

MyCHOIS

How-To Guide for Creating Client Accounts



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Creating Client Accounts

The PSYCKES team has expanded the use of MyCHOIS Consumer, the client-facing version of PSYCKES, so that any provider using PSYCKES can allow clients to access their treatment history. Clients can login to MyCHOIS from any web browser and access “My Treatment Data,” the client-facing version of the Clinical Summary, as well as other recovery-oriented tools. A separate user guide, “*How-To Guide for Clients to Request an Account and Login to MyCHOIS*” is available for clients upon request.

For providers to grant access to clients’ MyCHOIS Consumer accounts, providers will need to obtain the client’s proof of identity and NY.gov ID username. To assist clients with locating their NY.gov ID account information, please reference the “*How-To Guide for Clients to Obtain NY.gov ID Account Information*”.

Navigate to MyCHOIS within PSYCKES

To create a MyCHOIS Consumer account for your client, you must first log into PSYCKES and go to “MyCHOIS” in the purple navigation bar. From there, you will need to select a site to access the dashboard for the client you wish to create an account for (Figure 1).

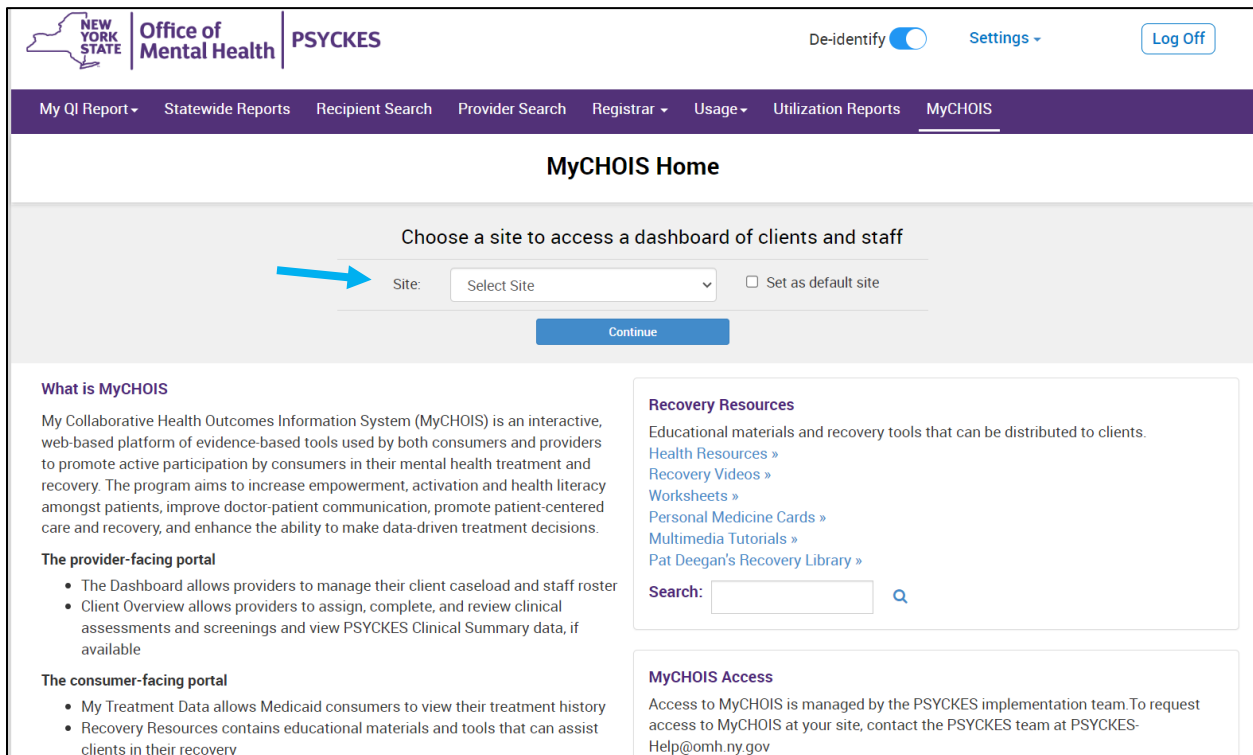


Figure 1: Navigating MyCHOIS in PSYCKES

Note: If you don't see MyCHOIS in the navigation bar and want to use this feature, contact PSYCKES-Help@omh.ny.gov.

