

Adding Intake Participants



Knowledge Base Article

Adding Intake Participants

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Adding Intake Participants

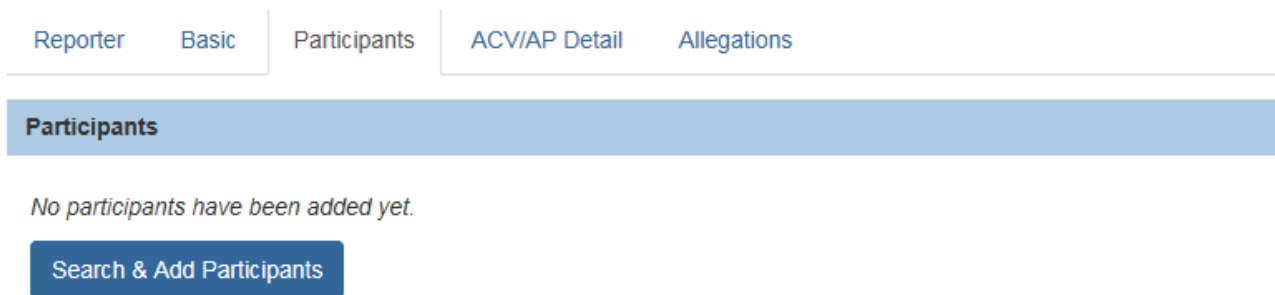
Overview

This article describes how to add Participants to an Intake using the redesigned Intake functionality implemented in **SACWIS Build 3.06**. Some functionality has been combined in order to simplify the process of adding people to an intake, and to reduce the need for the user to duplicate entry of Person information.

Recording Information & Searching for Participants

Complete the following steps to record information you have gathered for the person, and conduct a Person Search.

1. Navigate to the Intake screen **Participants** tab.



2. Click the **Search & Add Participants** button.

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The **Search & Add Participants** detail screen appears. This screen enables you to gather basic participant information AND serves as your Person Search criteria. The screen will also allow you to hold onto the information you have gathered and Reconcile it with any existing Person information already in SACWIS.

3. Click the **Current Narrative** link if you wish to display and/or edit the Intake Narrative on this detail screen. (Optional)

Search & Add Participants

Current Narrative

Current Narrative (saved) ▾

Search & Add Participant

First Name:

Middle Name:

Last Name:

AKA

AKA and 'Sounds Like' applies to last, middle, and first name. Wildcard (%) searches cannot be used with 'Sounds Like'.

Sounds Like

Gender:

DOB:



-or-

Age Range:

From Age To Age

SSN:

Person ID:

Note: If SSN or Person ID are entered, all other search criteria will be ignored

Address:

County:

4. In the fields of the **Search & Add Participant** section, enter as much information as you have in order to search for the person in SACWIS. You may enter the person's name, gender, DOB or age range, SSN, Person ID if known, address, and/or county.

Note:

- If you enter the **SSN** or **Person ID**, the system will only search on that field(s) when you click the **Search** button (in Step 7 below).
- The **Address** field uses **Google Search** functionality to list addresses that match the information you are typing, as shown below. If the appropriate address appears

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in the list while you are typing, click the address in the list to display it in the **Address** field.

Address: 4200 |

- 4200 East Broad Street, Whitehall, OH, United States
- 4200 International Gateway, Columbus, OH, United States
- 4200 East 5th Avenue, Columbus, OH, United States
- 4200 South Hamilton Road, Groveport, OH, United States
- 4200 Stelzer Road, Columbus, OH, United States

County:

Middle Name Gender

Address/County

powered by Google

Address: 4200 East 5th Avenue, Columbus, OH, United States

County:

5. Review the checkboxes selected in the **Search Using** bar near the bottom of the screen. Deselect one or more of the checkboxes, if desired.

Note: The **Search Using** bar allows you to select how you want to conduct the Person Search. Checkboxes in the **Search Using** bar will be checked automatically when you enter information in the related fields above. But you may have entered some information that you do not want to actually Search on.

