DHS Client Registration – Job Aid

A client must be registered prior to a CANS or ANSA assessment being documented by a participating provider. The process of registering a new client involves multiple steps which are completed on several screens. Prior to completing the Client Registration process, a client search must be completed to determine if the client is a known entity of the Allegheny County Department of Human Services (DHS). This Job Aid describes the steps to register a new client.

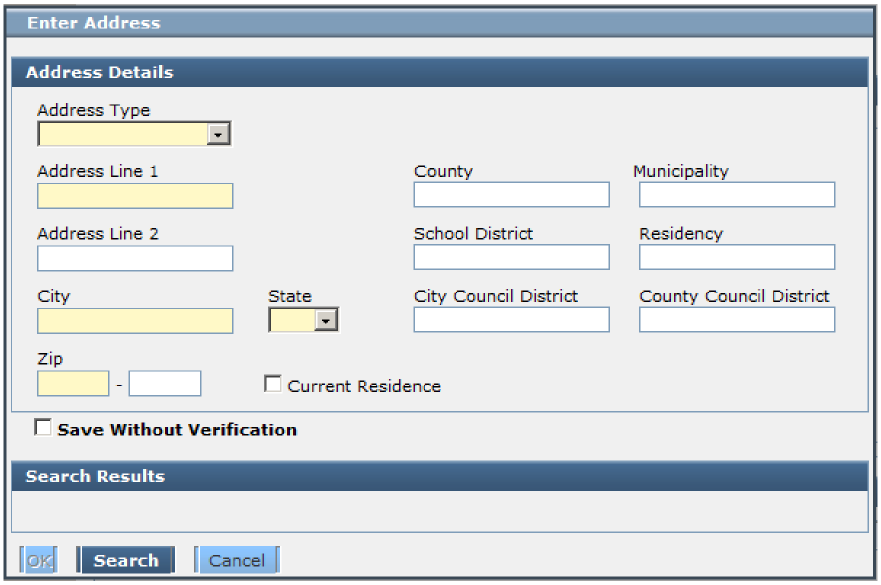
Client Search screen

1. Log in to the KIDS application using the user credentials supplied by DHS.
    a. https://kids.county.allegheny.pa.us/kids
2. Click on the *CANS/ANSA* menu button.
3. The splash screen of the DHS Assessment Tool application is displayed in a new window.
4. Navigate to the *Client Search* screen.
    a. **Client > Search**
5. Complete a *Client Search* to determine if the client is a known entity to DHS.
    i. *TIP: Please refer to the CANS/ANSA DHS Client Search Job Aid for the detailed steps on how to search for a client*.
    a. Potential matches are displayed in the *Search Results* grid. When a Client Match is found, select the person in the *Search Results* grid and click the **[Show]** button to bring that client into focus.
        i. *TIP: If a Client Match is found, once the Client is in focus, proceed with entering the assessment.*
    b. A 'No Match Found' message is displayed when there is no potential matching client. Click the **[OK]** button to remove the pop-up message.
6. Click the **[New]** button to display the *Client Registration* screen to complete the Client Registration activities.
    i. *TIP: The* ***[New]*** *button is not enabled until a Client Search is conducted.*

Completing Client Registration

1. Complete the *Client Registration* screen**.**
    - i. *TIP*: *A potential client must be searched prior to completing the registration process.*
    - a. Enter the *First Name,* if not populated with the entry from the *Client Search*.
    - b. Enter the *Last Name,* if not populated with the entry from the *Client Search*.
    - c. Enter the *SSN* (Social Security Number), if known.
    - d. Enter the *Date of Birth.*
    - e. Select the *Gender.*
2. Click the **[Verify Individual]** button to determine if the client has been previously registered in Master Client Index (MCI).
3. If potential matches <u>are</u> found, they are displayed in the *Verify Search Results* grid.
    - a. Highlight a potential match. Use the information displayed on the *Info*, *Address* and *Assessment History* tab to determine if the person is the same as your client.
        1. The *Info* tab displays the demographic details of the selected potential match.
        2. The *Address* tab displays the address history of the selected potential match.
        3. The *Assessment History* tab displays any CANS and ANSA Assessment history for the selected potential match.
    - b. Click the **[Show]** button to bring the selected matching client into focus.
    - c. When the displayed potential matches are not the same person as your client, click the **[New]** button to proceed with the Client Registration process.
        - *i. TIP**:** If a potential match has a score of 95% or greater, an existing client must be selected. If the 95% threshold must be overridden, please contact the Service Desk at* servicedesk@alleghenycounty.us*.*
4. When there <u>are no</u> potential matches, additional fields of the *Client Registration* screen are displayed.
    - a. Complete the additional fields in the *Individual Registration* section.
        - i. Click the **[Select]** button to select the *Race(s)* of the client.
            - *i. TIP: Selecting American Indian or Alaska Native, Other Asian, Other Pacific Islander or Other Race will open additional fields that must be completed. Select the Tribe or enter the Other Asian, Pacific Islander or Race.*
        - ii. Select the *Ethnicity* of the client.
    - b. Click the **[New**] button to create a new *Address* in the *Common Demographics* section. **Note:** *Please see below section for steps to enter an Address.*
    - c. Click the **[Edit]** button to edit an existing *Address*.
5. Click the **[Save]** button to save the *Client Registration* entries.
6. The client will be in focus. An *Assessment Provider Involvement* can be created and an assessment documented.

Enter Address window



1. Upon clicking the **[New]** or **[Edit]** button the *Enter Address* window is displayed.
2. On the *Enter Address* pop-up, select the type of address; *Home, Mailing or Other*.
3. Enter or edit the street address in *Address Line 1* and *Address Line 2*, if applicable.
4. Enter or edit the *City*.
5. Select the *State*.
6. Enter the *Zip Code*.
7. Click the **[Search]** button to validate the address. The application will validate the address against Postal records.
    a. If the address is validated, a message indicating such will be displayed. Click the **[OK]** button to close the window.
    b. If an alternate address is found, select the address in the *Search Results* grid and click the **[OK]** button to close the window.
    c. If the address is correct but does not validate, click the *Save Without Verification* check box and click the **[OK]** button to close the window.
8. Click the **[Save]** button to update Address entry or edits.

For more information…

For assistance, please contact the Allegheny County Service Desk at servicedesk@alleghenycounty.us or 412-350-4357 (Option 2 for DHS).
To access the Self Service Tool go to http://servicedesk.alleghenycounty.us.

This Job Aid and additional user materials are located on the DHS Amazon site at http://dhswbt.s3.amazonaws.com/KIDSJobAids/index.html.