Find/Add Client

To see if the client is already added to your “All Clients” tab, you can search by using the search bar located at the top right of the screen (Figure 2).

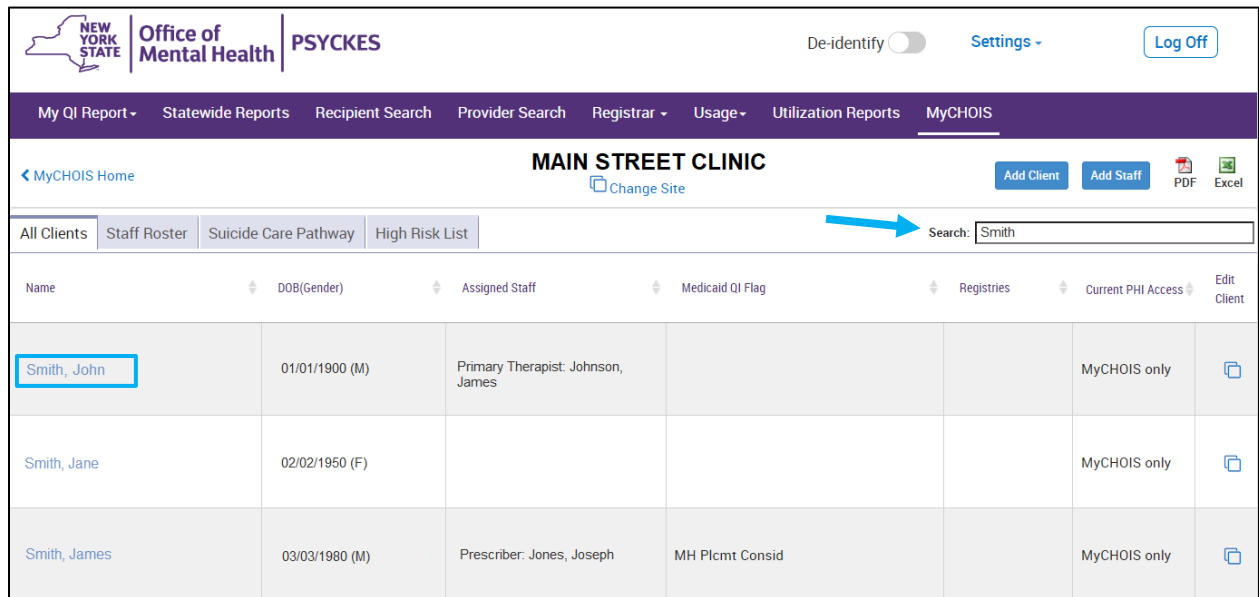


Figure 2: Finding a Client

If the client is new or has not already been added to your “All Clients” tab, you can select the “Add Client” button to securely add them. You can search using either Medicaid ID, Social Security Number, or a combination of Name and DOB (Figure 3).