- For example, if you enter the person's **DOB**, then the **Search Using** bar will automatically check the **DOB/Age Range** checkbox for the search criteria. However, you may not want to search on DOB because the person you are seeking may be in SACWIS, but may not have a DOB entered in the system.
- Starting with a broader search will help prevent the creation of duplicate Persons in SACWIS.

Address: County:

Search Using:

First Name Last Name Middle Name Gender

DOB/Age Range SSN Address/County

Sort Order:

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6. Select the desired **Sort Order** for your search results. The default is **Last Name (A-Z)**.
7. Click the **Search** button.

Address: County:

Search Using:

First Name Last Name Middle Name Gender
 DOB/Age Range SSN Address/County

Sort Order:

The search results display at the bottom of the screen. Click to expand the list of Related Persons for any Person in the Search Results.

Search Results

Result(s) 1 - 2 of 2 / Page 1 of 1

Person ID - Name	Address	Gender	(Age) DOB	Active Case
<input type="checkbox"/> 15734879 - Crayon, Periwinkle	123 Main Street Anytown OH 12345	Male	(39)07/07/1977	Yes
Related Persons ^				
<input type="checkbox"/> 15734876 - Crayon, Red - Male, Age 14, DOB 02/02/2002				
<input type="checkbox"/> 15734775 - Crayon, Pink - Male, Age 13, DOB 03/03/2003				
<input type="checkbox"/> 15734878 - Crayon, Orange - Female, Age 6, DOB 09/09/2009				
<input type="checkbox"/> 15734774 - Crayon, Magenta - Female,				
<input type="checkbox"/> 15734877 - Crayon, Blue - Female, Age 28, DOB 08/08/1988				
<input type="checkbox"/> 15734775 - Crayon, Pink		Male	(13)03/03/2003	Yes
Related Persons v				

Continue with the next section to review the Search Results and select the desired Participant(s) and Related Persons for the intake.

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Selecting a Participant and Related Persons

The **Search Results** section of the **Search & Add Participants** screen allows you to select intake **Participants** and **Related Persons** in the same step.

1. Review the **Search Results** list to determine whether the appropriate person(s) are listed.
2. Click the checkbox beside each person you want to add to the **Intake Participant** list.
 - a. If you have selected a person who you do not want to add to the **Intake Participant** list, click the checkbox beside the person to uncheck it.
 - b. To uncheck all the persons you selected at once, click the **Clear Selected** button in the screen footer to. All the person(s) you selected will be unchecked in the Search Results list.

Note: The **Clear Selected** button only displays when at least one Person checkbox has been selected in the Search Results list.

The screenshot shows a 'Search Results' section with a table of participants. The table has columns for Person ID - Name, Address, Gender, (Age) DOB, and Active Case. The first row is selected, and its 'Related Persons' are listed below it. A 'Clear Selected' button is highlighted in the footer.

Person ID - Name	Address	Gender	(Age) DOB	Active Case
<input checked="" type="checkbox"/> 15734879 - Crayon, Periwinkle	123 Main Street Anytown OH 12345	Male	(39) 07/07/1977	Yes
Related Persons ^				
<input checked="" type="checkbox"/> 15734876 - Crayon, Red - Male, Age 14, DOB 02/02/2002				
<input type="checkbox"/> 15734775 - Crayon, Pink - Male, Age 13, DOB 03/03/2003				
<input checked="" type="checkbox"/> 15734878 - Crayon, Orange - Female, Age 7, DOB 09/09/2009				
<input type="checkbox"/> 15734774 - Crayon, Magenta - Female,				
<input type="checkbox"/> 15734877 - Crayon, Blue - Female, Age 29, DOB 08/08/1988				
<input type="checkbox"/> 15734775 - Crayon, Pink		Male	(13) 03/03/2003	Yes
Related Persons v				

Footer buttons: Add Selected To Intake, **Clear Selected**, Cancel

Adding Intake Participants

3. If the **Search Results** list contains Person(s) you wish to add as an intake Participant:
 - a. Click the checkbox beside the Person(s).
 - b. Click the **Related Persons** hyperlink below the Person you selected.

