

# USER GUIDE



clientpath

Allegheny County Department of Human Services

## Client Management

ACDHS Users · Provider Users

Version 1.0

Created January 24, 2022

Prepared By:

coresphere

# 1 Revision History

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Version	Prepared By	Date Created	Description
1.0	CoreSphere	January 24, 2022	Initial Version

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## 3 Create a New Client

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

Refer to the ClientPath Referral User Guide to see how to create a new Client through the Information Referral Tool (IRT). Clients can also be created through the Clients tab.

1. Click the **Clients tab** to view a list of all Clients in ClientPath.
2. Click the **New button** to open a pop-up to input Client details. The Client's screen is separated into 3 sections: Individual Info, Additional Demographic Information, and Contact Info.
3. Enter/select information for the new Client.
  - **Required Fields:** Only the fields marked with a red asterisk (\*) are required to Save the Client record.
  - **Duplicate Check:** If the First and Last Names are a fuzzy match to an existing Client record, a warning message will display with a list of possible duplicates where you can select an existing record or proceed with creating the new Client. If the SSN is an exact match to an existing Client record, a message will display with a link to the existing record, and you will not be able to proceed with creating the new Client with the same SSN.
4. Click the **Save button** to create the new Client record. If the mandatory information to MCI-clear [First Name, Last Name, DOB, Legal Sex and SSN (optional)] has been entered in the Client record, an MCI Client Search pop-out will be displayed with a list of potential matches (with the highest percent match on top, if any). Refer to Section 5 below for more information on MCI Clearance.

## 4 View a Client

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	✓	✓	✓	✓	✓

All users can view all Client records within ClientPath.

1. Click the **Clients tab** to view a list of all Clients in ClientPath.
2. Click the **Client ID** of the Client record you wish to view. The Client record will open with the Details tab displayed. The Client's related Household(s) and Relationships are also displayed on the right side of the Client record.

Client ID ↑	Client Name	Date of Birth	Approximate Age	Legal Sex	MCI ID
1 C-0000001	Patrick Cummins	5/9/1984	37	Male	1001049136
2 C-0000002	Faizal Amir	6/1/1982	39	Male	1001049153
3 C-0000003	Staff Test				
4 C-0000005	Prateek Garg	8/25/1992	29	Male	1001049303
5 C-0000006	Kara Bgzvich	5/1/1980	41	Male	1001049252
6 C-0000007	Aanchal Bhatia				
7 C-0000008	Courtney Macurak	1/1/1972	50	Female	1001049255
8 C-0000009	Corrie Yanko	1/1/1972	50	Female	1001049599
9 C-0000012	Ankit Gupta				
10 C-0000013	Tim Burtak	5/1/2002	19	Male	1001049242
11 C-0000014	Jim Anderson	12/12/1970	51	Male	1001049251

## 4.1 Details Tab

Upon navigating to a Client record, the *Details tab* will be displayed. The Details tab consists of:

- The Client’s Individual Information such as their Name, Legal Sex, SSN, DOB, etc.
- The Client’s Additional Demographic Information such as Race, Ethnicity, etc.
- The Client’s Contact Information.

Client

**Patrick Cummins**

Date of Birth	Approximate Age	Legal Sex	Client ID
5/9/1984	37	Male	C-0000001

**DETAILS**   REFERRALS   SERVICES   CLIENT HISTORY

✓ Individual Info

First Name	MCI ID
Patrick	1001049136
Chosen Name	SSN
Pat	879987988
Last Name	Date of Birth
Cummins	5/9/1984
Legal Sex	Approximate Age
Male	37
Pronouns	
He, Him, His	

Additional Demographic Information

Race	American Indian or Alaska Native;Asian;Asian (Not Specified);Asian Indian	Marital Status	Separated
Ethnicity	Cuban	Veteran	Y
Primary Language	Bengali	Military Status	National Guard/Reserve
Sexual Orientation	Gay	Parent/Caregiver	Y
Gender Identity	Male		

Contact Info

Address Type	Home	Phone Type	Home
Street Address 1		Phone Number	(998) 899-8899
Street Address 2		Email	
City		County	Allegheny
State	Pennsylvania	Zip Code	11006

## 4.2 Referrals Tab

1. Click the **Referrals tab** within the Client record. A list of all Referrals associated to the Client (that you have access to) will be displayed.

