

ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES



CLIENT VIEW TRAINING



Spring/Summer 2022





Presented by

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SPRING/SUMMER 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, Wilkesburg, 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 to DHS 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.



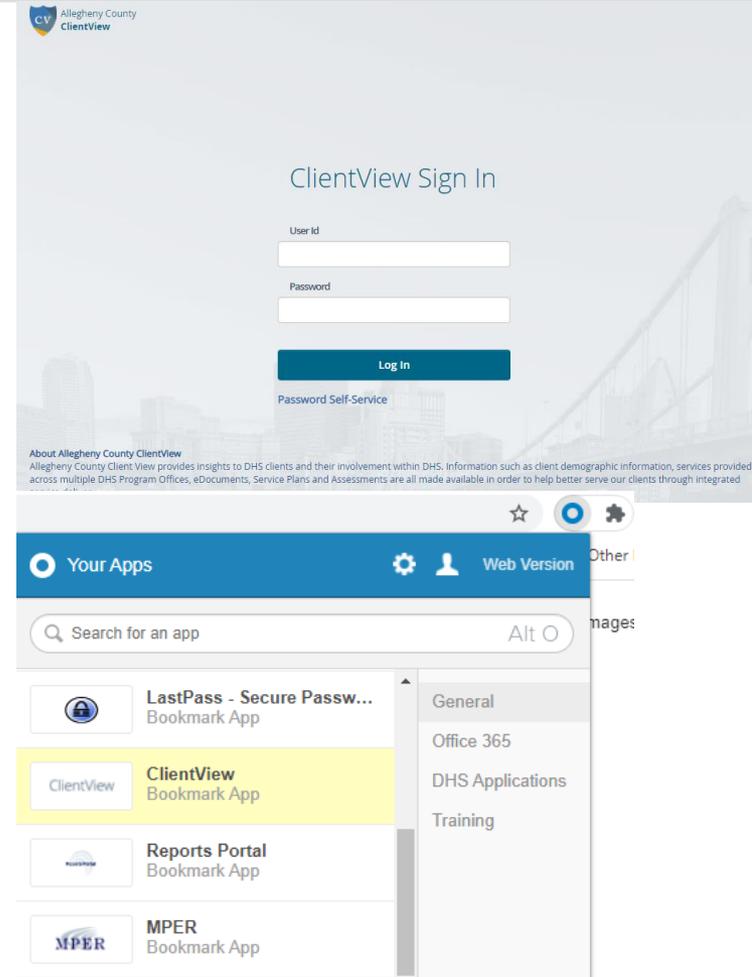
AGENDA

1. Logging into the System
2. Performing a Client Search
3. Viewing a Client Record
4. Understanding a Client's Service History
5. Audits
6. Granting Access to Clients
7. 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 a 'K' or a 'T' and be in the following format: Txxxxxx)
- You can also login through Okta using the Client View link on the Okta plugin as shown here.



ACCESSING CLIENT VIEW VIA ANOTHER SYSTEM..

- Other systems (i.e. KIDS, HMIS, Synergy applications) also link directly to Client View.
- This is a seamless login, so users do not have to sign in again.
- You will see hyperlinks on the client ID or MCI.

Search Results

Navigation: << < 2 3 4 5 6 7 8 9 10 > >>

Results 1 - 15 of 15

Client/Collateral ID▲	Entity Type	First Name	Mid Name	Last Name	Date of Birth	SSN	MCI ID
800867	Client						1000554078
800868	Client						1000727154
800869	Client						1000554079
800870	Client						1000554080
802768	Client						1000556074
802770	Client						1000556075
802771	Client						1000556076
802772	Client						1000556077
803912	Client						

- Once you login, the homepage displays your recent clients, saved clients, a navigation menu, any system announcements, a 'contact us' link, and the search fields.

The screenshot shows the 'Client Search' page in the Allegheny County ClientView system. The header includes the Allegheny County logo and 'ClientView' text, along with navigation links for 'New Search', 'Recent Clients', 'Saved Clients' (with a count of 10), 'Contact Us', and the user name 'Samantha Looney'. The main heading is 'Client Search', followed by a note: 'Last Name OR Social Security Number is required to search.' Below this are three input fields: 'Last Name', 'First Name', and 'Social Security Number', with an 'OR' separator between the first two and the third. A 'Search' button is located at the bottom right of the search area. Below the search fields is an 'Advanced Search' link with an upward-pointing triangle. At the bottom of the page, there is a link for 'Client View Update Frequency'.

PERFORMING A CLIENT SEARCH:

- Enter your search criteria.

The screenshot shows the 'Client Search' page in the Allegheny County ClientView system. At the top left is the logo for Allegheny County ClientView. At the top right are navigation links: 'New Search', 'Recent Clients', 'Saved Clients' (with a badge showing '10'), 'Contact Us', and the user name 'Samantha Loaney' with a profile icon. The main heading is 'Client Search'. Below it, a note states: 'Last Name OR Social Security Number is required to search.' The search form is divided into two main sections. The first section has three input fields: 'Last Name', 'First Name', and 'Social Security Number', with a vertical line and 'OR' between the first two and the third. The second section is titled 'Advanced Search' and has a note: 'If Last Name, SSN or Phone Number are unavailable, a Street Address or County MCI ID is required to search.' This section contains several input fields: 'Street Address', 'City', 'Zip', 'State' (a dropdown menu with '-Select-' and a downward arrow), 'Last 4 Digits of SSN', 'Date of Birth', 'Approximate Age' (a dropdown menu with '-Select-' and a downward arrow), 'Phone Number', and 'County MCI ID' (with an information icon). A yellow 'Search' button is located at the bottom right of the form area.

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 confirm you have found the person you are looking for, click the blue ‘View Details’ button in the far-right column.

Allegheny County ClientView

New Search Recent Clients Saved Clients 10 Contact Us Samantha Looney

Search Results

More than 100 records found. You may choose to refine your search.

Last Name: doe First Name: jane Social Security Number:

OR

Advanced Search

Search

Search within results:

Showing 1 to 10 of 100 entries

Last Name	First Name	County MCI ID	DOB	Gender	SSN	Involvement	Address	Action
Doe	Jane			Unknown		1 Program Area	address unknown, PA	View Details
Doe	Jane			Female	xxx-xx-6726	1 Program Area		View Details
Doe	Jane			Female		1 Program Area		View Details
Doe	Jane			Female	xxx-xx-0038	0 Program Areas	PITTSBURGH, PA, 15230	View Details

VIEWING A CLIENT:

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

The screenshot displays the Allegheny County ClientView interface. At the top, there is a navigation bar with the Allegheny County logo, a search bar, and links for 'New Search', 'Recent Clients', 'Saved Clients', 'Contact Us', and the user's name 'Samantha Looney'. Below this, the search results for 'Jane Doe' are shown, including buttons for 'View Client Workers' and 'View Addresses/911'. The main content area is divided into sections: 'Basic Info' with fields for Social Security #, Date of Birth, County MCI, State MCI, MA Recipient, and Age/Gender; 'Race' (Black/African American), 'Ethnicity' (No Data), and 'Marital Status' (No Data); 'Contact' with a 'Home Address' field and a 'Search Address' button; and 'Services & Documents' with a 'Timeline View' button. The 'Services & Documents' section features a grid of 12 service categories, each with an icon and a count of services: All Services (3), All Documents, Behavioral Health, Child Welfare, Family Strengthening Programs, Criminal & Juvenile Justice (3), Developmental Support, Education, Housing & Shelter, Life Events, Physical Health, Seniors, and State & County Public Benefits.