The **Related Persons** section expands and displays any Related Persons for the selected participant.

Search Results

Result(s) 1 - 2 of 2 / Page 1 of 1

	Person ID - Name	Address	Gender	(Age) DOB	Active Case
<input checked="" type="checkbox"/>	15734879 - Crayon, Periwinkle	123 Main Street Anytown OH 12345	Male	(38) 07/07/1977	Yes
Related Persons ^					
<input checked="" type="checkbox"/>	15734876 - Crayon, Red - Male, Age 14, DOB 02/02/2002				
<input type="checkbox"/>	15734775 - Crayon, Pink - Male, Age 13, DOB 03/03/2003				
<input checked="" type="checkbox"/>	15734878 - Crayon, Orange - Female, Age 7, DOB 09/09/2009				
<input type="checkbox"/>	15734774 - Crayon, Magenta - Female,				
<input type="checkbox"/>	15734877 - Crayon, Blue - Female, Age 28, DOB 08/08/1988				
<input type="checkbox"/>	15734775 - Crayon, Pink		Male	(13) 03/03/2003	Yes
Related Persons v					

- c. Click the checkbox beside each **Related Person** you want to add to the **Intake Participant** list.
 - d. Repeat this step for all other Participants and Related Persons you wish to select for the intake.
4. When the desired person(s) are selected, click the **Add Selected to Intake** button.

The **Participants** tab displays the selected Person(s) and Related Persons as Participants on the Intake record.

Adding Intake Participants

The screenshot shows the SACWIS interface with the 'Participants' tab selected. The 'Participants' section is highlighted with a red box and contains the following data:

Participant ID	Name	Gender	DOB	Address	City	State	ZIP	Actions
15734878	Crayon, Orange	Female	09/09/2009	123 Main Street	Anytown	OH	12345	edit Related Persons History delete
15734879	Crayon, Periwinkle	Male	07/07/1977	123 Main Street	Anytown	OH	12345	edit Related Persons History delete
15734876	Crayon, Red	Male	02/02/2002					edit Related Persons History delete

Below the 'Participants' section is the 'Participants Relationships' section, which includes a 'Retrieve Case Relationships' button and a table showing the following relationship:

Name	Number of Unspecified Relationships
edit Crayon, Orange	2

5. If the appropriate person is not listed in the Search Results, you have three options:
 - a. Deselect one or more of the checkboxes in the **Search Using** bar and Search again. (Return to Step 5 in the previous section.)
 - b. If you are certain that the person is not in SACWIS, and you wish to create a new Person and generate a Person ID, click the **Create New Person** button. A new Person record will appear in Edit mode and will be pre-filled with any data you have entered for the person in the First/Middle/Last Name, DOB, or Gender fields.

Note: The **Create New Person** button is only enabled when you have not selected a person in the Search Results list.

Can't find who you're looking for?
Create a new SACWIS person profile:

[Create New Person](#)

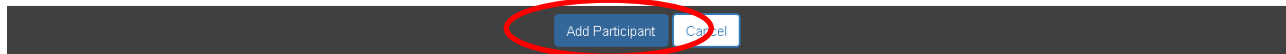
[Add Participant](#)

[Cancel](#)

Adding Intake Participants

- c. If you need more time to determine whether the Person is in SACWIS, you may add the Participant to the Intake now (and search/create a Person record for them in SACWIS later). Click the **Add Participant** button.

Can't find who you're looking for?
Create a new SACWIS person profile: [Create New Person](#)



- d. The **Participant Details** screen will appear in Edit mode and will be pre-filled with the data you have entered for the person on the search screen.

Note:

- The **Add Participant** button only displays when there are no persons selected in the Search Results list.
- Refer to the section **Adding a Participant Using the Add Participant Button** below for instructions to add the person to the intake using this button/screen.

Important: Each intake **Participant** must have a **Person ID** in SACWIS before you can Complete the intake.

