5. Click view to see the individual's profile information
- 6. If the individual does not have profile one can be created



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Home & People	I≣ My Lists ▲ Alerts							
Last Name	First Name:	Preferred Name	Address.	City:	Zip Code			
Placement County		10						
Person's ID:	5SN:	Medicaid #	Person's Phone Number	Date of Birth	Assigned Organization Unit	MCI ID		
				1		•		
Person's ID 0 Harmony ID	© Last Name © First Name	C Preferred Name C Date Of Birth	0 Placement County 0 SSN# 0	Current Medicaid # 0 MCI ID (	Assigned OU 0 Primary Phone #	0 Current Add	Ar Irest 0	d Person Actions
1 Clic	k on the Deenl	o Tob						
I. CIIC	k on the Peopl	elan				<u>×                                    </u>		
2. Clic	k on Add Perso	on						
					Add Pers	on		

Home A People EMy List	A Alerts	tails		
New Person	Person's Informati	on Demographics		New
ID - DOB -	Cancel			Save & Continue
		Person's Demographic Inform	ation	
		Person's Information		
		First Name:*		
		Last Name *		
		Middle Name:		
		Preferred Name		
		Suffix		
		Date of Birth.*		
		Gender.*	*	
		Race:	*	
		Ethnicity:	· · · · · · · · · · · · · · · · · · ·	
		Placement County:*		
		Additional Person's Information	1	
		SSN.*		
15.2 m 5.8 m		- Considers	Check if SSN is unknown Disclaimer: By checking this box you are agreeing to the risk of creating a duplicate person record.	

- 3. A new screen will appear under the Person's Details
- 4. Complete with known information.A red asterisk \* indicates items that are mandatory to complete
- 5. Click Save & Continue

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pennsylvania Pennsylvania Pennsylvani	ia Individualized Assessments	s UAT Ornadization Unit Advanc County Area Ansney on Anine	Menu Account
Home ▲ People IE My Lists	Alerts 🛯 🖼 Person's Detai	is	
Jason Borne	Person's Information	Phone Number	New
<ul> <li>Age: 69 ID: 27898RYAJ5D4100 DOB: 07/08/1948</li> </ul>		If the person doesn't have a phone number, click "Skip" to next section	akip Save & Continue
▼ Person's Information		Person's Phone	
Overview		Person's Phone Number-	
Case Management		Would you like to make this the primary phone number?	
Assessment		☑ Set as Primary Phone	
		Phone Type.*	
		Notes:	
	-		-
<ol> <li>A confirmation</li> <li>A new screen v Red asterisk * j</li> <li>Click Save &amp; Co</li> <li>A new screen a</li> </ol>	will appear Suc vill appear to en fields must be co ontinue sking for the pe	ccess New Person has been created nter the person's phone number ompleted erson's email will appear. If email is not known click Skip	
DEPARTMENT OF HUMAN SERVICES Pennsylvan	nia Individualized Assessmen	ts UAT Organization Unit Adams Coumly Area Agency on Aging	Menu Accou
there A People i≣ My Lists	Alerts Rerson's Deta		
Jason Borne • Age: 69	Person's Information	n — Address	Skin Save & Continu
D: 27898RYAJ5D4100 DOB: 07/08/1948			
Overview	,	Add Person's Address Form	
<ul> <li>Attachments</li> </ul>		Person's Address Information	
► Case Management		Would you like to set this as the current address?	
▶ Assessment			
		Set as Member Mailing Address Set as Member Residence Address	
		Set As Facility Address	
		Address Description	
		Street Address 1:*	
		Street Address 2	
		City.*	

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598.2 =

10. A new screen requiring address.

Address is a required field and cannot be skipped as it is marked by an asterisk  $\ast$ 

Placement County:\* Please make sure the county matches the address.

State \*

Zip Code.\*

11. Click Save & Continue

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Pennsylvania DEPARTMENT OF HUMAN SERVICES Pennsylvania	e Individuelized Assessments UAT	demo (On behalf of Jey, Jasen) Organization Unit: Adams County Area Agency on Aging		Menu Account
to Home ▲ People I My Lists ▲	Alerts Rerson's Details			
Jason Borne	Person's Information - Represe	ntative		New
ID: 27898RYAJ5D4100 DOB: 07/08/1948		If the person (	doesn't have a representative, click "Skip" to next section Skip	Save & Continue
* Person's Information	Representa	tive Contact Form		
<ul> <li>Attachments</li> <li>Case Management</li> <li>Assessment</li> </ul>	Representa First Name:* Last Name:* Middle Name Suffix:	tive Information		
99.7 ms	Relationship to Address Street Address City. State: Zip Code: Placement Co Contact Physics	Person:		*

12. A new screen requiring Representative/Contact information. Complete known information

## 13. Click Save & Continue

Pennsylvania DEPARTMENT OF HUMAN SERVICES Pennsylvania Indi	ividualized Assessments UAT	demo: (On behalf of. Joy, Jason) Organization Unit: Adams County Area Agency on Aging	Menu Account		
the Alert Alert Alert	is Details				
Jason Borne Po	erson's Information — Overview				
ID: 27898RYAJ5D4100 DOB: 07/08/1948			Collapse All		
▼ Person's Information	Person's De	emographics	Edn		
Overview	Person's Inform	nation			
Case Management	First Name:**	Jason			
▶ Assessment	Last Name **	Borne			
	Middle Name				
	Preferred Name:				
	Suffix				
	Date of Birth	07/08/1948			
	Gender:**	Maie			
	Race				
	Ethnicity:				
	Placement County	Adams			
	Additional Info	Additional Information-			
2.9 ms	Person's Identifier	27898RYAJ5D4100			
2.1 ms	SSN	***.0000	Success: Record has been created.		
1007 4 mm	Medicare #				

14. Person's Demographics is now completed