

ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES

CLIENT VIEW TRAINING



Winter/Spring 2022





Presented by

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WINTER/SPRING 2022

WHAT INFORMATION IS IN CLIENT VIEW?

Client involvement in DHS programs

- Homeless and Housing Supports
- Mental Health Services – county and managed care funded
- Children Youth and Families (parents and children)
- CYF Prevention and Diversion Services
- Drug and Alcohol Services (not available to providers)
- Aging Services
- Early Intervention
- Independent Living Services for Young Adults
- Criminal Justice Re-entry Services – Jail Collaborative
- Community Services Block Grant (self-sufficiency services)
- Medical Assistance Transportation
- Intellectual Disability
- Family Support Centers
- Head Start

Client involvement in external programs

- Juvenile Probation
- Allegheny County Jail
- Allegheny County and Pittsburgh Housing Authorities
- School Enrollment (Clairton, Duquesne, Elizabeth Forward, McKeesport, Propel, Woodland Hills, Penn Hills, Sto-Rox, Pittsburgh Public, Baldwin Whitehall, South Allegheny, East Allegheny, Wilkesburg, North Hills)
- Medical Examiner
- Public Benefits – SNAP, TANF, SSI, Other Medical (Commonwealth of PA)
- 911 “place based” data
- Birth Records
- Physical Health

PRIVACY/CONFIDENTIALITY

APPROPRIATE USE

Appropriate Uses – Examples

- To improve case practice.
- At the time of service intake, Client View can be used to better understand the breadth of services received by each individual, and then take that history and the underlying needs into account when coordinating and planning services.
- In the instance of child welfare investigations, it can be used prior to initiating an investigation to better understand the circumstances of the referred family, their services history, and any safety concerns.
- It can be used as a ready source to validate information collected from the client, and to review information about a client who has returned for services after being away from them for a period of time.
- Client View can and should be used to locate and confirm demographic information, resident addresses, and service and placement activity.

Inappropriate Uses – Examples*

- It is entirely inappropriate and illegal to search for individuals for whom you do not have a work responsibility. For example many hospital employees have had their employment terminated for looking up celebrities, or their neighbors in their information systems.
- It is also never acceptable to threaten to conduct a record search in Client View on any person, DHS client or not.
- The information in Client View should not be shared with individuals outside of those responsible for providing care (treatment), paying for that care (payment), and administering the operations supporting that care (operations). It should only be shared in professional circumstances.

* The examples provided above are not an exhaustive list of inappropriate uses.



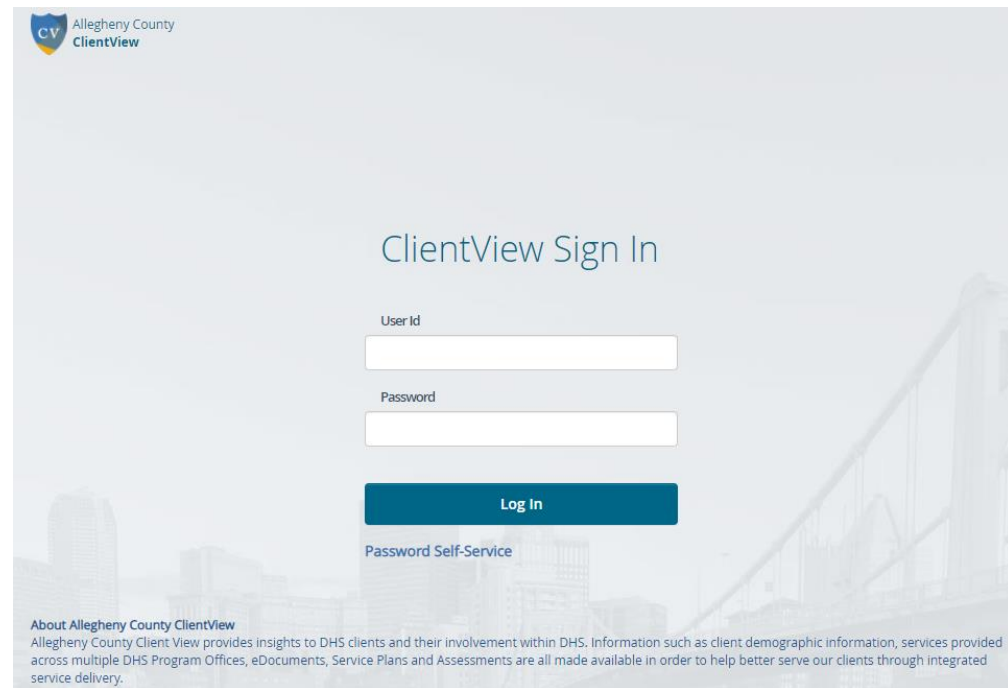
AGENDA

1. Logging into the System
2. Performing a Client Search
3. Claiming a Client
4. Viewing a Client Record
5. Understanding a Client's Service History
6. Audits
7. Admin Screens
8. Granting Access to Clients
9. Requesting Assistance



LOGGING IN:

- URL:
<https://clientview.alleghenycounty.us>
- Your user credentials are assigned by the Allegheny County Department of Human Services Service Desk.
- (ID should start with an 'X' and be in the following format: Xxxxxxx)



The screenshot shows the Allegheny County ClientView Sign In page. At the top left is the logo for Allegheny County ClientView, which includes a shield with 'CV' and the text 'Allegheny County ClientView'. The main heading is 'ClientView Sign In'. Below this are two input fields: 'User Id' and 'Password'. A blue 'Log In' button is positioned below the password field. A link for 'Password Self-Service' is located below the button. At the bottom, there is a section titled 'About Allegheny County ClientView' with a paragraph of text: 'Allegheny County Client View provides insights to DHS clients and their involvement within DHS. Information such as client demographic information, services provided across multiple DHS Program Offices, eDocuments, Service Plans and Assessments are all made available in order to help better serve our clients through integrated service delivery.'

ACCESSING CLIENT VIEW VIA ANOTHER SYSTEM..

- Other systems (i.e. KIDS or HMIS) also link directly to Client View.
- This is a seamless login, so users do not have to sign in again.

Search Results

Navigation: << < 2 3 4 5 6 7 8 9 10 > >>

Results 1 - 15 of 15

Client/Collateral ID▲	Entity Type	First Name	Mid Name	Last Name	Date of Birth	SSN	MCI ID
800867	Client						1000554078
800868	Client						1000727154
800869	Client						1000554079
800870	Client						1000554080
802768	Client						1000556074
802770	Client						1000556075
802771	Client						1000556076
802772	Client						1000556077
803912	Client						

- The homepage displays your list of clients, a navigation menu, any system announcements, a contact us link, and the search fields.

The screenshot shows the 'Client Search' page of the Allegheny County ClientView system. At the top left is the logo with 'CV' and 'Allegheny County ClientView'. At the top right are navigation links: 'Add Clients', 'My Clients', 'Contact Us', and a user profile for 'Samantha Looney'. The main heading is 'Client Search' with a note: 'Last Name OR Social Security Number is required to search.' Below this are three input fields: 'Last Name', 'First Name', and 'Social Security Number'. The 'Last Name' and 'First Name' fields are grouped together, with an 'OR' indicator between them and the 'Social Security Number' field. A 'Search' button is located at the bottom right of the search area. Below the search fields is a link for 'Advanced Search'. At the bottom of the page, there is a link for 'Client View Update Frequency'.

PERFORMING A CLIENT SEARCH:

- Enter your search criteria.

The screenshot shows the 'Client Search' page in the Allegheny County ClientView system. At the top left is the logo for Allegheny County ClientView. At the top right are navigation links: 'Add Clients', 'My Clients', 'Contact Us', and the user's name 'Samantha Looney'. The main heading is 'Client Search'. Below the heading is a note: 'Last Name OR Social Security Number is required to search.' The search form is divided into two sections. The first section has three input fields: 'Last Name', 'First Name', and 'Social Security Number', with a vertical line and 'OR' between the first two and the third. The second section is titled 'Advanced Search' and has a note: 'If Last Name, SSN or Phone Number are unavailable, a Street Address or County MCI ID is required to search.' This section contains several input fields: 'Street Address', 'City', 'Zip', 'State' (a dropdown menu), 'Last 4 Digits of SSN', 'Date of Birth', 'Approximate Age' (a dropdown menu), 'Phone Number', and 'County MCI ID' (with an information icon). A yellow 'Search' button is located at the bottom right of the form.

THE SEARCH RESULTS ARE DISPLAYED AS SHOWN BELOW.

- If there are multiple entries, you can search within the results to narrow it down by clicking in the “search within results” box, just above the table of results.
- When you find the person you are looking for, click the blue request button in the far-right column.

Search Results
More than 100 records found. You may choose to refine your search.

Last Name: First Name: Social Security Number:

OR

Advanced Search

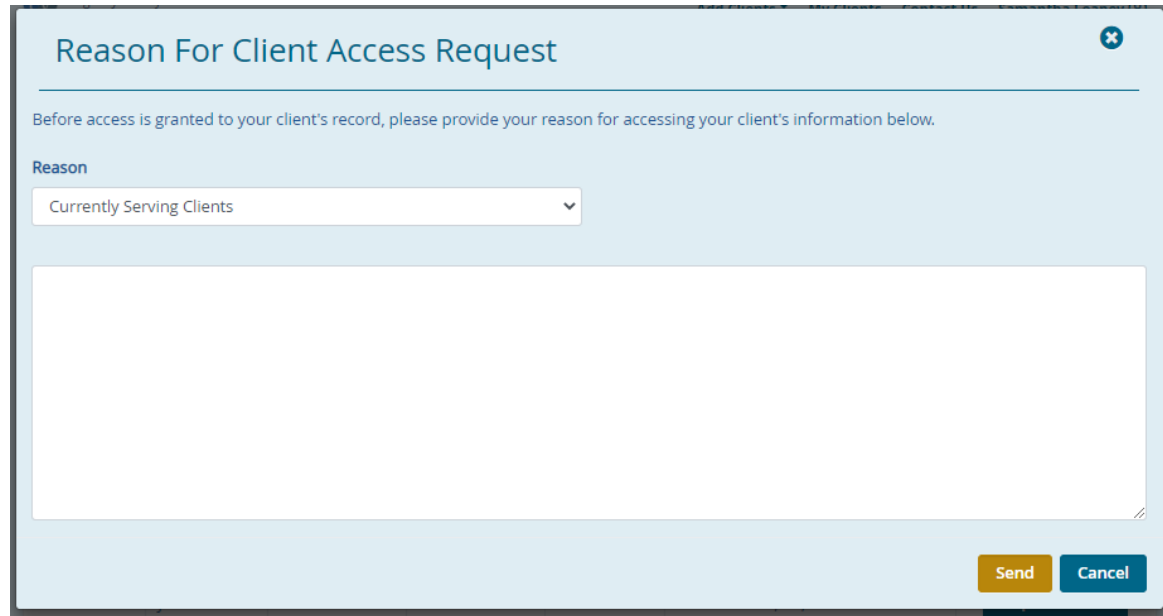
Search within results:

Showing 1 to 10 of 100 entries

Last Name	First Name	County MCI ID	DOB	Gender	Address	Action
Doe	Jane	[REDACTED]	[REDACTED]	Female	[REDACTED]	<input type="button" value="Request Access"/>
Doe	Jane	[REDACTED]	[REDACTED]	Female	[REDACTED]	<input type="button" value="Request Access"/>
Doe	Jane	[REDACTED]	[REDACTED]	Female	[REDACTED]	<input type="button" value="Request Access"/>

CLAIMING A CLIENT:

- Please indicate a reason for requesting access as shown here.