Adding Intake Participants

Adding a Participant Using the Add Participant Button

The **Add Participant** button on the **Search & Add Participants** screen enables you to add a person as an intake participant but does not create a Person record in SACWIS. However, any information on this screen can be moved to a new Person record or reconciled with an existing Person record as explained in a later section of this article.

1. On the **Search & Add Participants** screen, click the **Add Participant** button.

Note: The **Add Participant** button only displays when there are no persons selected in the Search Results list.

The **Participant Details** screen appears and is pre-filled with any data you have entered for the person on the Search and Add Participant page.

Participant Details

Current Narrative

[Current Narrative \(saved 09/21/2016 04:34 pm\)](#) ▼

Participant Details

Participant is unknown or partially known

First Name: Middle Name: Last Name: Suffix:

DOB: Estimated DOB DOB Unknown Deceased Date Unknown

Age Range: -
 From Age To Age

DOD: Deceased Date Unknown

Gender:

SSN:

Hispanic/Latino:

Race: *Select any that apply*

American Indian Asian Declined Unable to Determine Unknown Multi-racial (all races unknown)

Black/African American Native Hawaiian

White Alaskan Native

2. Click the **Current Narrative** link if you wish to display the Intake Narrative comments on this detail screen. (Optional)
3. Click the checkbox to indicate that the **Participant is unknown or partially known**, if applicable. (Optional)

Adding Intake Participants

Current Narrative

Current Narrative (saved 09/21/2016 04:34 pm) ▾

Participant Details

Participant is unknown or partially known

Note: If you select the “unknown” checkbox:

- Either the **First Name** or **Last Name** field must be blank. If both fields are entered, you cannot select this checkbox.
- If you know the first name only, you can enter it in the **First Name** field before clicking the “unknown” checkbox. The system will disable the **Last Name** field and will pre-populate “Unknown – Intake ID #” into the **Last Name** field upon save.
- If you know the last name only, you can enter it in the **Last Name** field before clicking the “unknown” checkbox. The system will disable the **First Name** field and will pre-populate “Unknown – Intake ID #” into the **First Name** field upon save.

Adding Intake Participants

4. Add additional details about the person in the relevant fields. (Optional)
 - The **Address** field uses **Google Search** functionality. If the appropriate address displays in the list while you are typing, select it to display it in the **Address** field.
 - You can either enter an **Address** OR click the **Unknown Address** checkbox; you cannot enter both fields.
 - Enter **Contact** information, if known.

Note: Relevant Contact fields will display based on the selected **Contact Type**.

Participant Details

Participant is unknown or partially known

First Name: Middle Name: Last Name: Suffix:

DOB: Estimated DOB DOB Unknown -OR- Age Range: From Age - To Age DOD: Deceased Date Unknown

Gender: SSN:

Hispanic/Latino: Race: *Select any that apply*

American Indian Asian Declined
 Black/African American Native Hawaiian Unable to Determine **i**
 White Other Pacific Islander Unknown **i**
 Alaskan Native Multi-racial (one or more races unknown) Multi-racial (all races unknown)

Address: Unknown Address

Contact Type:

Phone: Ext: Description:

Adding Intake Participants

5. Scroll down to the **Available Roles** list and assign the Roles for this Participant, if desired. (Optional)

Contact Type:

Available Roles:

[Add All](#) [Add](#)

- Caretaker
- Child Daycare Provider
- Child/Youth Subject of a Non-CA/N (Child/Youth Subject)
- Custodian
- Group Home Staff
- Nonrelative Foster Parent
- Nonrelative Kinship Provider
- Other involved adult (OIA)

Selected Roles:

[Remove](#) [Remove All](#)

[Apply](#) [Save](#) [Save & Add Another](#) [Cancel](#)

Note: You can also assign roles to multiple Participants simultaneously on the **Modify Participant Roles** screen. Refer to the next section below for instructions to assign roles via that screen.