TO SAVE A CLIENT:

- You can save a client to your 'saved clients' list so you can easily access them later.
- Just select the star next to the client's name.

The screenshot shows the Allegheny County ClientView interface. At the top, there is a navigation bar with 'New Search', 'Recent Clients', 'Saved Clients 10', 'Contact Us', and 'Samantha Loaney'. Below this is a search bar with a dropdown menu that says 'Select to save to your 'saved clients' list.' The client's name 'Jane Doe' is displayed with a star icon next to it. To the right of the name are two buttons: 'View Client Workers 0' and 'View Addresses/911 1'. Below the name is a 'Basic Info' section with the following fields:

SOCIAL SECURITY # xxx-xx-6726 Show Full SSN	DATE OF BIRTH [Redacted]	COUNTY MCI # 1 [Redacted]	STATE MCI # 1 No Data	MA RECIPIENT # 1 No Data	AGE / GENDER 60 / Female
RACE Black/African American	ETHNICITY No Data	MARITAL STATUS No Data			

At the bottom of the 'Basic Info' section are three buttons: 'Source Client Records', 'Generate Access Code', and 'Other Info 1'. Below this is a 'Contact' section with a 'HOME ADDRESS' field that is redacted. A 'Search Address' button is located at the bottom right of the contact section.

TO SAVE A CLIENT:

- You will notice the star is now filled in, and there are now 11 clients saved as shown here.

The screenshot displays the Allegheny County ClientView interface. At the top, the navigation bar includes 'New Search', 'Recent Clients', 'Saved Clients 11' (highlighted with a red box), 'Contact Us', and the user name 'Samantha Looney'. Below the navigation bar, the search results for 'Doe, Jane' are shown, featuring the name 'Jane Doe' with a blue star icon. Two buttons are visible: 'View Client Workers 0' and 'View Addresses/911 1'. The main content area is titled 'Basic Info' and contains a grid of client details:

SOCIAL SECURITY # xxx-xx-6726 Show Full SSN	DATE OF BIRTH [Redacted]	COUNTY MCI # ⓘ [Redacted]	STATE MCI # ⓘ No Data	MA RECIPIENT # ⓘ No Data	AGE / GENDER 60 / Female
RACE Black/African American	ETHNICITY No Data	MARITAL STATUS No Data			

At the bottom of the 'Basic Info' section, there are three buttons: 'Source Client Records', 'Generate Access Code', and 'Other Info 1'. Below this is a 'Contact' section with a 'HOME ADDRESS' field containing redacted information and a 'Search Address' button.

SAVED CLIENTS LIST

Allegheny County ClientView

New Search Recent Clients **Saved Clients 11** Contact Us Samantha Loaney

Saved Clients

Save clients and record notes to reference later.

Name	DOB	SSN	Date Added	Notes	Action
DOE, JANE	[REDACTED]	xxx-xx-6726	3/11/2021		View Details
[REDACTED]	[REDACTED]	xxx-xx-3105	2/8/2021		View Details
[REDACTED]	[REDACTED]	xxx-xx-3494	2/2/2021		View Details
[REDACTED]	[REDACTED]	xxx-xx-6102	9/10/2020		View Details
[REDACTED]	[REDACTED]	xxx-xx-4336	9/10/2020		View Details
[REDACTED]	[REDACTED]	xxx-xx-3824	9/10/2020		View Details
[REDACTED]	[REDACTED]	xxx-xx-8995	9/10/2020		View Details
[REDACTED]	[REDACTED]	xxx-xx-8115	9/10/2020		View Details
[REDACTED]	[REDACTED]	xxx-xx-3085	9/10/2020		View Details
[REDACTED]	[REDACTED]	xxx-xx-2429	9/10/2020		View Details

Show 10 entries

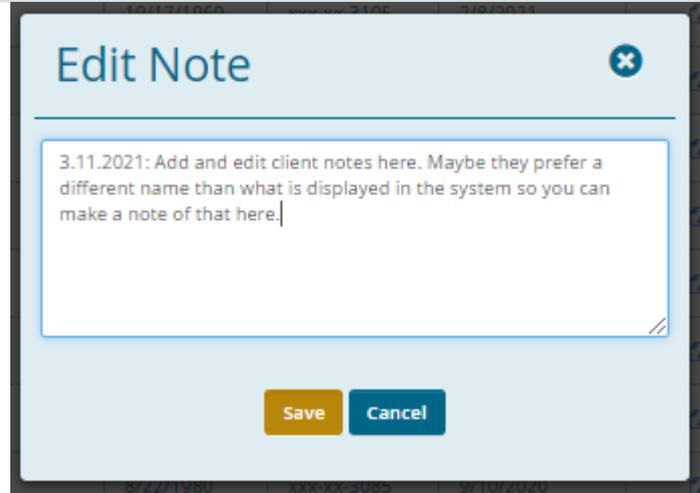
Client View Update Frequency

First Previous **1** 2 Next Last

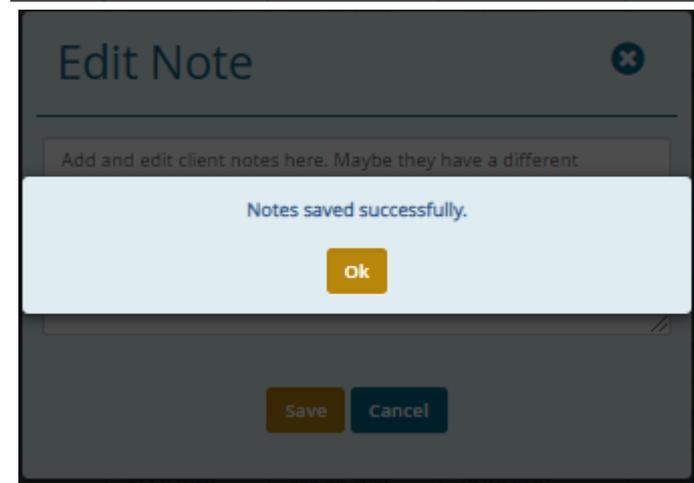
- On your saved clients list, you can also add notes for each client.
- Click on the notepad icon shown here to create, view, or edit a note.