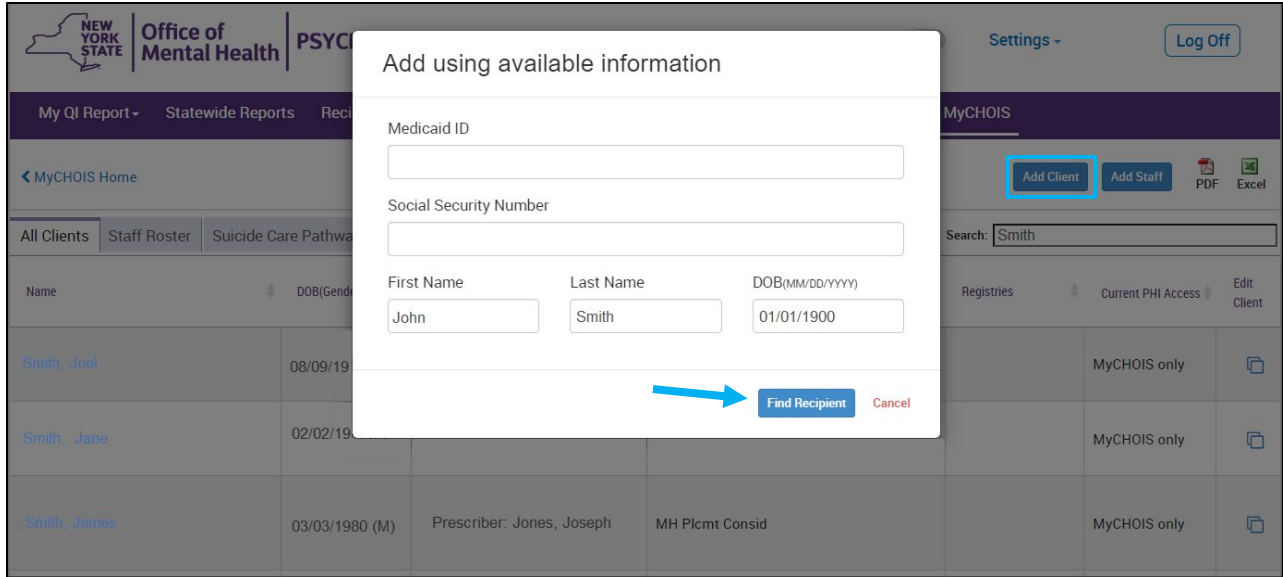


Figure 3: Adding a Client

Note: The “Add Client” button is not available to state PC users because clients are being added automatically using MHARS.

If the correct client is displayed in MyCHOIS, you can view and update their client profile as well as add them to your “All Clients” tab. However, if you don’t find the correct match, you can still add an account by selecting “Create new client” (Figure 4).

