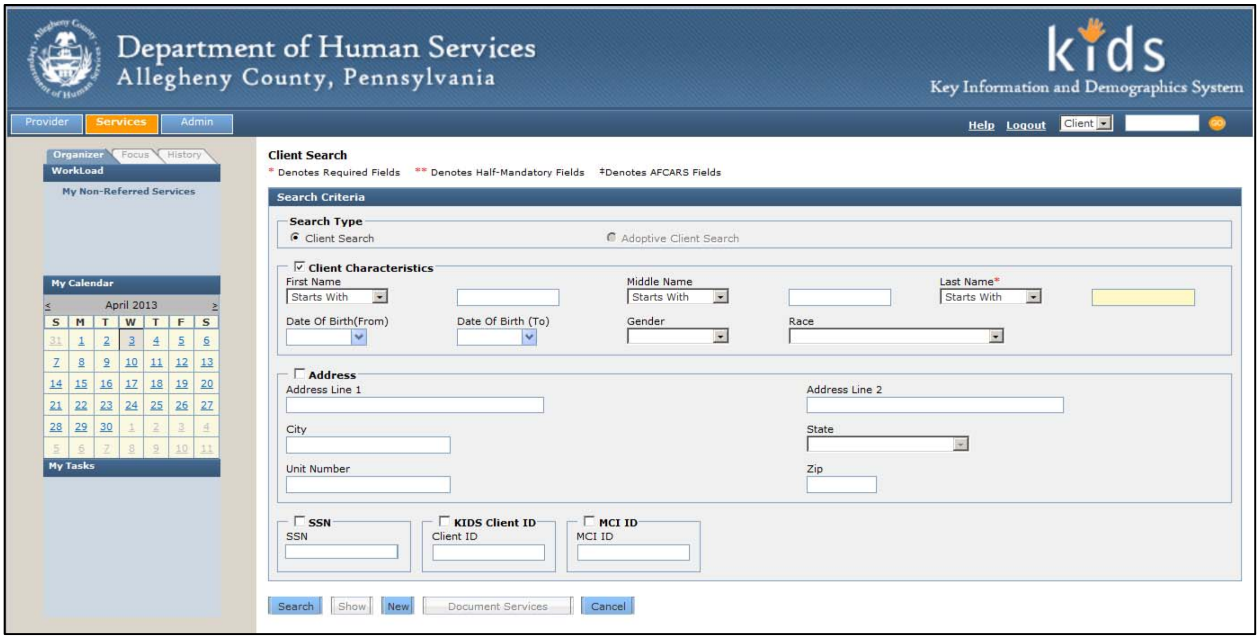
Non-Referred Service Client Creation-Provider Job Aid

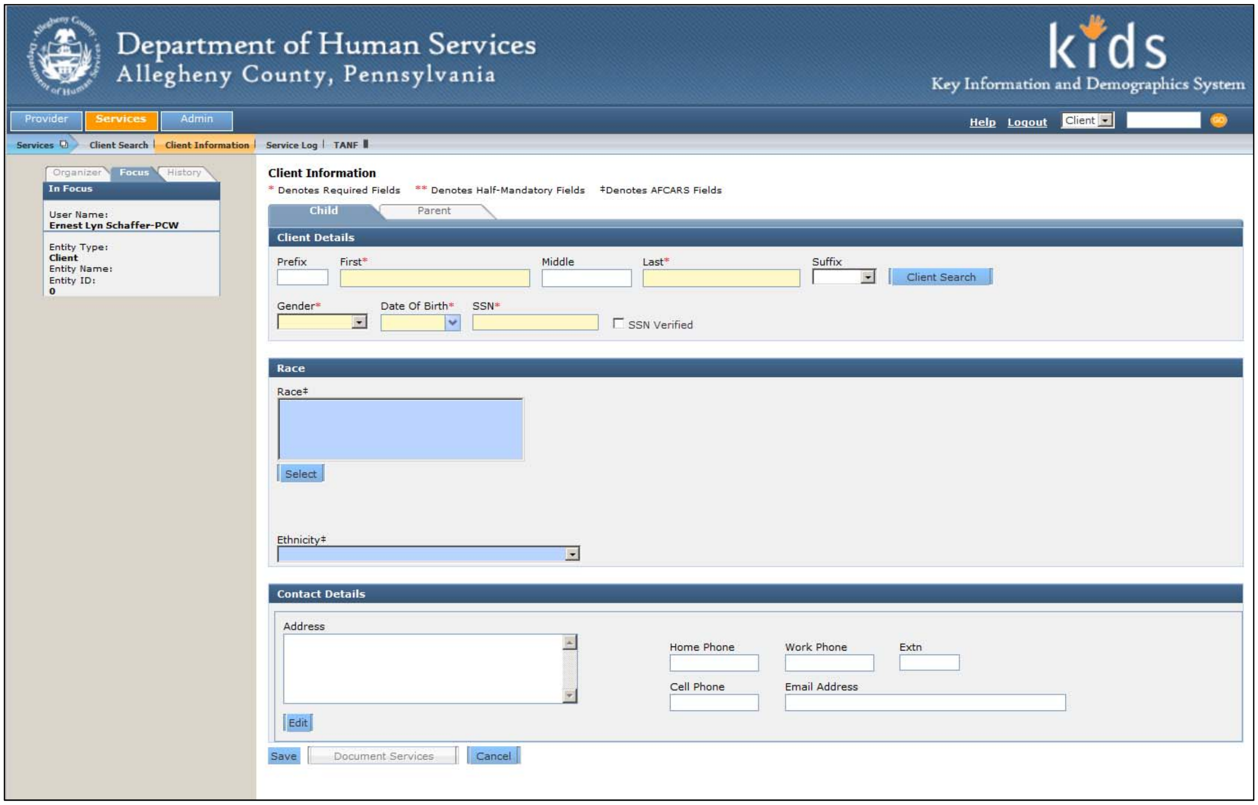
All new clients are researched through the *Client Search* screen prior completing the Client registration process and logging services for them. If a client is not currently known to the Department of Human Services, the Non-Referred Services provider can add the new client to the system. It is important to review all returned records to ensure that duplicate records are not created for the same client.