ADD NOTES

- Write a note and click save.
- You will see a confirmation that the note saved successfully.
- You can go in and edit or update the note later.



The screenshot shows a mobile application interface for editing a note. The title bar at the top is light blue and contains the text "Edit Note" and a close button (an 'x' in a circle). Below the title bar is a text input field with a light blue border. The text inside the field reads: "3.11.2021: Add and edit client notes here. Maybe they prefer a different name than what is displayed in the system so you can make a note of that here." At the bottom of the form, there are two buttons: a yellow "Save" button and a blue "Cancel" button.



The screenshot shows the same mobile application interface as the previous one, but in a dark theme. The title bar is dark grey and contains the text "Edit Note" and a close button. The text input field is also dark grey and contains the same text: "Add and edit client notes here. Maybe they have a different". A light blue modal dialog box is overlaid on the form, displaying the message "Notes saved successfully." and a yellow "Ok" button. At the bottom of the form, there are two buttons: a yellow "Save" button and a blue "Cancel" button.

RECENT CLIENTS LIST

- This list shows the last eight client records that you have viewed.
- If you recently viewed a client and want to pull the record up again but did not save it, you can find them again here.

Allegheny County ClientView

New Search **Recent Clients** Saved Clients 11 Contact Us Samantha Loaney

Recent Clients

Recently Viewed Client	DOB	SSN	Date	Action
Doe, Jane	[REDACTED]	xxx-xx-6726	3/11/2021	View Details
[REDACTED]	[REDACTED]	xxx-xx-6102	3/11/2021	View Details
[REDACTED]	[REDACTED]	xxx-xx-2452	3/10/2021	View Details
[REDACTED]	[REDACTED]	xxx-xx-9169	3/9/2021	View Details
[REDACTED]	[REDACTED]	xxx-xx-9453	3/5/2021	View Details
[REDACTED]	[REDACTED]	xxx-xx-5092	2/22/2021	View Details
[REDACTED]	[REDACTED]	xxx-xx-5979	2/18/2021	View Details
[REDACTED]	[REDACTED]	xxx-xx-8995	2/18/2021	View Details

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.

Search Results / Doe, Jane

Jane Doe★

[View Client Workers](#) ¹ [View Addresses/911](#) ¹

▼ Basic Info

SOCIAL SECURITY # xxx-xx-6726 Show Full SSN	DATE OF BIRTH ██████	COUNTY MCI # ¹ ██████	STATE MCI # ¹ No Data	MA RECIPIENT # ¹ No Data	AGE / GENDER 60 / Female
RACE Black/African American	ETHNICITY No Data	MARITAL STATUS No Data			

[Source Client Records](#) [Generate Access Code](#) [Other Info](#) ¹

Contact

HOME ADDRESS
████████████████████
████████████████████
████████████████████

[Search Address](#)

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

The screenshot displays a user interface for viewing client information. At the top right, there are two buttons: "View Client Workers" and "View Addresses/911". Below this is a "Basic Info" section with fields for Social Security # (xxx-xx-0007), Date of Birth, County MCI #, State MCI #, MA Recipient #, and Age/Gender (13 / Female). There are also fields for Race (White) and Ethnicity (Not Hispanic/Latinx). Action buttons include "Source Client Records", "Generate Access Code", and "Other Info".

The "Contact" section shows Home Address (1 SMITHFIELD ST, PITTSBURGH, PA, 15222), Cell, Home, Birth Mother*, and Birth Father* fields. A "Search Address" button is located at the bottom right of this section. A note states: "*As reported by Allegheny County birth records".

The "Services & Documents" section features a "Timeline View" button and a grid of 12 tiles. Each tile represents a category with a count and an icon:

- All Services: 209 Services (hand icon)
- All Documents: 72 Documents (document icon)
- Behavioral Health: 72 Services (head with plus icon)
- Child Welfare: 25 Client Workers, 32 Services, 72 Documents (hand holding child icon)
- Family Strengthening Programs: 2 Services (two people icon)
- Criminal & Juvenile Justice (scales icon)
- Developmental Support (house and person icon)
- Education: 1 Records (person at computer icon)
- Housing & Shelter (house icon)
- Life Events (hand holding plant icon)
- Physical Health: 99 Services (heart with pulse icon)
- Seniors (cloud icon)
- State & County Public Benefits: 4 Services (American flag icon)

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.

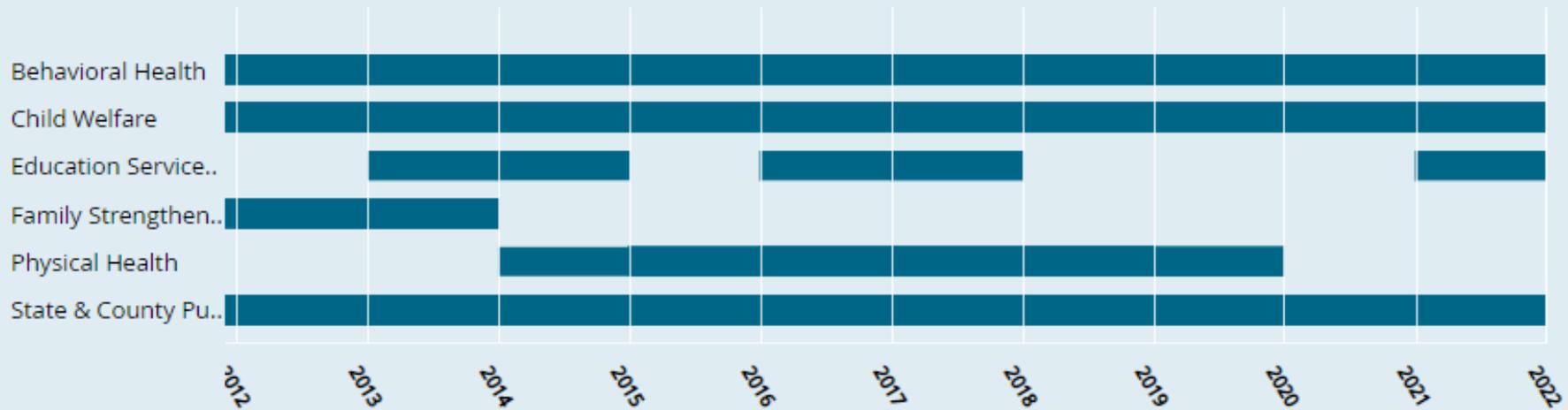


TIMELINE VIEW (YEARLY VIEW)

Timeline View

This is a visual timeline of services received by program area. For detailed information on a service, please click on the row label to open the corresponding tile. You may need to scroll to view additional years.