6. When you have entered all available information for this person, click the appropriate button:
 - If you wish to save this record and immediately display a blank Participant Details page in order to enter information for another person, click the **Save & Add Another** button. Repeat Steps 2-5 above.
OR
 - If you wish to save this record and return to the **Participants** tab, click the **Save** button. The **Participants** tab will appear displaying the Participant you added.
OR
 - Click the **Apply** button to save the Participant information without leaving the page.

Adding Intake Participants

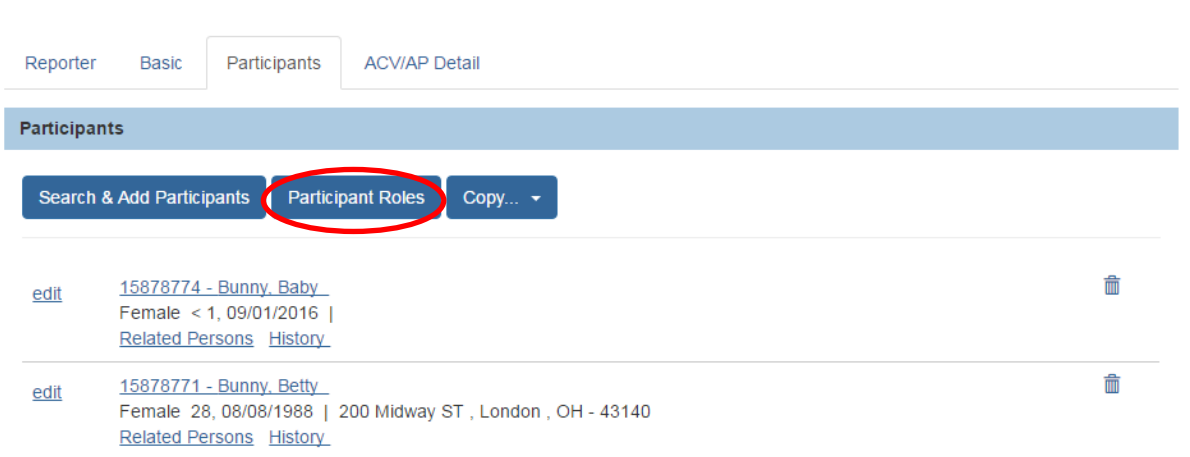
Assigning Participant Roles

You have two options for assigning Participant Roles:

- You can assign Roles within each person's **Participant Details** screen (as described in the previous section), OR
- You can assign Roles to one or more Participants in one location (the **Modify Participant Roles** screen).

Complete the following steps to assign Participant Roles on the **Modify Participant Roles** screen.

1. On the **Participants** tab of the intake, click the **Participant Roles** button.



The screenshot shows a web interface with a navigation bar at the top containing tabs: Reporter, Basic, Participants, and ACV/AP Detail. Below the navigation bar is a blue header labeled 'Participants'. Underneath the header are three buttons: 'Search & Add Participants', 'Participant Roles' (which is circled in red), and 'Copy...' with a dropdown arrow. Below the buttons is a list of two participants. Each participant entry includes an 'edit' link, a name (e.g., '15878774 - Bunny, Baby'), gender and date of birth (e.g., 'Female < 1, 09/01/2016'), and links for 'Related Persons' and 'History'. A trash icon is visible to the right of each entry.

Adding Intake Participants

The **Modify Participant Roles** screen appears displaying all Intake Participants and available Roles. On this screen you can either:

- Select an individual Participant and assign one or more Roles to that person, OR
- Select multiple Participants and assign one or more Roles to all of the selected Participants.

