

## Preventing Duplicate Clients

**Situation:** This Documentation Demonstrates how to do Wildcard Search, Move Intake and Merge Client Records, Delete Duplicate Client, Use SSRS Report to Identify Duplicate Clients

**Note:** Staff Member will Require the Following User Roles: Agency Administrator, Record Management, Intake (Full Access), Intake Close, Case ReOpen, Agency Reporting, Reports Access. **Contact** [witshelp@doh.hawaii.gov](mailto:witshelp@doh.hawaii.gov) to add SSRS Agency Reader

- 1. Wildcard Search** – Wildcard Search is done to Check to see if a Client Already Exists in WITS. If Client Exists, Continue Work as usual adding a New Episode if Necessary or contact your Agency WITS Administrator if you are having issues accessing Client. If Client Doesn't Exist Use Add Client Link Below the Go Button

The screenshot shows the HI-WITS Client Search interface. The left sidebar contains navigation links: Home Page, Agency, Group List, Clinical Dashboard, Client List (expanded), Client Profile, Linked Consents, Payor Group Enrollment, Non-Episode Contact, Activity List, Episode List, System Administration, Reports, and Support Ticket. The main content area is titled 'Client Search' and contains various input fields. Red boxes with arrows point to specific fields, numbered 1 through 5:

- 1. First 3 Letters and \*
- 2. Set to "Blank"
- 3. First 3 Letters and \*
- 4. Set to "All Clients"
- 5. "GO"

Below the search fields is a 'Client List (Export)' table with columns: Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table is currently empty. At the bottom right of the table is an 'Add Client' link. The 'Go' button is highlighted in blue.

- 2. Move Intake and Merge Client Records** – First Identify which Unique Client ID is the “Merge to” Client, Copy the Unique Client ID#. Then Go into the Context of “Merge from” Client. Next Click the Merge Intake Link at the Bottom Left of the Intake Screen. Finally Paste the Unique Client ID# as shown below and Click “GO” Once the Record is Visible. Click “Finish” to Merge. After Merge, Run SSRS Report “Agency Client List v2.0” Follow Delete Duplicate Client Instructions below to Delete the Client Record on SSRS Report that has “0” Intakes.

HI-WITS Training 20.8.15 TEST PROVIDER, Main Office Afsharzadeh, Yoseb, BS Logout

SSRS Reports Snapshot

Home Page  
Agency  
Group List  
Clinical Dashboard  
Client List  
Client Profile  
Linked Consents  
Payor Group Enrollment  
Non-Episode Contact  
Activity List  
Episode List  
System Administration  
Reports  
Support Ticket

Clients whose names are in RED are clients who currently have active alert notes.

Client Search

Agency: TEST PROVIDER Facility: [Dropdown]  
First Name: [Text] Last Name: [Text]  
SSN: [Text] DOB: [Text]  
HI-WITS Training Client Id: [Text] Provider Client ID: [Text]  
Unique Client Number: [Text] Primary Care Staff: [Text]  
Treatment Staff: [Dropdown] Intake Staff: [Dropdown]  
Case Status: All Clients Number Type: [Dropdown]  
Other Number: [Text]  
Include Only Active Consents: Yes [Dropdown]

Clear Go

Client List (Export) Add Client

| Actions | Unique Client # |        | DOB        | SSN         | Sex  |
|---------|-----------------|--------|------------|-------------|------|
| [Edit]  | AXBB1111991     | bb, aa | 11/11/1999 | ***-**-6678 | Male |
| [Edit]  | AXBB1111911     | bb, aa | 11/11/1991 | ***-**-1234 | Male |


1. Copy "Merge to" Unique Client ID#

Population  
Adolescent  
Child  
Father with Child  
Injection User  
Katrina affected clients

Population Selected  
Adult

Domains

Selected Domains  
Treatment

Date Closed   [Save & Close the Case](#)

[Cancel](#) [Save](#) [Finish](#)

Actions  
[Move Intake](#) [Delete Intake](#)

**1. Move Intake**

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Beam, Jim | JXBE1220741 | 1 SSRS Reports Snapshot

Home Page  
Agency  
Group List  
Clinical Dashboard  
Client List  
Client Profile  
Linked Consents  
Payor Group Enrollment  
Non-Episode Contact  
Activity List  
Intake  
Drug Testing  
Wait List

Enter Client # of Client to move this intake to

Unique Client Number AXBB1111991

**1. Paste Unique Client ID#**

**2. Click "GO"**

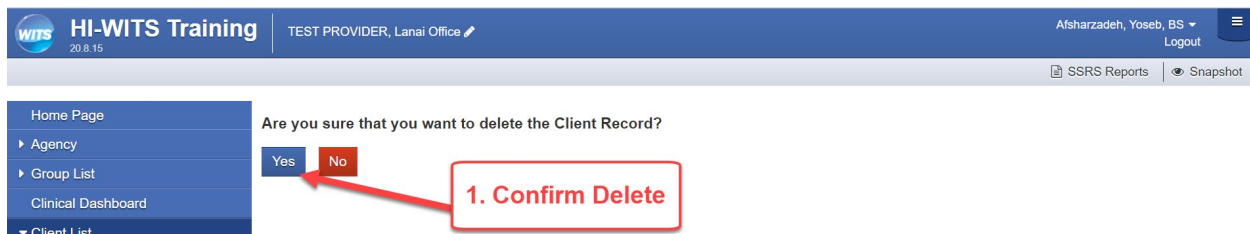
**3. Finish to Merge**

Move Intake to Client

First Name aa  
Last Name bb  
Date of Birth 11/11/1999  
Gender Male

[Cancel](#) [Finish](#)

**3. Delete Duplicate Client** – In Order to Delete Duplicate Client Records the User Must have *Records Management Role*. Hover over the Duplicate Client Action Pen and Click Delete Record. Confirm Delete on Confirmation Screen



#### 4. Use SSRS Report to Identify Duplicate Clients – User Must Have Access to SSRS. See Below for Report Path for Prevention Monitoring, Prevention Providers and Treatment Providers.