View Yearly View Monthly

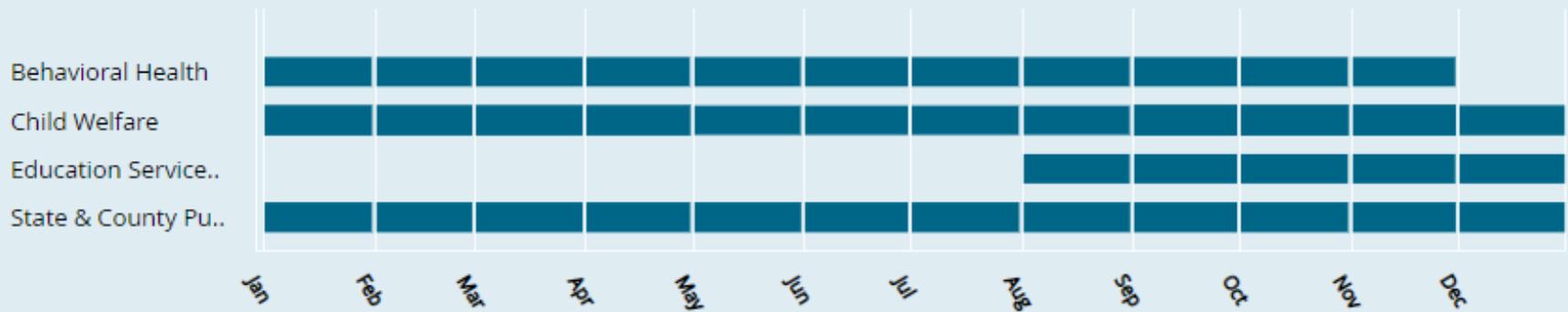


TIMELINE VIEW (MONTHLY VIEW)

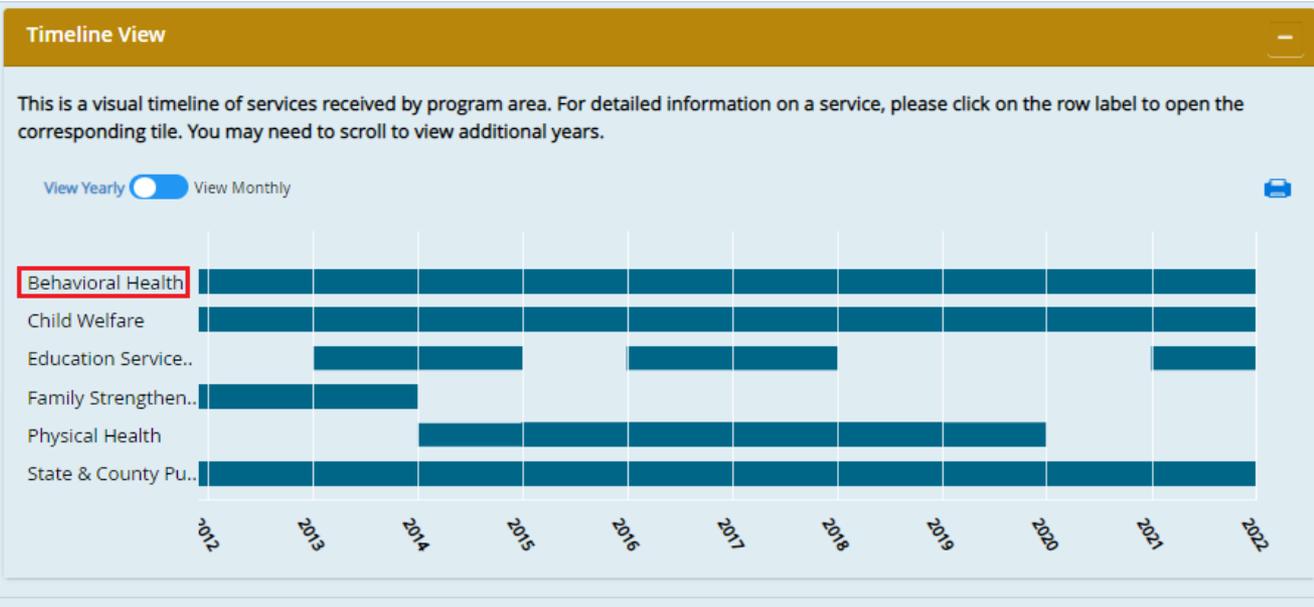
Timeline View

This is a visual timeline of services received by program area. For detailed information on a service, please click on the row label to open the corresponding tile. You may need to scroll to view additional years.

View Yearly View Monthly 2021



- 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.

The screenshot displays a user interface for birth records. At the top right, there are two buttons: "View Client Workers" with a notification badge of 28, and "View Addresses/911" with a notification badge of 15. Below these is a "Basic Info" section with a dropdown arrow. The fields in this section are: SOCIAL SECURITY # (xxx-xx-0007, with a "Show Full SSN" link), DATE OF BIRTH, COUNTY MCI # (with a notification badge of 1), STATE MCI # (with a notification badge of 1), MA RECIPIENT # (with a notification badge of 1), and AGE / GENDER (13 / Female). Below these are RACE (White) and ETHNICITY (Not Hispanic/Latinx). To the right of these fields are three buttons: "Source Client Records", "Generate Access Code", and "Other Info" (with a notification badge of 14). A "Contact" section follows, with fields for HOME ADDRESS (1 SMITHFIELD ST, PITTSBURGH, PA, 15222), CELL, and HOME. To the right of these are two fields for BIRTH MOTHER* and BIRTH FATHER*, each with a DOB field. These two fields are enclosed in a red rectangular box. At the bottom right is a "Search Address" button. A footer note states: "*As reported by Allegheny County birth records".

Basic Info					
SOCIAL SECURITY #	DATE OF BIRTH	COUNTY MCI # 1	STATE MCI # 1	MA RECIPIENT # 1	AGE / GENDER
xxx-xx-0007 Show Full SSN					13 / Female
RACE	ETHNICITY				
White	Not Hispanic/Latinx				

Contact		BIRTH MOTHER*		BIRTH FATHER*	
HOME ADDRESS	CELL	HOME	DOB:	DOB:	
1 SMITHFIELD ST, PITTSBURGH, PA, 15222					

*As reported by Allegheny County birth records

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.

Life Events 

This table only reflects children born in Allegheny County for which birth certificate data was available.

[Allegheny County Department of Human Services](#) [PA South West 2-1-1](#)

[Export to Excel](#)

Search:

Showing 1 to 4 of 4 entries

Event Name	Event Date
Birth of [Redacted]	[Redacted]/2012
Birth of [Redacted]	[Redacted]/2006
Birth of [Redacted]	[Redacted]/2003
Birth of [Redacted]	[Redacted]2001

Note: This table only reflects children born in Allegheny County for which birth certificate data was available

SERVICE INVOLVEMENT BY PROGRAM AREA

- Within each tile, there is a description section, helpful links, workers assigned to that client, documents, and a list of services.
- 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.)



