ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES

# CLIENT VIEW TRAINING

Allegheny County
**ClientView**

*Winter/Spring 2022*

*Presented by*

# BRIAN BELL AND SAMANTHA LOANEY

**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, Wilkinsburg, 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.
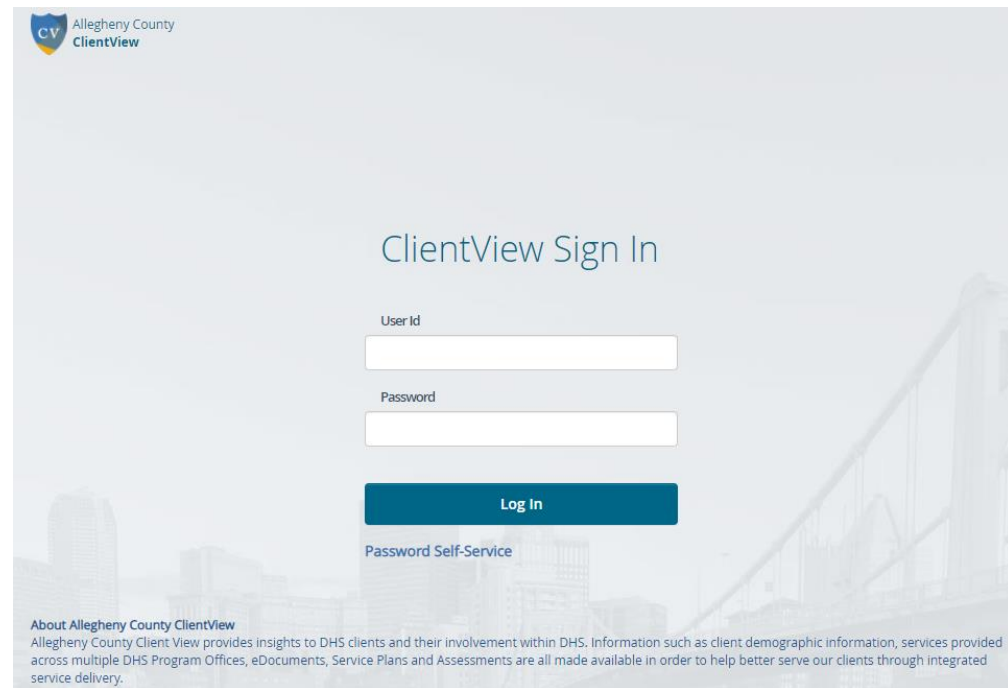
# AGENDA

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)



ClientView Sign In

User Id

Password

Log In

Password Self-Service

About Allegheny County ClientView
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.

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

# PERFORMING A CLIENT SEARCH:

- Enter your search criteria.

# 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 |
|---|---|---|---|
| doe | jane | OR | |
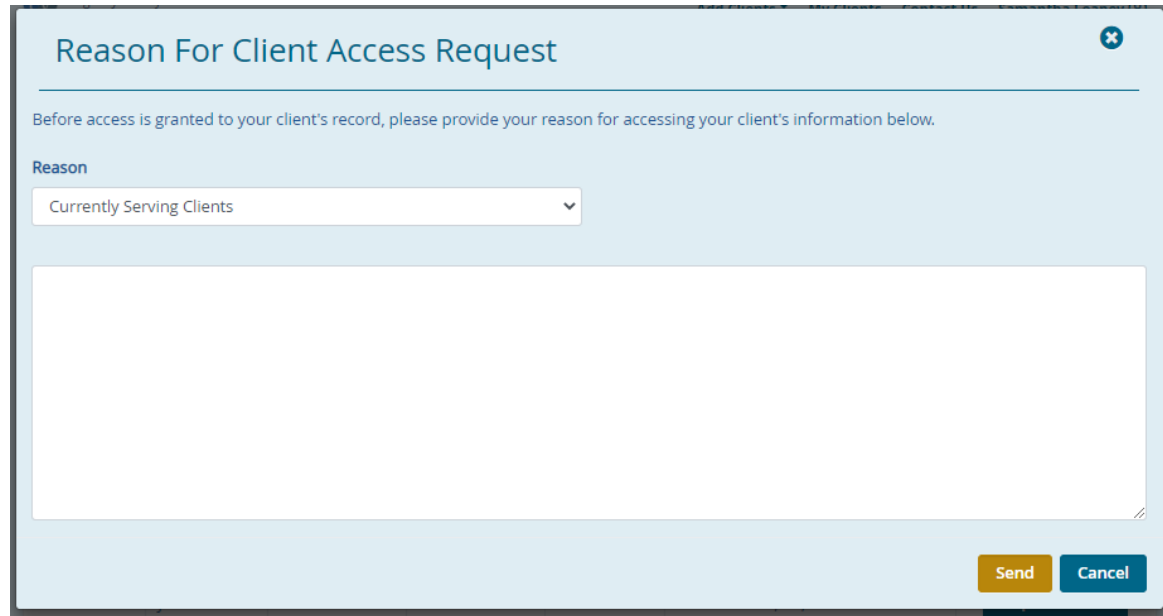
▲ Advanced Search

