USER GUIDE

clientpath
Allegheny County Department *of* Human Services

Services

ACDHS Users · Provider Users

Version 1.0
Created January 24, 2022

Prepared By:
coresphere

1 Revision History

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

2 Table of Contents

3 Service Process

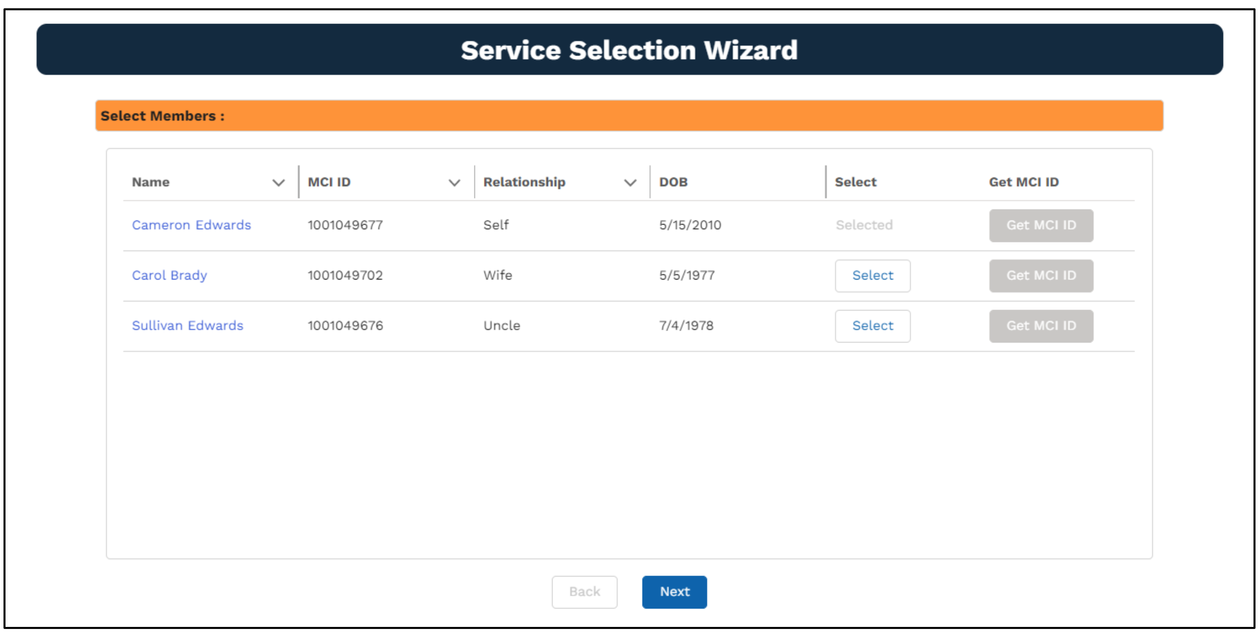
ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

Services can be assigned to Clients in one of two ways: (1) via a Referral, or (2) via a Client record (without a Referral). Services assigned via a Referral can only be done by those who have Full Access to the Referral record, and only when the Referral Status = Accepted.

1.1 Assign a Service – Launch Service Selection Wizard

1.1.1 Select Members

1. **From either a Client record or Accepted Referral record, click the *Select Service button*.** The Service Selection Wizard (SSW) is displayed. The first screen is the Select Members screen. If the SSW was launched from a Referral, it will display all Clients from the Referral, with the primary Client pre-selected. If the SSW was launched from a Client record, it will display the pre-selected primary Client, as well as all Clients with an existing relationship.



2. **If a Client does NOT have an MCI ID, click the *Get MCI ID button* next to the appropriate Client.** A Client cannot be selected for service without being MCI-cleared. *Continue to Step 3.*

   Otherwise, if the Client DOES have an MCI ID, click the *Select button* next to the appropriate Client(s) to select them for service. The Client will become Selected. If a Client already has an MCI ID, the Get MCI ID button is disabled. *Skip to Step 5.*

- MCI Clearance: 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).

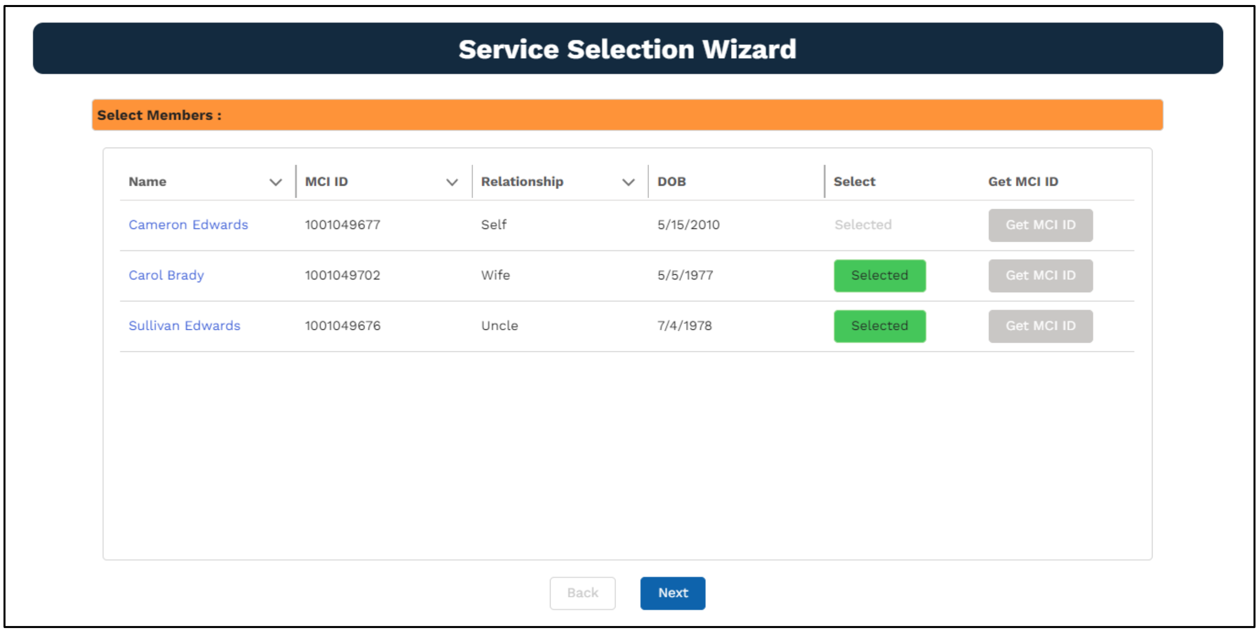
- Otherwise, if the mandatory information to MCI-clear is NOT entered, a message will appear stating that MCI clearance cannot be completed until [missing information] is entered. You must then navigate to the Client record, by clicking on the Client Name, to make the appropriate updates.

3. **If the proper MCI match exists, click the *radio box* next to the appropriate Client, and click the *Update MCI ID button*.** The Client record in ClientPath will be updated with the MCI ID. *Skip to Step 5.*

   Otherwise, if the proper match does NOT exist, *continue to Step 4.*

4. **If the proper MCI match does NOT exist, click the *Create New MCI ID button*.** The Client record in ClientPath will be updated with a new MCI ID.

5. **Upon selecting the Client(s) for service, click the *Next button* to go to the next screen.**