Helpful Links

[Housing & Shelter](#)

[Housing Link](#)
[Housing Help 2.0.1](#)

Client Workers

Showing 1 of 1 of 1 workers

First Initial	Last Initial	Name	Email	Phone Number	Supervisor	Program Area	Position	Association	Role Type
N	B	Neil, Barbara	barbara.neil@alleganycountypa.gov		Harris, Terry		Office of Community Services, Housing and Supportive Services Coordination	Allegheny County Department of Human Services	Contractor

View: 1 of 1 workers

Documents

Showing 1 of 1 of 1 workers

Title	Date	Download
WFOC&P	1/16/2018	Download
WFOC&P	4/23/2018	Download
WFOC&P	4/23/2018	Download
WFOC&P	3/23/2018	Download
WFOC&P	3/23/2018	Download

View: 1 of 1 workers

Service Involvement

All Records

Showing 11 of 11 of 7 workers

First Initial	Last Initial	Program Area	Position	Service	Start/End
N	B	Housing and Housing Support		WRES - SCU	
A	T	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATION	Emergency Shelter HAP (Habitat Voucher)	1/1/2021
N	B	Housing and Housing Support	Allegheny County Department of Human Services	Housing Case Management Supportive Services	1/1/2021
A	T	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATION	Innovative HAP	1/1/2021
J	H	Allegheny County Housing Authority		Services R	
J	H	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATION	Rapid Re-Housing S&D HAP	1/1/2021
L	B	Housing and Housing Support	COMMUNITY HOUSING SERVICES COORDINATION	Personnel Re-trained, S&D HAP	2/1/2022

View: 1 of 1 workers

Export to Excel

Housing & Shelter

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.

Use Study View

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

Provider Services ✕

WESLEY FAMILY SERVICES 🖨️

Program Area(s) for services received: MENTAL HEALTH SERVICES (ALL)

221 Penn Ave
WILKINSBURG, PA 152212118

Show Unit & Cost Details

Export to Excel

Showing 1 to 10 of 31 entries

First Activity ↑↓	Last Activity ↑↓	Service ↑	Diagnosis Description ↑↓	Facility Name ↑↓	Total Units ↑↓
1/12/2021	1/12/2021	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	4
12/15/2020	12/15/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	4
11/19/2020	11/19/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	4
8/20/2020	8/20/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	3
5/21/2020	5/21/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	2
5/7/2020	5/7/2020	Service Coordination Administrative Management Administrative Management Services (.25 Hour)	Attention-deficit hyperactivity disorder, combined type	WESLEY FAMILY SERVICES	2



EDUCATION RECORDS TILE

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 ¹ ↓	Withdrawal Date ¹ ↓	School Name ¹ ↓	District ¹ ↓	Grades ¹ ↓
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 entries

- 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.

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 Documents 

Displayed below are all documents available within the system organized by service category. You may view the document by clicking the download button to the right of the title.

▼ Child Welfare 

Search:

Showing 1 to 10 of 35 entries

Title	Date	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	
CYT - Safety Assessments & Plans	11/24/2020	

Show 10 entries First Previous 1 2 3 4 Next Last

▼ Family Strengthening Programs 

Search:

Showing 1 to 4 of 4 entries

Title	Date	
Independent Living Transition Plan	8/1/2020	Download
Independent Living Transition Plan	8/1/2020	Download
Independent Living Transition Plan	8/3/2019	Download
Independent Living Transition Plan	8/3/2019	Download

Show 10 entries First Previous 1 Next Last

▼ Housing & Shelter 

Search:

Showing 1 to 3 of 3 entries

Title	Date	
VISPOAT	3/21/2019	
VISPOAT	7/19/2018	
VISPOAT	1/11/2016	

Show 10 entries First Previous 1 Next Last

ALL SERVICES TILE

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 (OPMH)	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 entries

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

- 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.

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 Workers
The Allegheny County Workers that are or have previously supported this individual. This data is refreshed on a daily basis.

Search: Showing 1 to 10 of 53 entries

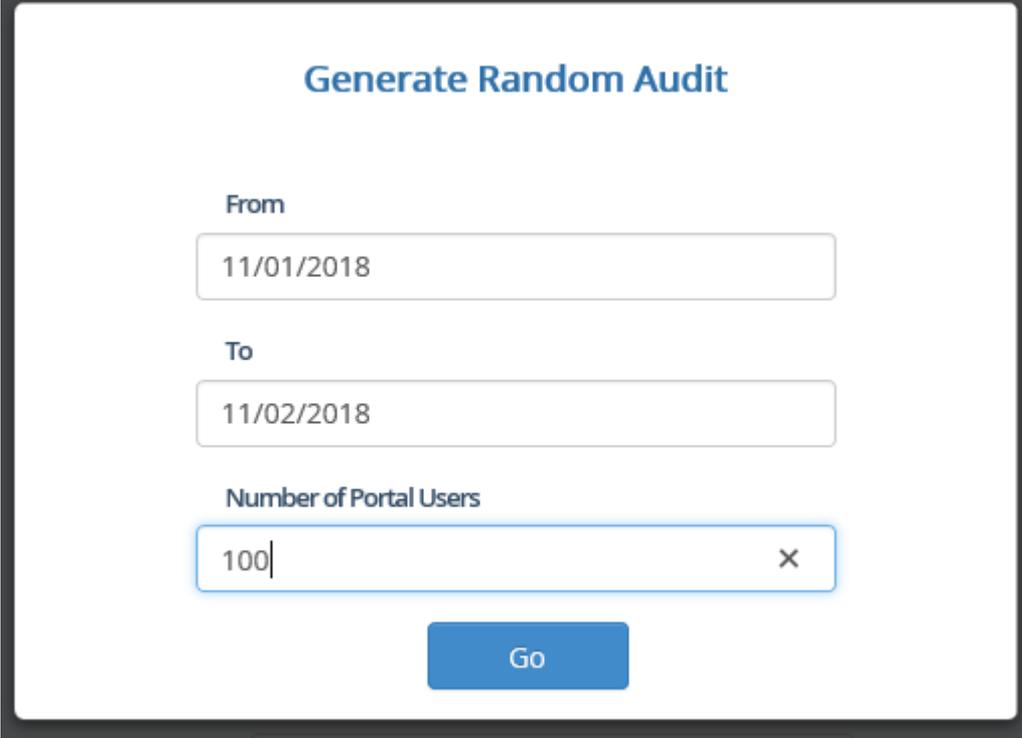
First Activity	Last Activity	Name	Contact Method	Supervisor	Program Area	Provider/SCU	Association	Role Type
4/30/2019	9/15/2020	Durant, Maria	Maria.Durant@AlleghenyCounty.US	Sedillon, William	South Regional Office		Allegheny County Department of Human Services	
7/2/2019	8/24/2020	Mullinary, Alison	Alison.Mullinary@AlleghenyCounty.US	Berry, Deane		Office of Children Youth and Families - Independent Living	Allegheny County Department of Human Services	Transition Planner
5/5/2020	6/3/2020	McGrady, Madeline	Meraldhar.inakarthi@AlleghenyCounty.US	--		AU/BERLE	Service Provider	
2/18/2020	2/25/2020	Cillo, Roberta	Roberta.Cillo@AlleghenyCounty.US	Cillo, Roberta	Intake	Intake Office	Allegheny County Department of Human Services	
1/22/2020	2/19/2020	Durant, Maria	Maria.Durant@AlleghenyCounty.US	Sedillon, William	South Regional Office		Allegheny County Department of Human Services	
2/18/2020	2/18/2020	Pickens, Josette	Josette.Pickens@AlleghenyCounty.US	Pickens, Josette	South Regional Office		Allegheny County Department of Human Services	
1/27/2020	1/27/2020	Moquette, Altagracia	altagracia.moquette@acu3.net	Murphy, Samantha		Office of Integrated Program Services - Allegheny Intermediate Unit	Service Provider	Education Records Consultant
1/22/2020	1/22/2020	Schemm, Jessie	Jessie.Schemm@AlleghenyCounty.US	Schemm, Jessie	Intake		Allegheny County Department of Human Services	
1/16/2020	1/16/2020	Pickens, Josette	Josette.Pickens@AlleghenyCounty.US	Pickens, Josette	South Regional Office		Allegheny County Department of Human Services	
4/16/2019	6/14/2019	Pickens, Josette	Josette.Pickens@AlleghenyCounty.US	Pickens, Josette	Intake		Allegheny County Department of Human Services	

