

# MyCHOIS

How-To Guide for Creating Client Accounts



Office of  
Mental Health

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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 create a user ID and password for a client they serve. Clients can then 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.

### Navigate to MyCHOIS within PSYCKES

To create a MyCHOIS consumer ID and password for a client you serve, 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).

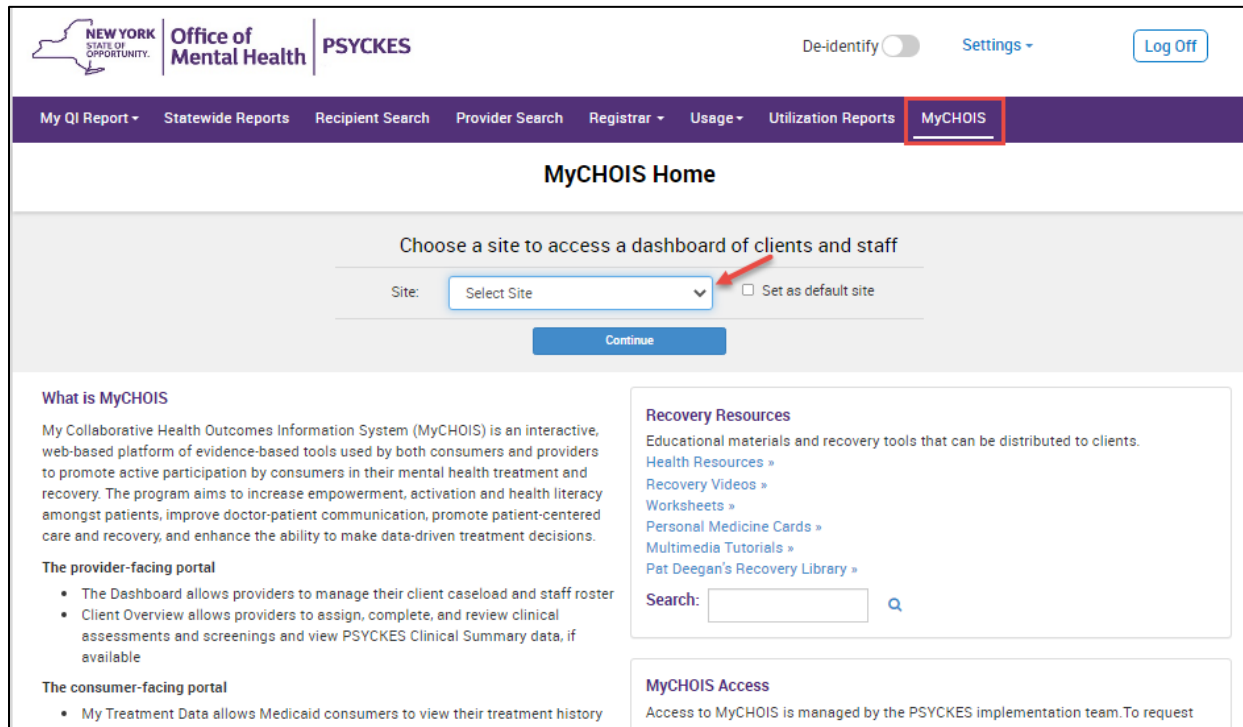


Figure 1: Navigating MyCHOIS in PSYCKES

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

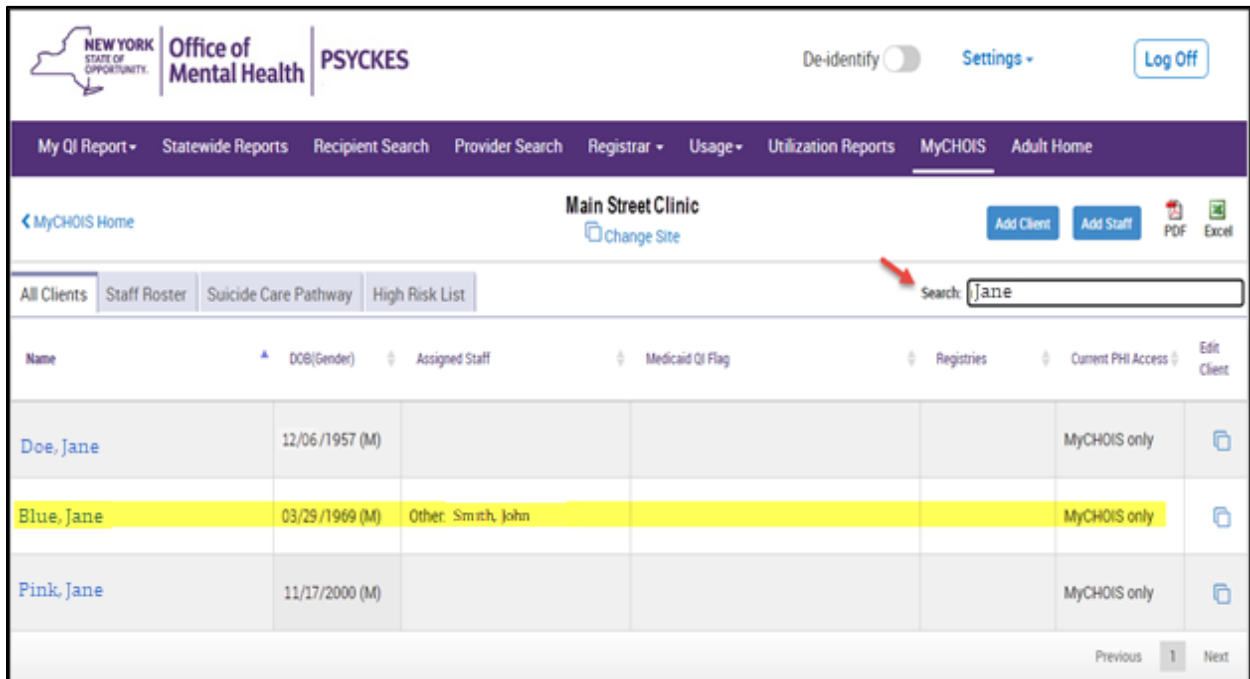


Figure 2: Finding a Client

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).

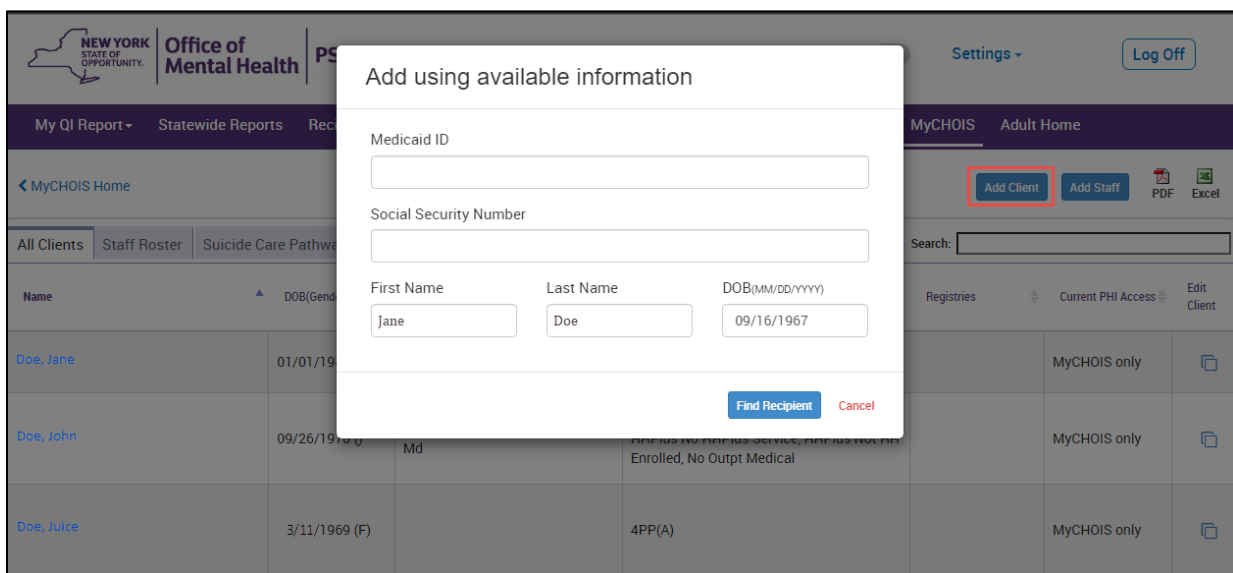


Figure 3: Adding a Client

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).