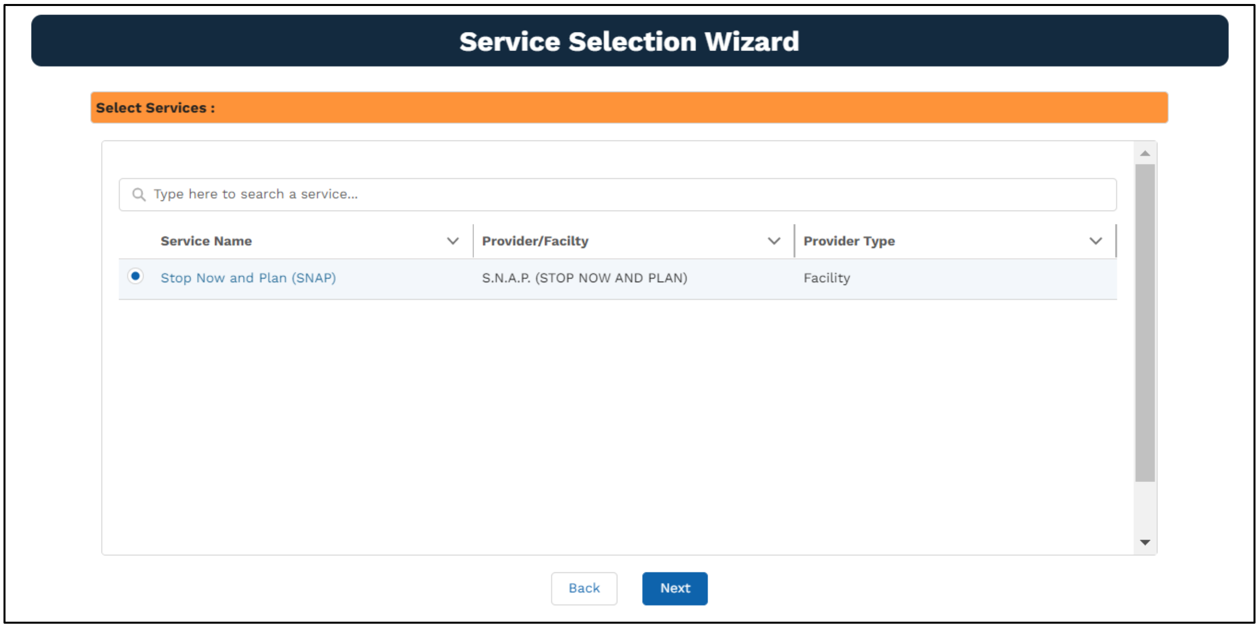
1.1.2 Select Service

The Select Service screen displays a list of any SP Services you have access to (as a Service Contact), and only for those that have the Services Module enabled. Each SP Service in the list includes the Service Name and the Facility/Provider through which it is associated. If the SP Service is configured as Confidential, the SP Service will automatically be marked as confidential.

1. **Optionally *enter the SP Service Name* in the search box to filter down to your Service.**

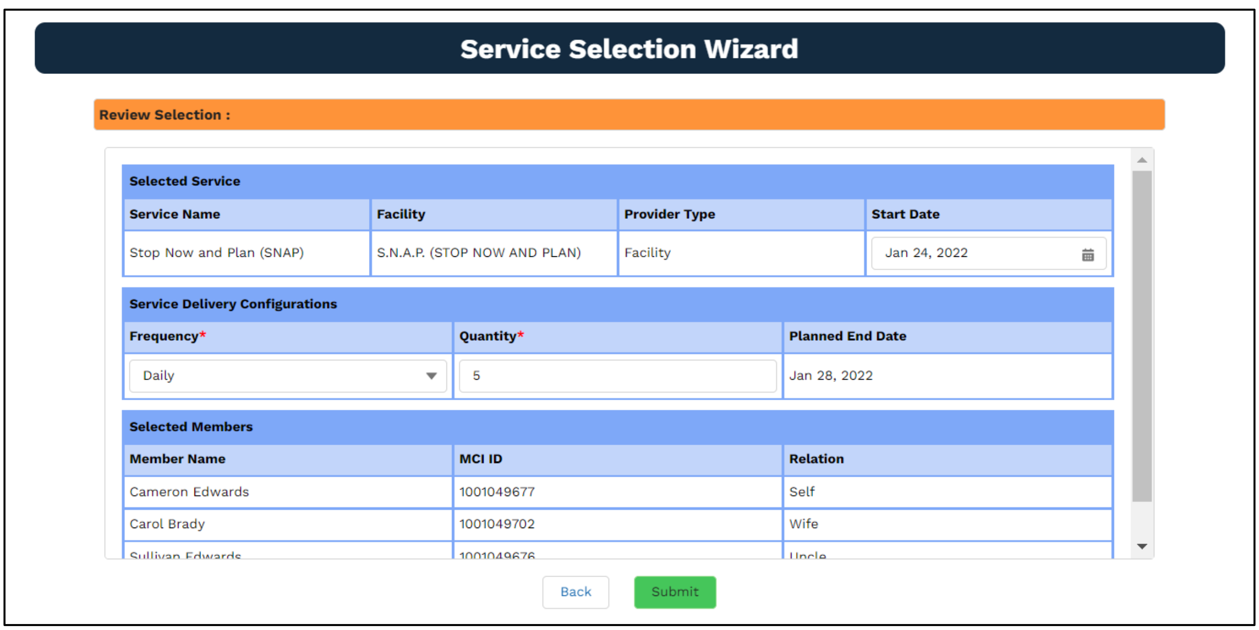
2. **Click the *radio box* next to the Service you wish to assign.** This selection will apply to ALL off the selected Clients from the previous screen (Select Members screen).

3. **Click the *Next button* to navigate to the next screen.**



1.1.3 Review Selection

The Review Selection screen of the Service Selection Wizard (SSW) includes 2-3 sections depending on the configuration of the associated SP Service. Regardless of configuration, summaries of the Selected Service and Selected Member(s) will be displayed. If the 'Service Delivery' Module was enabled for the selected SP Service, only then will the 'Service Delivery Configuration' section appear with the Frequency and Quantity pre-populated per the SP Service configuration.



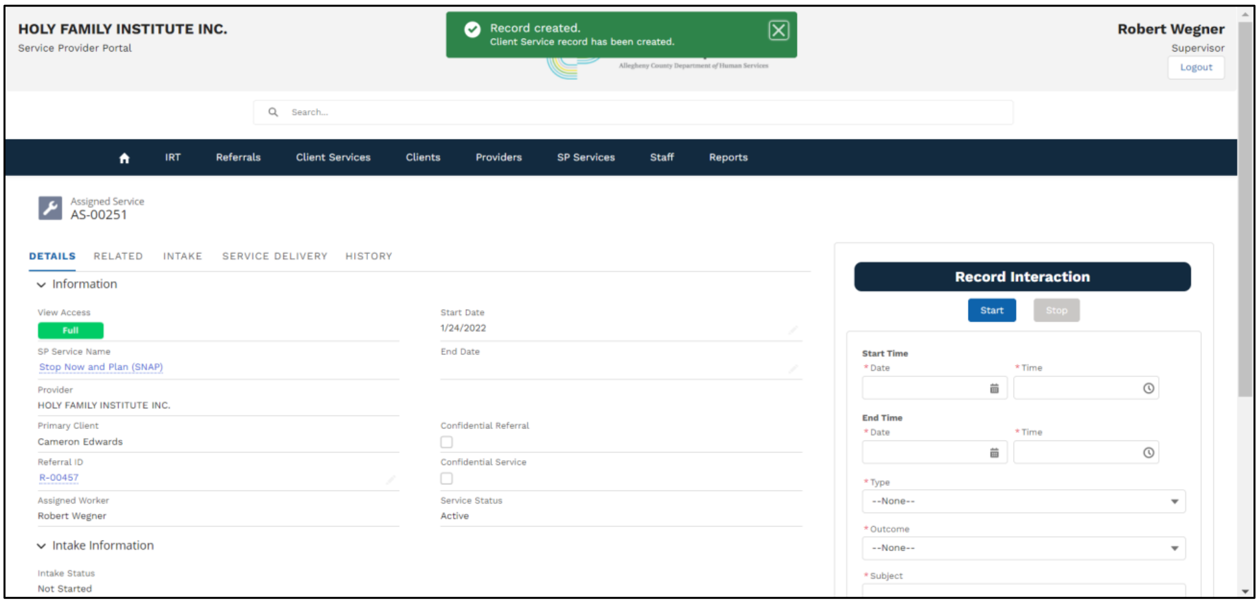
1. **Optionally, update the *Start Date* to a date in the past, if applicable.**

2. **Optionally, update the *Frequency* and/or *Quantity*.** The Planned End Date will automatically adjust based on Start Date, Frequency, and Quantity.

3. **Optionally, click the *Back button* to navigate back to previous screens.**

1.1.4 Submit Assignment

1. **Within the Review Selection screen, click the *Submit button* to create and save the assignment.** Upon successful submission, a success message is displayed, an Assigned Service record will be created and you will automatically be navigated to the Assigned Service record.



Information from the SSW is copied into the Assigned Service record. Additionally:

- The ***Assigned Worker*** field will populate with the name of the user who created the Assigned Service
- The ***Provider*** field will populate with the Provider the Owner is associated with
- An ***Assigned Service ID*** is assigned
- The ***Service Status*** defaults to Active.
- The ***Created By*** and ***Last Modified By*** fields are updated with the Name/Date/Time of who/when the record was created/updated.

1.2 Access an Assigned Service

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

All ClientPath users can view Assigned Services across all Clients, Services, and Providers. Assigned Services can be found through the Client Services tab, or by navigating to a Client record to view Services specific to that Client.