Search
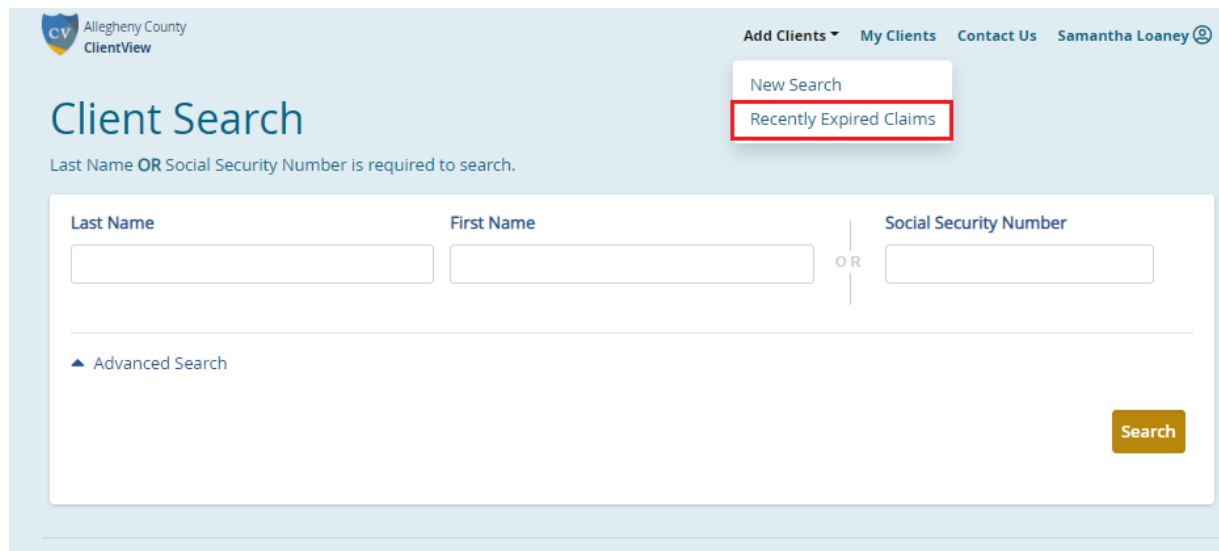
Search within results: [          ]                                    Showing 1 to 10 of 100 entries

| Last Name ↑↓ | First Name ↑↓ | County MCI ID ↑↓ | DOB ↑↓ | Gender ↑↓ | Address ↑↓ | Action ↑↓ |
|---|---|---|---|---|---|---|
| Doe | Jane | | | Female | | Request Access |
| Doe | Jane | | | Female | | Request Access |
| Doe | Jane | | | Female | | Request Access |

# CLAIMING A CLIENT:

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

# 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'.

# 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 |
|---|---|---|---|
| doe | jane | 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 |
|---|---|---|---|
| | | | -Select- |

| Last 4 Digits of SSN | Date of Birth | Approximate Age | Phone Number |
|---|---|---|---|
| | | -Select- | |

County MCI ID ⓘ

Search

Search within results: 

Showing 1 to 10 of 100 entries

| Last Name ↑↓ | First Name ↑↓ | County MCI ID ↑↓ | DOB ↑↓ | Gender ↑↓ | Address ↑↓ | Action ↑↓ |
|---|---|---|---|---|---|---|
| Doe | Jane | | | Female | | Request Access |
| Doe | Jane | | | Female | | 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.

