

How to Search for a Person and Add a New Person

Pennsylvania Individualized Assessments UAT
 demo (On behalf of: Jay, Jason)
 Organization Unit: Adams County Area Agency on Aging

Home **People** My Lists Alerts

Last Name: First Name: Preferred Name: Address: City: Zip Code:

Placement County:

Person ID: SSN: Medicaid #: Person's Phone Number: Date of Birth: Assigned Organization Unit: MCI ID:

Search [Add Person](#)

Person's ID	Harmony ID	Last Name	First Name	Preferred Name	Date of Birth	Placement County	SSN#	Current Medicaid #	MCI ID	Assigned OU	Primary Phone #	Current Address	Actions
18892QVAKBZ5110		Kinder	Kathy		09/18/1952	Adams	***-**-0000			Adams County Area Agency on Aging		8450 Oak Drive, Gettysburg 17325	View

1. Click on the **People Tab**
2. Complete **Optional Fields** with known information
3. Click search
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



1. Click on the People Tab
2. Click on Add Person

Add Person

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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Menu Account

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[People](#)
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[Person's Details](#)

Jason Borne
 Age: 69
 ID: 27898RYAJ5D4100 DOB: 07/06/1948

Person's Information
 Overview
 Attachments
 Case Management
 Assessment

Person's Information — Phone Number
New

If the person doesn't have a phone number, click "Skip" to next section
 Skip Save & Continue

Person's Phone

Person's Phone Number

Would you like to make this the primary phone number?
 Set as Primary Phone

Phone Type: *

Phone Number (XXX XXX XXXX) * Ext.

Notes:

Success: New Person has been created.

6. A confirmation will appear *Success New Person has been created*
7. A new screen will appear to enter the person's phone number
*Red asterisk * fields must be completed*
8. Click Save & Continue
9. A new screen asking for the person's email will appear. If email is not known click Skip

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Person's Information — Address
New

If the person doesn't have an address, click "Skip" to next section
 Skip Save & Continue

Add Person's Address Form

Person's Address Information

Would you like to set this as the current address?
 Set as Current Address

Set as Member Mailing Address
 Set as Member Residence Address
 Set As Facility Address

Address Description:

Street Address 1: *

Street Address 2:

City: *

State: *

Zip Code: *

Placement County: *

Please make sure the county matches the address.

10. A new screen requiring address.
*Address is a required field and cannot be skipped as it is marked by an asterisk **
11. Click Save & Continue

DEPARTMENT OF HUMAN SERVICES **Pennsylvania Individualized Assessments UAT**
demo (On behalf of: Joy, Jason)
Organization Unit: Adams County Area Agency on Aging
Menu Account

Home People My Lists Alerts Person's Details

Jason Borne
 Age: 69
 ID: 27898RYAJ5D4100 DOB: 07/08/1948

Person's Information
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Person's Information — Representative New

if the person doesn't have a representative, click "Skip" to next section Skip Save & Continue

Representative Contact Form

Representative Information

First Name: *

Last Name: *

Middle Name:

Suffix:

Relationship to Person:

Address

Street Address 1:

Street Address 2:

City:

State:

Zip Code:

Placement County:

Contact Phones

Success: Record has been created.

12. A new screen requiring Representative/Contact information. Complete known information
13. Click Save & Continue

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Jason Borne
 Age: 69
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Person's Information — Overview Collapse All

Person's Demographics Edit

Person's Information

First Name: ** Jason

Last Name: ** Borne

Middle Name:

Preferred Name:

Suffix:

Date of Birth: ** 07/08/1948

Gender: ** Male

Race:

Ethnicity:

Placement County: ** Adams

Additional Information

Person's Identifier: 27898RYAJ5D4100

SSN: ***-**-0000

Medicare #:

Success: Record has been created.

14. Person's Demographics is now completed