1.2.1 Confidential Services

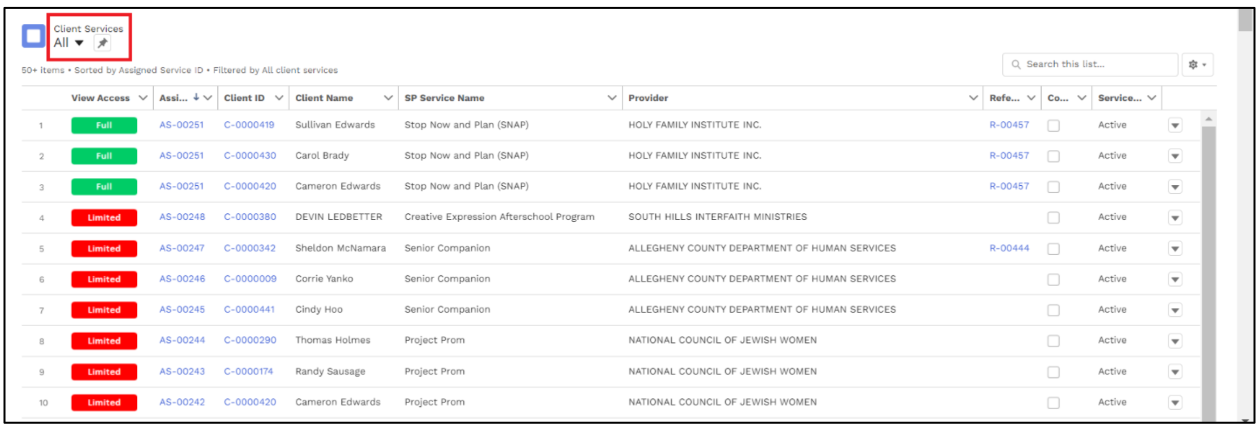
Confidential Assigned Services are only viewable to the Assigned Worker/Owner, those above them in their Provider hierarchy, Admins and ACDHS Super Users. ACDHS/Provider Read-Only Users do not have access to any Confidential Assigned Services. If you do not have access to a Confidential Assigned Service, you will not see it in any list, report, or search result.

If Select Services was launched from a Referral and the SP Service selected in the SSW is not configured to be Confidential, but the Referral was marked confidential through the IRT, the Assigned Service record will automatically become confidential. Users with **Full Access** can optionally ***de-select the Confidential checkbox*** in the Referral to make both the Referral and Assigned Service non-confidential. Refer to Section 5 in the ClientPath Referrals User Guide to see how to edit a Referral.

1.2.2 Access Assigned Services Via Client Services Tab

1. **Click the *Client Services tab* to see a list of Assigned Services that you have access to.** By default, the 'Recently Viewed' list view may be displayed. This list only shows the Assigned Services you have recently viewed, not all Assigned Services.

2. **Optionally, click the *drop-down arrow* at the top left and select the *All* list view.**



	View Access	Assi...	Client ID	Client Name	SP Service Name	Provider	Refe...	Co...	Service...
1	Full	AS-00251	C-0000419	Sullivan Edwards	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	R-00457		Active
2	Full	AS-00251	C-0000430	Carol Brady	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	R-00457		Active
3	Full	AS-00251	C-0000420	Cameron Edwards	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	R-00457		Active
4	Limited	AS-00248	C-0000380	DEVIN LEDBETTER	Creative Expression Afterschool Program	SOUTH HILLS INTERFAITH MINISTRIES			Active
5	Limited	AS-00247	C-0000342	Sheldon McNamara	Senior Companion	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES	R-00444		Active
6	Limited	AS-00246	C-0000009	Corrie Yanko	Senior Companion	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES			Active
7	Limited	AS-00245	C-0000441	Cindy Hoo	Senior Companion	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES			Active
8	Limited	AS-00244	C-0000290	Thomas Holmes	Project Prom	NATIONAL COUNCIL OF JEWISH WOMEN			Active
9	Limited	AS-00243	C-0000174	Randy Sausage	Project Prom	NATIONAL COUNCIL OF JEWISH WOMEN			Active
10	Limited	AS-00242	C-0000420	Cameron Edwards	Project Prom	NATIONAL COUNCIL OF JEWISH WOMEN			Active

For each Assigned Service in the All list view, links to the Assigned Service and Client records are displayed, as well as the Client Name, SP Service Name, Provider, link to associated Referral (if any), an indicator (selected) if the Assigned Service is confidential, and the Service Status. Once you see Assigned Service records listed, you can sort by clicking on the headers or filter the list further by using the search box.

Full Access vs. Limited Access: A green Full View Access or red Limited View Access icon is next to each Assigned Service to help you better understand which Assigned Services you see all or partial information for. If the Assigned Service is associated to your Provider, you have **Full Access** and can view all tabs within the Assigned Service record. This includes the ability to upload/view documents and record Interactions, External Referrals, Concrete Goods, Intake details, Service Delivery Details, and Discharge details, as applicable. If the Assigned Service is NOT associated to your Provider, you have **Limited Access** and can only view the Assigned Service Details tab and related Clients, but do NOT have access to upload/view documents or record Interactions, External Referrals, Concrete Goods, Intake details, Service Delivery Details, or Discharge details.

3. **Optionally, click the *pushpin icon* next to the list view you want to make your default.**

4. **Click the *Assigned Service ID* to view a specific Assigned Service record.** The Assigned Service record will be displayed.

1.2.3 Access Assigned Services Via Clients Tab

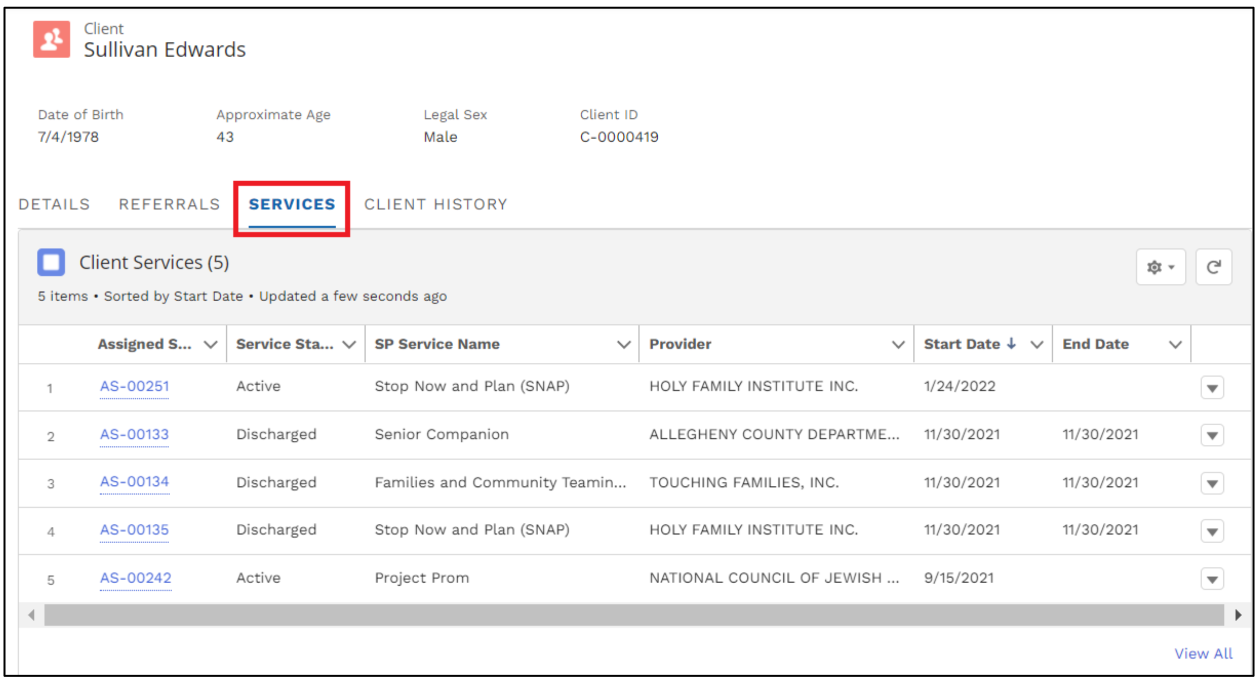
1. **Click the *Clients* tab.** A list of all Clients in ClientPath will be displayed.

2. **Click the *Client ID* for the Client record you wish to view.** The Client record will open with the Details tab displayed.

3. **Click the *Services tab* within the Client record.** A list of all services assigned to that specific Client are displayed, along with the Service Status, SP Service Name, Provider, Start and Edn Date.

4. **Optionally click *column headers* to sort rows (ascending/descending).**

5. **Click the *Assigned Service ID* to view a specific Assigned Service record.** The Assigned Service record will be displayed. See 4.2 above regarding Full Access and Limited Access.