The screenshot shows a light blue modal window titled "Reason For Client Access Request" with a close button in the top right corner. Below the title is a horizontal line, followed by the instruction: "Before access is granted to your client's record, please provide your reason for accessing your client's information below." Underneath this is a label "Reason" above a dropdown menu that currently displays "Currently Serving Clients" with a downward arrow. Below the dropdown is a large, empty white text area for providing a reason. At the bottom right of the modal are two buttons: a yellow "Send" button and a blue "Cancel" button.

IF THE ADMIN IN YOUR ORGANIZATION ELECTS TO APPROVE ACCESS REQUESTS..

- A confirmation will appear at the top of the page. Once the Administrator approves the request, you will be able to access this record.
- In the meantime, the button is grayed out and shows 'Request Sent'.

Access to Client Record has been sent to Administrator for approval.

Search Results

Last Name

First Name

OR

Social Security Number

▲ Advanced Search

If Last Name, SSN or Phone Number are unavailable, a Street Address or County MCI ID is required to search.

Street Address

City

Zip

State

Last 4 Digits of SSN

Date of Birth

Approximate Age

Phone Number

County MCI ID ⓘ

Search within results:

Showing 1 to 10 of 100 entries

Last Name	First Name	County MCI ID	DOB	Gender	Address	Action
Doe	Jane	██████	██████	Female	████████████████████	<input type="button" value="Request Access"/>
Doe	Jane	██████	██████	Female	████████████████████	<input type="button" value="Request Sent"/>
Doe	Jane	██████	██████	Female	████████████████████	<input type="button" value="Request Access"/>

IF YOUR ORGANIZATION ELECTS TO AUTO-APPROVE ACCESS REQUESTS..

- A confirmation will appear at the top of the page, and access to that client record will be granted immediately.
- Once you have access to a record, the button will change to say 'View Details'.

Access to Client Record successfully granted.

Search Results

Last Name

First Name

Social Security Number

OR

▲ Advanced Search

If Last Name, SSN or Phone Number are unavailable, a Street Address or County MCI ID is required to search.

Street Address

City

Zip

State

Last 4 Digits of SSN

Date of Birth

Approximate Age

Phone Number

County MCI ID ⓘ

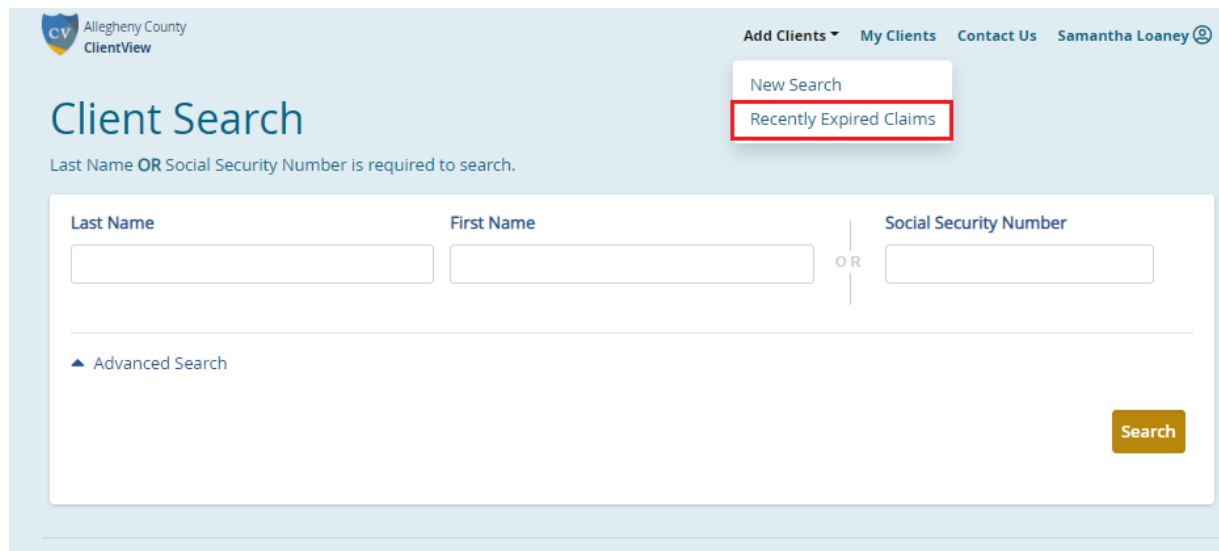
Search within results:

Showing 1 to 10 of 100 entries

Last Name ↑↓	First Name ↑↓	County MCI ID ↑↓	DOB ↑↓	Gender ↑↓	Address ↑↓	Action ↑↓
Doe	Jane	[REDACTED]	[REDACTED]	Female	[REDACTED]	<input type="button" value="Request Access"/>
Doe	Jane	[REDACTED]	[REDACTED]	Female	[REDACTED]	<input type="button" value="View Details"/>

EXPIRED CLAIMS

- Under the “Add Clients” dropdown menu, you are able to view Recently Expired Claims.
- Once a Provider has claimed a client (requested access to their records), the claim is valid for **90 days** if one of their Workers is actively serving that client.
- If the Worker is only claiming the client for a referral, the claim is only valid for **72 hours**.
- If the Provider still needs access to those records after this time period, they do have the opportunity to renew.



The screenshot displays the Allegheny County ClientView interface. At the top left, the logo for Allegheny County ClientView is visible. On the top right, there are navigation links: "Add Clients", "My Clients", "Contact Us", and a user profile for "Samantha Looney". Below the navigation, there is a search dropdown menu with two options: "New Search" and "Recently Expired Claims", which is highlighted with a red rectangular box. The main heading is "Client Search", followed by the instruction "Last Name OR Social Security Number is required to search." Below this, there are three input fields: "Last Name", "First Name", and "Social Security Number", with "OR" between the first two. A "Search" button is located at the bottom right of the search area. There is also a link for "Advanced Search" on the left side of the search area.

RECENTLY EXPIRED CLAIMS

Recently Expired Claims

Showing 1 to 3 of 3 entries

Search within results:

Recently Expired Claims	DOB	SSN	Expired Date	Reclaim
[REDACTED]	[REDACTED]	xxx-xx-1806	3/3/2021	
[REDACTED]	[REDACTED]	xxx-xx-7278	3/2/2021	
[REDACTED]	[REDACTED]	xxx-xx-2589	2/4/2021	

Show entries

First Previous **1** Next Last

- You can re-claim any clients you are still working with by clicking the plus sign in the far-right column.

RECENTLY EXPIRED CLAIMS

Client Claims Expired After Your Last Login

Recently Expired Claims	DOB	SSN	Date	Status	Reclaim
[REDACTED]	[REDACTED]	[REDACTED]	3/3/2021	Expired	+
[REDACTED]	[REDACTED]	[REDACTED]	3/2/2021	Expired	+
[REDACTED]	[REDACTED]	[REDACTED]	2/4/2021	Expired	+

Show 10 entries

First Previous 1 Next Last

Cancel

- If you have had client claims expire since you last logged into Client View, you will see this pop-up when you do login again.
- You can re-claim any clients you are still working with by clicking the plus sign in the far-right column.

MY CLIENTS LIST

- Once access has been granted, the client will appear in your 'My Clients' list.
- You can extend access to a record expiring soon or remove a client you are no longer serving from here.

Allegheny County ClientView

Add Clients ▾ My Clients Contact Us Samantha Loaney

My Clients

Search within results:

Showing 1 to 5 of 5 entries

Client Name ↑↓	County MCI ID ↑↓	DOB ↑↓	Gender ↑↓	Access Expires in ↑↓	Extend Access?	Details	Remove Access
[REDACTED]	[REDACTED]	[REDACTED]	Male	6 Day(s) !	Extend	View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Female	55 Day(s)		View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Male	55 Day(s)		View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Male	77 Day(s)		View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Female	90 Day(s)		View Details	✕

Show entries

First Previous **1** Next Last

VIEWING A CLIENT:

- When you click on the 'View Details' button, the client demographics and service information will appear.

The screenshot displays the Allegheny County ClientView interface. At the top, the logo for Allegheny County ClientView is on the left, and navigation links for 'Add Clients', 'My Clients', 'Contact Us', and the user 'Samantha Loaney' are on the right. Below the navigation, the breadcrumb 'My Clients / Doe, Jane' is shown. The main heading is 'Jane Doe', with two buttons: 'View Client Workers' (with a '2' icon) and 'View Addresses/911' (with a '3' icon). A 'Basic Info' section is expanded, showing a grid of client data: DATE OF BIRTH, COUNTY MCI # (with a '1' icon), STATE MCI # (with a '1' icon), MA RECIPIENT # (with a '1' icon) 'No Data', AGE / GENDER '82 / Female', and RACE 'White'. Below this, ETHNICITY is 'Not Hispanic/Latinx' and MARITAL STATUS is 'No Data'. At the bottom of the Basic Info section are three buttons: 'Source Client Records', 'Generate Access Code', and 'Other Info' (with a '3' icon). A 'Contact' section follows, with 'HOME ADDRESS' and 'HOME' fields, both containing redacted information. A 'Search Address' button is located at the bottom right of the contact section.

WHERE THE INFORMATION COMES FROM..

- The information displayed on this page is the information of record in our data warehouse.
- If multiple entries exist, you can click these two links to open a window displaying all of the available data, including the source from which each entry is derived.

Allegheny County ClientView

Add Clients ▾ My Clients Contact Us Samantha Looney

My Clients / Doe, Jane

Jane Doe

View Client Workers ² View Addresses/911 ³

Basic Info

DATE OF BIRTH	COUNTY MCI # ¹	STATE MCI # ¹	MA RECIPIENT # ¹ No Data	AGE / GENDER 82 / Female	RACE White
ETHNICITY Not Hispanic/Latinx	MARITAL STATUS No Data				

Source Client Records Generate Access Code Other Info ³

Contact

HOME ADDRESS	HOME

Search Address

EXAMPLE:

Other Information Records ✕			
Source System	Race	Ethnicity	Living Arrangement
eCAPS	White 12/4/2018	No Data 12/4/2018	ID - Supported living 12/4/2018
CCBHO	White 3/31/2011		Family Setting 4/30/2011
KIDS - Children	White 12/31/2011	Not Hispanic/Latinx 12/31/2011	Married Parents 1/31/2017
PA Department of Human Services	White 10/31/2008		
Family Support Centers	White 11/30/2007	Not Hispanic/Latinx 11/30/2007	
DHS Assessment Tool	White 12/30/2020		
HealthChoices - CCBH Eligibility	White 10/12/2016		Restrictive Setting 11/22/2019
HealthChoices - CCBH Physical Health	White 11/30/2014	Hispanic/Latinx 11/30/2014	
Synergy Youth Support Partners (YSP)	White 12/16/2019		Unknown 2/27/2020
Synergy Dragonfly		No Data 2/13/2019	Unknown 2/19/2020
Allegheny Intermediate Unit ChildPlus	White 11/19/2019		
Master Client Index (MCI)	White 12/18/2018		
CYF - Referrals/Investigation	White 4/10/2019	Not Hispanic/Latinx 4/10/2019	Married Parents 4/10/2019
Allegheny County Health Department	White	No Data	No Data

OTHER ADDRESSES:

Addresses / 911 Information

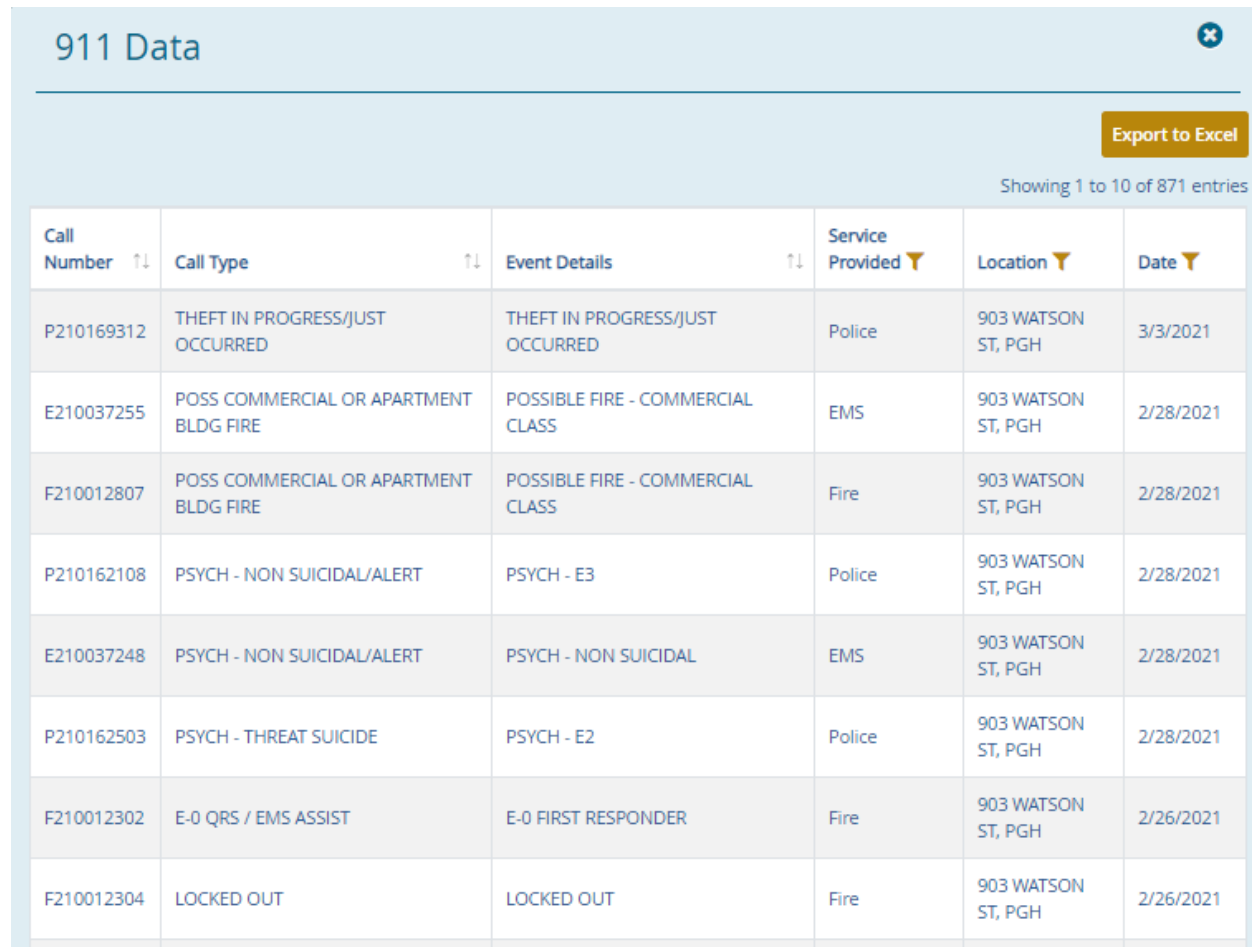
Please note the 911 data is tied to the location ONLY and is not associated to the individual in focus.

Showing 1 to 15 of 15 entries

Source System	Address	Municipality	Address Date		
DHS Assessment Tool	[REDACTED]		12/30/2020	Search Address	911 Data
PA Department of Human Services	[REDACTED]		7/27/2020	Search Address	911 Data
CCBHO	[REDACTED]		7/10/2020	Search Address	911 Data
Synergy Youth Support Partners (YSP)	[REDACTED]		2/27/2020	Search Address	911 Data
HealthChoices - CCBH Eligibility	[REDACTED]		11/22/2019	Search Address	911 Data
HealthChoices - CCBH Physical Health	[REDACTED]		11/22/2019	Search Address	911 Data

VIEWING 911 DATA

- It's important to keep in mind that **the 911 data is tied to the address** and not necessarily to the client in focus.
- The entries shown are based on dispatches, meaning the details you see are based on the information provided at the time of the call.
- This also means there could be multiple rows (dispatches) for the same incident (police and EMS for example).



911 Data

Export to Excel

Showing 1 to 10 of 871 entries

Call Number ↑↓	Call Type ↑↓	Event Details ↑↓	Service Provided ⌵	Location ⌵	Date ⌵
P210169312	THEFT IN PROGRESS/JUST OCCURRED	THEFT IN PROGRESS/JUST OCCURRED	Police	903 WATSON ST, PGH	3/3/2021
E210037255	POSS COMMERCIAL OR APARTMENT BLDG FIRE	POSSIBLE FIRE - COMMERCIAL CLASS	EMS	903 WATSON ST, PGH	2/28/2021
F210012807	POSS COMMERCIAL OR APARTMENT BLDG FIRE	POSSIBLE FIRE - COMMERCIAL CLASS	Fire	903 WATSON ST, PGH	2/28/2021
P210162108	PSYCH - NON SUICIDAL/ALERT	PSYCH - E3	Police	903 WATSON ST, PGH	2/28/2021
E210037248	PSYCH - NON SUICIDAL/ALERT	PSYCH - NON SUICIDAL	EMS	903 WATSON ST, PGH	2/28/2021
P210162503	PSYCH - THREAT SUICIDE	PSYCH - E2	Police	903 WATSON ST, PGH	2/28/2021
F210012302	E-0 QRS / EMS ASSIST	E-0 FIRST RESPONDER	Fire	903 WATSON ST, PGH	2/26/2021
F210012304	LOCKED OUT	LOCKED OUT	Fire	903 WATSON ST, PGH	2/26/2021

VIEWING SERVICE INVOLVEMENT:

- Tiles are displayed below the basic demographics section.
- The tiles are categorized by program types. Each program-specific tile includes services, documents, and any workers assigned to that client.
- You can also opt to view all services or all documents by clicking on either of those tiles.

View Client Workers 13
View Addresses/811 15

Basic Info

SOCIAL SECURITY # XXX-XX-0007 Show Full SSN	DATE OF BIRTH [REDACTED]	COUNTY MCI # [REDACTED]	STATE MCI # [REDACTED]	MA RECIPIENT # [REDACTED]	AGE / GENDER 14 / Female
RACE White	ETHNICITY Not Hispanic/Latinx	VETERAN Unknown			

Source Client Records
Generate Access Code
Other Info

Contact

HOME ADDRESS PITTSBURGH, PA, 15235	CELL [REDACTED]	HOME [REDACTED]	BIRTH MOTHER* [REDACTED]	BIRTH FATHER* [REDACTED]
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Search Address

*As reported by Allegheny County birth records

Services & Documents

Select a category to view the documents, client workers and services received associated with that specific area. You can view all of these service categories combined by clicking the 'All Service' tile at the top.

<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> All Services 199 Services </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> All Documents 79 Documents </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Behavioral Health 81 Services 26 Documents </div>	
<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Child Welfare 31 Client Workers 33 Services 53 Documents </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Family Strengthening Programs 1 Client Workers 2 Services </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Criminal & Juvenile Justice </div>	
<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Developmental Support </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Education 2 Records </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Housing & Shelter </div>	
<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Life Events </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Physical Health 99 Services </div>	<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> Seniors </div>	
<div style="background-color: #00728f; color: white; padding: 10px; text-align: center;"> State & County Public Benefits 4 Services </div>			

TIMELINE VIEW

- To see an overview of service history in a timeline format (no service details), click the 'Timeline View' button below the tiles.
- This will expand the timeline and show whether the client was active (receiving services) during a particular timeframe.

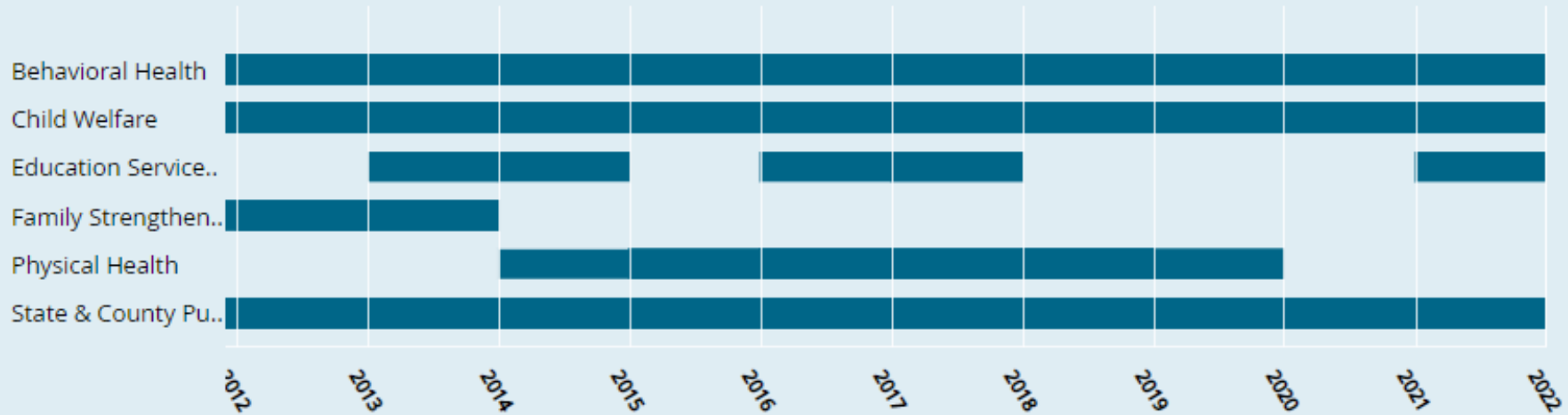


TIMELINE VIEW (YEARLY VIEW)

Timeline View

This is a visual timeline of services received by program area. For detailed information on a service, please click on the row label to open the corresponding tile. You may need to scroll to view additional years.