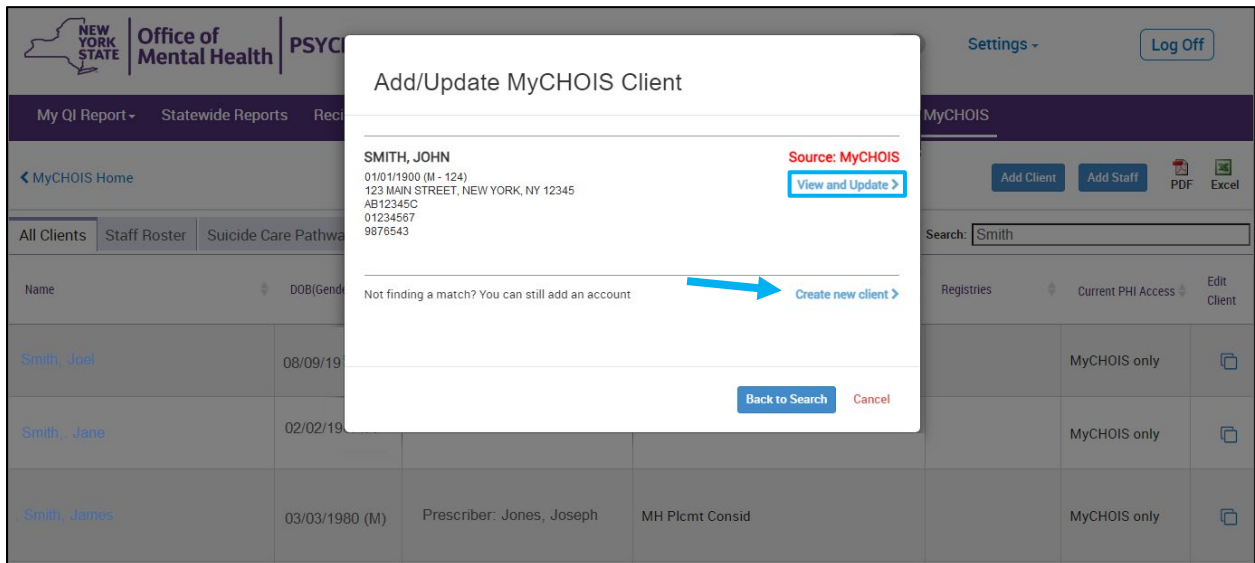


Figure 4: Updating a Client’s Information

When completing the client’s profile, it will be required to include not only all client information listed in the profile, but also the client must have at least one program staff

assignment. If the appropriate staff member is not listed in the drop down, the user can add a staff member by selecting “Add Staff”.

Once the profile is complete, select either “Save” or “Create MyCHOIS Account”, depending on what was selected on the previous screen (Figure 5).

The screenshot shows a web form titled "Add MyCHOIS Client". The form is organized into two main sections. The first section, "Client Information", contains several input fields: "First Name" (JOHN), "Last Name" (SMITH), "DOB" (01/01/1900), "Gender (M/F/O)" (M), "SSN" (empty), "Address" (123 MAIN STREET), "City" (MAIN CITY), "State" (NY), "Zip Code" (11111), "Email" (John.Smith@maincity.com), and "Phone" (empty). The second section, "Program Staff assignment", includes a "+ Add Staff" button and three dropdown menus: "Physician/Prescriber" (empty), "Primary Therapist" (JOHNSON, JAMES), and "Other assigned staff" (empty). At the bottom of the form, there are three buttons: "Create MyCHOIS Account" (highlighted with a blue arrow), "Back to Search", and "Cancel".

Figure 5: Adding a New Client

Consumer Account

To grant a client access to their MyCHOIS Consumer account, you will need to link the client’s MyCHOIS account to their NY.gov ID account.

- If the client **does** have a NY.gov ID account, you will need their NY.gov ID username.
- If the client **does not** have a NY.gov ID account, they will need to create one.

For more information on how clients can create a NY.gov ID account, obtain their existing NY.gov ID username, or reset their NY.gov ID account password, please reference the “*How-To Guide for Clients to Obtain NY.gov ID Account Information*”.

Once the client provides their NY.gov ID username, you will need to navigate to their

MyCHOIS account and select the “Edit Client” button at the far right of that client’s row. Then select the “Link to NY.gov ID” option listed in the menu dropdown (Figure 6).