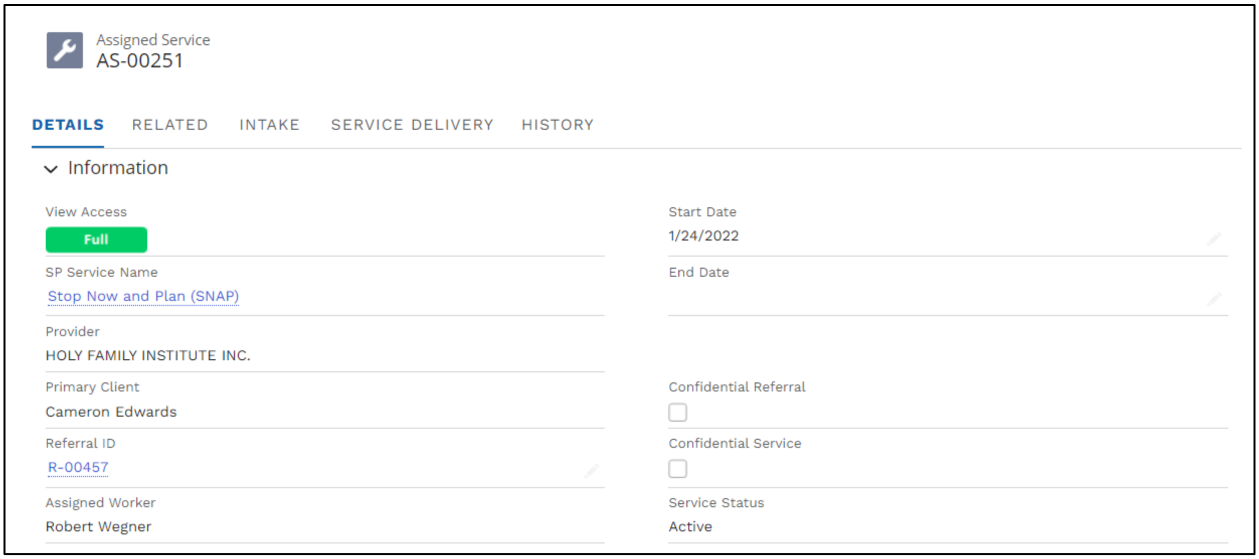
1.3 View an Assigned Service Record

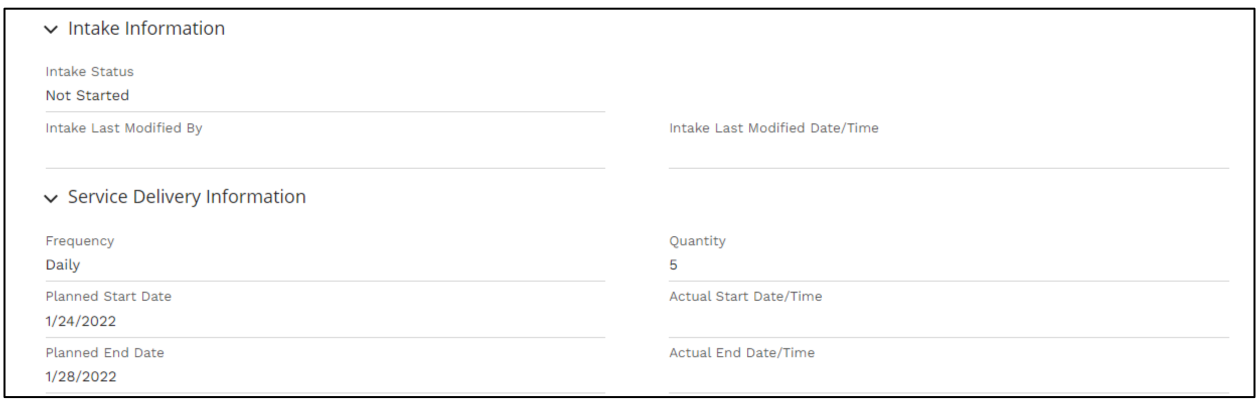
1.3.1 Details Tab

Upon navigating to an Assigned Service record (see 4.2 and/or 4.3 above), the ***Details tab*** will be displayed. The Details tab consists of:

- Information pertaining to the Assigned Service including SP Service Name, Provider, and Primary Client.
- Intake Information (initially blank but with an Intake Status = Not Started).

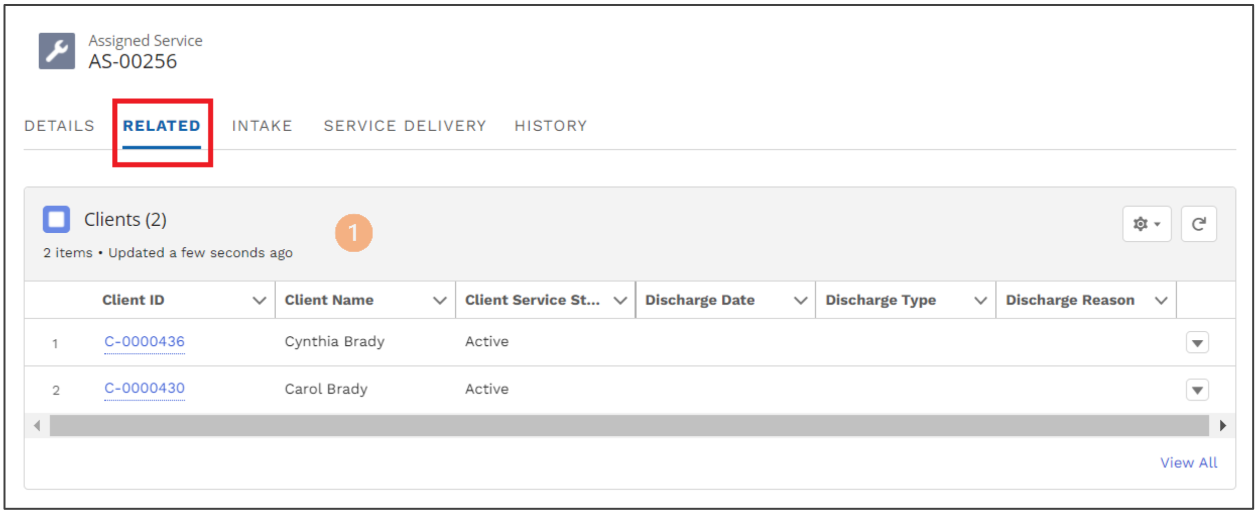
- Service Delivery Information (with the Frequency, Quantity, Planned Start and End Dates pre-populated as per the SSW) only if Service Delivery was configured for the SP Service

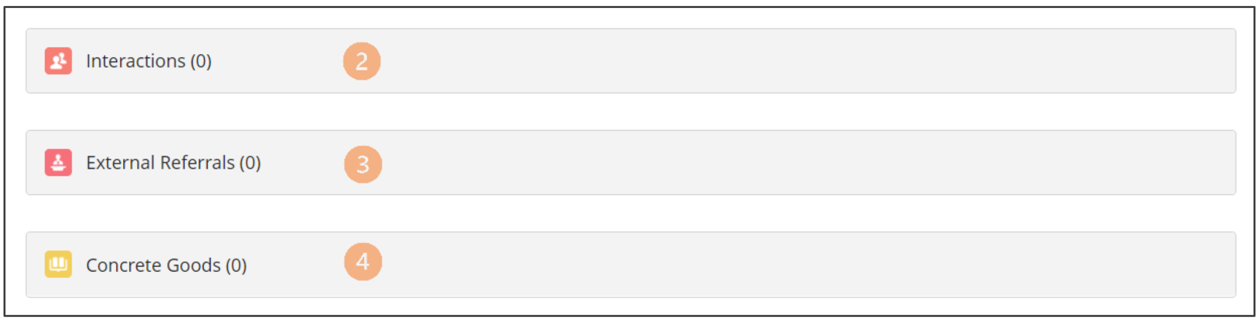




1.3.2 Related Tab

1. **Click the *Related tab* within the Assigned Service record.** The Related tab of an Assigned Service record displays data related to the Assigned Service, referred to as Related Lists. This includes (1) a list of all Clients included on the Assigned Service, and any associated (2) Interactions, (3) External Referrals, and (4) Concrete Goods. Each related list includes the number of records in parentheses, otherwise it will display 0. If a plus (+) sign is included in the count, that indicates there are more records than visible in the related list.
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 *record ID* (link) for the record you wish to open/view.**





1.3.3 Intake Tab

Intake related information can be found within the Intake Tab of an Assigned Service record. This is only applicable for services that have Intake enabled. See additional guide for information on the Intake process.

