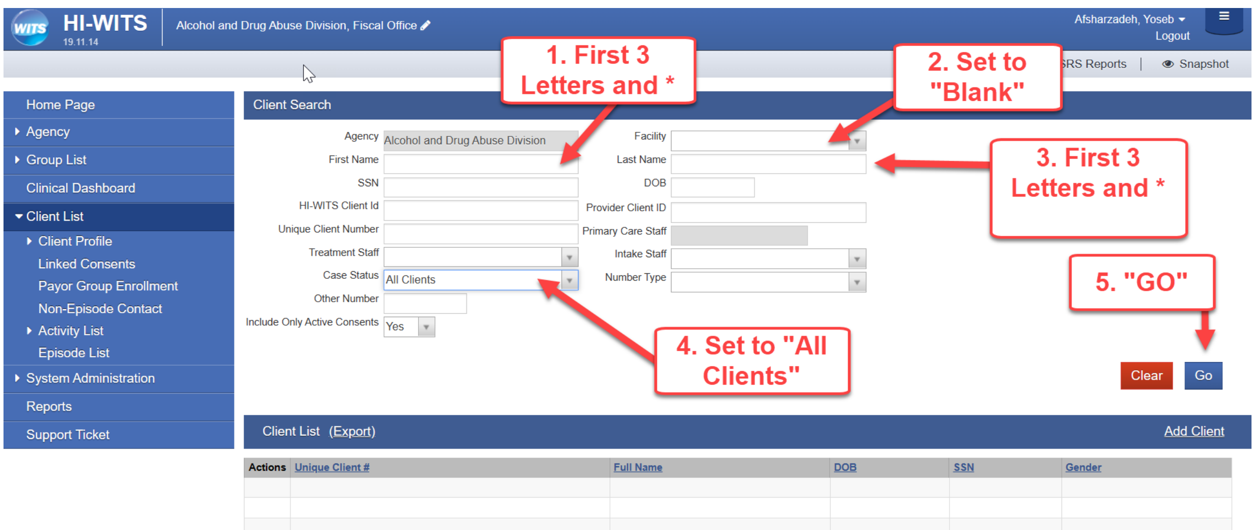
Preventing Duplicate Clients

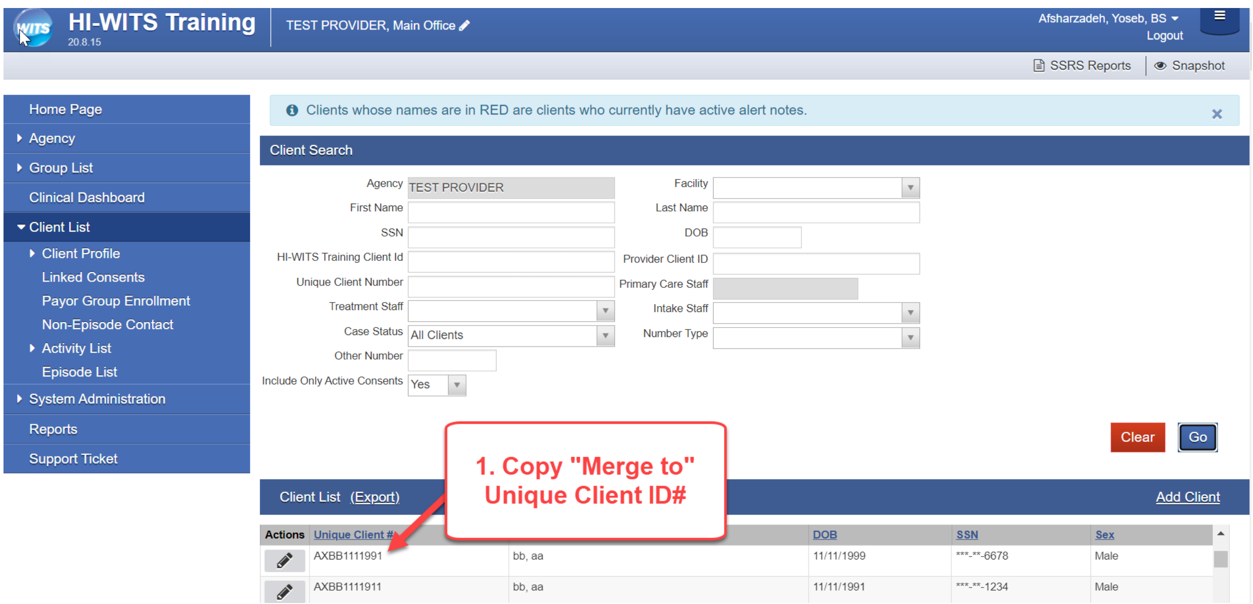
Situation: This Documentation Demonstrates how to do Wildcard Search, Move Intake and Merge Client Records, Delete Duplicate Client, Use SSRS Report to Identify Duplicate Clients