Modify Participant Roles

The screenshot shows the 'Modify Participant Roles' interface. At the top, there is a 'Current Narrative' section with a dropdown menu showing 'Current Narrative (saved 09/23/2016 01:25 pm)'. Below this is a 'Select Participants to Assign/Modify Roles' section. On the left, under 'Choose Participants', there is a list of four participants: Crayon, Orange (Female, Age 7, DOB 09/09/2009), Crayon, Periwinkle (Male, Age 39, DOB 07/07/1977), Crayon, Pink (Male, Age 13, DOB 03/03/2003), and Crayon, Red (Male, Age 14, DOB 02/02/2002). On the right, under 'Add Participant Roles', there is an 'Available Roles' list with a search bar and an 'Add All' button. The roles listed are: Caretaker, Child Daycare Provider, Child/Youth Subject of a Non-CA/N (Child/Youth Subject), Custodian, Group Home Staff, Nonrelative Foster Parent, and Nonrelative Kinship Provider. Below the available roles is an 'Assign Roles' button. To the right of the available roles is a 'Selected Roles' section with 'Remove' and 'Remove All' buttons and a search bar. At the bottom of the screen, there are 'Save' and 'Cancel' buttons.

2. Click the **Current Narrative** link if you wish to display the Intake Narrative comments on this detail screen. (Optional)

Adding Intake Participants

3. In the **Choose Participants** section (shown in red below), click the checkbox beside each Participant to whom you wish to assign a particular role(s).
4. In the **Available Roles** list (shown in blue below):
 - a. Click the role(s) you wish to assign to the selected Participant(s).
 - b. Click the **Add** hyperlink to move the role to the **Selected Roles** list.
 - c. Repeat this step for any additional roles you wish to assign to the selected Participant(s).

Note: If you move a role in error, select it in the **Selected Roles** list and click the **Remove** link to move it back to the **Available Roles** list.

Modify Participant Roles

The screenshot shows the 'Modify Participant Roles' interface. At the top, there is a 'Current Narrative' section with a dropdown menu showing 'Current Narrative (saved 09/23/2016 01:25 pm)'. Below this is the 'Select Participants to Assign/Modify Roles' section. On the left, the 'Choose Participants' list is highlighted with a red box. It contains four entries: 'Crayon, Orange /15734878' (checked), 'Crayon, Periwinkle /15734879', 'Crayon, Pink /15734775' (checked), and 'Crayon, Red /15734876'. On the right, the 'Add Participant Roles' section is highlighted with a blue box. It has two columns: 'Available Roles' and 'Selected Roles'. The 'Available Roles' list includes: Caretaker, Child Daycare Provider, Custodian, Group Home Staff, Nonrelative Foster Parent, Nonrelative Kinship Provider, Other Professional, and Other involved adult (OIA). The 'Selected Roles' list contains: 'Child/Youth Subject of a Non-CA/N (Child/Youth Subject)'. Below the 'Available Roles' list is an 'Assign Roles' button, which is circled in red. At the bottom of the interface are 'Save' and 'Cancel' buttons.

5. When you have selected the appropriate roles, click the **Assign Roles** button to assign the selected Roles to the selected Participants.

The **Choose Participants** section displays the roles that have been assigned for each Participant.

Adding Intake Participants

Modify Participant Roles

Current Narrative

Current Narrative (saved 09/23/2016 01:25 pm) v

Select Participants to Assign/Modify Roles

Choose Participants

- Crayon, Orange /15734878
Female, Age 7, DOB 09/09/2009
Child/Youth Subject of a Non-CA/N (Child/Youth Subject)
- Crayon, Periwinkle /15734879
Male, Age 39, DOB 07/07/1977
- Crayon, Pink /15734775
Male, Age 13, DOB 03/03/2003
Child/Youth Subject of a Non-CA/N (Child/Youth Subject)
- Crayon, Red /15734876
Male, Age 14, DOB 02/02/2002

Add Participant Roles

Available Roles:

- Caretaker
- Child Daycare Provider
- Child/Youth Subject of a Non-CA/N (Child/Youth Subject)
- Custodian
- Group Home Staff
- Nonrelative Foster Parent
- Nonrelative Kinship Provider

Assign Roles

Selected Roles:

Remove Remove All

Save Cancel

- If you assigned a role to a person in error:
 - Click the **Delete** icon () beside the role under the appropriate Participant.
 - Repeat the steps above to re-assign the person's role(s) as appropriate.
- When the role assignments are complete, click the **Save** button.

The **Participants** tab appears.

Adding Intake Participants

Adding Participant Relationships

Relationships between all **Intake Participants** must be recorded in order to complete the Intake.