1.3.4 Service Delivery Tab

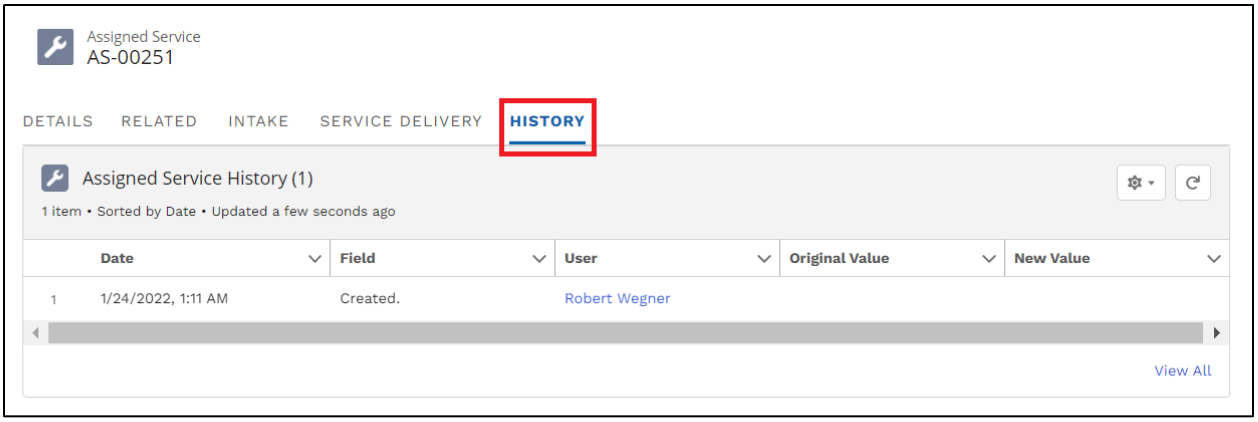
Service Delivery related information can be found within the Service Delivery Tab of an Assigned Service record. This is only applicable for services that have Service Delivery enabled and intend to capture information to each specific service episode. See additional guide for information on the Service Delivery process.

1.3.5 History Tab

1. **Click the *History tab* within the Assigned Service record.** The History tab of an Assigned Service record displays a related list of changes to data within the Assigned Service 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.**

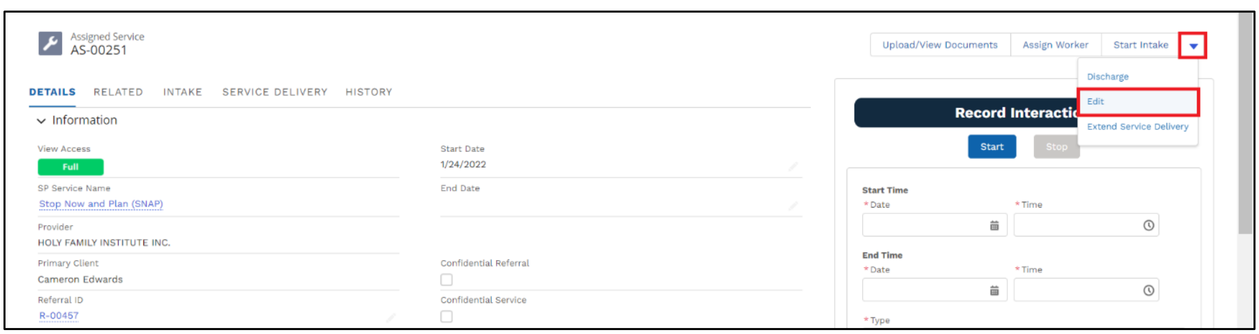


1.4 Edit an Assigned Service

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

If you have **Full Access** to an Assigned Service record and the Service Status = Active, you can edit the Assigned Service. See steps below. If you have **Limited Access** to the Assigned Service, you do NOT have access to edit the Assigned Service.

1. **From within an Assigned Service record, click the *drop-down arrow* at the top right next to the group of buttons and click *Edit*.** The Assigned Service will open in a pop-up screen in editable mode.



2. **Update data as required and click the *Save button* to save your changes.** Only the End Date can be changed. Changes are captured in the Assigned Service's History Tab.

1.5 Assign Worker to an Assigned Service

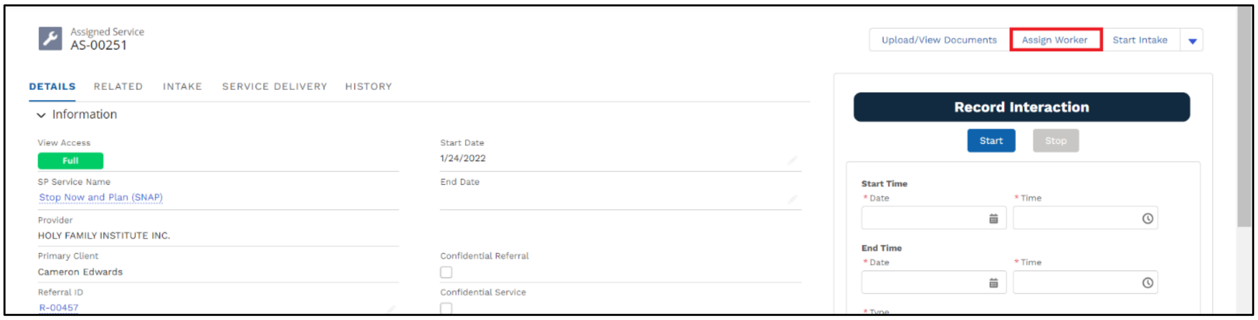
ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only

✓	✓	✓	✓	--	✓	✓	✓	--

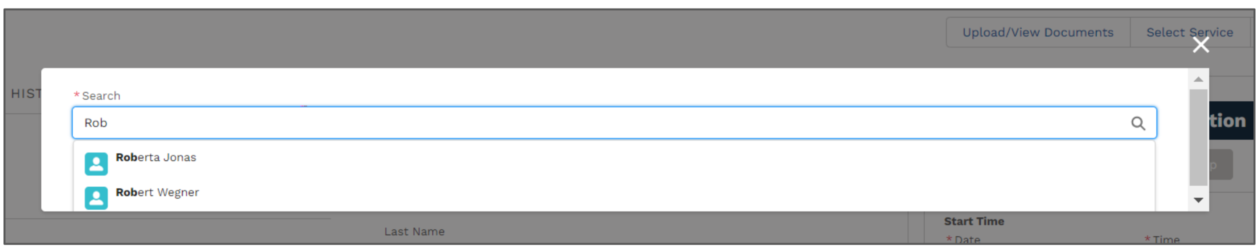
If you have **Full Access** to an Assigned Service record and the Service Status = Active, you can assign a Worker to the Assigned Service. See steps below. If you have **Limited Access** to the Assigned Service, you do NOT have access to assign a Worker.

The default Assigned Worker (Owner) is the user who created the Assigned Service through the SSW. To change the assigned Worker:

1. **Within an Assigned Service record, click the *Assign Worker* button.** A search pop-up will be displayed.



2. **In the search box, *type the name* of the staff member you want to search for.** Only Active Staff members associated to the same Provider (as the Assigned Service) will be displayed.



3. **Select the *staff member* you want to assign.**

4. **Click the *Save button* the save the worker assignment.** Upon save, the Assigned Worker field is updated with the newly selected staff member's name. Additionally, the History tab of the Assigned Service record captures the change(s) to the Assigned Worker field.

