

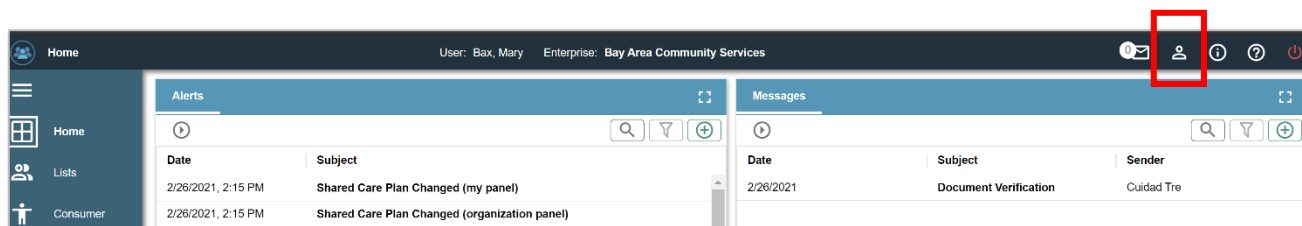
TIP SHEET: Add a Consumer to Your Organization's Panel (Self-Attribution)

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If a Care Team member (end-user) is working with a Consumer who is on Medi-Cal or is uninsured in Alameda County, but who they are unable to locate or view in the CHR, this is likely because the Consumer is not yet attributed to their organization. End-users can manually attribute the Consumer using self-attribution to gain access to the Consumer's Health Record. To self-attribute a consumer, a user must have an exact match of the Consumer's first name, last name, Date of Birth (DoB) and gender to complete self-attribution using the Consumer Search functions.

1 Perform a Consumer Search

- Self-Attribution can be completed from clicking the consumer search icon in the top toolbar of the homepage dashboard **OR**



- By using the advanced search icon in the **Consumer** Main Side Menu consumer search field

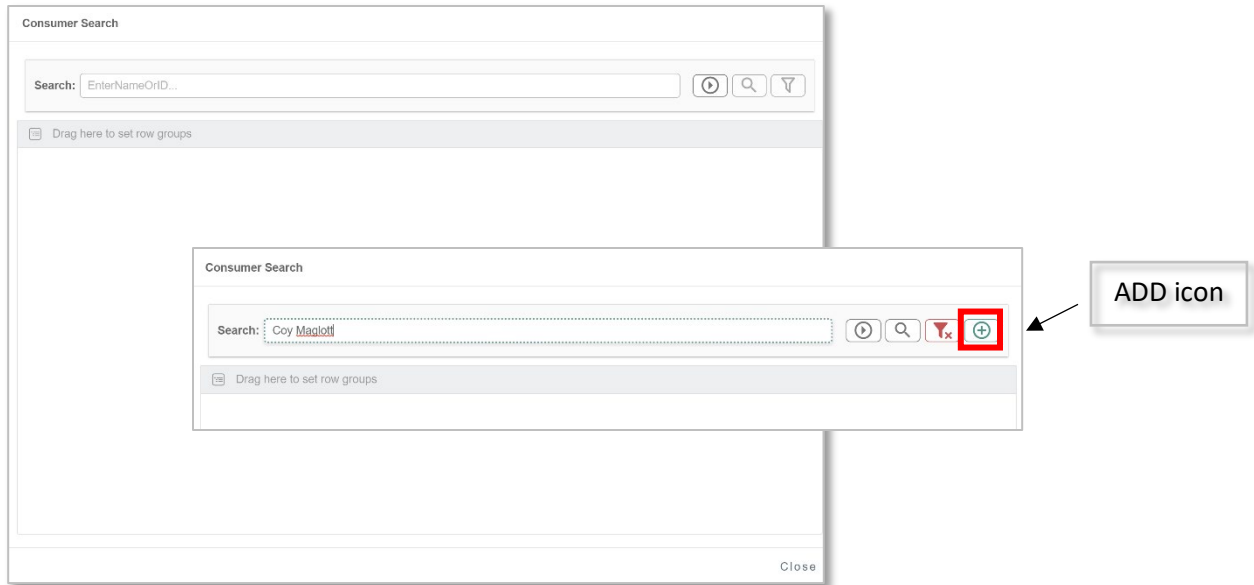


2 Open the Consumer Search Window

- Click either the Consumer search icon  on the top tool bar or use the advanced search icon from the Main Menus Consumer Search field.
 - Consumer Search window opens

3 Search for Consumer

- Enter first and last name, or last name and first name in the Consumer Name search box
 - Click Search icon 
 - If no results are returned, an Add Icon will appear in the upper right of the window



- Click the **ADD** icon  to open Add Consumer window

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Add Consumer

- Complete the required data fields
 - Enter the last name, first name, gender and DoB of the consumer. Information must be an exact match to the data in the CHR.
 - Provide a justification for why you need access to this record.
 - Click **ADD** button when finished.
 - The Consumer's Health Record will open if the data matches.
You can now add yourself to the Consumer's care team!

The image shows the 'Add Consumer' form. It has several input fields: '*First:', '*Last:', '*Gender:' (a dropdown menu), '*DoB:' (a date picker), and 'Zip:'. Below these fields is a large text area labeled '*Justification for Add:'. At the bottom right of the form, there are two buttons: 'Close' and 'Add'. The 'Add' button is highlighted with a red box.

- To watch a video demonstrating how to self-attribute a Consumer record, register for the CHR Refresher Training at [Self-Paced CHR Training Registration](#).