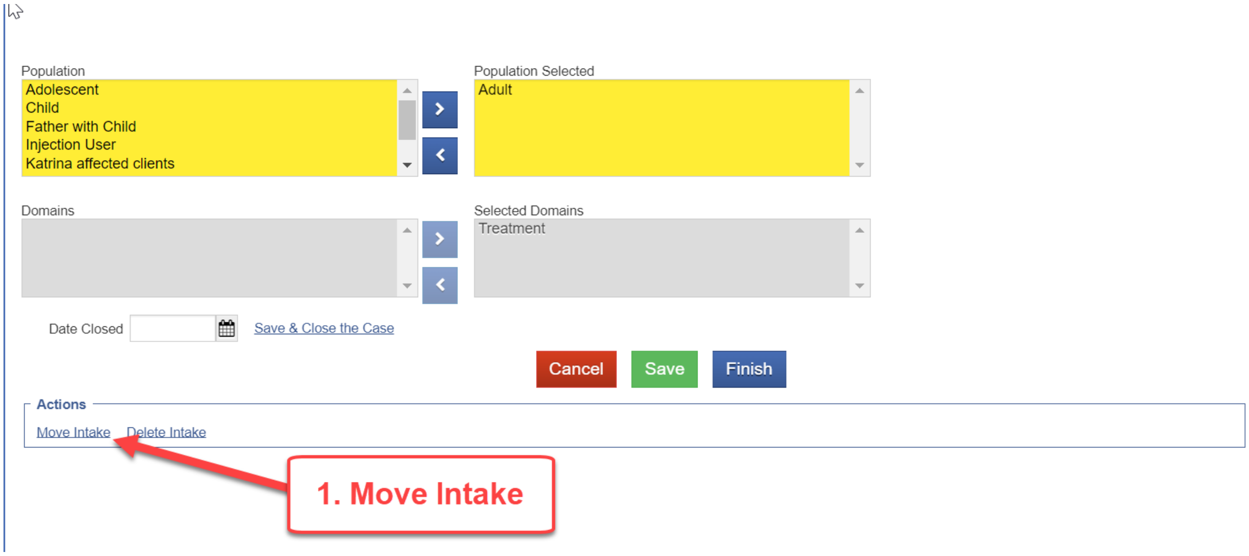
Note: Staff Member will Require the Following User Roles: Agency Administrator, Record Management, Intake (Full Access), Intake Close, Case ReOpen, Agency Reporting, Reports Access. Contact witshelp@doh.hawaii.gov to add SSRS Agency Reader

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



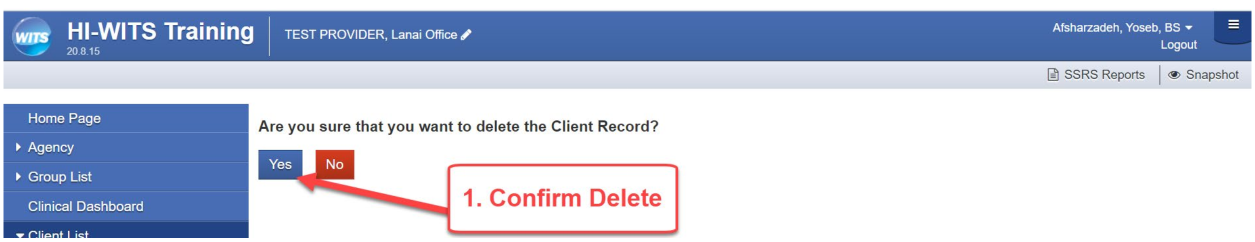
2. **Move Intake and Merge Client Records –** First Identify which Unique Client ID is the "Merge to" Client, Copy the Unique Client ID#. Then Go into the Context of "Merge from" Client. Next Click the Merge Intake Link at the Bottom Left of the Intake Screen. Finally Paste the Unique Client ID# as shown 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.