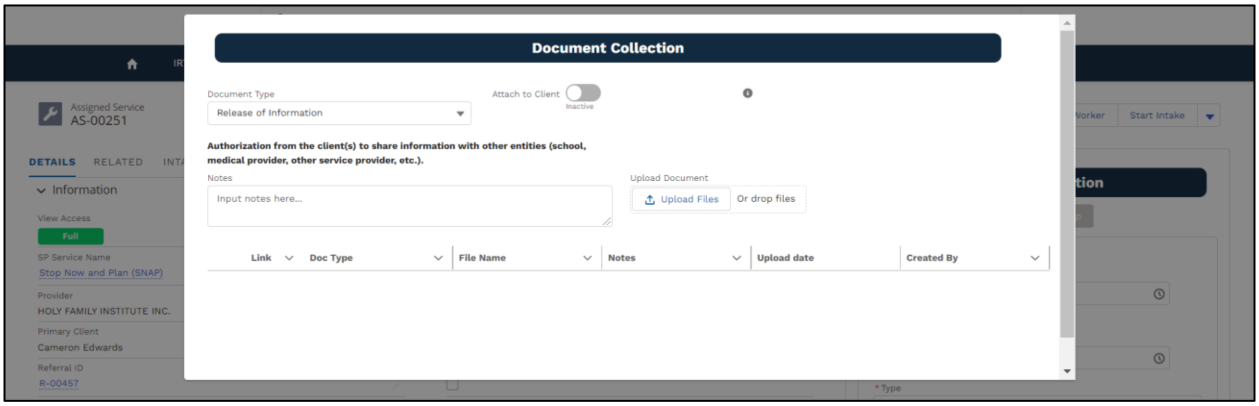
1.6 Upload/View Documents

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

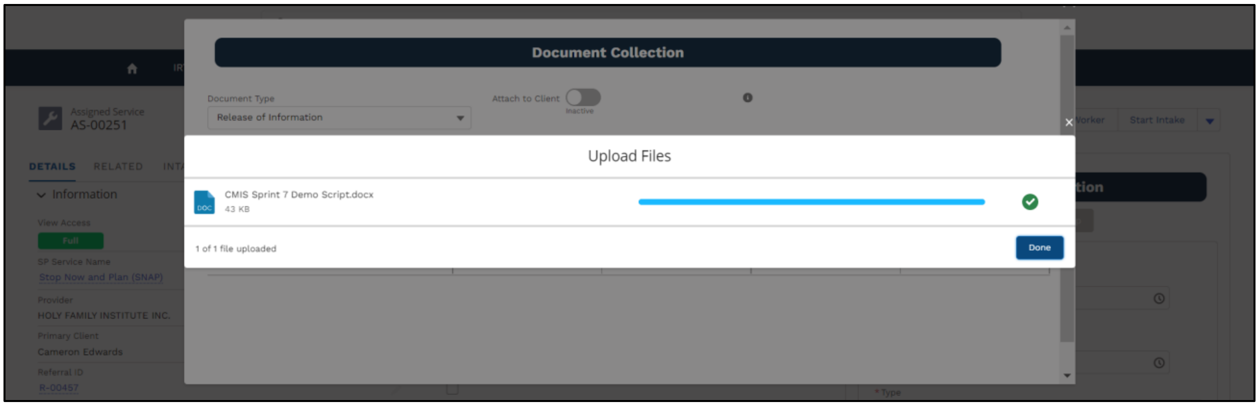
If you have **Full Access** to an Assigned Service record, you have access to Upload/View Documents related to the Assigned Service. Read-Only users do NOT have access to upload documents. If you have **Limited Access** to the Assigned Service, you do NOT have access to Upload/View Documents related to the Assigned Service.

1.6.1 Upload Documents

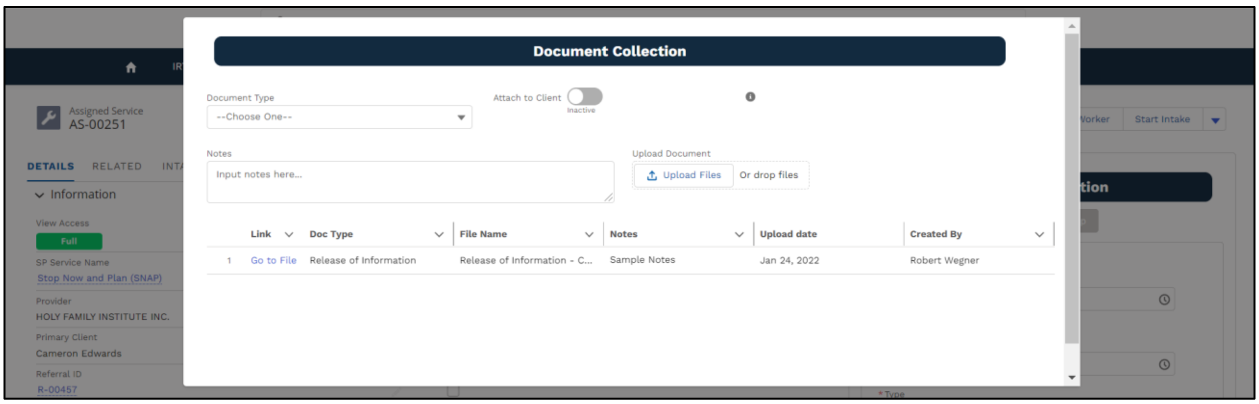
1. **Within an Assigned Service record, click the *Upload/View Documents button* toward the top right of the screen.** The Document Collection screen will be displayed.



2. **Select a *Document Type* from the drop-down provided.** Upon selection, the Document Type Description will appear for your reference.
3. **Optionally, click the *Attach to Client toggle*.** With this toggle enabled, the document will not only get attached to the Assigned Service record, but also attached to all Client records associated with the Assigned Service. If the Assigned Service is marked as Confidential, the Attach to Client toggle will not be available for selection.
4. **Optionally, enter any *Notes* about the document.**
5. **Click the *Upload Files button* to search and *select a file* from your computer.** Upon selection, the file will be uploaded.



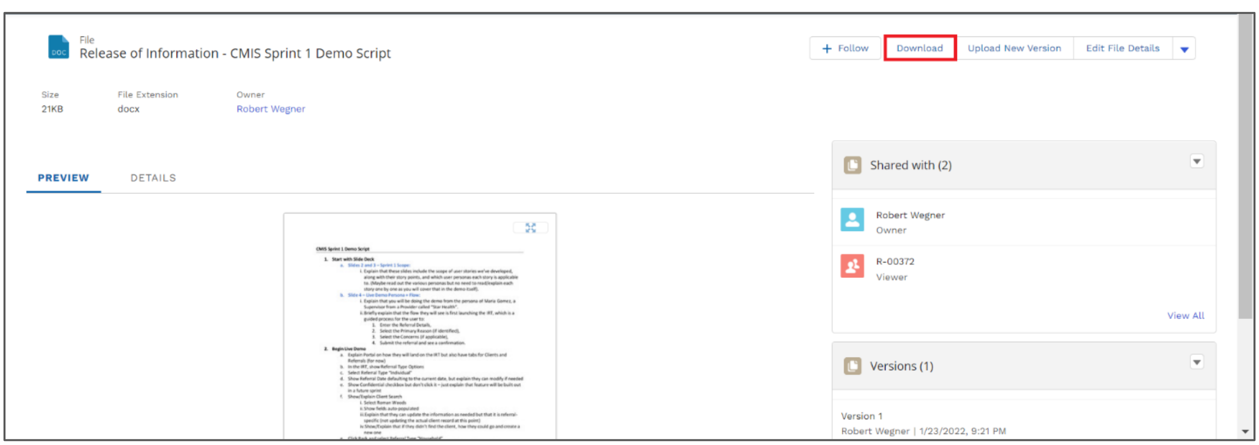
6. **Click the *Done button* once it is available.** A row will be created for the attached file that includes a Link to the file, Doc Type, File Name, Notes (if any), Upload Date, and Created By.



1.6.2 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.**

1.7 Record Interactions

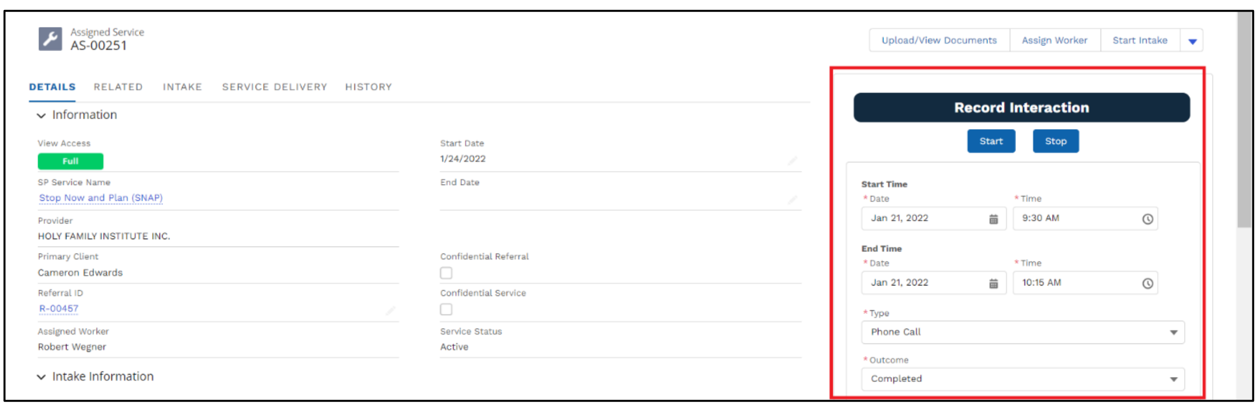
ACDHS Staff					Provider Staff			
Admin	**Super User**	**Supervisor**	**Worker**	**Read-Only**	**Super User**	**Supervisor**	**Worker**	**Read-Only**
✓	✓	✓	✓	--	✓	✓	✓	--

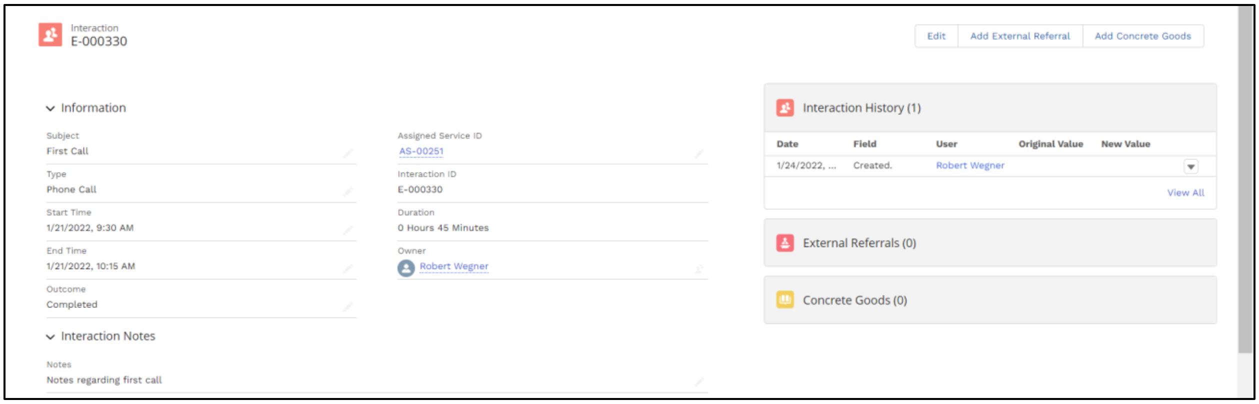
If you have **Full Access** to an Assigned Service record, you have access to view and record Interactions related to the Assigned Service. If you have **Limited Access** to the Assigned Service, you do NOT have access to view or record Interactions related to the Assigned Service.