# RECENTLY EXPIRED CLAIMS



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

# RECENTLY EXPIRED CLAIMS



- 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.

# VIEWING A CLIENT:

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

# 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.

# 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:

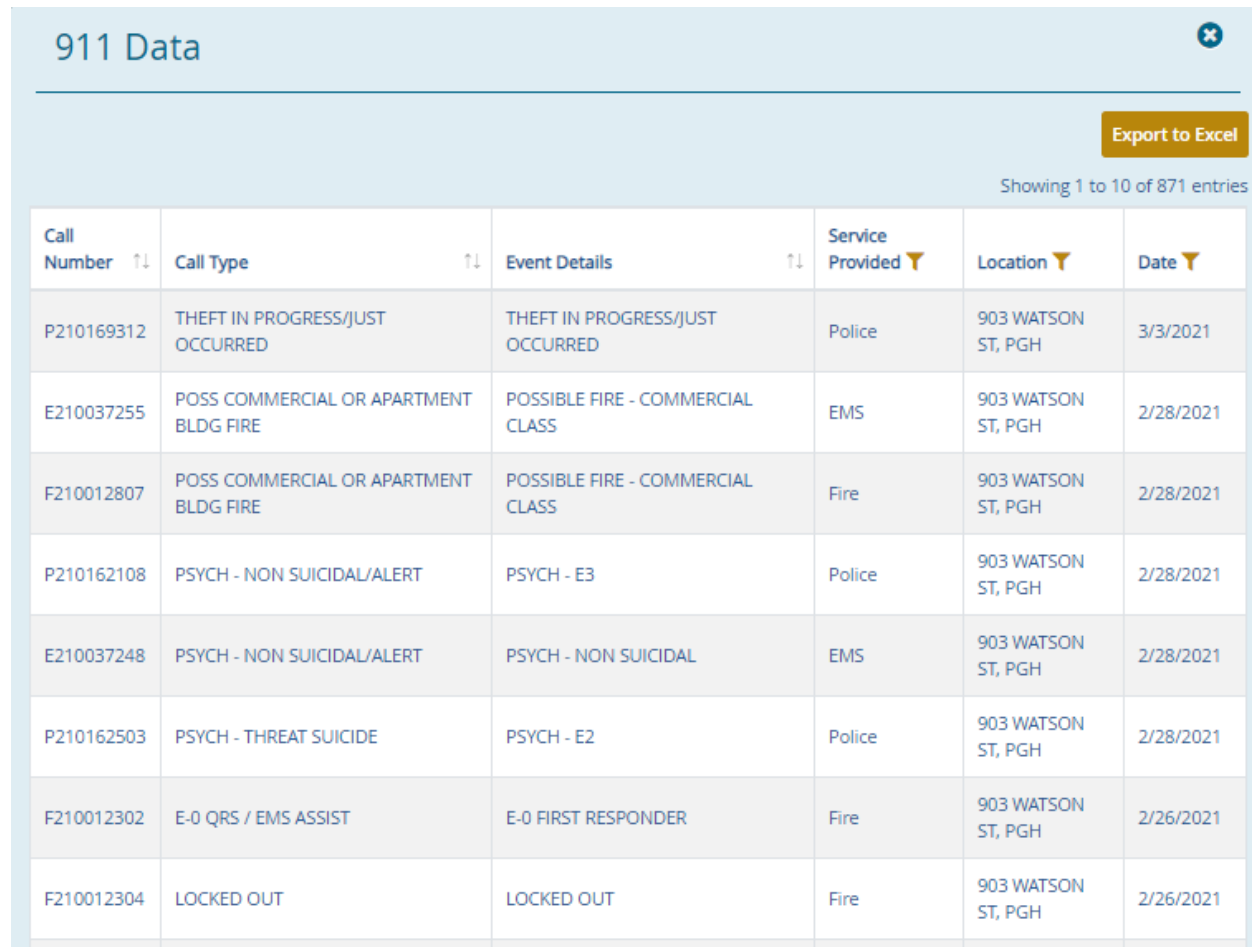## Addresses / 911 Information

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 | | | 12/30/2020 | Search Address | 911 Data |
| PA Department of Human Services | | | 7/27/2020 | Search Address | 911 Data |
| CCBHO | | | 7/10/2020 | Search Address | 911 Data |
| Synergy Youth Support Partners (YSP) | | | 2/27/2020 | Search Address | 911 Data |
| HealthChoices - CCBH Eligibility | | | 11/22/2019 | Search Address | 911 Data |
| HealthChoices - CCBH Physical Health | | | 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.