Client: Patrick Cummins

Date of Birth: 5/9/1984 | Approximate Age: 37 | Legal Sex: Male | Client ID: C-0000001

DETAILS | **REFERRALS** | SERVICES | CLIENT HISTORY

Referrals (10+)

Referral	Referral Status	Primary Reason	Referral Date	Provider
<a href="#">R-00449</a>	Waitlist	Financial Assistance	12/21/2021	SOUTH HILLS INTERFAITH MINISTRI Waitlist
<a href="#">R-00431</a>	Discharged	Financial Assistance	12/20/2021	SOUTH HILLS INTERFAITH MINISTRIES
<a href="#">R-00413</a>	Services Assigned	Food for Thought Pantry	12/9/2021	NORTH HILLS COMMUNITY OUTREACH, INC.
<a href="#">R-00410</a>	Services Assigned	Back to School Store	12/9/2021	NATIONAL COUNCIL OF JEWISH WOMEN
<a href="#">R-00406</a>	Discharged	Senior Companion	12/9/2021	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES

Households (1)

Household	Client Name	Primary?
<a href="#">Cummins Househ...</a>	Patrick Cummins	<input checked="" type="checkbox"/>

Relationships (1)

Secondary C...	Category	Summary	Relationship ID
<a href="#">Gary Bear</a>	Family/Biologi...	Patrick Cummins is Father of Gary	<a href="#">R-000233</a>

2. Optionally, click **column headers** to sort data (ascending/descending).
3. Optionally, click **View All** under the respective related list to view all records.
4. Optionally, click the **Referral ID** (link) for the record you wish to open/view.

## 4.3 Services Tab

1. Click the **Services tab** within the Client record. A list of all Services assigned to the Client (that you have access to) will be displayed.

Client: Patrick Cummins

Date of Birth: 5/9/1984 | Approximate Age: 37 | Legal Sex: Male | Client ID: C-0000001

DETAILS | REFERRALS | **SERVICES** | CLIENT HISTORY

Client Services (10+)

Assigned S...	Service Sta...	SP Service Name	Provider	Start Date	End Date
1 AS-00228	Discharged	Financial Assistance	SOUTH HILLS INTERFAITH MINIS...	12/20/2021	12/20/2021
2 AS-00213	Active	Housing Navigator	ALLEGHENY COUNTY DEPARTME...	12/16/2021	
3 AS-00223	Active	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	12/16/2021	
4 AS-00224	Active	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	12/16/2021	
5 AS-00193	Active	Creative Expression Afterschool ...	SOUTH HILLS INTERFAITH MINIS...	12/13/2021	
6 AS-00166	Active	Housing Navigator	ALLEGHENY COUNTY DEPARTME...	12/9/2021	

Households (1)

Household	Client Name	Primary?
Cummins Househ...	Patrick Cummins	<input checked="" type="checkbox"/>

Relationships (1)

Secondary C...	Category	Summary	Relationship ID
Gary Bear	Family/Biologi...	Patrick Cummins is Father of Gary Bear	R-000233

2. Optionally, click [column headers](#) to sort data (ascending/dscending).
3. Optionally, click [View All](#) under the respective related list to view all records.
4. Optionally, click the [Assigned Service ID](#) (link) for the record you wish to open/view.

## 4.4 Client History Tab

1. Click the [Client History tab](#) within the Client record. The History tab of a Client record displays a related list of changes to data within the Client record. This includes the:
  - Date the change was made
  - Field that was changed
  - User who made the change
  - Original Value that previously existed
  - New Value that was entered
2. Optionally, click [View All](#) to view all records.