A ***Record Interaction*** component resides on the right side of each Assigned Service record. Use this component to document any interactions you have with the Client(s) or other supports during the Services stage. All required fields are indicated with a red asterisk (*).

1. **Ensure all fields are entered/selected. Optionally click the *Start and Stop buttons* to automatically populate the Start/End Date and Time fields. Otherwise, *manually enter* those details.**

2. **Click the *Save button* at the bottom of the component to save the interaction or click the *Clear button* to clear the form and start over.** Upon save of an Interaction, an Interaction record is created, and you will be automatically navigated to that record. The duration of the interaction is automatically calculated based on Start Date/Time and End Date/Time. All Interactions associated to a given Assigned Service can be found within the Related tab of the Assigned Service record and within the Interactions related list.

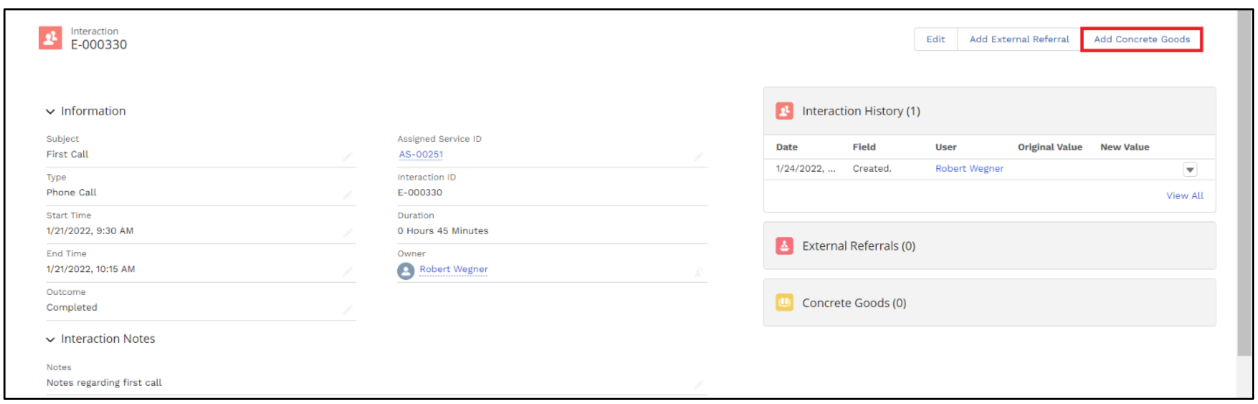


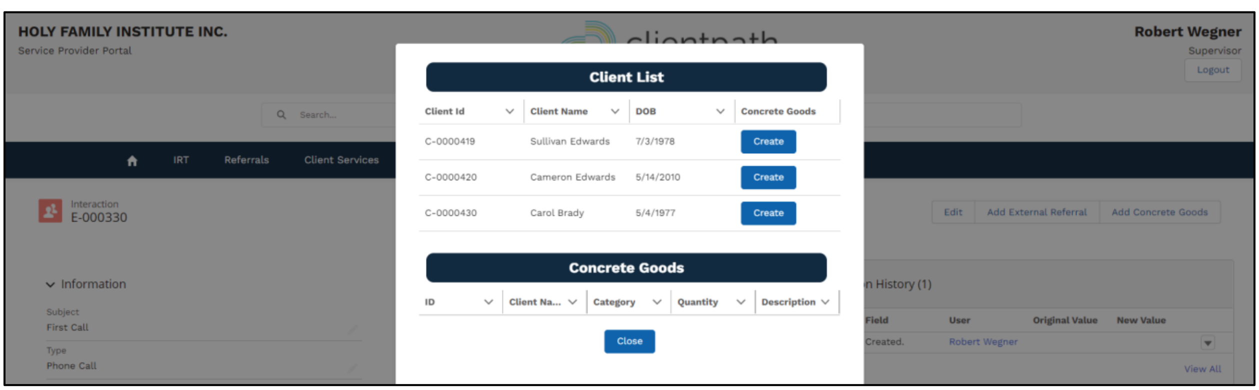


1.7.1 Record Concrete Goods

Within an Assigned Service Interaction record, users with Core Plus profiles can view record any concrete goods (tangible items) provided to the Client(s) during the Services stage.

1. **Within the Interaction record, click the *Add Concrete Goods button*.** A pop-up will be displayed with a list of all Clients associated to the Assigned Service, as well as a list of Concrete Goods provided (if any).





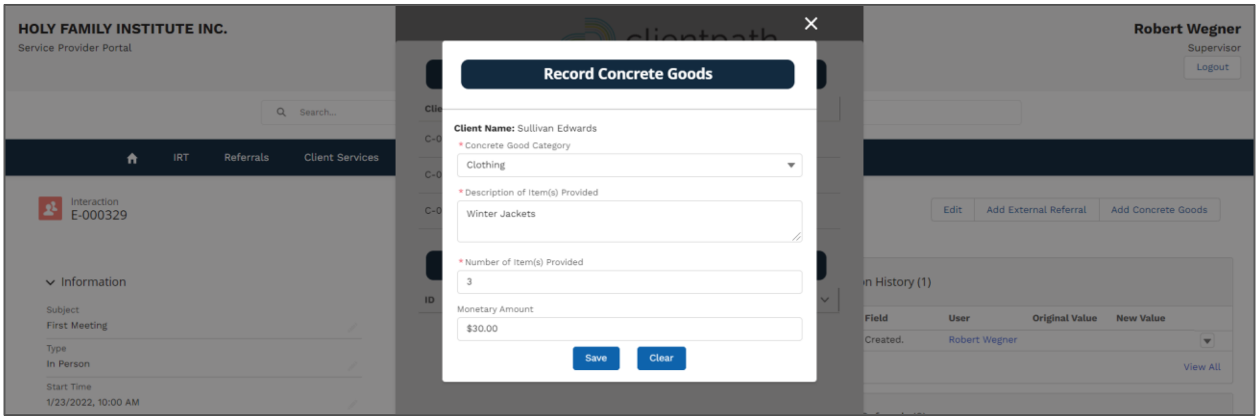
2. **Click the *Create button* next to the respective Client.** A Record Concrete Goods pop-up is displayed.

3. **Ensure a *Concrete Good Category* is selected.** This information is required to Save.

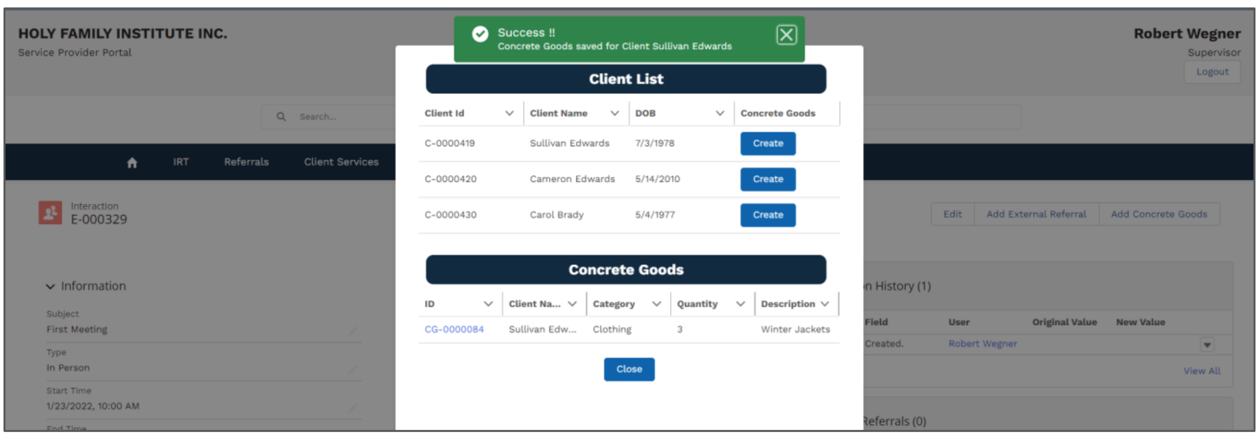
4. **Ensure a *Description of Item(s) Provided* is entered.** This information is required to Save.