The **Participants Relationships** grid displays the number of unspecified relationships for each person.

Participants Relationships

Retrieve Case Relationships

	Name	Number of Unspecified Relationships
edit	Bunny, Betty	1
edit	Bunny, Bugs	1

1. Click the Retrieve Case Relationships button to pull forward existing Case Relationships in SACWIS.
 - a. If the Participants do not have existing Relationships, a message will display at the top of the page.

✔ No relationships exist for any intake participant.

- b. If Case Relationships exist between any of the Intake Participants, the **Retrieve Case Relationships** page displays the **Most Recent Case Relationships**.

Retrieve Case Relationships

Most Recent Case Relationships

	of Bunny Betty	of Rabbit Peter
Bunny Betty is the	Self	Cousin
Rabbit Peter is the	Cousin	Self

Save Cancel

2. Click **Save** to pull these **Relationships** into the Intake. If you do not wish to pull these Relationships forward, click **Cancel**.
3. To record the remaining unspecified **Relationships**, click the edit link next to the Participant's name.

Adding Intake Participants

The Participant Relationships details page displays.

Participant Relationships

Relationship(s) to: 15878773 - Bugs , Bunny

Reminder: Do not select "Non-related Adult / Child" unless no other relationship description applies.

Name	Relationship	Reciprocal Relationship
Baby Bunny is the	<input type="text"/>	of Bunny Bugs
Betty Bunny is the	<input type="text"/>	of Bunny Bugs
Peter Rabbit is the	<input type="text"/>	of Bunny Bugs

4. Select the appropriate Relationship value from each drop down.

Participant Relationships

Relationship(s) to: 15878773 - Bugs , Bunny

Reminder: Do not select "Non-related Adult / Child" unless no other relationship description applies.

Name	Relationship	Reciprocal Relationship
Baby Bunny is the	<input type="text"/>	of Bunny Bugs
Betty Bunny is the	<div style="border: 2px solid red; padding: 5px;"><ul style="list-style-type: none">Adoptive BrotherAdoptive DaughterAdoptive FatherAdoptive MotherAdoptive SisterAdoptive SonAlleged DaughterAlleged FatherAlleged Mother<li style="background-color: #007bff; color: white;">Alleged SonAuntBiological Brother</div>	of Bunny Bugs
Peter Rabbit is the	<input type="text"/>	of Bunny Bugs

5. When all Relationships are complete, click **Save**.

6. Repeat steps 3 through 5 until there are no unspecified relationships remaining.

Adding Intake Participants

Reconciling (Updating) the Person Record with Original Participant Data

Once you have linked a person as a Participant on the Intake, the top section of the **Participants** tab will display information that is currently on the participant's **Person** record.

Some of this data may be different than the information you originally entered while on the phone with the caller. You may use this original information to update the **Person** record without having to go to the Person record.

Note: The original information you entered during the call is available until the intake has been screened.

Complete the following steps to reconcile (update) the Person record from within the Intake.

The screenshot shows a web interface with several tabs: Reporter, Basic, Participants (selected), ACV/AP Detail, and Allegations. Below the tabs is a blue header bar labeled 'Participants'. Underneath are two buttons: 'Search & Add Participants' and 'Participant Roles'. A table of participants is displayed below, with one row highlighted by a red border. The row contains the following information: an 'edit' link circled in red, the text '15946772 - Crayon, Periwinkle. Alleged Perpetrator (AP)', and a trash icon. Below the text are the details 'Male 31, 05/05/1985 | 123 Any Old Street, Sometown, OH - 12345' and two links: 'Related Persons' and 'History'.

1. On the **Participants** tab, click the **Edit** link beside the person whose data you wish to reconcile.

Adding Intake Participants

The **Participant Details** screen appears.