View Yearly View Monthly

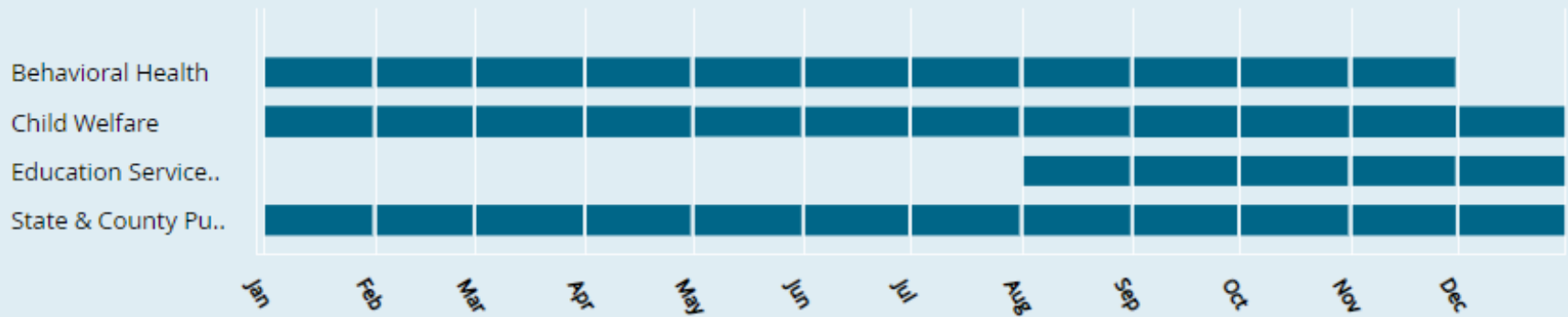


TIMELINE VIEW (MONTHLY VIEW)

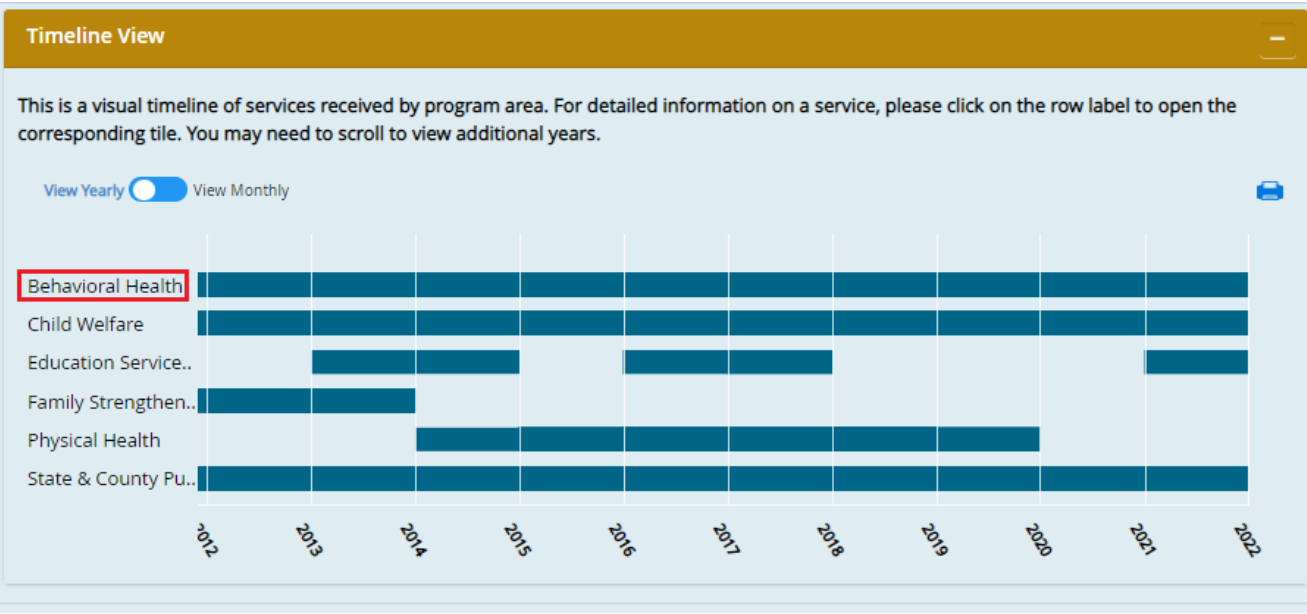
Timeline View

This is a visual timeline of services received by program area. For detailed information on a service, please click on the row label to open the corresponding tile. You may need to scroll to view additional years.

View Yearly View Monthly 2021



- The program labels are hyperlinks.
- Clicking on a label will direct the user to the corresponding program tile.



- The timeline opens below the list of services.
- Users can toggle between the yearly and monthly view.
- Users can click 'Back to Info Screen' to return to the demographics screen.

5/20/2020	5/20/2020	Mental Health Services (All)	PRESSLEY RIDGE	Individual Psychotherapy -- 45 - 50 minute session (OPMH)	4/30/2021
1/24/2020	5/1/2020	Mental Health Services (All)	WESLEY FAMILY SERVICES	Child Family Focused Solution Based Services - Individual delivered	4/6/2021
1/7/2020	4/14/2020	Mental Health Services (All)	WESLEY FAMILY SERVICES	Child Family Focused Solution Based Services - Individual delivered	4/6/2021

Show 10 entries

First Previous 1 2 3 4 5 6 7 Next Last

[Back to Info Screen](#)

Behavioral Health

This is a visual timeline of services received for the selected program area. For more information on a particular service, please refer to the service involvement grid above. You may need to scroll to view additional years.

View Yearly View Monthly

Mental Health Ser..

2015 2016 2017 2018 2019 2020 2021 2022

BIRTH RECORDS

- If available, and based on the information provided in birth records from the Allegheny County Health Department, the names and date of birth for the child's birth parents will appear here as well.
- These are hyperlinks that will direct to the parent's record.

The screenshot shows a user interface for birth records. At the top right, there are two buttons: "View Client Workers" with a notification badge of 28, and "View Addresses/911" with a notification badge of 15. Below these is a "Basic Info" section with a dropdown arrow. It contains several fields: "SOCIAL SECURITY #" with value "xxx-xx-0007" and a "Show Full SSN" link; "DATE OF BIRTH" with a redacted value; "COUNTY MCI #" with a redacted value and a notification badge of 1; "STATE MCI #" with a redacted value and a notification badge of 1; "MA RECIPIENT #" with a redacted value and a notification badge of 1; and "AGE / GENDER" with value "13 / Female". Below these are "RACE" (White) and "ETHNICITY" (Not Hispanic/Latinx). To the right of this section are three buttons: "Source Client Records", "Generate Access Code", and "Other Info" with a notification badge of 14. A "Contact" section follows, with "HOME ADDRESS" (1 SMITHFIELD ST, PITTSBURGH, PA, 15222), "CELL" (redacted), and "HOME" (redacted). A red box highlights the "BIRTH MOTHER*" and "BIRTH FATHER*" fields, each with a redacted name and "DOB:" followed by a redacted date. A "Search Address" button is located at the bottom right. A footer note states: "*As reported by Allegheny County birth records".

LIFE EVENTS TILE

- Birth Records also appear in the 'Life Events' tile.
- Currently, you will only see information pertaining to Allegheny County birth records in this table, but we hope to add other events in the future.
- The child's name is a hyperlink that will direct you to their client record.

Life Events

This table only reflects children born in Allegheny County for which birth certificate data was available.

[Allegheny County Department of Human Services](#) [PA South West 2-1-1](#)

[Export to Excel](#)

Search:

Showing 1 to 4 of 4 entries

Event Name	Event Date
Birth of [REDACTED]	[REDACTED]/2012
Birth of [REDACTED]	[REDACTED]/2006
Birth of [REDACTED]	[REDACTED]/2003
Birth of [REDACTED]	[REDACTED]2001

Note: This table only reflects children born in Allegheny County for which birth certificate data was available

SERVICE INVOLVEMENT BY PROGRAM AREA

- Within each tile, there is a description section, helpful links, workers assigned to that client, documents, a list of services, and the timeline.
- All of these sections are specific to the program area tile selected.
- If no data is available, the section will not appear.
- Users can also export the list of services to Excel (gold button above the service involvement table on the right.)

Housing & Shelter

Allegany County also including prevention, support, emergency shelter, housing and rehoming programs within the Allegany County Continuum of Care, and Section 8 and public housing.

Helpful Links

[Housing Link](#) [VA Health Benefit](#)

Client Workers

Showing 1 of 1 of 1 workers

First Initial	Last Initial	Name	Email	Phone Number	Supervisor	Program Area	Position	Association	Role Type
W	B	Belk, Barbara	barbara.belk@alleganycountypa.gov		Harris, Terry		Office of Community Services, Housing and Supportive Services Coordinator	Allegany County Department of Human Services	Coordinator

View: 1 of 1 workers

First Previous 1 Next Last

Documents

Showing 1 of 1 of 1 workers

Title	Date	Download
WFOCAL	1/19/2018	Download
WFOCAL	4/27/2018	Download
WFOCAL	4/27/2018	Download
WFOCAL	5/22/2018	Download
WFOCAL	5/22/2018	Download

View: 1 of 1 workers

First Previous 1 Next Last

Service Involvement

All Records

Export to Excel

Showing 1 of 1 of 7 workers

First Initial	Last Initial	Program Area	Position	Service	Start/End
W	B	Housing and Housing Support		WRES - SCU	
W	B	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATOR	Emergency Shelter HAP (Habitat)	1/13/2021
W	B	Housing and Housing Support	Allegany County Department of Human Services	Housing Case Management Supportive Services	1/13/2021
W	B	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATOR	Innovative HAP	1/13/2021
W	B	Allegany County Housing Authority		Section 8	
W	B	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATOR	Rapid Re-Housing H&D HAP	1/13/2021
W	B	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATOR	Preventive/Rehabilitative Services	1/13/2021

View: 1 of 1 workers

First Previous 1 Next Last

Back to Table Screen

Housing & Shelter

This is a visual timeline of services received for the selected program area. For more information on a particular service, please refer to the service involvement grid above. You may need to scroll to view additional years.

Use Today View Month

Back to Table Screen



TO VIEW SERVICES BY PROVIDER..

- Users can click on the name of a Provider (hyperlink in blue) to view all services received and the details of each.
- Users can also export the list of services to Excel (gold button above the table on the right.)

Behavioral Health

Allegheny County data for individuals receiving publicly-funded mental health and substance use services. Includes both clinical services, such as individual and group therapy, and non-clinical services such as case management and peer support.

Helpful Links

[PA South West 2-1-1](#) [Resolve Crisis Services](#)

[Substance Use, PA](#) [Get Help Now](#)

Service Involvement

All Records ▾

Export to Excel

Showing 1 to 10 of 72 entries

First Activity ↑↓	Last Activity 📌 ↑↓	Program Area ▾	Provider/SCU ▾	Service ▾	Data Refresh 📌
3/21/2019	1/12/2021	Mental Health Services (All)	WESLEY FAMILY SERVICES	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	2/22/2021
5/4/2020	1/8/2021	Mental Health Services (All)	PRESSLEY RIDGE	Collateral Family Psychotherapy (OPMH)	2/5/2021
5/13/2020	1/6/2021	Mental Health Services (All)	PRESSLEY RIDGE	Family Psychotherapy (OPMH)	2/5/2021
12/10/2019	12/23/2020	Mental Health Services (All)	PRESSLEY RIDGE	OP visit for evaluation and management of established patient, problem moderate to high, f/f with patient or family	2/5/2021

PROVIDER SERVICE INVOLVEMENT

Provider Services ✕

WESLEY FAMILY SERVICES 🖨️

Program Area(s) for services received: MENTAL HEALTH SERVICES (ALL)

221 Penn Ave
WILKINSBURG, PA 152212118

Show Unit & Cost Details

Export to Excel

Showing 1 to 10 of 31 entries

First Activity ↑↓	Last Activity ↑↓	Service ↑	Diagnosis Description ↑↓	Facility Name ↑↓	Total Units ↑↓
1/12/2021	1/12/2021	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	4
12/15/2020	12/15/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	4
11/19/2020	11/19/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	4
8/20/2020	8/20/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	3
5/21/2020	5/21/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	2
5/7/2020	5/7/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	2



EDUCATION RECORDS TILE

Education

Allegheny County children and youth enrolled in kindergarten through twelfth grade in a DHS data - sharing partner school district. For a list of participating districts and details for each, please [click here](#).