5. **Ensure the *Number of Item(s) Provided* is entered.** This information is required to Save.

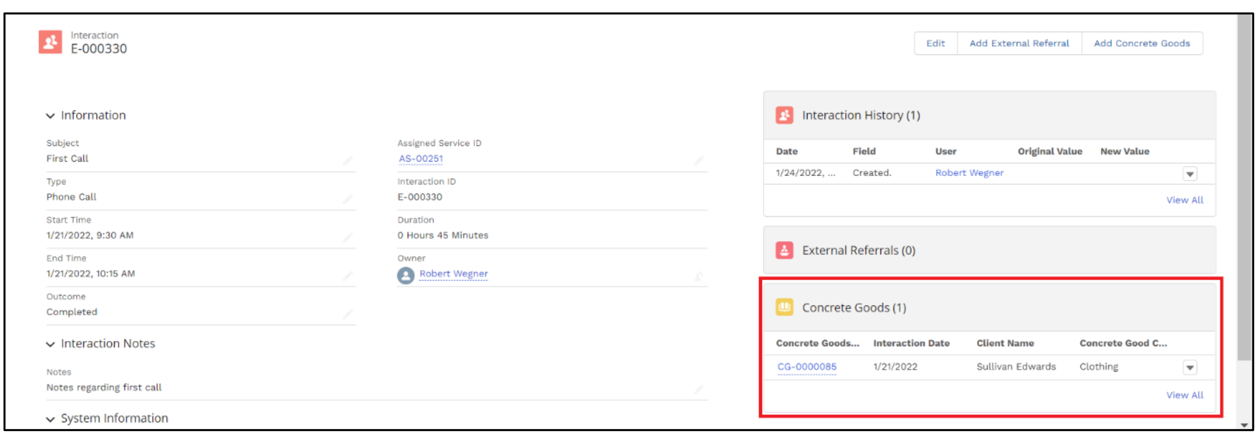
6. **Optionally enter an associated *Monetary Amount*.**



7. **Click the *Save button* to save the data or click the *Clear button* to clear the form and start over.** Upon Save, a Concrete Good record is created, and a row is displayed within the Concrete Goods list.



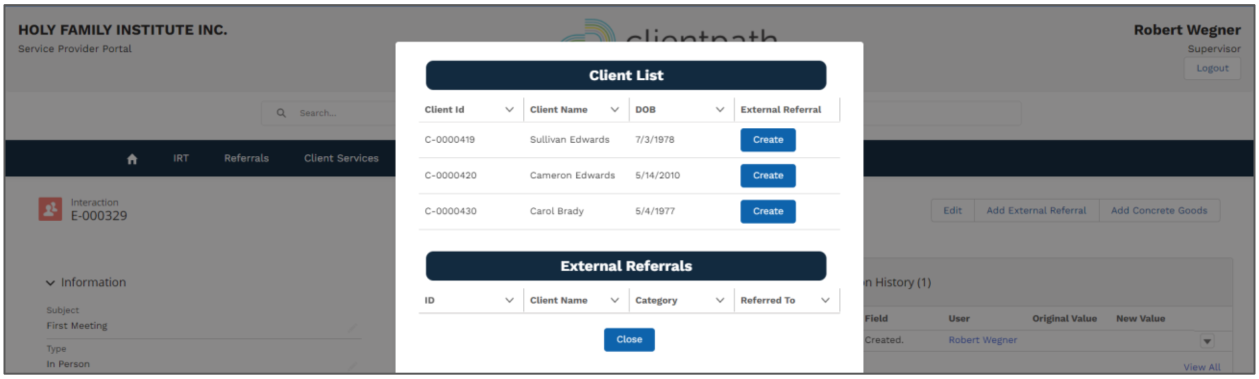
8. **Click the *Close button* to close the Concrete Goods screen.** Any Concrete Goods record created will also appear in the Concrete Goods related list on the right side of the Interaction record.



1.7.2 Record External Referrals

Within an Assigned Service Interaction record, users with Core Plus profiles can view record any External Referrals provided to the Client(s) during the Services stage. This functionality can be used if you are referring the Client(s) to a service for another provider.

1. **Within the Interaction record, click the *Add External Referral button*.** A pop-up will be displayed with a list of all Clients associated to the Assigned Service, as well as a list of External Referrals provided (if any).

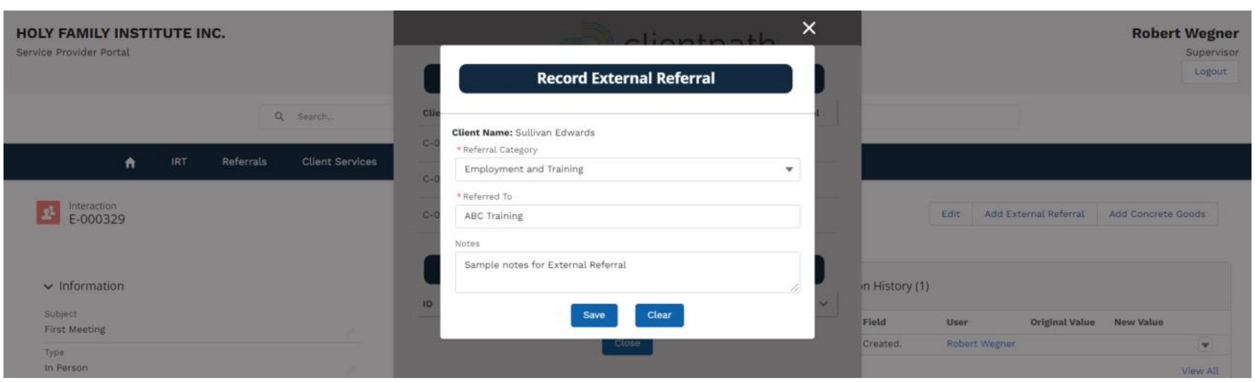


2. **Click the *Create button* next to the respective Client.** A Record External Referral pop-up is displayed.

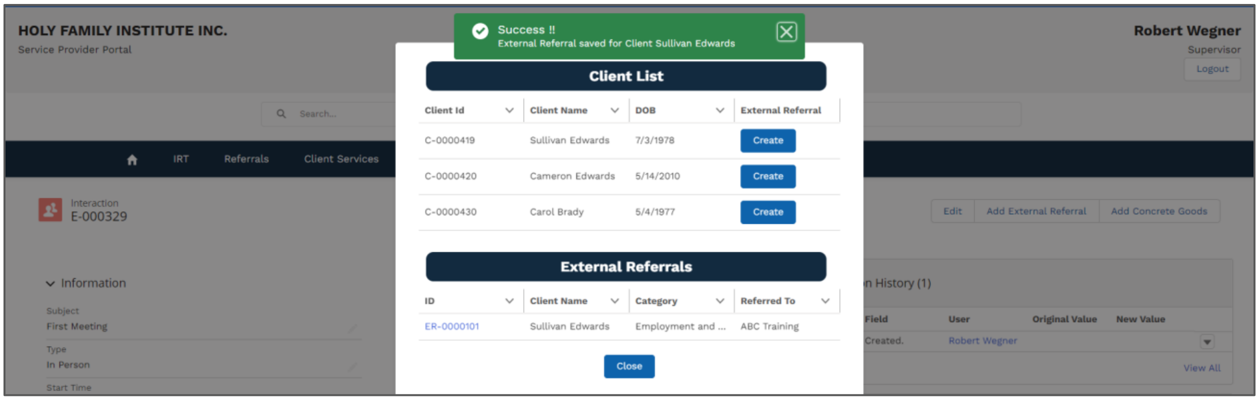
3. **Ensure a *Referral Category* is selected.** This information is required to Save.

4. **Ensure a *Referred To* is entered.** This information is required to Save.

5. **Optionally enter any associated *Notes*.**



6. **Click the *Save button* to save the data or click the *Clear button* to clear the form and start over.** Upon Save, an External Referral record is created, and a row is displayed within the External Referrals list.



7. **Click the *Close button* to close the External Referrals screen.** Any External Referrals record created will also appear in the External Referrals related list on the right side of the Interaction record.