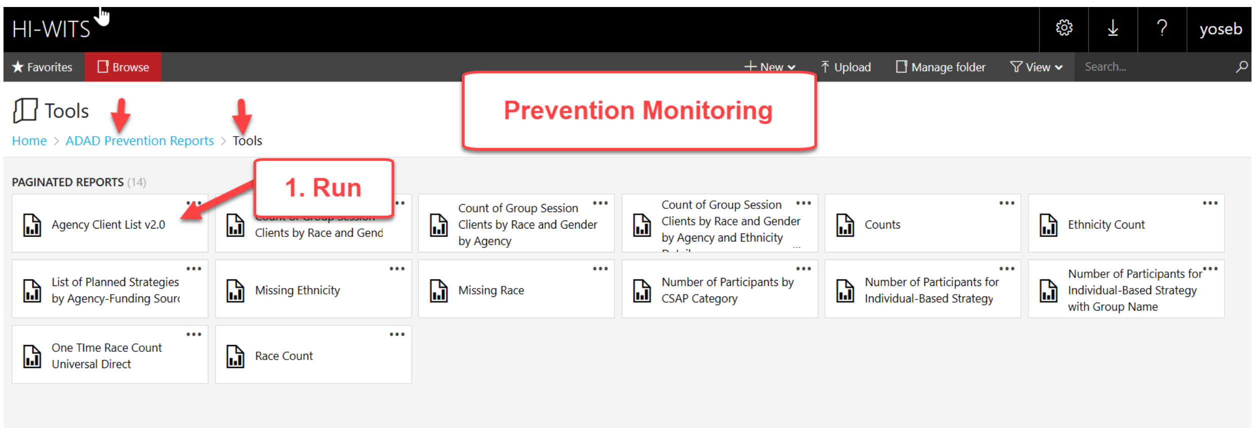

Population
Adolescent
Child
Father with Child
Injection User
Katrina affected clients
Population Selected
Adult
Domains
Selected Domains
Treatment
Date Closed
Save & Close the Case
Cancel
Save
Finish
Actions
Move Intake
Delete Intake
1. Move Intake

