How do I Allow SSN Retrieval on a client profile?

For electronic visit verification (EVV) aggregations, social security number (SSN) retrieval may be required. View the current setting selection on the client profile and edit to allow SSN retrieval.

1. Log in to the DCI web portal
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. In the Basic Demographics widget, view the setting Allow SSN Retrieval.
   a. Yes = Allows for SSN Retrieval. The SSN will be stored in a retrievable format for use in EVV aggregation. Only select Yes if this client will be funded by a funding source that requires SSN to be aggregated.
   b. No = Does not allow for SSN Retrieval
7. If the setting is No, proceed with editing the client profile:
   a. Click **Actions**
   b. Select **Edit Client** from the drop-down menu
   c. On the Basic Demographics tab, scroll to the bottom to the setting Allow SSN Retrieval.
   d. Select **Yes**
   e. Click **Save** and **Yes** to confirm

Related articles

- How do I Allow SSN Retrieval on a client profile?
- October 2020 Release Notes