Show 10 entries

First Previous 1 2 3 4 5 6 Next Last

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

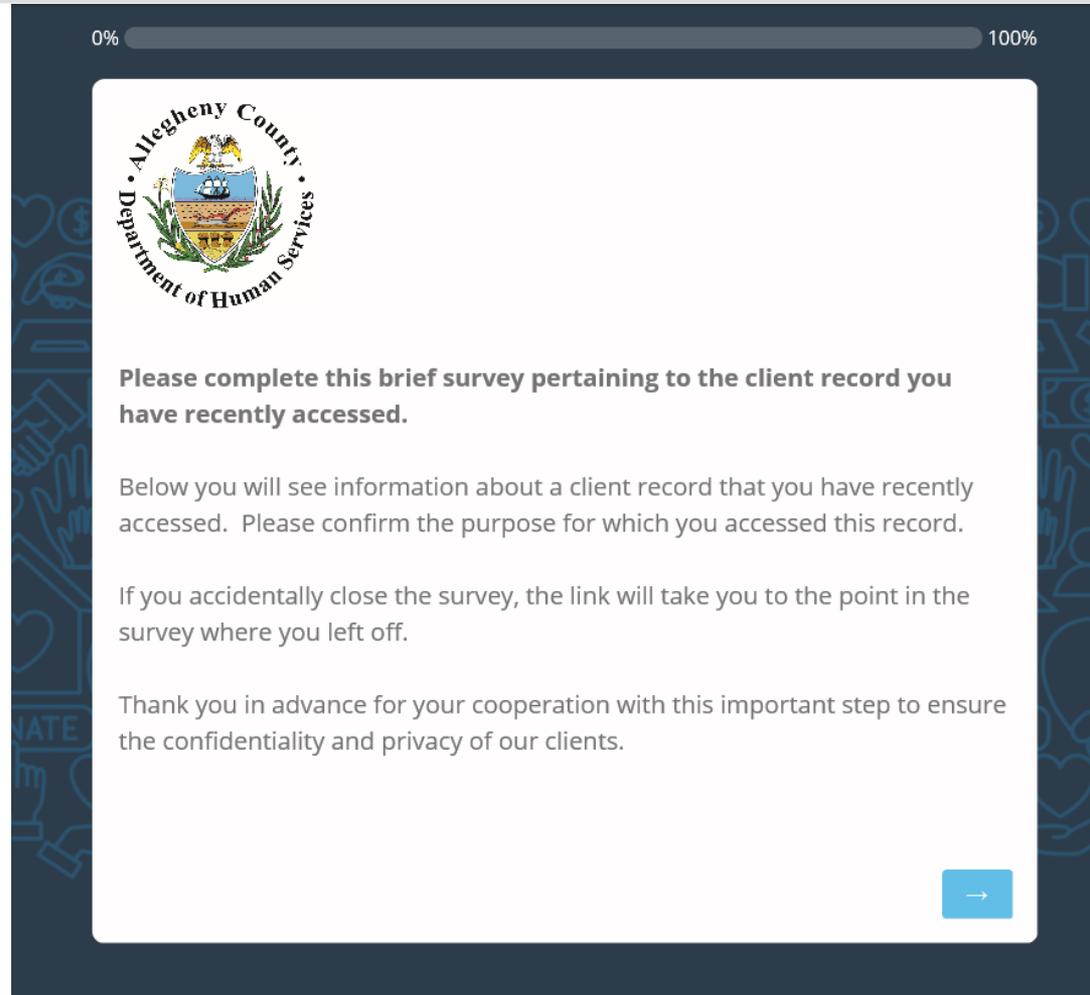
Why do we audit?