Export to Excel

Search:

Showing 1 to 16 of 16 entries


Enrollment Date	Withdrawal Date	School Name	District	Grades
09/01/2020		Hill House Passport Academy Charter School	Pittsburgh Public Schools	12th
02/14/2020		Hill House Passport Academy Charter School	Pittsburgh Public Schools	11th
08/26/2019	2/3/2020	Brashear High School	Pittsburgh Public Schools	11th
09/17/2018	3/20/2019		Pittsburgh Public Schools	10th
08/28/2017		Carrick High School	Pittsburgh Public Schools	9th
08/29/2016		South Brook 6-8	Pittsburgh Public Schools	8th
08/31/2015		South Brook 6-8	Pittsburgh Public Schools	7th
01/07/2015		South Brook 6-8	Pittsburgh Public Schools	6th
01/05/2015	1/6/2015	Mercy Behavioral Health	Pittsburgh Public Schools	6th
08/25/2014	12/23/2014	South Brook 6-8	Pittsburgh Public Schools	6th
08/26/2013	6/9/2014	Concord K-5	Pittsburgh Public Schools	5th
08/30/2012	6/13/2013	Concord K-5	Pittsburgh Public Schools	4th
09/01/2011	6/13/2012	Concord K-5	Pittsburgh Public Schools	3rd
09/02/2010	6/15/2011	Concord K-5	Pittsburgh Public Schools	2nd
09/03/2009	6/16/2010	Concord K-5	Pittsburgh Public Schools	1st
09/04/2008	6/12/2009	Concord K-5	Pittsburgh Public Schools	All Day Kindergarten

Show 25 entries


- This tile displays enrollment data for Allegheny County children and youth enrolled in kindergarten through twelfth grade in a DHS data-sharing partner school district.
- Users can view the list of participating districts by clicking the link in the description section.

ALL DOCUMENTS TILE

- Users can also view all available documents by selecting the 'All Documents' tile.
- They will be grouped by program area as seen here.

All Documents 

Displayed below are all documents available within the system organized by service category. You may view the document by clicking the download button to the right of the title.

▼ Child Welfare 

Search:

Showing 1 to 10 of 35 entries

Title	Date	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	
CIT - Safety Assessments & Plans	11/24/2020	

Show 10 entries First Previous 1 2 3 4 Next Last


▼ Family Strengthening Programs 

Search:

Showing 1 to 4 of 4 entries

Title	Date	
Independent Living Transition Plan	8/1/2020	Download
Independent Living Transition Plan	8/1/2020	Download
Independent Living Transition Plan	8/3/2019	Download
Independent Living Transition Plan	8/3/2019	Download

Show 10 entries First Previous 1 Next Last

▼ Housing & Shelter 

Search:

Showing 1 to 3 of 3 entries

Title	Date	
VISPOAT	3/21/2019	
VISPOAT	7/19/2018	
VISPOAT	1/11/2016	

Show 10 entries First Previous 1 Next Last



ALL SERVICES TILE

All Services







All services available for the individual provided by Allegheny County Department of Human Services and external providers. For detailed information about the data that is available, please [click here](#). This document provides the definitions for the programs captured in the system, as well as, for each system how far back in time the data is captured. It also explains any potential lags in data that may occur.

Service Involvement

All Records ▾

[Export to Excel](#)

Showing 1 to 10 of 113 entries

First Activity 	Last Activity 	Program Area 	Provider/SCU 	Service 	Data Refresh 
9/6/2002	6/6/2079	HealthChoices/ PA Medical Assistance	-	Enrolled	6/6/2018
7/31/2019	1/31/2021	Transition Age Youth	-	IL Unit	
5/1/2018	1/4/2021	Mental Health Services (All)	SOUTHWESTERN HUMAN SERVICES	OP visit for evaluation and management of established patient, problem low to moderate, f/f with patient or family	2/5/2021
1/31/2020	12/31/2020	PA Department of Human Services	-	Mental Health Benefits	
1/31/2008	12/31/2020	PA Department of Human Services	-	SNAP	
10/31/2014	12/31/2020	PA Department of Human Services	-	SSI Benefits	
11/8/2013	9/11/2020	Children and Youth, 18 and Younger - Active Cases	YOUTH ADVOCATE PROGRAM INC	Educational and Training Services/Education Support Services/Guidance and Counseling/Truancy Counseling	2/23/2021
4/20/2019	9/8/2020	Children and Youth, 18 and Younger - Active Cases	AUBERLE	Family Foster Care/Teen Family Foster Care (ages 12-21 years)	2/23/2021
2/20/2020	7/30/2020	Mental Health Services (All)	PERSAD CENTER, INC.	Individual Psychotherapy -- 20 - 30 minute session (OPMH)	2/5/2021
12/9/2019	7/2/2020	Mental Health Services (All)	PERSAD CENTER, INC.	Individual Psychotherapy -- 45 - 50 minute session (OPMH)	2/5/2021

Show entries

First Previous **1** 2 3 4 5 ... 12 Next Last



- Users can also view all available services NOT grouped by program.
- These services are organized by date with the most recent listed first.
- Users can also export the list of services to Excel (gold button above the service involvement table on the right), sort, and filter by program area.

VIEW CLIENT WORKERS

- Users can also view all workers assigned to a specific client.
- Workers are organized by date with the most recent listed first.
- ‘View Client Workers’ is a gold button located above the client’s demographics (next to the address list).

Client Workers
The Allegheny County Workers that are or have previously supported this individual. This data is refreshed on a daily basis.

Search: Showing 1 to 10 of 53 entries

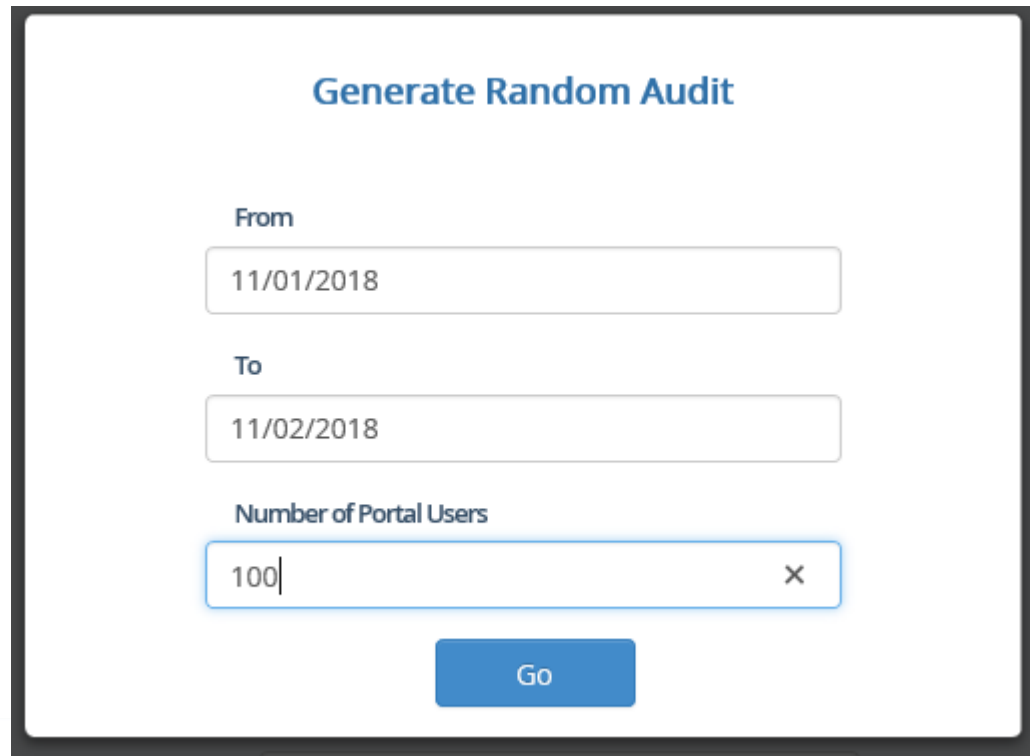
First Activity	Last Activity	Name	Contact Method	Supervisor	Program Area	Provider/SCU	Association	Role Type
4/30/2019	9/15/2020	Durant, Maria	Maria.Durant@AlleghenyCounty.US	Sedillon, William	South Regional Office		Allegheny County Department of Human Services	
7/2/2019	8/24/2020	Mullinary, Alison	Alison.Mullinary@AlleghenyCounty.US	Berry, Deane		Office of Children Youth and Families - Independent Living	Allegheny County Department of Human Services	Transition Planner
5/5/2020	6/3/2020	McGrady, Madeline	Madeline.McGrady@AlleghenyCounty.US	--		AU/ERLE	Service Provider	
2/18/2020	2/25/2020	Cillo, Roberta	Roberta.Cillo@AlleghenyCounty.US	Cillo, Roberta	Intake	Intake Office	Allegheny County Department of Human Services	
1/22/2020	2/19/2020	Durant, Maria	Maria.Durant@AlleghenyCounty.US	Sedillon, William	South Regional Office		Allegheny County Department of Human Services	
2/18/2020	2/18/2020	Pickens, Josette	Josette.Pickens@AlleghenyCounty.US	Pickens, Josette	South Regional Office		Allegheny County Department of Human Services	
1/27/2020	1/27/2020	Moquette, Altagracia	altagracia.moquette@ajcs.net	Murphy, Samantha		Office of Integrated Program Services - Allegheny Intermediate Unit	Service Provider	Education Records Consultant
1/22/2020	1/22/2020	Schemm, Jessie	Jessie.Schemm@AlleghenyCounty.US	Schemm, Jessie	Intake		Allegheny County Department of Human Services	
1/16/2020	1/16/2020	Pickens, Josette	Josette.Pickens@AlleghenyCounty.US	Pickens, Josette	South Regional Office		Allegheny County Department of Human Services	
4/16/2019	6/14/2019	Pickens, Josette	Josette.Pickens@AlleghenyCounty.US	Pickens, Josette	Intake		Allegheny County Department of Human Services	

Show 10 entries

First Previous 1 2 3 4 5 6 Next Last

CLIENT VIEW AUDITS

- Random Audits
 - Done quarterly.
 - Pull 100 random entries from the audit log in Client View.
 - Pull for a two-day timespan (as shown).
- Ad hoc targeted audits
 - Typically look at public figures or cases that hit the news.



The screenshot shows a web form titled "Generate Random Audit". It contains three input fields: "From" with the value "11/01/2018", "To" with the value "11/02/2018", and "Number of Portal Users" with the value "100". A blue "Go" button is located below the inputs.