Client: Patrick Cummins

Date of Birth: 5/9/1984 | Approximate Age: 37 | Legal Sex: Male | Client ID: C-0000001

DETAILS | REFERRALS | SERVICES | **CLIENT HISTORY**

Client History (6+)

Date	Field	User	Original Value	New Value
12/16/2021, 8:23 AM	First Name	Corrie Yanko	Pat	Patrick
12/6/2021, 9:16 AM	Date of Birth	MPER Batch	1984-05-10	1984-05-09
12/3/2021, 2:04 PM	Chosen Name	Tara Matthews	Patty	Pat
12/3/2021, 1:57 PM	Chosen Name	Misi Bielich	Pat	Patty
12/3/2021, 1:53 PM	Chosen Name	Meredith Brown	Patty	Pat
12/3/2021, 1:52 PM	Chosen Name	Meredith Brown	Pat	Patty

[View All](#)

## 4.5 Relationships

Relationships (3)			
Secondary C...	Category	Summary	Relationship ID
<a href="#">Sullivan Edwards</a>	Extended Fa...	Cameron Edwards is Nephew of Sullivan Edwards	<a href="#">R-000236</a> ▼
<a href="#">Carol Brady</a>	Family/Biologi...	Cameron Edwards is Husband of Carol Brady	<a href="#">R-000293</a> ▼
<a href="#">Moir Rose</a>	Non-Family	Cameron Edwards is Roommate of Moira Rose	<a href="#">R-000294</a> ▼
<a href="#">View All</a>			

Within a given Client record, a list of all existing (whether current or ended) relationships are displayed. See example screenshot to the left.

The Name of the related Client, the Category, Summary, and Relationship ID are displayed for each related Client. The Summary describes the Client in focus and their relationship to the related Client.

1. Click the **Relationship ID**. The relationship record will be displayed.
2. Optionally, click the **Secondary Client's name** to view the related Client's record and see the reciprocal relationship.

For example, Cameron Edward's Client record includes a relationship where Sullivan Edwards is listed as his Nephew, and therefore Cameron is Sullivan's Uncle. Similarly, Sullivan Edward's Client record will list Cameron Edwards as his Uncle, and therefore Sullivan is Cameron's Nephew.

DETAILS	RELATED
<p>Information</p>	
Relationship ID	Category
R-000236	Extended Family
Primary Client Name	Relation
<a href="#">Cameron Edwards</a>	Nephew
Secondary Client Name	Summary
<a href="#">Sullivan Edwards</a>	Cameron Edwards is Nephew of Sullivan Edwards
End Date	Status
	Current
	Owner
	 <a href="#">Kelly Naylor</a>

DETAILS
RELATED

▼ Information

Relationship ID  
R-000237

---

Primary Client Name  
[Sullivan Edwards](#)

---

Secondary Client Name  
[Cameron Edwards](#)

---

End Date

---

Category  
Extended Family

---

Relation  
Uncle

---

Summary  
Sullivan Edwards is Uncle of Cameron Edwards

---

Status  
Current

---

Owner  
 [Kelly Naylor](#)

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## 5 MCI-Clear a Client

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

ClientPath is integrated with Allegheny County’s Master Client Index (MCI), which is system of citizens, each assigned a unique identifier – a MCI ID. MCI ID is Allegheny County’s version of a Social Security Number and helps ACDHS keep track of services and supports a individual receives over their lifetime.

The MCI Clearance process consists of either locating the existing Client within the MCI system, or creating a new one, and syncing that MCI ID into ClientPath. The MCI Clearance process is NOT required at the Referral stage but is required to assign Services.

If a Client does not have a MCI ID (displayed within their Client record), users (besides Read-Only users) can obtain the MCI ID from the Master Client Index system.

1. **Click the [Get MCI ID button](#).** If the mandatory information to MCI-clear [First Name, Last Name, DOB, Legal Sex and SSN (optional)] has been entered in the Client record, the MCI Client Search pop-up will be displayed.

Otherwise, if the mandatory information to MCI-clear is NOT entered, a message will appear stating that MCI clearance cannot be completed until [missing information] is entered.

2. **If the proper MCI match exists, click the [radio box](#) next to the appropriate Client, and click the [Update MCI ID button](#).** The newly created Client record in ClientPath will be updated with the selected MCI ID.