- 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**



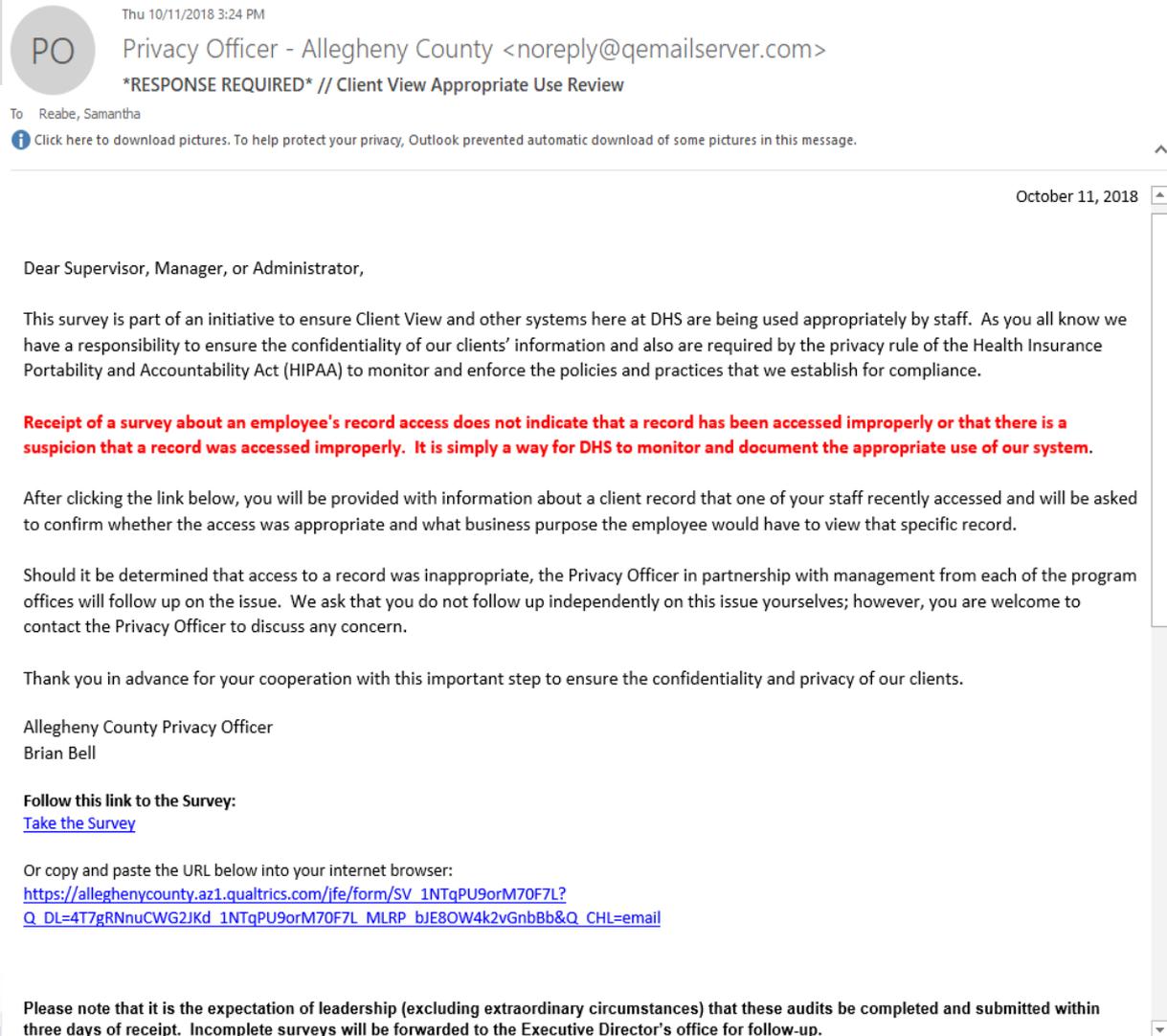
AUDIT SURVEY:

- 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.



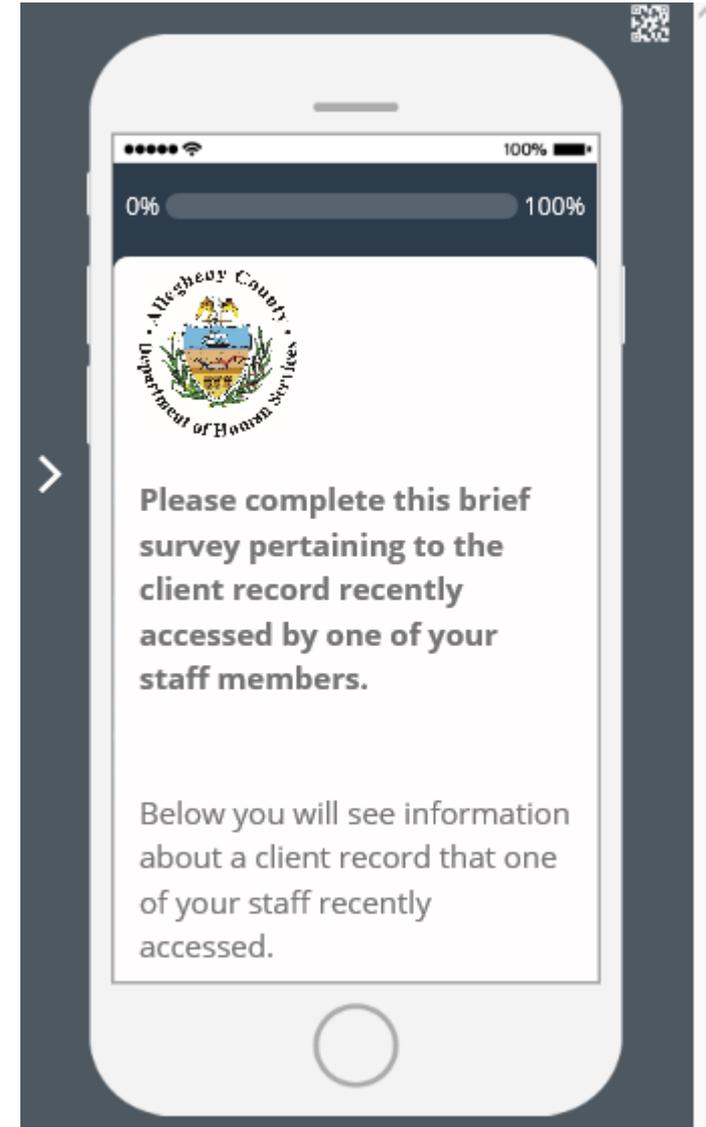
EMAIL EXAMPLE:

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



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.
- Deputy Directors are notified of users with outstanding surveys
- Incomplete surveys are forwarded to the Administrative Office
- Final results are submitted to Erin Dalton for review
- Any instances of access deemed to be inappropriate are referred to Human Resources for follow up.



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.

Allegheny County ClientView

New Search Recent Clients Saved Clients 11 Contact Us Samantha Loaney

My Account Maintenance

If you need to update the email or phone number associated to your Okta account, please do so by clicking here ([OKTA Help](#)).

First Name *	Middle Name	Last Name *
<input type="text" value="Samantha"/>	<input type="text"/>	<input type="text" value="Loaney"/>
Email *	Phone Number	
<input type="text" value="Samantha.Loaney@AlleghenyCounty.US"/>	<input type="text" value="(412) 350-7092"/>	
Supervisor Name *	Supervisor Email *	
<input type="text" value="Bell, Brian"/>	<input type="text" value="Brian.Bell@alleghenycounty.us"/>	

[Update Account Details](#)

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.
- Go to the record of the individual who is requesting access.

The screenshot displays the Allegheny County ClientView interface. At the top, there is a navigation bar with options: New Search, Recent Clients, Saved Clients (11), Contact Us, and Samantha Looney. The main content area shows search results for 'Jane Doe'. Below the name, there are two buttons: 'View Client Workers' and 'View Addresses/911'. The 'Basic Info' section is expanded, showing a grid of client details:

SOCIAL SECURITY # xxx-xx-6726 Show Full SSN	DATE OF BIRTH [Redacted]	COUNTY MCI # [1] [Redacted]	STATE MCI # [1] No Data	MA RECIPIENT # [1] No Data	AGE / GENDER 60 / Female
RACE Black/African American	ETHNICITY No Data	MARITAL STATUS No Data			

Below the 'Basic Info' section, there are three buttons: 'Source Client Records', 'Generate Access Code', and 'Other Info'. The 'Contact' section is partially visible, showing a 'HOME ADDRESS' field with redacted text and a 'Search Address' button.