Generate Random Audit

From
11/01/2018

To
11/02/2018

Number of Portal Users
100

Go



CLIENT VIEW AUDITS

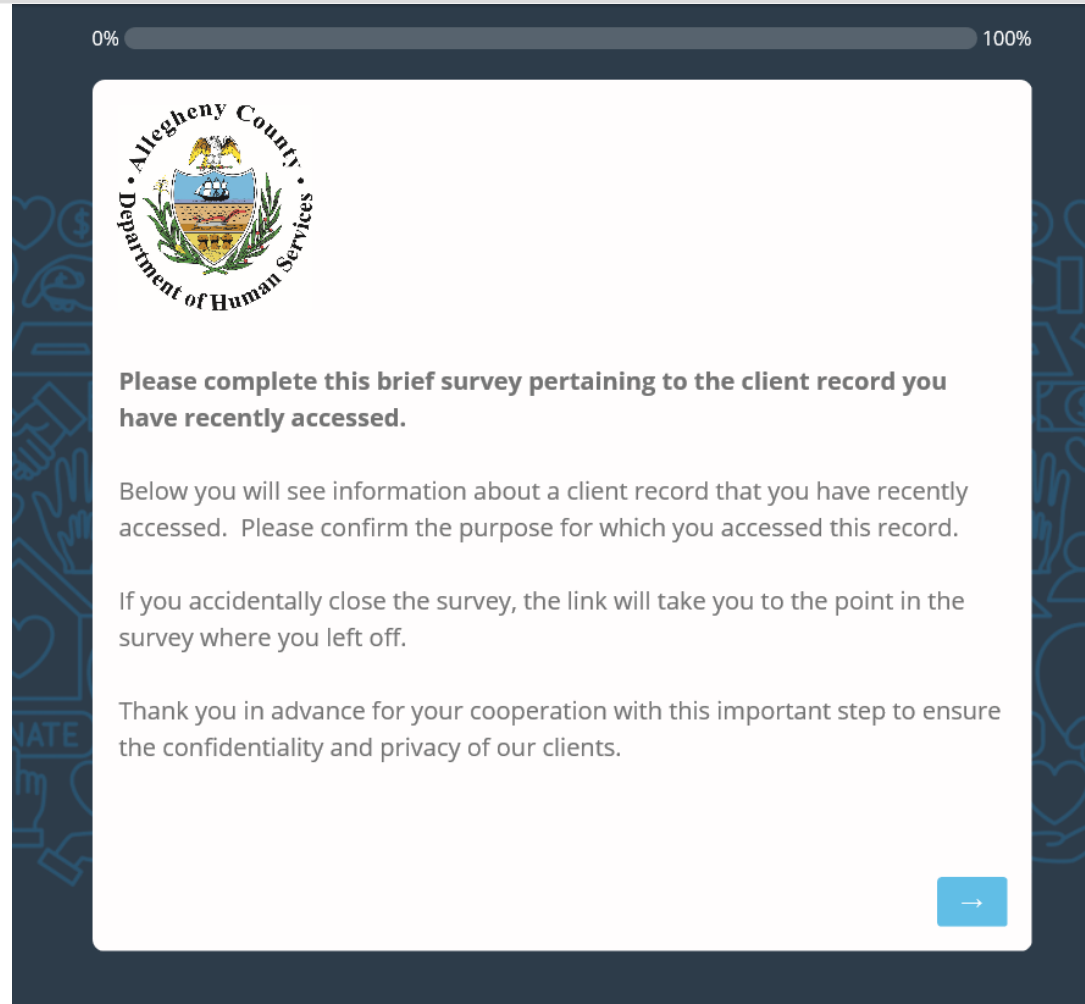
Why do we audit?

- Client View gives unrestricted and broad access to client information
- Regulatory Compliance
 - Client's Right to Privacy
 - Minimum Necessary
- Response Expectations
 - Hope to have responses within 3 days and results to Erin within a week.
 - Accommodate staff out of office
 - Response is **mandatory**



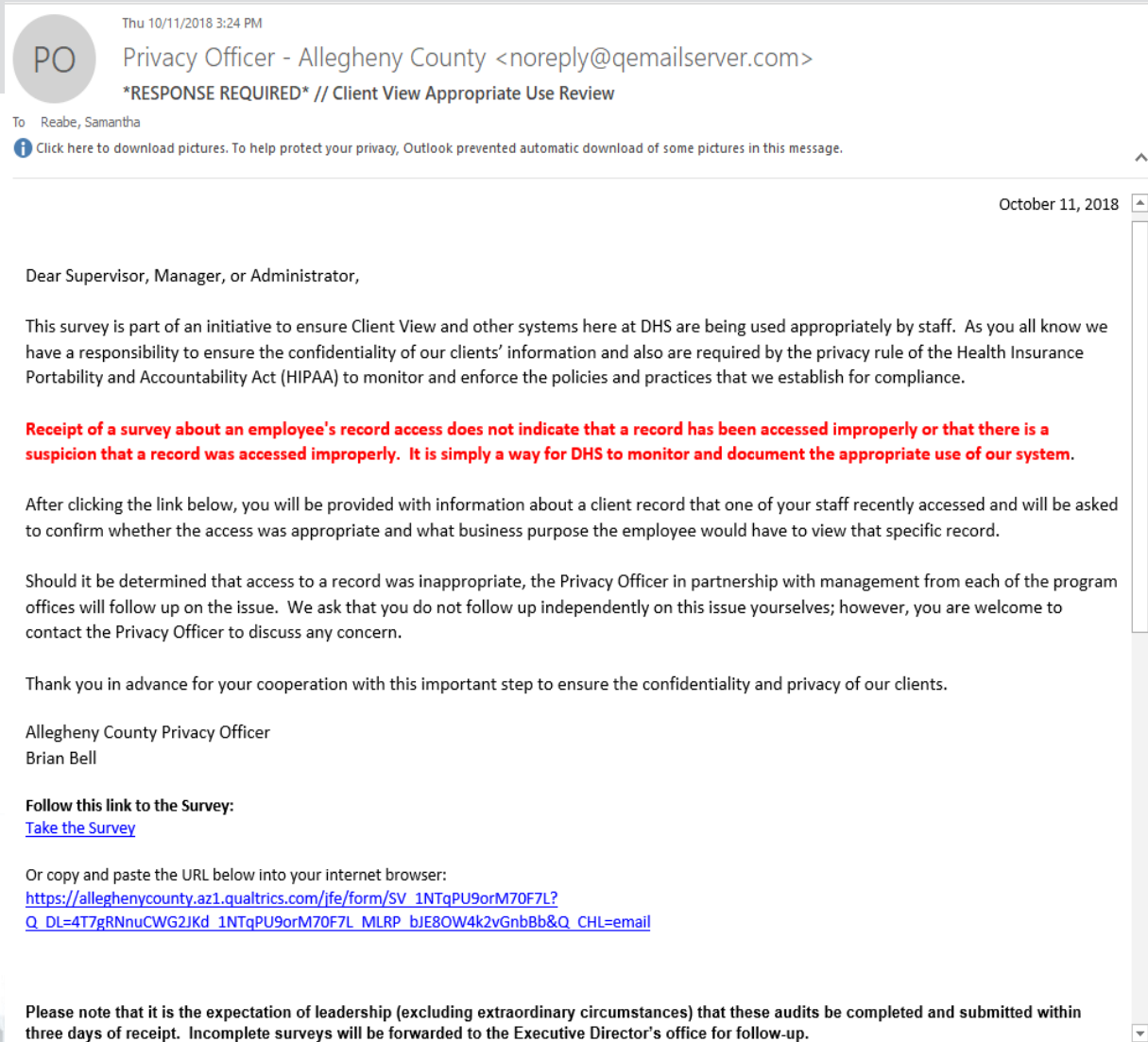
AUDIT SURVEY:

- We use Qualtrics to send a short survey to both the staff member and their direct supervisor (based on the supervisor information the user has entered into Client View).
- It's extremely important that users keep this supervisor information up-to-date.



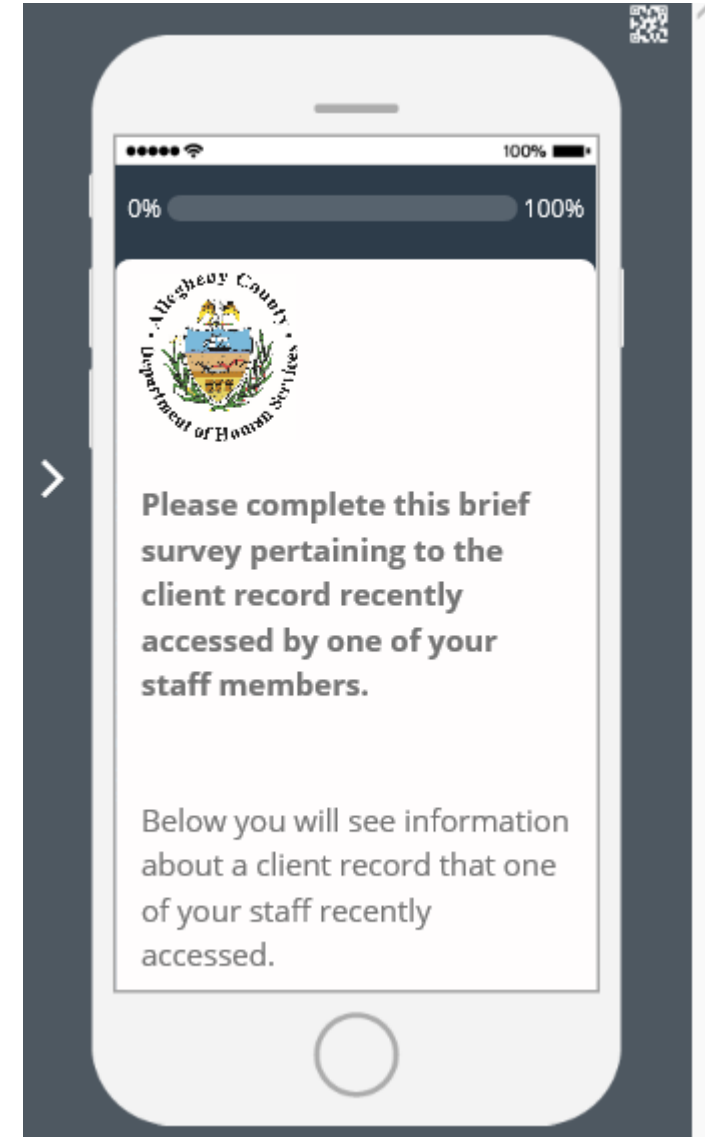
EMAIL EXAMPLE:

- The email looks like this and because it is sent from Qualtrics could end up in your junk or spam folder.
- Samantha Looney will oftentimes send an email alerting users who have received a survey in case it ends up in one of those other folders so they know to look for it.
- If you are unsure if the email is legitimate, please reach out to Samantha Looney.



PROCESS:

- The survey invitation and two reminders are sent out of Qualtrics.
- Additional reminders are sent out of the CV Admin Inbox and Samantha Loaney's personal inbox.
- Incomplete surveys are forwarded to the Administrative Office
- Any instances of access deemed to be inappropriate are referred to Agency Leadership for follow up and will result in immediate loss of access.



MY ACCOUNT MAINTENANCE PAGE

- Because of the audits, it's important that users keep their supervisor information up-to-date.
- Once a year, users will be prompted (via pop-up) to review the information when they login, but you can update it anytime on the account maintenance page.

The screenshot shows the 'My Account Maintenance' page. At the top left is the Allegheny County ClientView logo. At the top right are links for 'Add Clients', 'My Clients', 'Contact Us', and the user's name 'Samantha Loaney'. The main heading is 'My Account Maintenance'. Below it is a link for 'OKTA Help'. There are two toggle switches for email notifications: 'Claimed Client Expiration Email Notification' (disabled) and 'Pending Clients Decision Email Notification' (disabled). The form contains several fields: 'Facility/Division/Bureau' (DIVERSIFIED CARE MANAGEMENT), 'First Name' (Samantha), 'Middle Initial' (empty), 'Last Name' (Loaney), 'Provider Email' (Samantha.Loaney@AlleghenyCounty.US), 'Phone Number' ((412) 350-7092), 'Facility Street Address' (9515 Goehring Rd), 'Facility Address Line 2' (empty), 'City' (Cranberry Township), 'State' (PA), 'Zip Code' (16066), 'Supervisor Name' (Bell, Brian), and 'Supervisor Email' (Brian.Bell@alleghenycounty.us). At the bottom, there are radio buttons for 'Preferred Contact Method' (Email selected, Phone unselected) and a 'Password Self-Service' link. An 'Update Account Details' button is in the bottom right corner.

Allegheny County ClientView

Add Clients My Clients Contact Us Samantha Loaney

My Account Maintenance

If you need to update the email or phone number associated to your Okta account, please do so by clicking here (OKTA Help).