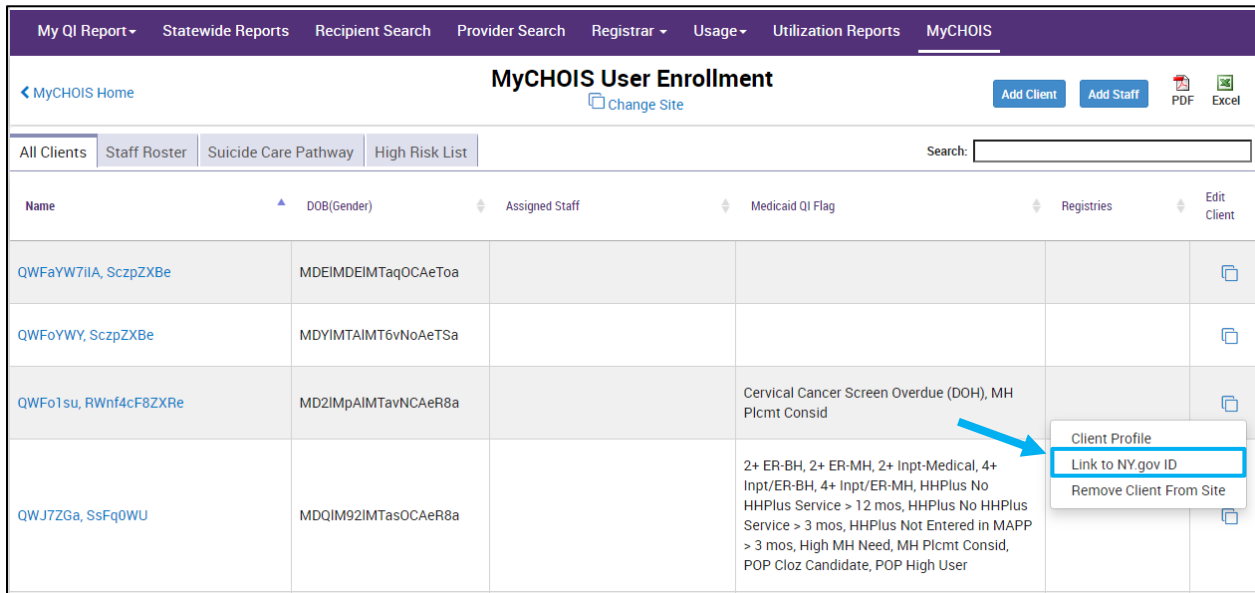


Figure 6: Link to NY.gov ID

You will then be prompted to enter the client’s NY.gov ID username or email (Figure 7). Once entered, click “Search”.

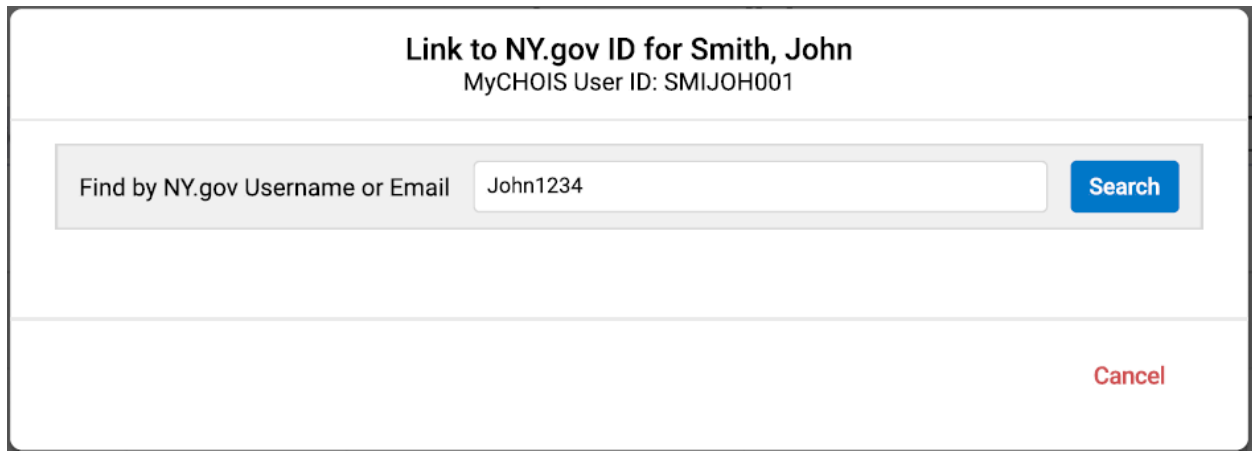


Figure 7. Search by NY.gov ID Username or Email

You will then need to verify that you are linking the correct person on the results page. **Note:** Multiple results may show, so it’s important to confirm the client’s name, NY.gov ID, email, and any other information provided by comparing the results to the client’s proof of identity.

Once you feel confident that you've found the correct person for the linkage, select "Link" (Figure 8).

Link to NY.gov ID for Smith, John
MyCHOIS User ID: SMIJOH001

Find by NY.gov Username or Email Search

■ Data shown below comes from NY.gov ID. if there are multiple matches, select the client's preferred username.