The screenshot shows the HI-WITS interface. The breadcrumb path is [Home](#) > [ADAD Prevention Reports](#) > [Tools](#). A red box labeled "Prevention Monitoring" points to the "Tools" link. A red box labeled "1. Run" points to the "Agency Client List v2.0" report in the "PAGINATED REPORTS (14)" list.

| PAGINATED REPORTS (14)                              |   |   |   |  |  |
|---|---|---|---|--|--|
| Agency Client List v2.0                             | Count of Group Session Clients by Race and Gender | Count of Group Session Clients by Race and Gender by Agency | Count of Group Session Clients by Race and Gender by Agency and Ethnicity | Counts   | Ethnicity Count  |
| List of Planned Strategies by Agency-Funding Source | Missing Ethnicity                                 | Missing Race  | Number of Participants by CSAP Category                                   | Number of Participants for Individual-Based Strategy | Number of Participants for Individual-Based Strategy with Group Name |
| One Time Race Count Universal Direct                | Race Count  |   |   |  |  |

The screenshot shows the HI-WITS interface. The breadcrumb path is [Home](#) > [Prevention Provider Reports](#). A red box labeled "Prevention Providers" points to the "Prevention Provider Reports" link. A red box labeled "1. Run" points to the "Agency Client List v2.0" report in the "PAGINATED REPORTS (15)" list.

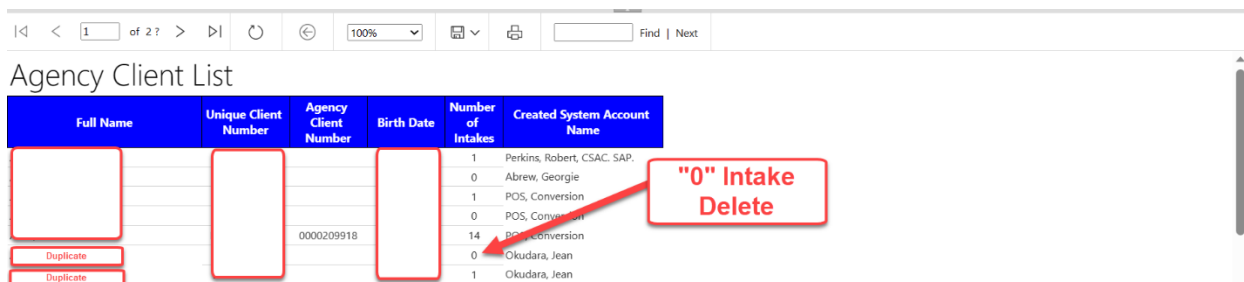
| PAGINATED REPORTS (15)                 |  |   |  |   |  |
|--|--|---|--|---|--|
| Agency Client List v2.0                | Client Demographics  | Count of Group Session Clients by Race and Gender by Agency and Ethnicity | Details by session Date of Individual-Based Strategy Implementation v1.1 | Ethnicity Count v2.0                          | PREV_PrePost_Scores  |
| SABG Table 31                          | SABG Table 32  | SABG Table 34   | Summary by Group of Individual Based Strategy Implementation v1.1        | Summary of Community Based Interventions v2.1 | Summary of Community Based Interventions with Recurring v2.5 |
| Summary of One-Time Interventions v1.1 | Summary of Planned Strategy and Data Collection Methods by Pla | Summary of Prevention Strategy Groups v2.0                                |  |   |  |

The screenshot shows the HI-WITS interface. The breadcrumb path is [Home](#) > [Treatment Provider Reports](#) > [00. October 2021 Reports](#) > [Tools](#). A red box labeled "Treatment Providers" points to the "Tools" link. A red box labeled "1. Run" points to the "Agency Client List v2.0" report in the "PAGINATED REPORTS (34)" list.

| PAGINATED REPORTS (34) |                             |                        |                             |   |                         |
|------------------------|-----------------------------|------------------------|-----------------------------|---|-------------------------|
| # Of ASI Assessments   | # of Intakes by Fiscal Year | ADAD 6 month follow-up | Admission by Diagnosis v2.0 | Admission by Diagnosis v2.0_Opioid_11-27-2019 | Agency Client List v2.0 |

The SSRS Report below shows the following columns:

- Client Full Name – Full name of the client
- Unique Client Number -- The unique ID# generated by the system
- Agency Client Number -- The unique ID# manually added to the Client Profile screen by Agency Staff
- Client Birth Date – The birth date of the client
- Number of Intakes – The total number of Intakes for the Unique Client ID#
- Created by Agency Staff Name – Name of Staff Member who entered the Client into WITS



Agency Client List

| Full Name | Unique Client Number | Agency Client Number | Birth Date | Number of Intakes | Created System Account Name |
|-----------|----------------------|----------------------|------------|-------------------|-----------------------------|
|           |                      |                      |            | 1                 | Perkins, Robert, CSAC, SAP. |
|           |                      |                      |            | 0                 | Abrew, Georgie              |
|           |                      |                      |            | 1                 | POS, Conversion             |
|           |                      |                      |            | 0                 | POS, Conversion             |
|           | 0000209918           |                      |            | 14                | POS, Conversion             |
|           |                      |                      |            | 0                 | Okudara, Jean               |
|           |                      |                      |            | 1                 | Okudara, Jean               |

"0" Intake Delete

Duplicate

If you have any questions, please call the WITS Staff or email [WITSHELP@doh.hawaii.gov](mailto:WITSHELP@doh.hawaii.gov).