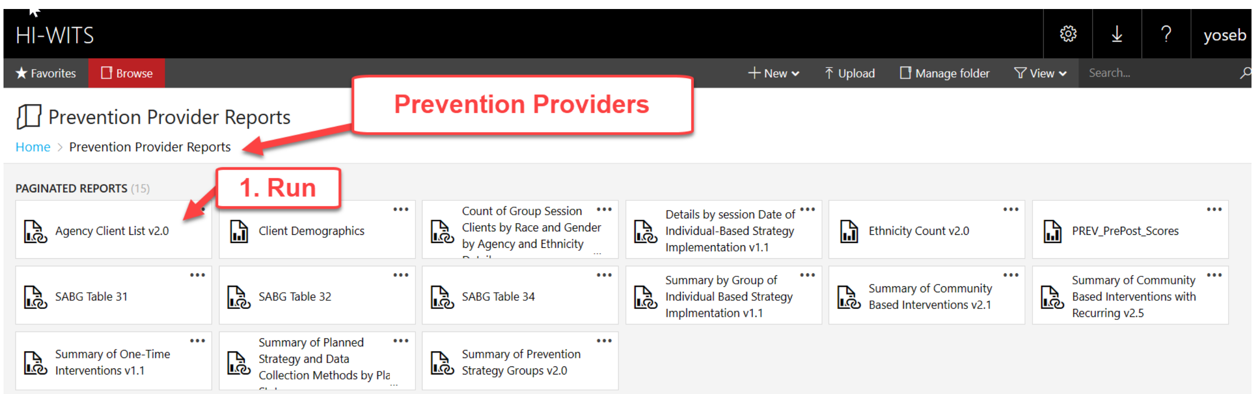

HI-WITS Training
20.8.15
TEST PROVIDER, Lanai Office
Afsharzadeh, Yoseb, BS
Logout
Beam, Jim | JXBE1220741 | 1
SSRS Reports
Snapshot
Home Page
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Linked Consents
Payor Group Enrollment
Non-Episode Contact
Activity List
Intake
Drug Testing
Wait List
Enter Client # of Client to move this intake to
1. Paste Unique Client ID#
Unique Client Number
AXBB1111991
2. Click "GO"
Go
Move Intake to Client
First Name
aa
Last Name
bb
Date of Birth
11/11/1999
Gender
Male
3. Finish to Merge
Cancel
Finish

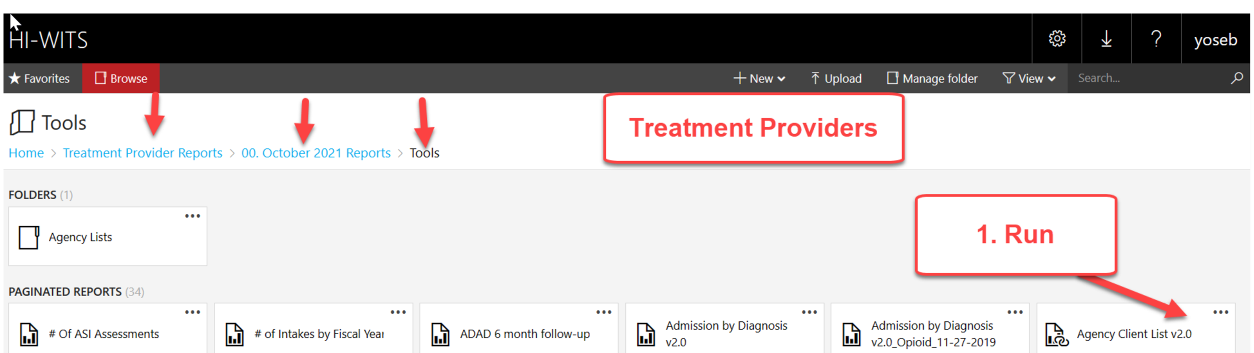
3. **Delete Duplicate Client –** In Order to Delete Duplicate Client Records the User Must have *Records Management Role*. Hover over the Duplicate Client Action Pen and Click Delete Record. Confirm Delete on Confirmation Screen



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.

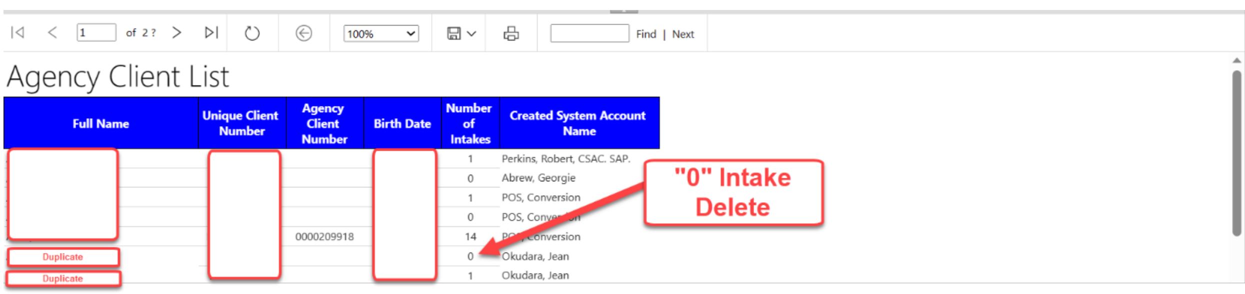






The SSRS Report below shows the following columns:

- 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



If you have any questions, please call the WITS Staff or email WITSHELP@doh.hawaii.gov.