**Otherwise, if the proper match does NOT exist, click the [Create New MCI ID button](#).** The Client record in ClientPath will be updated with a newly created MCI ID.

MCI Client Search

MCI ID	First Name	Middle Na...	Last Name	Legal Sex	DOB	SSN	Score
<input type="radio"/> 1001067162	John		Smith	Male	Mar 25, 1974		91

Update MCI ID
Create New MCI ID
Cancel

## 6 Edit a Client

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

You can edit Clients that have an association to your provider through a Referral and/or Service. Edit access to a Client record can take a few minutes if the Client was just created and/or if the client was associated to a Referral or Assigned Service with your Provider for the first time.

### 6.1 Edit from Within Client Record

1. **From within a Client record, click the *Edit* button.** The Client record will open in a pop-up screen in editable mode.

Client  
Patrick Cummins

Get MCI ID
Select Service
Edit

Date of Birth 5/9/1984	Approximate Age 37	Legal Sex Male	Client ID C-0000001
---------------------------	-----------------------	-------------------	------------------------

DETAILS
REFERRALS
SERVICES
CLIENT HISTORY

Individual Info

First Name Patrick	MCI ID 1001049136
Chosen Name Pat	SSN 879987988
Last Name Cummins	Date of Birth 5/9/1984
Legal Sex Male	Approximate Age 37
Pronouns He, Him, His	

Additional Demographic Information

**Households (1)**

Household	Client Name	Primary?
Cummins Househ...	Patrick Cummins	✓

[View All](#)

**Relationships (1)**

Secondary C...	Category	Summary	Relationship ID
Gary Bear	Family/Biologi...	Patrick Cummins is Father of Gary Bear	R-000233

2. **Update data as required and click the *Save* button to save your changes.** Any changes are captured in the Client's Client History tab. Any changes to core elements (First Name, Last Name, Date of Birth, Legal Sex, SSN) will automatically update the respective Client record in the ACDHS Master Client Index (MCI) System. Refer to Section 5 above for more information on MCI.

### 6.2 Edit from List View

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1. From within the Clients tab list view, click the **drop-down arrow** at the end of the row for a given Client record and click **Edit**. The Client will open in a pop-up screen in editable mode.

Client ID ↑	Client Name	Date of Birth	Approximate Age	Legal Sex	MCI ID	
1 C-0000001	Patrick Cummins	5/9/1984	37	Male	1001049136	▼
2 C-0000002	Faizal Amir	6/1/1982	39	Male	1001049153	▼ Edit
3 C-0000003	Staff Test					▼
4 C-0000005	Prateek Garg	8/25/1992	29	Male	1001049303	▼
5 C-0000006	Kara Bgzvich	5/1/1980	41	Male	1001049252	▼

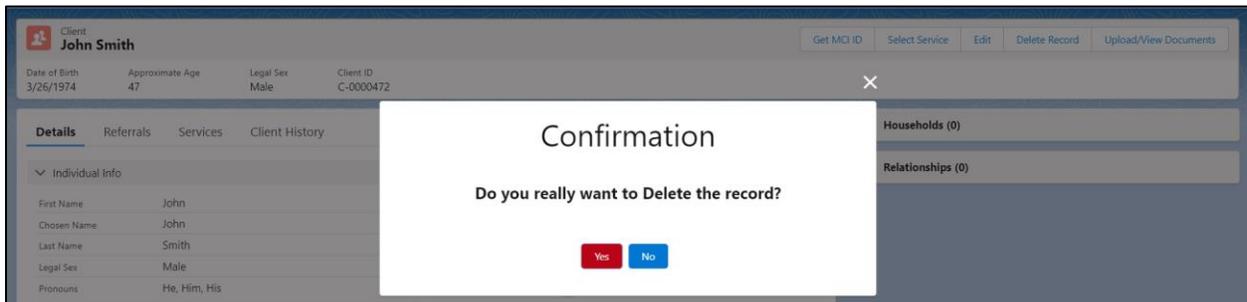
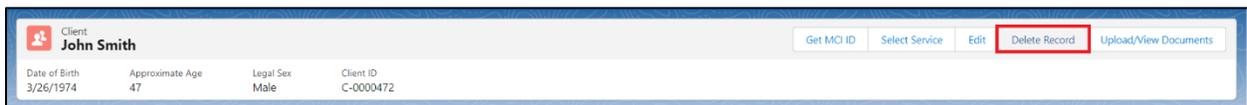
2. Edit data as required and click the **Save button** to save your changes. Any changes are captured in the Client’s Client History tab. Any changes to core elements (First Name, Last Name, Date of Birth, Legal Sex, SSN) will automatically update the respective Client record in the ACDHS Master Client Index (MCI) System. Refer to Section 5 above for more information on MCI.