- 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.

The screenshot displays the Allegheny County ClientView interface. At the top, there is a navigation bar with links for 'New Search', 'Recent Clients', 'Saved Clients' (with a count of 11), 'Contact Us', and the user's name 'Samantha Looney'. Below this, the search results for 'Jane Doe' are shown. The client's name is followed by two buttons: 'View Client Workers' (0) and 'View Addresses/911' (1). The main content area is titled 'Basic Info' and contains a table of client details:

SOCIAL SECURITY #	DATE OF BIRTH	COUNTY MCI #	STATE MCI #	MA RECIPIENT #	AGE / GENDER
xxx-xx-6726 Show Full SSN	[Redacted]	[Redacted]	No Data	No Data	60 / Female
RACE	ETHNICITY	MARITAL STATUS			
Black/African American	No Data	No Data			

Below the table, there are three buttons: 'Source Client Records', 'Generate Access Code' (highlighted with a red box), and 'Other Info' (1). At the bottom, there is a 'Contact' section with a 'HOME ADDRESS' field that is redacted, and a 'Search Address' button.

- 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.

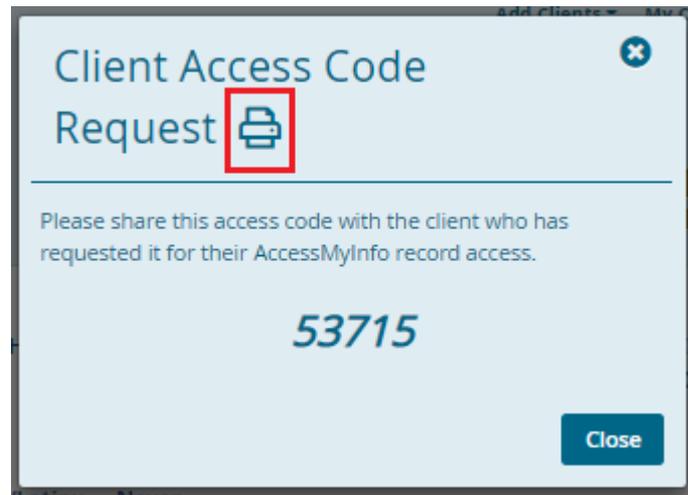
Matching Record Selected:
Name: [REDACTED]
County MCI: [REDACTED]

Address

- [REDACTED] PITTSBURGH PA 15233
- [REDACTED] MCKEES ROCKS PA 15136 Allegheny
- [REDACTED] MCKEES ROCKS PA 15136 Allegheny
- [REDACTED] PA 15233
- [REDACTED] MCKEES ROCKS PA 15136
- [REDACTED] MCKEES ROCKS PA 15136
- 903 WATSON ST PITTSBURGH PA 15219 Allegheny**
- [REDACTED] 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).



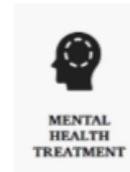


Allegheny County Department of Human Services

Your information. All in one place.

Name: Example Name

You can already access your medical records from your doctor or hospital. At AccessMyInfo, you can get information about other services you've received like:



Get access to the information you need to participate in your own care!

How to Set Up Your Account

1. Go to: <https://accessmyinfo.alleghenycounty.us>
2. Use access code: 49851
3. Your access code will expire on : 9/20/2020

You may not have enough information to set up the account on your own. That's ok!
Call 1-800-862-6783 and someone will help.

A screenshot of a web form titled "Access Code". It asks "Do you have an Access Code?" with radio buttons for "Yes" and "No". Below that is a text input field labeled "Access Code Number" with a red asterisk indicating a required field.

The Allegheny County Department of Human Services (sometimes called DHS) is not a direct care provider. It supports and coordinates human services care in Allegheny County.

- 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.

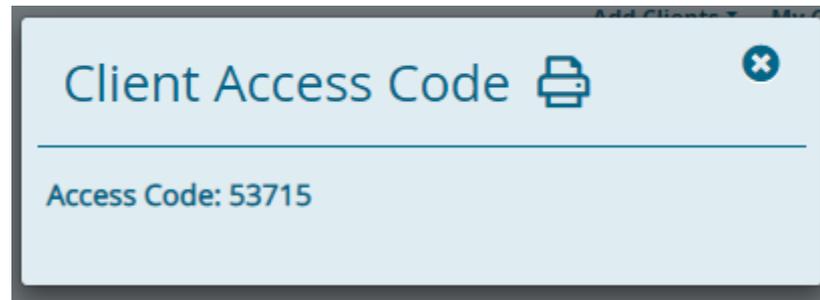
TO VIEW AN ACCESS CODE THAT WAS PREVIOUSLY GENERATED..

- 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.”

The screenshot displays a client record page with the following elements:

- Top Right:** Two buttons: "View Client Workers" and "View Addresses/911".
- Basic Info Section:**
 - SOCIAL SECURITY #: xxx-xx-3105 (with a "Show Full SSN" link)
 - DATE OF BIRTH: [Redacted]
 - COUNTY MCI #: [Redacted]
 - STATE MCI #: [Redacted]
 - MA RECIPIENT #: [Redacted]
 - AGE / GENDER: 51 / Female
 - RACE: Black/African American
 - ETHNICITY: Not Hispanic/Latinx
 - MARITAL STATUS: Never Married/Single
- Navigation Buttons:** "Source Client Records", "View Access Code" (highlighted with a red box), and "Other Info".
- Contact Section:**
 - HOME ADDRESS: [Redacted]
 - CELL: [Redacted]
 - HOME: [Redacted]
- Search Address:** A button located at the bottom right of the contact section.
- Services & Documents Section:**
 - Text: "Select a category to view the documents, client workers and services received associated with that specific area. You can view all of these service categories combined by clicking the 'All Service' tile at the top."
 - Timeline View button.

- 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.

The screenshot displays the Allegheny County ClientView interface. At the top, there is a navigation bar with the following elements: the Allegheny County ClientView logo, a 'New Search' button, 'Recent Clients', 'Saved Clients' with a count of 11, a 'Contact Us' button (highlighted with a red box), and the user's name 'Samantha Loaney' with a profile icon.

Client Search

Last Name OR Social Security Number is required to search.

Last Name **First Name** **Social Security Number**

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**

Last 4 Digits of SSN **Date of Birth** **Approximate Age** **Phone Number**

County MCI ID

- 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.

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 *

Details *

B *I* U 16 open_sansregular

Submit

QUESTIONS?

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