# 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 (Monthly View)

- The program labels are hyperlinks.

- Clicking on a label will direct the user to the corresponding program tile.
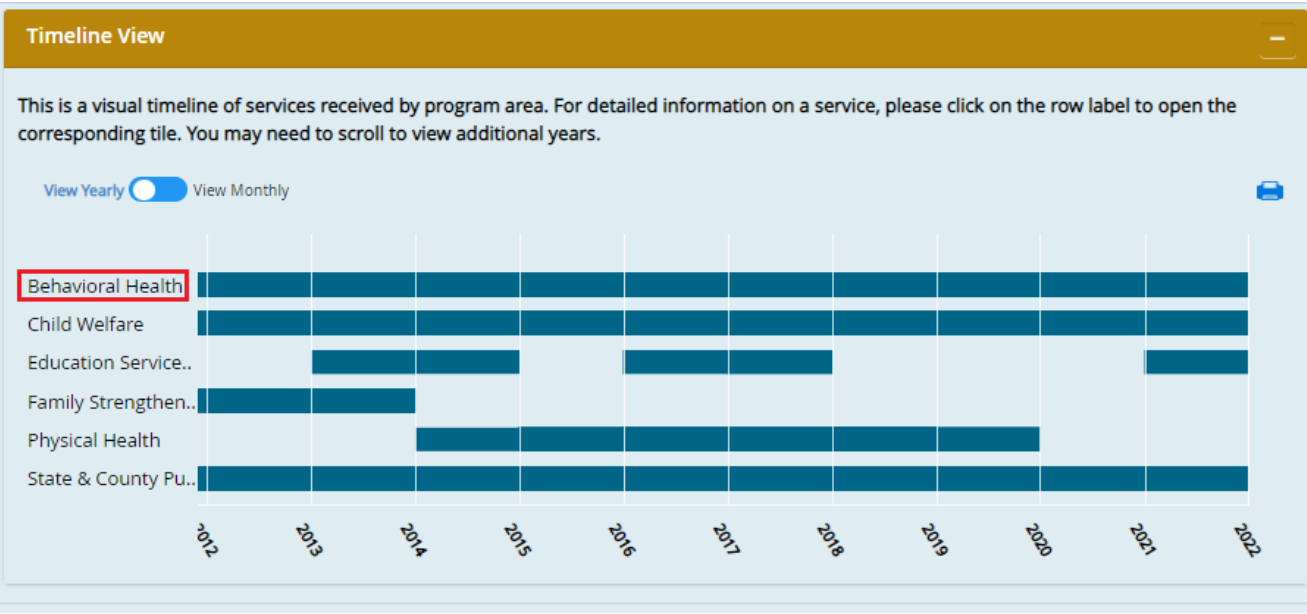
- The timeline opens below the list of services.

- 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.

# 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.

# 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.)



ALLEGHENY

# 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

# EDUCATION RECORDS TILE

- 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.



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

# 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 SERVICES TILE

- 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.

## 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 (OMPH) | 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 [10 ⇕] entries