## 7 Delete a Client

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	--	--	--	--	--	--	--

Only Admins and ACDHS Super Users can delete a Client.

1. Navigate to the Client record you wish to delete.
2. Click the **drop-down arrow** next to the group of buttons and click **Delete Record**. A pop-up will be displayed with a confirmation message and the option to click Yes, No, or X to close the screen.



3. Click **Yes** to proceed with deleting the Client. The Client record will be soft-deleted (along with any child data) and marked as Inactive. History tracking captures who soft-deleted the record and when. All Inactive Clients are removed from list views and searches. Only Admins can view Inactive Clients and restore Clients back to an Active state.

Otherwise, click **No** or **Cancel** to not proceed with soft-deleting the Referral.

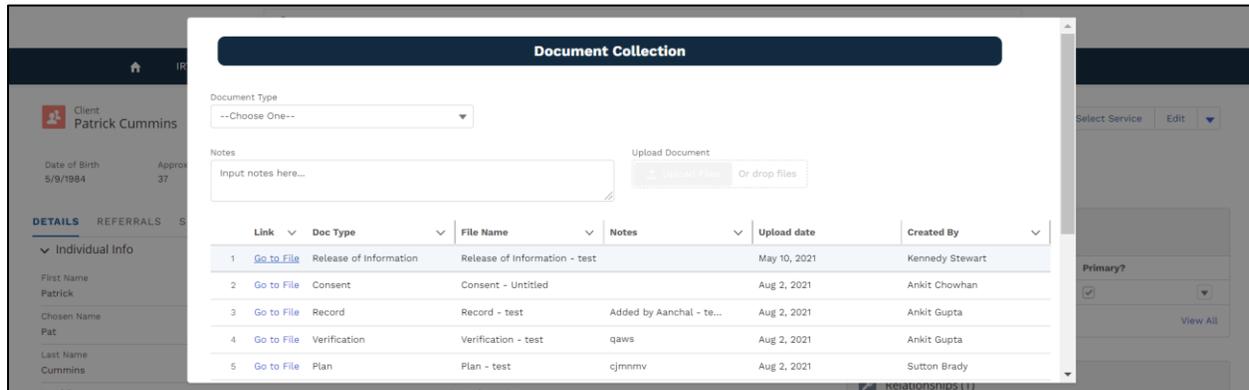
## 8 Upload/View Documents

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	✓	✓	✓	✓	✓

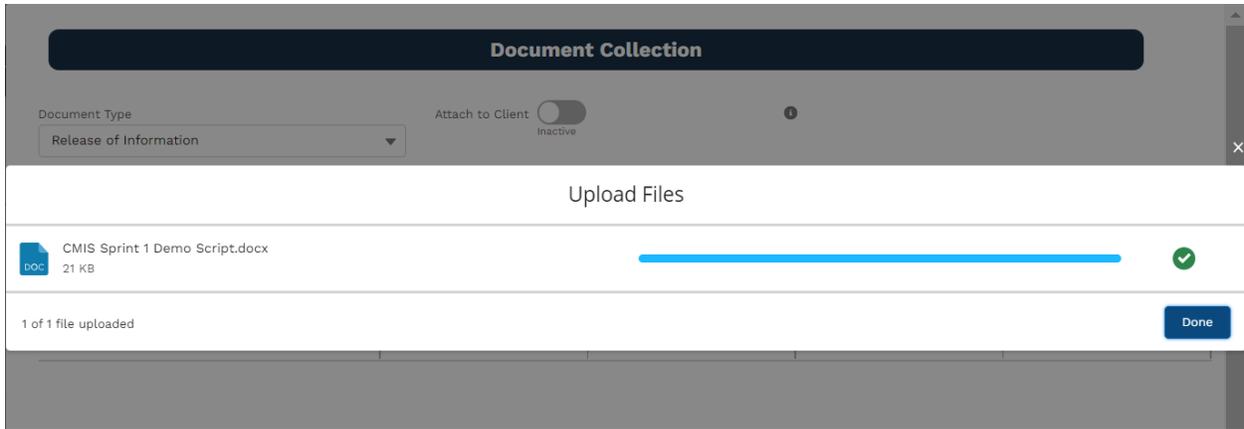
All users can Upload/View Documents associated to Client records. Read-Only Users do not have access to upload documents (only view).