Access the Client Search screen



1. Navigate to the *Client Search* screen.
    1. **Client > Search**
2. Enter the *Search Criteria*.
    1. Enter the Child's *First Name* and *Last Name* in their respective fields.
    2. Mark the *Area Header* checkbox to query the search by *Address*, *SSN*, *KIDS Client ID* or *MCI ID* and enter the *Search Criteria*.
3. Click the **[Search]** button.
4. Review the *Search Results* area to determine if your client is a known entity of DHS. Highlight a client in the *Search Results* grid.
5. Review the *Information* and *Address* tabs to learn more about the highlighted client.
6. If the child client is a known entity, highlight the record and click the **[Show]** button to bring them in focus. Click the **[Document Services]** button to complete the *Service Log* screen.
7. If the client is not located in the *Search Results* grid, click the **[New]** button to establish a new client on the *Client Information* screen.

Completing the Client Information Screen



i. TIP: *The Child tab and Parent tab must be completed and saved before service records can be documented. The information captured on each of these tabs is the same.*

1. Type in the child's *First* and *Last* names in their respective fields.
2. Select the *Gender* of the child.
3. Type in the child's *Date of Birth*.
4. Type in the *SSN* (social security number).
5. Click the **[Client Search]** button to determine if the client is a known entity.
   a. If there is not a potential match to the client, a pop-up message indicating such is displayed. Click the **[Ok]** button to remove the message.
   b. Potential Matches are displayed on the *Person Search Results* pop-up.
      1. Select a name in the *Potential Matches* grid.
      2. Review the information on the tabs in the *Detailed Information* section to determine if the potential match person is the same as the client being created.
      3. If a record displayed in the *Potential Matches* grid <u>*IS NOT*</u> the same individual as the client being created, click the **[Select]** button located in the top section of the pop-up.
         1. *TIP: A confirmation message is displayed when creating a new client when an existing client has a 95% or greater matching threshold. Click **[Yes]** to proceed.*
      4. If a record displayed does match your client, select the record and click the **[Select]** button located in the *Potential Matches* section.
         i. The checkboxes located on the right side of the *Info* tab will allow you to limit the information that populates into the client record.
         ii. Unmarking a checkbox will not bring that information forward into the client record.
6. Click the **[Select]** button to select the *Race(s).*
   a. Selecting '*American Indian* or *Alaska Native*' will open the *Enrolled or Principal Tribe* field. Click the **[Select]** button to select the tribe.
   b. Selecting '*Other Asian*' will open the *Other Asian* text field. Enter the name of the race.
   c. Selecting '*Other Pacific Islander*' will open the *Other Pacific Islander* text field. Enter the name of the race.
   d. Selecting '*Other Race*' will open the *Other Race* text field. Enter the name of the race.

7. Select the *Ethnicity*.
8. Click the **[Edit]** button to display the *Enter Address* pop-up.
    a. Select the *Address Type.*
    b. Enter the street address in *Address Line 1* and *Address Line 2*, if applicable.
    c. Enter the *City*.
    d. Select the *State*.
    e. Enter the *Zip* code.
    f. Click the **[Search]** button to validate the address. The application will validate the address against Postal records.
        1. If the address is validated, a message indicating such will be displayed. Click the **[OK]** button to close the window.
        2. If an alternate address is found, select the address in the *Search Results* grid and click the **[OK]** button to close the window.
        3. If the address is correct but does not validate, mark the *Save Without Verification* checkbox and click the **[OK]** button to close the pop-up.
9. Click the *Parent* tab and repeat the above steps.
10. Click the **[Save]** button to save your entries. The Child Client will be in focus.
11. Click the **[Document Services]** button to complete the *Service Log* screen.

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.