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

# 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 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.

**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.
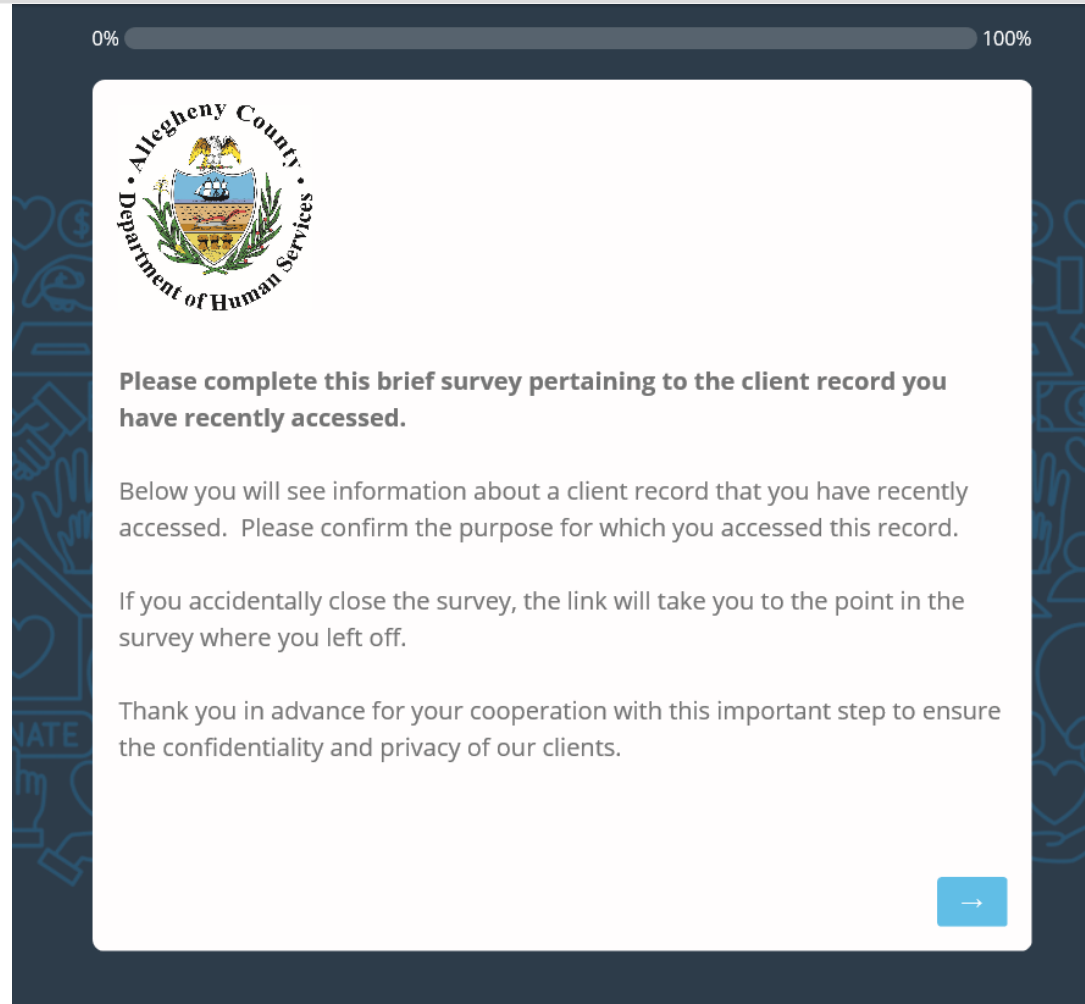
# EMAIL EXAMPLE:

- The email looks like this and because it is sent from Qualtrics could end up in your junk or spam folder.

- Samantha Loaney 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 Loaney.

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Thu 10/11/2018 3:24 PM

**PO**

Privacy Officer - Allegheny County <noreply@qemailserver.com>

*RESPONSE REQUIRED* // Client View Appropriate Use Review

To    Reabe, Samantha

ⓘ Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

October 11, 2018

Dear Supervisor, Manager, or Administrator,

This survey is part of an initiative to ensure Client View and other systems here at DHS are being used appropriately by staff.  As you all know we have a responsibility to ensure the confidentiality of our clients' information and also are required by the privacy rule of the Health Insurance Portability and Accountability Act (HIPAA) to monitor and enforce the policies and practices that we establish for compliance.

**Receipt of a survey about an employee's record access does not indicate that a record has been accessed improperly or that there is a suspicion that a record was accessed improperly.  It is simply a way for DHS to monitor and document the appropriate use of our system**.

After clicking the link below, you will be provided with information about a client record that one of your staff recently accessed and will be asked to confirm whether the access was appropriate and what business purpose the employee would have to view that specific record.