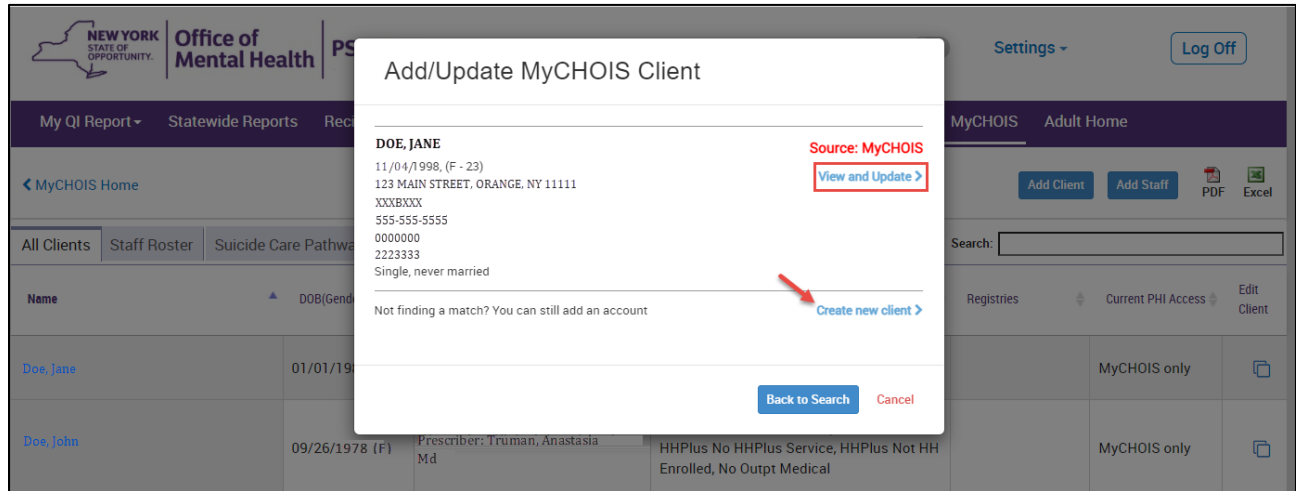


Figure 4: Updating a Client’s Information

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).

**Add MyCHOIS Client**

**Client Information**

First Name: JANE      Last Name: DOE

DOB: 11/04/1998      Gender (M/F/O): F      SSN: XXXXXX

Address: 123 MAIN STREET

City: ORANGE      State: NY      Zip Code: 11111

Email: Doe.jane54@yahoo.com      Phone: 555-555-5555

**Program Staff assignment** + Add Staff

Physician/Prescriber: [Dropdown]

Primary Therapist: SMITH, JOHN [Dropdown]

Other assigned staff: [Dropdown]

[Create MyCHOIS Account](#) [Back to Search](#) [Cancel](#)

Figure 5: Adding a New Client

### Consumer Login Account

To create the consumer login account for the client, you will need to select the “Edit Client” button at the far right of that client’s row. The “Consumer Login Account” option will be listed in the menu dropdown (Figure 6).

The screenshot shows the MyCHOIS interface for Main Street Clinic. At the top, there are navigation tabs: My QI Report, Statewide Reports, Recipient Search, Provider Search, Registrar, Usage, Utilization Reports, MyCHOIS, and Adult Home. Below these is a search bar and buttons for 'Add Client', 'Add Staff', 'PDF', and 'Excel'. The main content area displays a table of clients with the following columns: Name, DOB(Gender), Assigned Staff, Medicaid QI Flag, Registries, Current PHI Access, and Edit Client. The table lists four clients: John Smith, Jane Doe, Mini Mouse, and Micky Mouse. A dropdown menu is open for the 'Micky Mouse' client, showing options: Client Profile, PHI Access/Consent, Consumer Login Account (highlighted), COVID-19 Registry, Client Registries, Link to Other Databases (Medicaid, MHARS), and Remove Client From Site. A red arrow points to the 'PSYCKES Consent' option in the dropdown.

