

Chapter 4: Lookup

[4.1 Overview](#)

Located in the eCornerstone Navigation Menu, the Lookup menu item provides a direct link to the Participant Lookup page. To begin working in eCornerstone, either select an existing participant, or add a new participant into the system. To perform either function, first perform a lookup. Processing within this page requires always checking to ensure a duplicate participant is not inadvertently added to the system.

The Participant Lookup function offers various methods for searching for a participant:

- **Search by Name**
 - The Last Name must be completed to perform a search. To reduce the chance of entering duplicate participants into the system, use several fields when searching. This prompts the system to find more potential matching participants. Refer to the To Perform a Lookup instructions in this chapter for the recommended search options/criteria.
 - The Name Search Type drop down list allows a search by "Sounds Like". This search will find all participants with a name similar in sound to the name entered. For example, if the last name of "Warren" is entered, eCornerstone would also find participants with similar last names, such as "Warran". The "Exact Match" search looks for an exact match on a participant's name. The "Begins With" search finds participants whose last names begin with the name being searched.
- **Search by Date of Birth**
 - Enter the participant's date of birth in the Date of Birth field, using the format of MM/DD/YYYY.
 - The "Match Birth Date By" drop down list provides the option of searching for a participant if the exact date of birth is unknown. Selecting "Month" will produce a list of all participants with a birth month equal to the month entered in the Date of Birth field. Selecting "Year" will produce a list of all participants with a birth year equal to the year entered in the Date of Birth field. The "Exact Match" will find participants with a birth date matching the month, day, and year entered in the Date of Birth field.
- **Search by Participant ID number**
 - Enter the participant's eCornerstone ID number in the Participant ID Number field to locate the participant with that ID number.
- **Advanced Search**
 - Select the "Advanced Search" link to search by participant gender, social security number, IDPA Recipient Number, Street Address, City, State, Zip, and/or County.

[4.2 Perform a Lookup](#)

When the Participant Lookup page is accessed, the Participant menu will be automatically removed from the eCornerstone Navigational menu. The Participant menu will become available again once a participant is added or selected.

1. On the Participant Lookup page, enter the participant's last name in the Last Name field.

NOTE: This is the recommended field for performing a search. Fewer fields entered on the Lookup page prompts the finding of more potential matching participants. However, complete additional fields and perform an advanced search if necessary, by selecting the "Advanced Search" link on the Participant Lookup page.

2. Select the "Search" button to search eCornerstone for participants matching the criteria entered.

If potential matches are found, they will be displayed at the bottom of the page alphabetically (last name, first name) using a "paging" format. One "page" of results are shown at a time, and pages of the search results are navigated between using the page number links and the "Next" and "Last" links. The participant's "Known By" name, date of birth, gender, and Cornerstone ID will be displayed, if available. Detailed participant information can be obtained by selecting the "Display Details" link in the Details column. Additionally, select the "Advanced Search" link to search using more detailed participant information such as Gender, Social Security Number, IDPA Recipient Number, Street Address, City, State, Zip Code, and/or County.

The search functionality displays a participant (potential match) just once, even if the participant has multiple names and/or multiple addresses. When the results are returned for a participant search, only the name types that match the last name being searched on are displayed. For example, if a participant whose Known By name is "Fox" and his Birth Name is "Foster", the results for a search on "Fox" will only show the Fox (Known By) name. A search for "Foster" would also return this person, and in this case, his "Foster" (Birth Name) would be displayed.

If any of the potential matches is the participant you wish to work with, select the participant by clicking on the participant's name. The system will select the participant and display the Preparing the Participant for Intake page.

If none of the potential matches are the participant you wish to work with, select the "Add" button. The Preparing the Participant for Intake page will be displayed.

If no potential matches are found, the message "No matches were found for your search" will be displayed at the bottom of the page. To add the participant, select the "Add" button. The system will display the Preparing Participant for Intake page.

Participant Lookup

Basic Criteria

Name Search Type: Sounds Like Last Name: Brooks First Name: Garth

Match Birth Date By: Exact Match Date of Birth (mm/dd/yyyy):

Cornerstone ID Number: Advanced Search

Lookup

©IDHS Welcome Page Version: 2.1 Show Version Detail (Opens New Window) You are logged in as: cststall

4.3 Preparing Participant for Intake

The Preparing the Participant for Intake page collects basic participant demographic information. The required fields for completing the Preparing Participant for Intake page include First Name, Last Name, Date of Birth, Intake Date, Consented, and Gender.

Upon completion of this page, eCornerstone assigns the participant a unique, permanent participant ID number, known as the "Cornerstone ID" number. This number is displayed as part of the participant's information at the top of each page.