Should it be determined that access to a record was inappropriate, the Privacy Officer in partnership with management from each of the program offices will follow up on the issue.  We ask that you do not follow up independently on this issue yourselves; however, you are welcome to contact the Privacy Officer to discuss any concern.

Thank you in advance for your cooperation with this important step to ensure the confidentiality and privacy of our clients.

Allegheny County Privacy Officer
Brian Bell

**Follow this link to the Survey:**
Take the Survey

Or copy and paste the URL below into your internet browser:
https://alleghenycounty.az1.qualtrics.com/jfe/form/SV_1NTqPU9orM70F7L?
Q_DL=4T7gRNnuCWG2JKd_1NTqPU9orM70F7L_MLRP_bJE8OW4k2vGnbBb&Q_CHL=email

**Please note that it is the expectation of leadership (excluding extraordinary circumstances) that these audits be completed and submitted within three days of receipt.  Incomplete surveys will be forwarded to the Executive Director's office for follow-up.**

# 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.



Please complete this brief survey pertaining to the client record recently accessed by one of your staff members.

Below you will see information about a client record that one of your staff recently accessed.
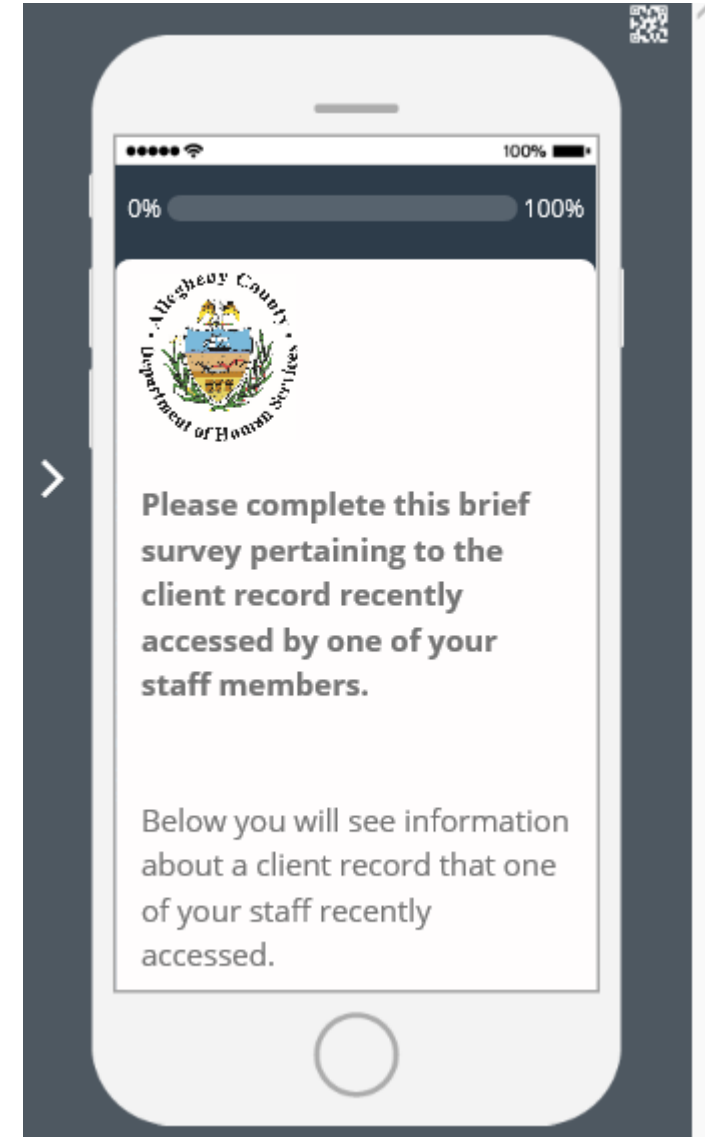
# MY ACCOUNT MAINTENANCE PAGE

- 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.