Name	DOB(Gender)	Assigned Staff	Medicaid QI Flag	Registries	Current PHI Access	Edit Client
John Smith	11/01/1981 (M)				MyCHOIS only	
Jane Doe	12/06/1970 (F)		2+ ER-BH, 2+ ER-MH, 4+ Inpt/ER-BH, HHPPlus No HHPPlus Service, HHPPlus Not HH Enrolled, High Mental Health Need		MvCHOIS only	
Mini Mouse	03/29/1969 (F)		4PP(A)			
Micky Mouse	07/14/1981 (M)		2+ ER-BH, 2+ ER-MH, 2+ ER-Medical, 2+ Inpt-BH, 2+ Inpt-MH, 4+ Inpt/ER-BH, 4+ Inpt/ER-MH, Adher-AD - Recovery (DOH), HARP No Assessment for HCBS, HARP No Health Home, HHPPlus No HHPPlus Service, HHPPlus Not HH Enrolled, High Mental Health Need, No Detox f/u 14d, POP High User, Readmit 30d - BH to BH, Readmit 30d - MH to All Cause		PSYCKES Consent	

Figure 6: Consumer Login Account

An email and phone number are required to create a consumer account (Figure 7):

The screenshot shows a form titled 'MyCHOIS Consumer Account for Smith, John(M - 29)'. The form contains the following text: 'Creating a consumer account will allow an individual client to login to MyCHOIS Consumer to access their personal health record, use the Recovery Library, upload or edit their Psychiatric Advance Directive, and many other resources and tools. The client's email and phone number are required to create an account:'. Below this text are two input fields: 'Client's Email' and 'Client's phone number'. Below the input fields is the text: 'Once the consumer account is created, you will be given instructions to review and share with the client.'. At the bottom right of the form are two buttons: 'Create Account' and 'Cancel'.

Figure 7: Creating a Consumer Login Account

A username and a one-time password will be generated to give to the client, including instructions for how the client can login for the first time (Figure 8). The client will then enter the username and the one-time password that was generated when their account was created.

