

Email

From: AHS - DAIL Housing Portal <AHS.DAILHousingPortal@vermont.gov>
Sent: Monday, June 21, 2021 1:51 PM
Subject: DAIL Housing Portal - Contacts

DAIL Housing Super Users,

The number of State programs using Salesforce is increasing. While programs cannot see the programmatic information for other programs, Salesforce does use Universal Contacts (contacts shared by all Users.) The State is working to change the way Contacts are viewed in the Portal so that only Contacts belonging to the program will show, a way to help prevent duplicate Contacts from being entered, and a way to make it easier to choose the correct Contact when there are multiple individuals with the same name. **Until these updates are made, please be very cautious when choosing Contacts in the DAIL Housing Portal.**

Please note: If you choose the wrong Contact when entering information, this may cause complications with finding the information at a later date, seeing information in a Location/Case/Assessment, and the information may not show on your reports. DAIL realizes that despite all attempts to choose the correct Contact there may be times when the wrong Contact is chosen. If you discover a wrong Contact has been chosen, please contact DAIL so they may work with you to get the information corrected.

Some of the things that will help you in choosing the correct DAIL Housing Contact in the Portal:

Citizen Provider – When entering a Shared Living Provider and there are multiple Contacts with the same name, look for the Contact with Citizen Provider as the Account Name. DAIL is the only program that uses Citizen Provider; therefore, any Contact with this Account Name is a Contact in the DAIL Housing Program. Please note though, there may still be 2 Contacts (Providers) within the DAIL Housing Portal with the same name; therefore, you still need to choose wisely.

Citizen Public – When entering a Participant and there are multiple Contacts with the same name, look to see if Citizen Public is below the name. There are multiple programs in the Portal who use Citizen Public so this does not guarantee it is a Contact for the DAIL Housing Program, but it will help you to narrow down the possibilities. See below about additional ways to determine if the Contact is for the DAIL Housing Portal.

Assigned Service Coordinator – When entering an Assigned Service Coordinator, the DAIL Housing Portal Contact includes the agency name as the Account Name and most of these were created by 'aloeb' or 'dvakh' Looking for these items will help you to determine the correct Contact to use.

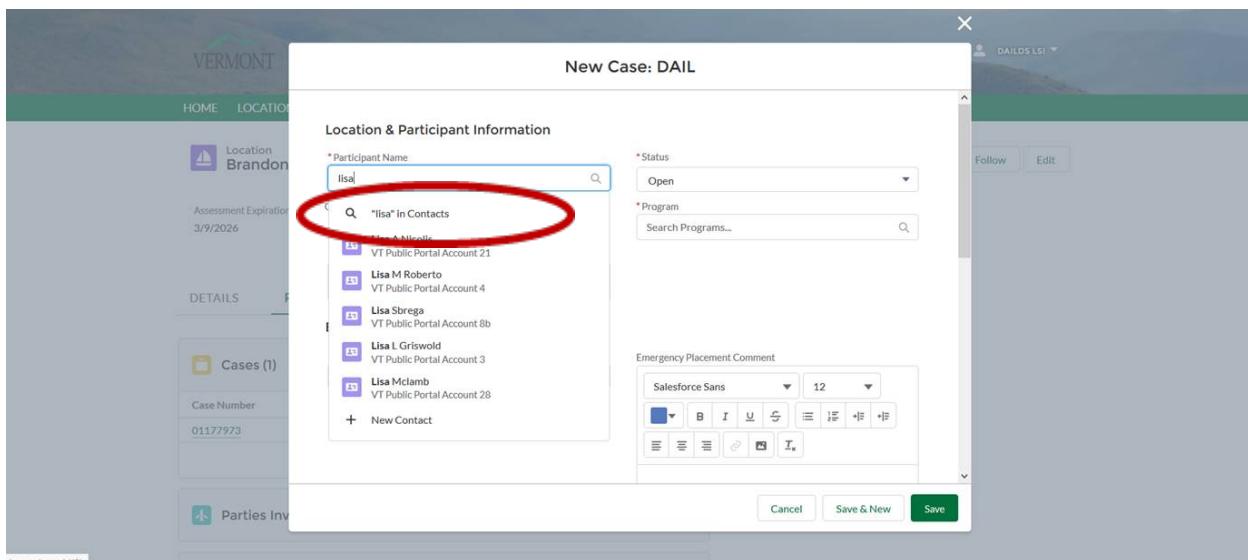
Provider Agency – Most of the DAIL Provider Agency Contacts have an acronym after the agency name and are not written in all caps. (ex: Howard Center (HC) not HOWARD CENTER) However, there are other programs in Salesforce that have entered agency names with the acronym after the name that are not capitalized so another thing to look for is who created the Provider Agency Contact. The Provider Agency Contacts created by DAIL were created by “dvakh”

And Remember: Always look for a Contact name in multiple ways before entering a new one to prevent duplicate Contacts. (Examples: Mike, Micheal, Michael; Elizabeth, Beth, Liz, and Phil, Phillip, Phill)

To find more information about a Contact in the DAIL Housing Portal:

Start typing the name and either “Return” or click on the hourglass. A list of all the contacts with that name will show with the Account Name (type of contact it is), Contact Owner Alias, and, if there is one, an e-mail or phone number. *Note: The Contact Owner Alias is the person who created the Contact, and is an abbreviated name for the person. (For example, Lisa Parro will show as lparr) Not all Contacts have a Contact Owner.*

Use the “Relevance” dropdown or click on “Name” column title when there are many results. This can alphabetize the results to make it easier to find the Contact you need. The “Relevance” dropdown will allow you to sort the search results by Name, Account Name, Contact Owner Alias, Email and phone.