# 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.
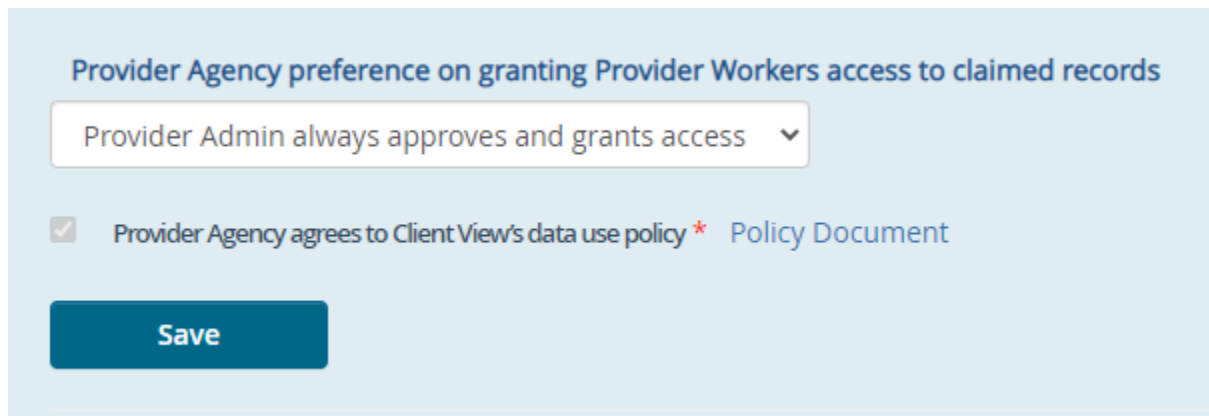
# TO CHANGE APPROVAL PREFERENCES..

- 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.

# 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.

# 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.

# 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.



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# 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.

# 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.

- 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.

- 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.

- 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.

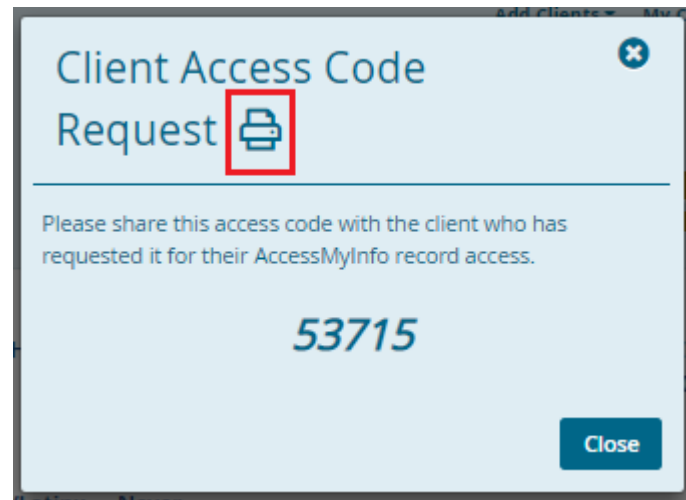Please ask the resident to name an address they currently or previously have lived at.

**Matching Record Selected:**

Name:

County MCI:

**Address**

PITTSBURGH PA 15233

MCKEES ROCKS PA 15136 Allegheny

MCKEES ROCKS PA 15136 Allegheny

PA 15233

MCKEES ROCKS PA 15136

MCKEES ROCKS PA 15136

903 WATSON ST PITTSBURGH PA 15219 Allegheny

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).

- 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."

- 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.
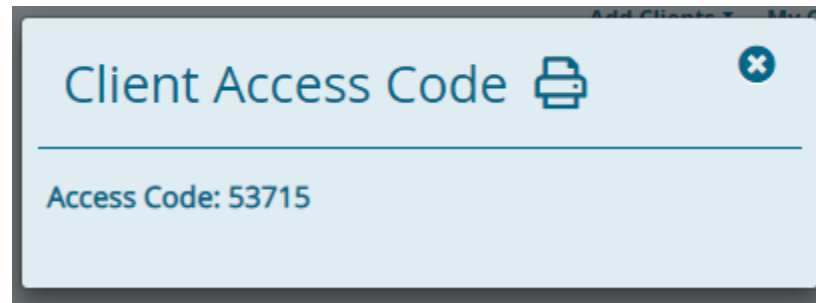
# REQUESTING ASSISTANCE:

- 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.



ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES

## 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.

First Name *

Last Name *

Email *

Phone Number *

Reason for Contact *

-Select-

Details *

| B | I | U | | 16 ▾ | A ▾ | open_sansregular ▾ |

Submit

- 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.

ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES

# QUESTIONS?

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