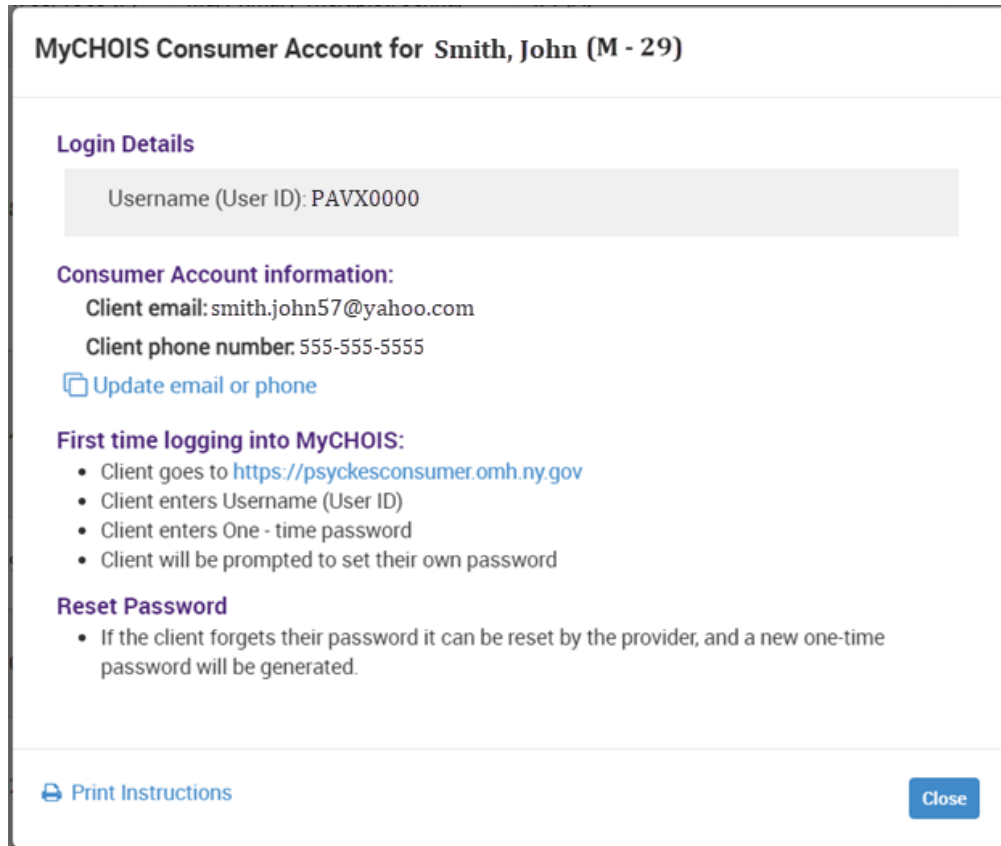


Figure 8: Creating a Consumer Login Account

### ***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 9). 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 10).