Name, DOB, Address	Username	Email	
Smith, John 01/01/1900 123 Main Street, Main City, NY 11111	John1234	John.Smith@maincity.com	Link
Doe, John	John12345doe	Johndoe12@email.com	Link
Doe, Johnny 01/01/1901	John123456789	Johnny.Doe1@email.com	Link

Cancel

Figure 8. Confirming Match and Linking to NY.gov ID

The following screen (Figure 9) will confirm that a linkage has occurred between the client's MyCHOIS Consumer account and their NY.gov ID account.



Figure 9. Linkage Confirmation Screen

You may then notify the client that they can now access their MyCHOIS Consumer account. To assist them with logging in and navigating the website, please provide them with the “How-To Guide for Clients to Request an Account and Login to MyCHOIS”.

View/Update Client’s Contact Information

If you would like to either view client information or update a client’s contact details, you will need to select the “Edit Client” button at the far right of that client’s row (Figure 10).

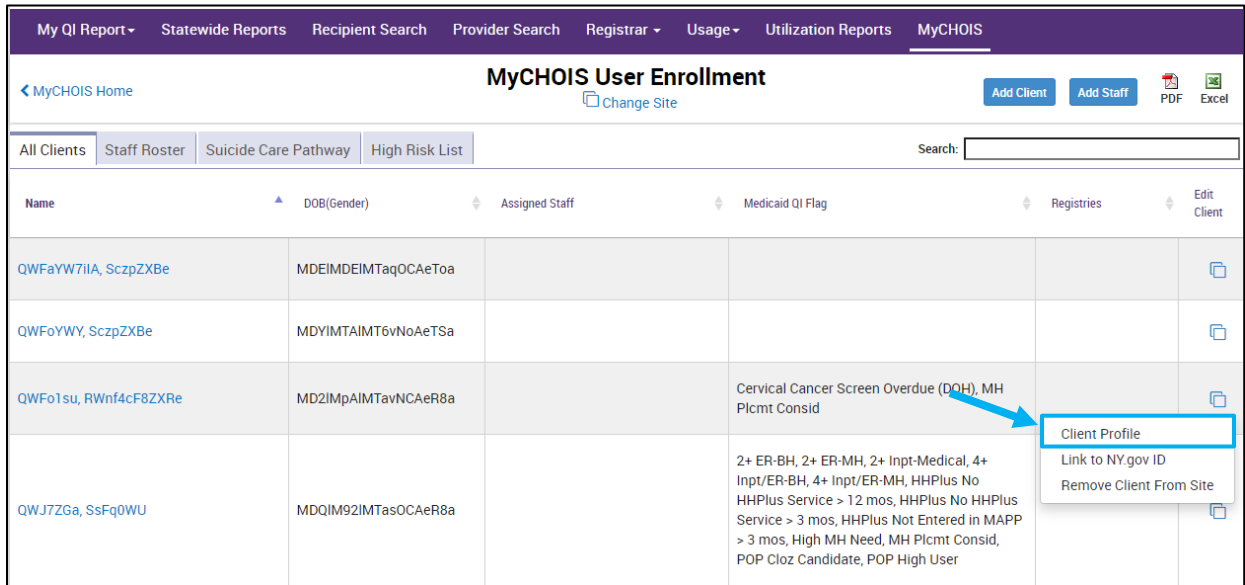


Figure 10: Viewing Client Profile

The “Client Profile” option will be the first listed within the menu. When selected, the user can review or update the client’s information, such as their email address or phone number, if necessary (Figure 11).

Client Profile for SMITH, JOHN
MyCHOIS User ID: SMUJOH001

Client Information

First Name: JOHN Last Name: SMITH

DOB: 1/1/1900 Gender (M/F/O): M SSN: [Empty]

Address: 123 MAIN STREET

City: MAIN CITY State: NY Zip Code: 11111

Email: John.Smith@maincity.com Phone: 1112223333

Program Staff assignment + Add Staff

Physician/Prescriber: [Empty]

Primary Therapist: JOHNSON, JAMES

Other assigned staff: [Empty]

Save Cancel

Figure 11: Updating Client Profile