Claimed Client Expiration Email Notification Pending Clients Decision Email Notification

Facility/Division/Bureau

DIVERSIFIED CARE MANAGEMENT

First Name * Middle Initial Last Name *

Samantha

Loaney

Provider Email * Phone Number *

Samantha.Loaney@AlleghenyCounty.US (412) 350-7092

Facility Street Address Facility Address Line 2

9515 Goehring Rd

City State Zip Code

Cranberry Township PA 16066

Supervisor Name * Supervisor Email *

Bell, Brian Brian.Bell@alleghenycounty.us

Preferred Contact Method Email Phone Password Self-Service

Update Account Details

ADMIN CAPABILITIES:

- If you are logged in as a Provider Admin, you have more options under the Navigation Menu.
- You can view your individual account information or the information pertaining to your organization's account under the "Maintenance" tabs.

Allegheny County
ClientView

Add Clients ▾ My Clients Contact Us Samantha Looney @

Client Search

Last Name OR Social Security Number is required to search.

Last Name First Name

OR

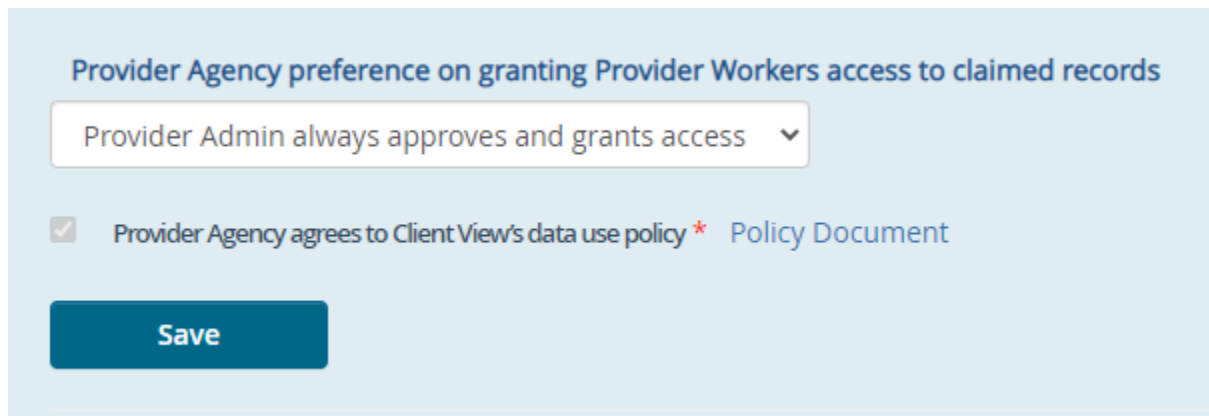
Advanced Search

Search

- My Account Maintenance
- My Provider Maintenance
- Provider's Accounts
- Pending Client Record Access Requests
- Existing Client Record Access
- Provider Admin Reports
- Log Out

TO CHANGE APPROVAL PREFERENCES..

- The “My Provider Maintenance” tab is where the Admin is able to view and change the preferences pertaining to whether they will require Administrator approval for access requests or choose to let the system auto-approve all requests for their Workers.



Provider Agency preference on granting Provider Workers access to claimed records

Provider Admin always approves and grants access ▼

Provider Agency agrees to Client View's data use policy * [Policy Document](#)

Save

TO VIEW A LIST OF ACTIVE WORKERS..

- The “Provider’s Accounts” tab shows all of the Worker accounts associated with the organization.
- If a Worker were to leave the organization, this is where the Admin would go to deactivate their account.

The screenshot displays the 'Client View Overview' interface for Allegheny County ClientView. At the top, there are navigation links: 'Add Clients -', 'My Clients', and 'Contact Us'. The user is identified as 'Samantha Looney'. A dropdown menu is open, showing options: 'My Account Maintenance', 'My Provider Maintenance', 'Provider's Accounts' (highlighted), 'Pending Client Record Access Requests', 'Existing Client Record Access', 'Provider Admin Reports', and 'Log Out'.

The main section is titled 'DIVERSIFIED CARE MANAGEMENT Accounts'. It contains search filters for 'Last Name', 'First Name', and 'Creation Date Range' (with 'to' between two date input fields). A 'Search' button is located below these filters.

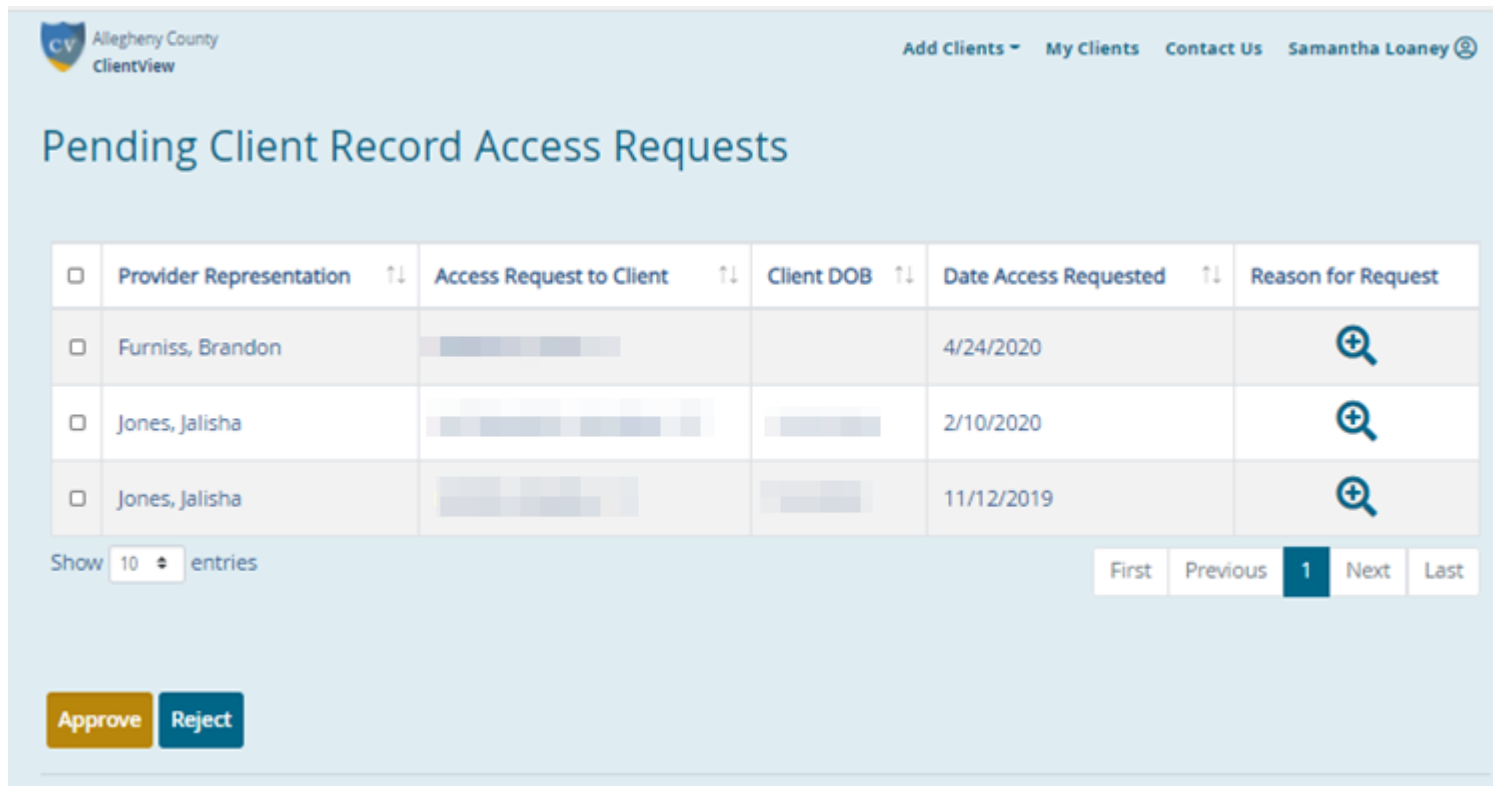
Below the search filters is a section titled 'Provider Workers'. It shows 'Showing 21 to 28 of 28 entries' and a search input field. A table lists the workers with columns for 'Last Name', 'First Name', and 'Created Date'. Each row has a checkbox in the first column.

	Last Name	First Name	Created Date
<input type="checkbox"/>	Johnson	Leonardo	7/14/2017
<input type="checkbox"/>	Comans	Melanie	1/17/2017
<input type="checkbox"/>	Muehlbauer	David	1/17/2017
<input type="checkbox"/>	Black	Donni	1/17/2017
<input type="checkbox"/>	Boyd-Davis	Asia	1/17/2017
<input type="checkbox"/>	Jones	Jalisha	1/17/2017
<input type="checkbox"/>	Dorsey	Lanika	1/17/2017
<input type="checkbox"/>	Hall	Towan	1/17/2017

At the bottom of the table, there is a 'Show 10 entries' dropdown and a pagination control showing 'First', 'Previous', '1', '2', '3' (highlighted), 'Next', and 'Last'. A 'Deactivate Account' button is located below the table.

TO REVIEW ACCESS REQUESTS..

- The “Pending Client Record Access Requests” tab is where the Admin would go to either approve or reject access requests submitted by their Workers.



The screenshot displays the 'Pending Client Record Access Requests' page in the Allegheny County ClientView system. The page header includes the Allegheny County logo, the text 'Allegheny County ClientView', and navigation links for 'Add Clients', 'My Clients', 'Contact Us', and the user profile 'Samantha Loaney'. The main heading is 'Pending Client Record Access Requests'. Below this is a table with the following columns: 'Provider Representation', 'Access Request to Client', 'Client DOB', 'Date Access Requested', and 'Reason for Request'. Each row in the table has a checkbox on the left and a magnifying glass icon on the right. The table contains three entries: 'Furniss, Brandon' with a date of 4/24/2020, 'Jones, Jalisha' with a date of 2/10/2020, and 'Jones, Jalisha' with a date of 11/12/2019. Below the table, there is a 'Show 10 entries' dropdown and a pagination control with buttons for 'First', 'Previous', '1', 'Next', and 'Last'. At the bottom left, there are two buttons: 'Approve' (orange) and 'Reject' (blue).

<input type="checkbox"/>	Provider Representation	Access Request to Client	Client DOB	Date Access Requested	Reason for Request
<input type="checkbox"/>	Furniss, Brandon	[REDACTED]	[REDACTED]	4/24/2020	
<input type="checkbox"/>	Jones, Jalisha	[REDACTED]	[REDACTED]	2/10/2020	
<input type="checkbox"/>	Jones, Jalisha	[REDACTED]	[REDACTED]	11/12/2019	

Show 10 entries

First Previous 1 Next Last

Approve Reject

TO VIEW ALL (ACTIVE) CLAIMED CLIENTS..

- The “Existing Client Record Access” tab shows all of the clients that have been claimed by this Provider and the Workers associated with each.
- The Admin also has the ability to search by employee or client name to narrow the results.

The screenshot displays the 'Existing Client Record Access' section of the ClientView application. It includes a search form with the following fields:

- Provider Last Name
- Provider First Name
- Client Last Name
- Client First Name
- Approval Date Range (with 'to' separator)

A 'Search' button is located below the form. Below the search form is the 'Client Record Access' section, which shows 'Recently Approved Client Access' with a table of results. The table has the following columns: Representative Last Name, Representative First Name, Access Request to Client, Date Access Approved, and Approver. The table shows 4 entries, with the first three being visible in the screenshot.

	Representative Last Name	Representative First Name	Access Request to Client	Date Access Approved	Approver
<input type="checkbox"/>	Moffe	Angela	[Redacted]	2/1/2021	Moffe, Angela
<input type="checkbox"/>	Ertzman	Nicole	[Redacted]	1/14/2021	Ertzman, Nicole
<input type="checkbox"/>	Loaney	Samantha	[Redacted]	3/10/2021	Loaney, Samantha
<input type="checkbox"/>	Moffe	Angela	[Redacted]	2/1/2021	Moffe, Angela

TO AUDIT WORKER ACCESS..