Contact Results

NAME	ACCOUNT NAME	PHONE	EMAIL	CONTACT OWNER ALIAS
Lisa A Nicolis	VT Public Portal Account 21	(802) 229-1426	nikkido_1999@yahoo.com	
Douglas J Eldred	VT Public Portal Account 8b	(802) 862-7614	eldred.lisa@yahoo.com	
Lisa M Roberto	VT Public Portal Account 4	(802) 451-9349	swirlvintage@gmail.com	
Lisa Strega	VT Public Portal Account 8b	(518) 222-0553	lisasbrega96@gmail.com	
Lisa L Griswold	VT Public Portal Account 3	(802) 356-7664	lisalgriswold@gmail.com	
Lisa Howard	VT Public Portal Account 19	(216) 790-1023	lisahoward79@gmail.com	
Lisa McIamb	VT Public Portal Account 28	(802) 863-5262	lataagent.ac@accountant.com	

NOTE: None of the Account Names above are DAIL Housing Portal Account Names, and therefore, none of these Contacts belong to DAIL.

After entering part of the Contact name and either ‘Return’ or clicking the hourglass to search Contacts, a list of Contacts that includes what was entered comes up. If you click on the column heading, it will sort the information for that column; or you can click the down arrow on ‘Relevance’ you can click on the column in which you want sorted.

Contact Results

NAME	INT NAME	PHONE	EMAIL	CONTACT OWNER ALIAS
ELIZABETH Managan	gistration		emanagan@gmail.com	
Elizabeth Managan	Account Name	gistration	emanagan@husd.org	
Elizabeth Mandell-Sea	Phone	Provider	lizzymandell@gmail.com	
Elizabeth Manero	Email	gistration 2	maneroelizabeth@gmail.com	
Elizabeth Maney	Contact Owner Alias	gistration	elizabananas@gmail.com	
Elizabeth Manfredi	Citizen Provider			

Example:

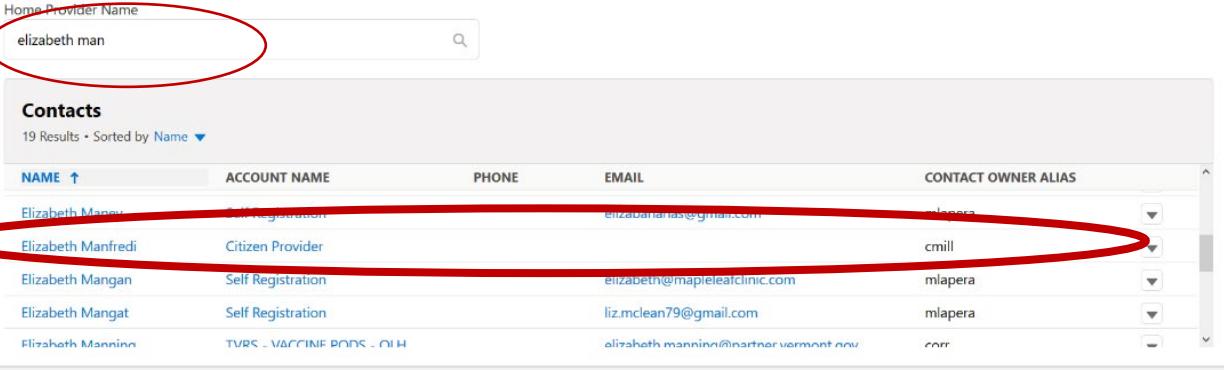
Home Provider Name

Home Provider Name
elizabeth man

Contacts
19 Results • Sorted by Name ▾

NAME ↑	ACCOUNT NAME	PHONE	EMAIL	CONTACT OWNER ALIAS
Elizabeth Maney	Self Registration		elizabethmaney@gmail.com	mde m
Elizabeth Manfredi	Citizen Provider			cmill
Elizabeth Mangan	Self Registration		elizabethmangan@gmail.com	mlapera
Elizabeth Mangat	Self Registration		liz.mclean79@gmail.com	mlapera
Elizabeth Manning	TVRS - VACCINE PROPS - NIH		elizabeth.manning@partner.vermont.gov	corr

Cancel

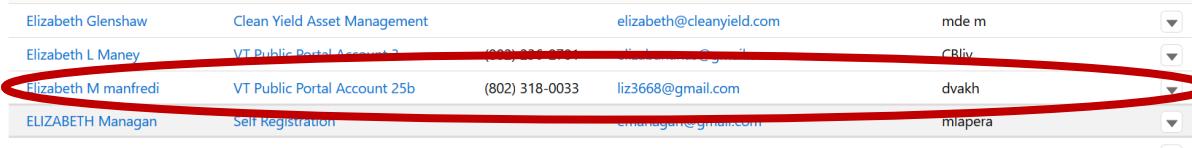


Home Provider Name

Home Provider Name
elizabeth man

Contacts
19 Results • Sorted by Name ▾

NAME ↑	ACCOUNT NAME	PHONE	EMAIL	CONTACT OWNER ALIAS
Elizabeth Glenshaw	Clean Yield Asset Management		elizabeth@cleanyield.com	mde m
Elizabeth L Maney	VT Public Portal Account 2	(802) 318-0751	liz.laney@vt.gov	CBliv
Elizabeth M manfredi	VT Public Portal Account 25b	(802) 318-0033	liz3668@gmail.com	dvakh
ELIZABETH Managan	Self Registration		emanagan@gmail.com	mlapera
Elizabeth Managan	Self Registration		emanagan@husd.org	mlapera



*Screen Shot #1, Account Name is "Citizen Provider" created by "Cmill" – this IS a DAIL Contact.
Screen Shot #2, the account was created by "dvakh" but the Account Name is "VT Public Portal Account 25b" – this is NOT a Contact of DAIL's.*