Following are instructions for completing the Preparing Participant for Intake page:

1. Enter the participant's last name in the Last (name) field; if it is already displayed, verify that the last name is spelled correctly.

NOTE: Use the following guidelines when entering the participant's name:

- Do not use apostrophes or spaces. (i.e., "McDonald", not "Mc Donald")
- Hyphenated last names should contain no spaces.
- Eliminate II, III, Jr., Sr., etc.

2. Navigate to the First (name) field. Enter the participant's full first name.
3. Navigate to the Middle (name) field. Enter the participant's middle initial or name.
4. Navigate to the Date of Birth field. Enter the participant's date of birth, using the DD/MM/YYYY format, or use the pop-up calendar to select the appropriate date.
5. Navigate to the Intake Date field. Enter the intake date, using the DD/MM/YYYY format, or use the pop-up calendar to select the appropriate date.

NOTE: Once this date is saved, it can not be changed. The Intake Date must be greater than the participant's date of birth, and not greater than the current date.

6. Navigate to the Gender field. Using the drop down list, select the appropriate option.
7. For the Consented field, use the drop down box to select "Yes" if the participant has consented his or her information, and "No" if the participant has not consented his or her information.

NOTE: Please refer to the Intake – Consent section of the Participant chapter for important information regarding consent.

8. Navigate to the SSN field, and enter the participant's Social Security Number.

NOTE: The participant's Social Security Number is requested, but not required.

9. Navigate to the Address Type field. Using the drop down list, select the appropriate option.

YOUTH SERVICES NOTE: For homeless youth participants with no known address, select "Business" for address type and enter your agency address. If the participant is living in a shelter, use the address of the shelter.

10. In the Address Type field, use the drop down box to select the address type.

11. Navigate to the Street Address field. Enter the participant's address.

NOTE: Use the following guidelines when entering the participant's address:

- Use one space between the street number, street name, etc.
- For PO Boxes, DO NOT use punctuation. DO put a space between "PO" and "BOX". (i.e., "PO BOX", not "P.O. BOX".)
- For Rural Route numbers, use the format "RR 1 BOX 111". Do not spell out "Rural Route", and do not use pound signs (#).
- Use standard abbreviations without punctuation:

Street Suffixes				Secondary Unit Designators	
AVENUE	AVE	PARKWAY	PKWY	BASEMENT	BSMT
BEND	BND	RIDGE	RDG	BUILDING	BLDG
BOULEVARD	BLVD	ROAD	RD	DEPARTMENT	DEPT
CIRCLE	CIR	STREET	ST	FLOOR	FL
CORNER	COR	TERRACE	TR	LOT	LOT
COURT	CT	TRAIL	TRL	PENTHOUSE	PH
CROSSING	XING			PIER	PIER
DIVIDE	DV	EAST	E	ROOM	RM
DRIVE	DR	NORTH	N	SUITE	STE
HEIGHTS	HTS	SOUTH	S	TRAILER	TRLR
JUNCTION	JCT	SOUTHWEST	SW	UNIT	UNIT
LANE	LN	WEST	W		

For additional abbreviations, contact your local post office, or visit the United States Postal Service's web site at http://www.usps.com/ncsc/lookups/usps_abbreviations.htm.

12. Navigate to the City field. Enter the participant's city.
13. Navigate to the State field. Enter the participant's state.
14. Navigate to the Zip field. Enter the participant's zip code. Navigate to the second Zip box, and enter the four-digit suffix, if known.
15. Navigate to the County field. Using the drop down list, select the participant's county.
16. Select the "Save" option.

NOTE: After "Save" is selected, the system will perform an additional search to help prevent duplicate entries, using the first name, last name, and date of birth entered on the Preparing a Participant for Intake page. If possible duplicates are found, the results are automatically displayed. Verify if any of the following participants are the same person they are attempting to add. Select the link for the correct participant to continue or select "Add" if none of the possible duplicates are the same participant. Selecting "Cancel" will perform the look-up again.

Once the Preparing a Participant for Intake page is completed, complete the rest of the Participant Intake process by accessing the Intake pages located on the **Participant** menu.

Help Menu) **eCornerstone**

▼ Home Lookup ▼ Administrative Help Logout

Preparing Participant for Intake

Note: Fields marked with an asterisk (*) are required.

Review the information below, make sure all required fields have data entered.

*Last: *First: Middle:

*Date of Birth: (mm/dd/yyyy)

*Intake Date: (mm/dd/yyyy)

*Gender:

*Consented:

SSN: (123-45-6789 or 123456789)

Address Type:

Street Address:

City:

State:

Zip: -

County:

©IDHS [Welcome Page](#) Version: 2.1 [Show Version Detail \(Opens New Window\)](#) You are logged in as: cststall