- The “Provider Admin Reports” tab allows the user to run reports depicting a list of the clients being viewed as well as the Workers who are viewing them.
- This is especially helpful for internal audits to ensure the appropriate use of the system and that users are only accessing records for clients they are working with.

The screenshot displays the 'Provider Admin Reports' interface in the Allegheny County ClientView system. The user is logged in as Samantha Loaney. The interface includes a navigation bar with 'Add Clients', 'My Clients', and 'Contact Us' options. The main heading is 'Provider Admin Reports'. Below this, there are two dropdown menus: 'Reports' and 'Provider Agency *'. The 'Reports' dropdown is open, showing three options: '-Select-', 'Provider Accounts Access to DHS Clients' (which is highlighted in blue), and 'Clients Viewed by Provider Agency'. The 'Provider Agency' dropdown is currently set to 'DIVERSIFIED CARE MANAGEMENT'. At the bottom of the form, there are two buttons: 'OK' and 'Cancel'.

GRANTING ACCESS TO CLIENTS:

- When a client wishes to request access to their records, they must obtain an access code either from a caseworker/care coordinator at DHS or their contracted service provider.
- On the top of the main page, there is a link to “My Clients.” This will take you to the list of active claimed clients assigned to you.

The screenshot displays the Allegheny County ClientView interface. At the top left is the logo for Allegheny County ClientView. On the top right, there are navigation links: "Add Clients", "My Clients" (highlighted with a red box), "Contact Us", and the user name "Samantha Looney" with a profile icon.

Client Search

Last Name OR Social Security Number is required to search.

Search fields include:

- Last Name
- First Name
- Social Security Number

Below these is an "Advanced Search" section with a dropdown arrow. A note states: "If Last Name, SSN or Phone Number are unavailable, a Street Address or County MCI ID is required to search."

Advanced search fields include:

- Street Address
- City
- Zip
- State (dropdown menu)
- Last 4 Digits of SSN
- Date of Birth
- Approximate Age (dropdown menu)
- Phone Number
- County MCI ID (with an information icon)

A "Search" button is located at the bottom right of the form area.

- Here you see the list of active clients you have claimed.
- Click to 'View Details' for the individual who is requesting access.
- This will take you to their record.

Allegheny County ClientView

Add Clients ▾ My Clients Contact Us Samantha Loaney @

My Clients

Search within results:

Showing 1 to 5 of 5 entries

Client Name ↑↓	County MCI ID ↑↓	DOB ↑↓	Gender ↑↓	Access Expires in ↑↓	Extend Access?	Details	Remove Access
[REDACTED]	[REDACTED]	[REDACTED]	Male	6 Day(s) !	Extend	View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Female	55 Day(s)		View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Male	55 Day(s)		View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Male	77 Day(s)		View Details	✕
[REDACTED]	[REDACTED]	[REDACTED]	Female	90 Day(s)		View Details	✕

Show entries

First Previous **1** Next Last

- You will see there are buttons on the demographics card.
- On the right-hand side below the MA Recipient # and client's age, you will see a blue button labeled "Generate Access Code."
- Click on this button, and a new window will open.

The screenshot displays the 'Client View Overview' interface. At the top right, there are two buttons: 'View Client Workers' with a '20' notification badge and 'View Addresses/911' with a '14' notification badge. Below these is a 'Basic Info' section with the following fields:

SOCIAL SECURITY # xxx-xx-5969 Show Full SSN	DATE OF BIRTH [REDACTED]	COUNTY MCI # 1 [REDACTED]	STATE MCI # 1 [REDACTED]	MA RECIPIENT # 1 [REDACTED]	AGE / GENDER 48 / Female
RACE White	ETHNICITY Not Hispanic/Latinx	MARITAL STATUS Married			

Below the 'Basic Info' section, there are three buttons: 'Source Client Records', 'Generate Access Code' (highlighted with a red box), and 'Other Info' with a '13' notification badge. Below these buttons is a 'Contact' section with the following fields:

HOME ADDRESS [REDACTED]	CELL [REDACTED]	HOME [REDACTED]
----------------------------	--------------------	--------------------

At the bottom right of the 'Contact' section, there is a 'Search Address' button. Below the 'Contact' section is a 'Services & Documents' section with the text: 'Select a category to view the documents, client workers and services received associated with that specific area. You can view all of these service categories combined by clicking the 'All Service' tile at the top.' At the bottom right of this section, there is a 'Timeline View' button.

- As a secondary check that this is the correct client record, please ask the client to name an address that they currently or have previously lived at.
- Click on the address that the resident named (it will highlight in yellow) and hit submit.

Please ask the resident to name an address they currently or previously have lived at.

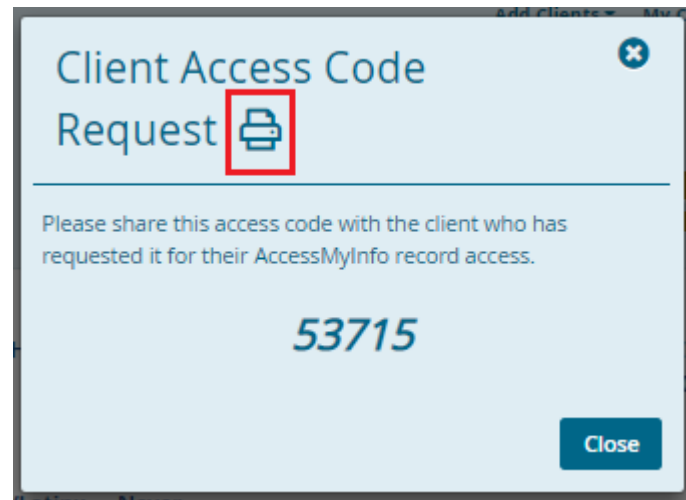
Matching Record Selected:
Name: [REDACTED]
County MCI: [REDACTED]

Address

- [REDACTED] PITTSBURGH PA 15233
- [REDACTED] MCKEES ROCKS PA 15136 Allegheny
- [REDACTED] MCKEES ROCKS PA 15136 Allegheny
- [REDACTED] PA 15233
- [REDACTED] MCKEES ROCKS PA 15136
- [REDACTED] MCKEES ROCKS PA 15136
- 903 WATSON ST PITTSBURGH PA 15219 Allegheny**
- [REDACTED] MC KEES ROCKS PA 15136

Submit **Close**

- Here you see the unique access code you have just generated for this client.
- You will also see a printer icon (highlighted in red here).





Allegheny County Department of Human Services

Your information. All in one place.

Name: Example Name

You can already access your medical records from your doctor or hospital. At AccessMyInfo, you can get information about other services you've received like:



Get access to the information you need to participate in your own care!

How to Set Up Your Account

1. Go to: <https://accessmyinfo.alleghenycounty.us>
2. Use access code: 49851
3. Your access code will expire on : 9/20/2020

You may not have enough information to set up the account on your own. That's ok!
Call 1-800-862-6783 and someone will help.

A screenshot of a web form titled "Access Code". It asks "Do you have an Access Code?" with radio buttons for "Yes" and "No". Below that is a field for "Access Code Number" with a red asterisk indicating a required field. The "No" radio button is selected.

The Allegheny County Department of Human Services (sometimes called DHS) is not a direct care provider. It supports and coordinates human services care in Allegheny County.

- When you click on the printer icon, a window will open with a flyer.
- This flyer can be printed and given to the client as it contains their unique access code as well as complete instructions on how to request access to their records.

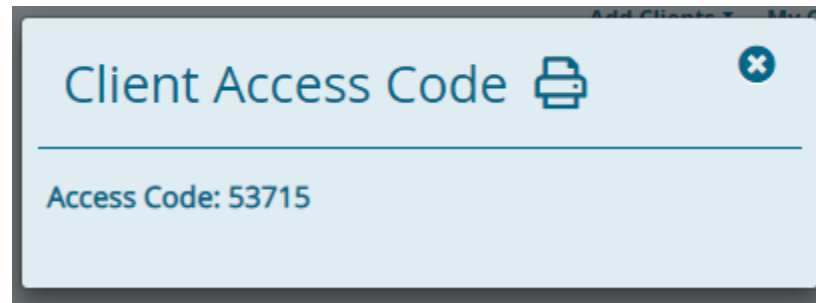
TO VIEW AN ACCESS CODE THAT WAS PREVIOUSLY GENERATED..

- If an access code has already been generated for a client and they request it again (perhaps they misplaced the letter), you are still able to view this in their record.
- When you go into their record now, the “Generate Access Code” button is gone, and you will now see a link to “Click here to view client Access Code.”

The screenshot displays a client record page with the following elements:

- Top Navigation:** Two buttons: "View Client Workers" and "View Addresses/911".
- Basic Info Section:**
 - SOCIAL SECURITY #: xxx-xx-3105 (with a "Show Full SSN" link)
 - DATE OF BIRTH: [Redacted]
 - COUNTY MCI #: [Redacted]
 - STATE MCI #: [Redacted]
 - MA RECIPIENT #: [Redacted]
 - AGE / GENDER: 51 / Female
 - RACE: Black/African American
 - ETHNICITY: Not Hispanic/Latinx
 - MARITAL STATUS: Never Married/Single
- Action Buttons:** "Source Client Records", "View Access Code" (highlighted with a red box), and "Other Info".
- Contact Section:**
 - HOME ADDRESS: [Redacted]
 - CELL: [Redacted]
 - HOME: [Redacted]
- Search:** "Search Address" button.
- Services & Documents Section:**
 - Text: "Select a category to view the documents, client workers and services received associated with that specific area. You can view all of these service categories combined by clicking the 'All Service' tile at the top."
 - "Timeline View" button.

- When you click this link, a new window will open. The same Access Code will appear, and you see the printer icon in case you need to provide the flyer again as well.



REQUESTING ASSISTANCE:

- Users can contact the Client View Administrator by filling out an information request form.
- This is located on the top of every page in Client View as shown here.

The screenshot displays the 'Client Search' page in the Allegheny County ClientView system. The page header includes the Allegheny County ClientView logo, navigation links for 'Add Clients', 'My Clients', and 'Contact Us' (highlighted with a red box), and the user name 'Samantha Loaney'. The main heading is 'Client Search', followed by the instruction: 'Last Name OR Social Security Number is required to search.' The search form consists of several input fields: 'Last Name', 'First Name', and 'Social Security Number' (with an 'OR' separator between the first two); an 'Advanced Search' section with a dropdown arrow; and a row of fields for 'Street Address', 'City', 'Zip', and 'State' (a dropdown menu). Below this is another row with 'Last 4 Digits of SSN', 'Date of Birth', 'Approximate Age' (with a '-Select-' dropdown), and 'Phone Number'. At the bottom left is a 'County MCI ID' field with an information icon. A yellow 'Search' button is located at the bottom right of the form area.

Contact Us

Use the form below to contact the Client View system administrator. Please tell us if you are experiencing any account issues, have questions, have a request for additional information, or have general feedback.

- A new window will appear.
- Please be as detailed as possible when describing the issue in order for the administrator to assist you as quickly and comprehensively as possible.

First Name *

Last Name *

Email *

Phone Number *

Reason for Contact *

Details *

B *I* U 16 ⚠ open_sansregular

QUESTIONS?

- You can send an email to CVAdmin@alleghenycounty.us OR Samantha.Loaney@alleghenycounty.us