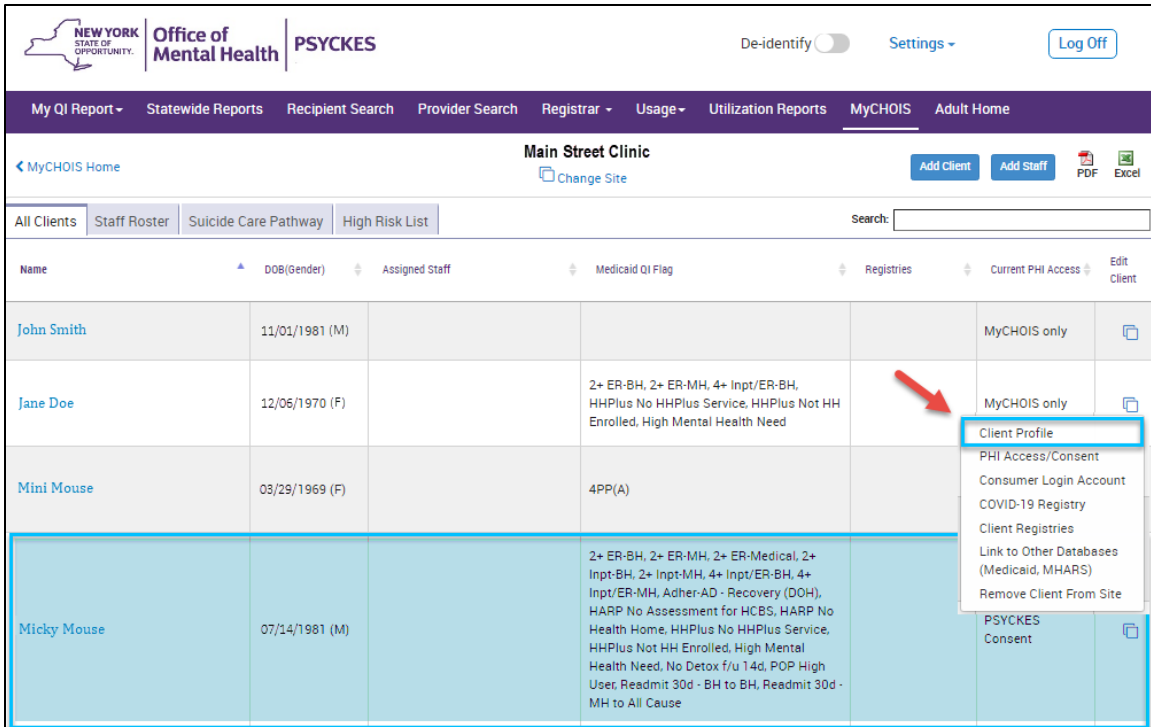


Figure 9: Viewing Client Profile

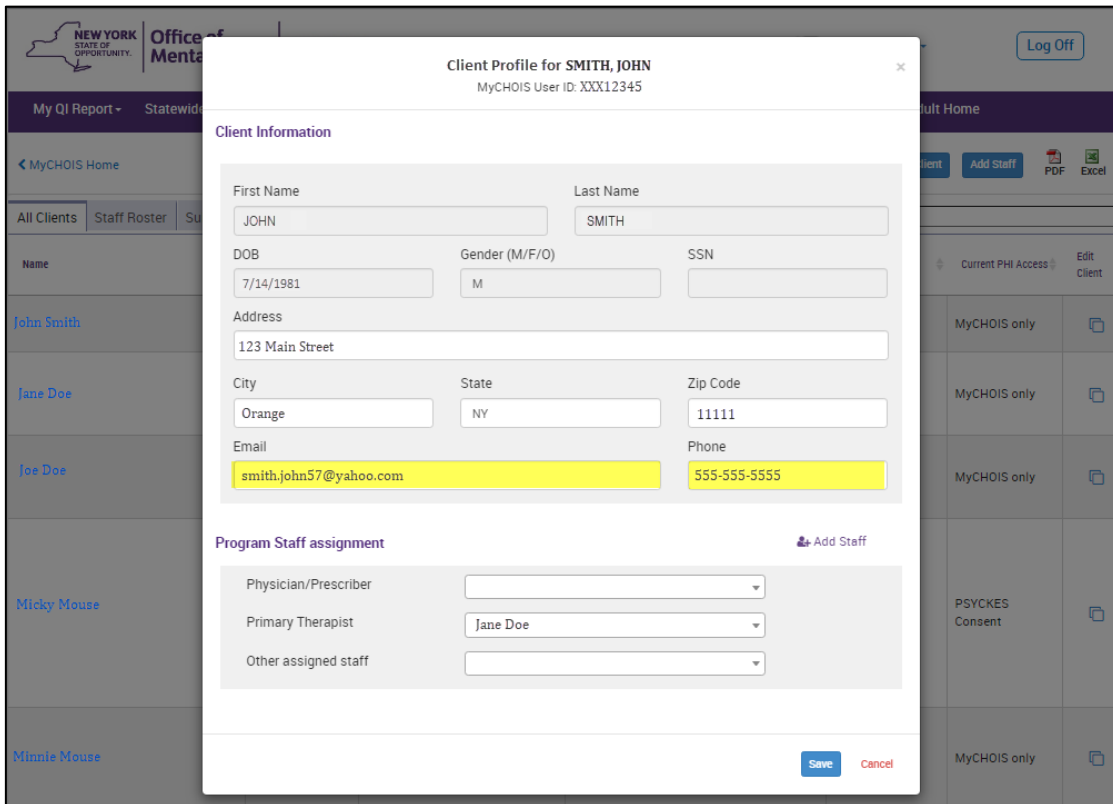


Figure 10: Updating Client Profile

Note: The “Consumer Account Login” details would be what the client uses to log in to their MyCHOIS Consumer account. The “MyCHOIS ID” is a unique identifier assigned to a client when they are added into MyCHOIS for provider user reference.

### Reset Consumer Password

If a client forgets their password, a provider user can reset it by going to the client’s account in MyCHOIS and selecting “Reset Consumer Password” from the “Edit Client” menu (Figure 11). This will generate another one-time use password that can be provided to the client (Figure 12).