Participant Details

Participant is unknown or partially known

Person ID: 15946772

First Name: Periwinkle Middle Name: Last Name: Crayon Suffix:

DOB: 05/05/1985 Estimated DOB DOB Unknown -or- Age Range: From Age To Age DOD: Deceased Date Unknown

Gender: Male SSN:

Hispanic/Latino: Yes Race: *Select any that apply*
 American Indian Black/African American White Alaskan Native
 Asian Native Hawaiian Other Pacific Islander Multi-racial (one or more races unknown)
 Declined Unable to Determine Unknown Multi-racial (all races unknown)

Address: 123 Any Old Street, Sometown, OH-12345 Unknown Address

2. Click the **Original Participant Data / Search Criteria** hyperlink at the bottom of the screen.

The information that was originally collected during the referral displays.

[Original Participant Data / Search Criteria ^](#)

Information displayed below was originally collected during the referral. Select "Reconcile" to apply information to the person profile.

First Name: Peri
Last Name/Suffix: Crayon, Jr
DOB: 05/04/1985
Race: American Indian
Address: 4020 East 5th Avenue, Columbus, OH - 43219
Contact Type: Cell
Contact: (987) 654-3210

3. To apply all or some of this original information to the Person record, click the **Reconcile** button.

The **Reconcile Person** screen appears. This screen displays data from the **Existing Person Profile** (shown in blue below), and **Intake Participant Data** (shown in red below) that does not match.

Adding Intake Participants

Reconcile Person Record

Participant - Person Comparison for 15946772 - Crayon, Periwinkle

Check the boxes below to select intake participant data to be applied to the linked Person record.

	Existing Person Profile 15946772 - Crayon, Periwinkle	Intake Participant Details
Person Name	Crayon, Periwinkle	<input type="checkbox"/> Crayon, Peri
DOB	05/05/1985	<input type="checkbox"/> 05/04/1985
Race	Asian,Black/African American,White	<input type="checkbox"/> American Indian
Address	Residence (Primary) 123 Any Old Street Sometown,OH 12345	<input type="checkbox"/> 4020 East 5th Avenue, Columbus,OH 43219
Contact	Cell, (123) 456-7890	<input type="checkbox"/> Cell, (987) 654-3210

- Click the checkbox beside any **Intake Participant Data** information you want to reconcile (update) on the Person record. If Address is selected, a Search Address button displays.

Reconcile Person Record

Participant - Person Comparison for 15946772 - Crayon, Periwinkle

Check the boxes below to select intake participant data to be applied to the linked Person record.

	Existing Person Profile 15946772 - Crayon, Periwinkle	Intake Participant Details
Person Name	Crayon, Periwinkle	<input type="checkbox"/> Crayon, Peri
DOB	05/05/1985	<input checked="" type="checkbox"/> 05/04/1985
Race	Asian,Black/African American,White	<input type="checkbox"/> American Indian
Address	Residence (Primary) 123 Any Old Street Sometown,OH 12345	<input checked="" type="checkbox"/> 4020 East 5th Avenue, Columbus,OH 43219 <input type="button" value="Search Address"/>
Contact	Cell, (123) 456-7890	<input checked="" type="checkbox"/> Cell, (987) 654-3210

- To reconcile the **Address**:
 - Click the **Search Address** button to display an Address search screen.
 - Search and select the address. The system returns you to the **Reconcile Person Record** screen displaying additional fields for the Address:

Address	Residence (Primary) 123 Any Old Street Sometown,OH 12345	<input checked="" type="checkbox"/> 4020 E 5th AVE Columbus, OH 43219-1811 Replace Primary Address? <input type="radio"/> Yes <input checked="" type="radio"/> No Specify Address Type: <input type="text"/> <input type="button" value="Search Address"/>
Contact	Cell, (123) 456-7890	<input checked="" type="checkbox"/> Cell, (987) 654-3210

- Click the **Yes** or **No** radio button to indicate whether to **Replace Primary Address**.

Adding Intake Participants

- d. In the **Specify Address Type** field, select the appropriate type from the drop-down list.
6. Click the **Save** button.

The system updates the **Person** record with the changes you indicated, and displays the **Participants** tab.

If you need additional information or assistance, please contact the SACWIS Help Desk.