### 8.1 Upload Documents

1. Within a Client record, if needed, click the **drop-down arrow** to access and click the **Upload/View Documents button** toward the top right of the screen. The Document Collection screen will be displayed, along with any documents already associated to the Client in focus. This includes documents uploaded directly to the Client record, as well as documents ‘Attached’ via a Referral or Assigned Service.



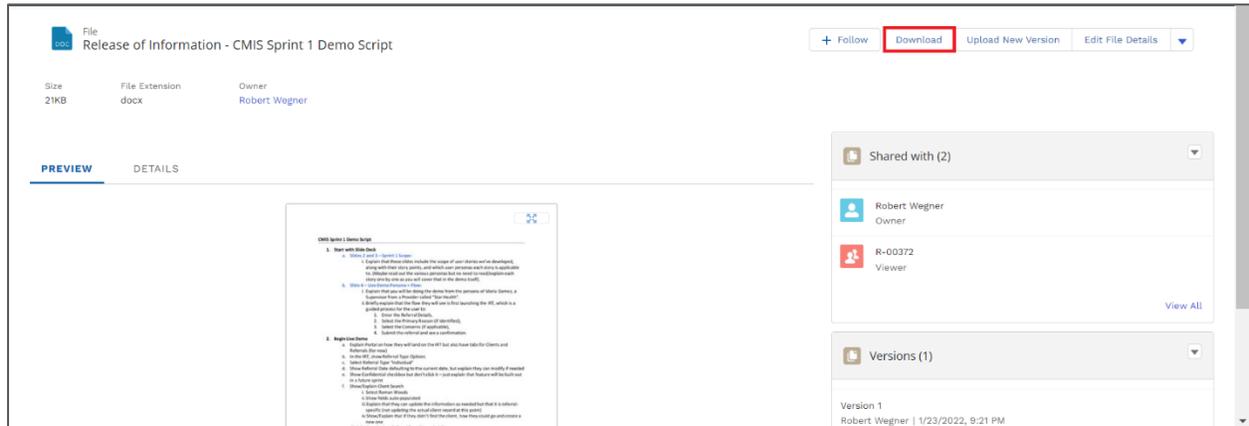
2. Select a **Document Type** from the drop-down provided. Upon selection, the Document Type Description will appear for your reference.
3. Optionally, enter any **Notes** about the document.
4. Click the **Upload Files button** to search and **select a file** from your computer. Upon selection, the file will be uploaded.



5. Click the **Done** button once it is available. A row will be created for the attached file that includes a link to the file, Doc Type, File Name, Notes (if any), Upload Date, and Created By.

## 8.2 View Documents

1. Click the **Upload/View Documents** button to open the Document Collection screen.
2. Click the **Go to File link** next to the document you wish to view. The Preview tab of the File record is displayed.



3. Click the **Download** button to download the file.
4. Optionally, click the **Details** tab to view details of the document.

## 9 Assign Referrals and Services

See the ClientPath Referrals and Services User Guides for details.