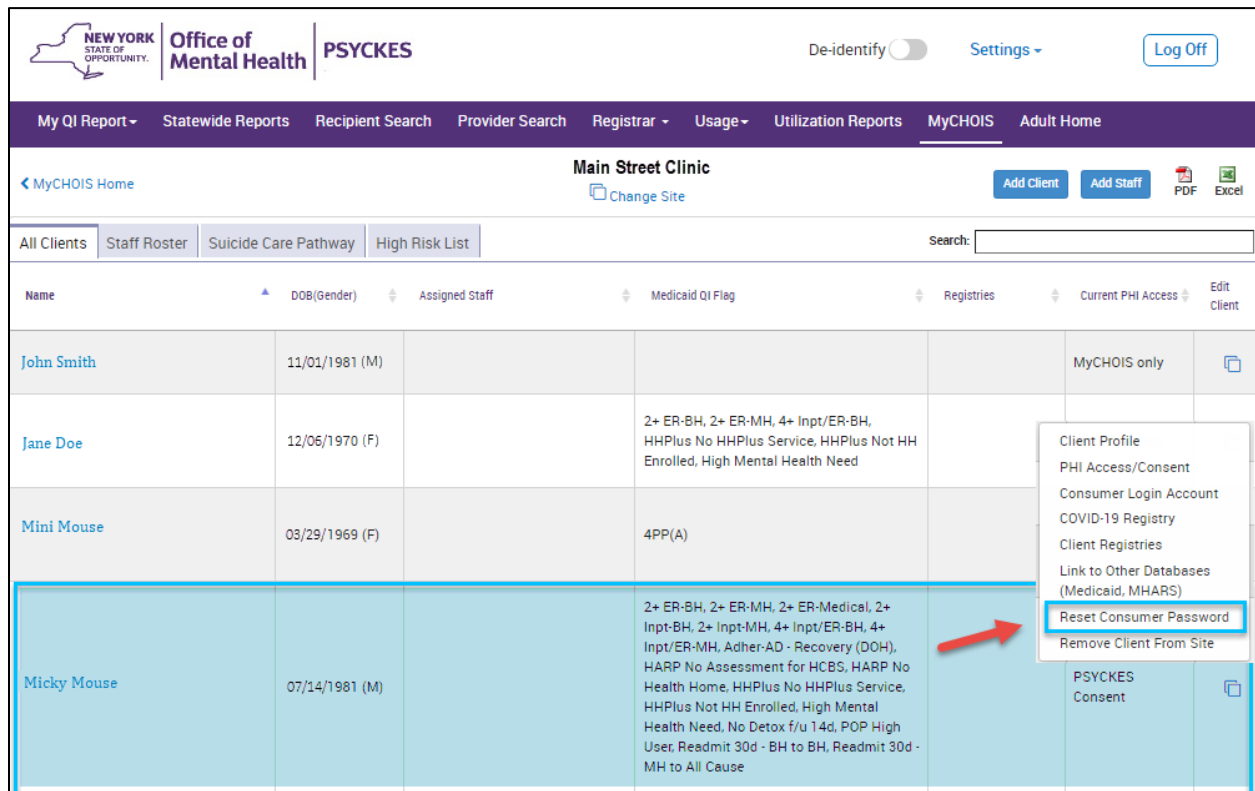


Figure 11: Resetting a Consumer’s Password

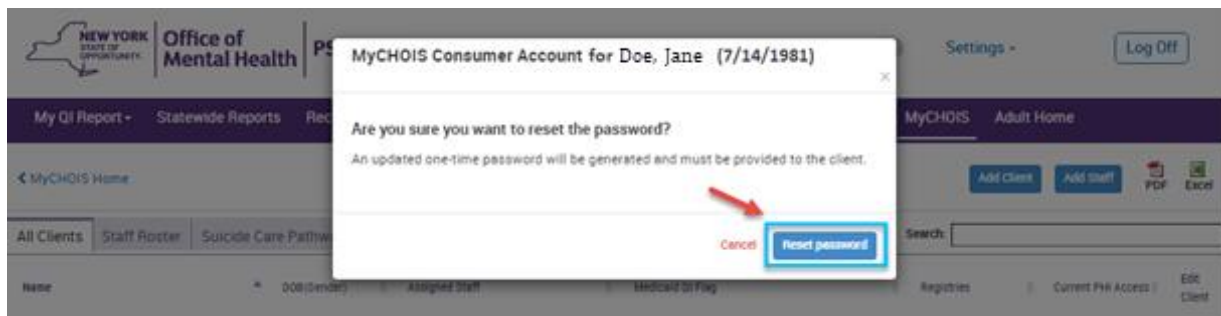


Figure 12: Generating a One-time Password