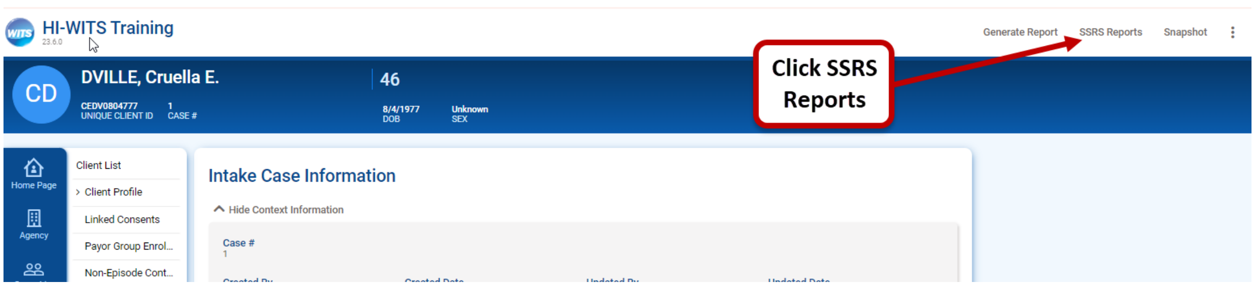
# Preventing Duplicate Clients

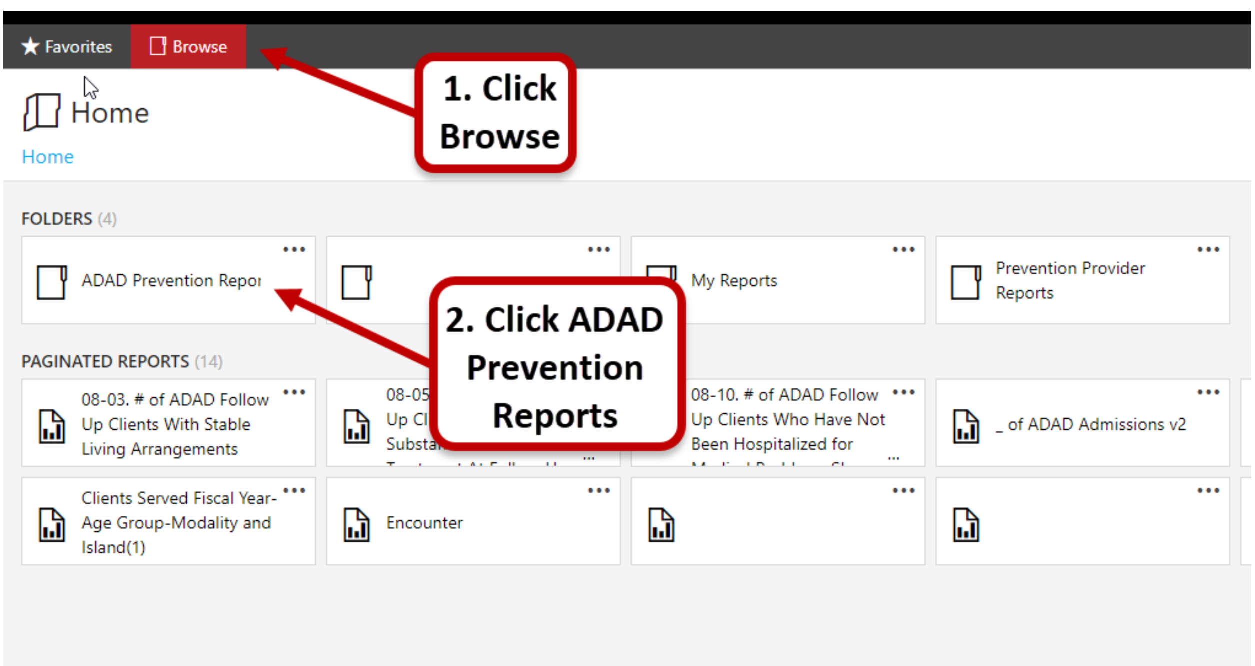
This documentation demonstrates how to use SSRS Report to identify duplicate clients, perform a Wildcard Search, move Intake and merge Client Records, and delete duplicate clients.

**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 DOH.ADAD.WITSHELP@doh.hawaii.gov to add SSRS Agency Reader.

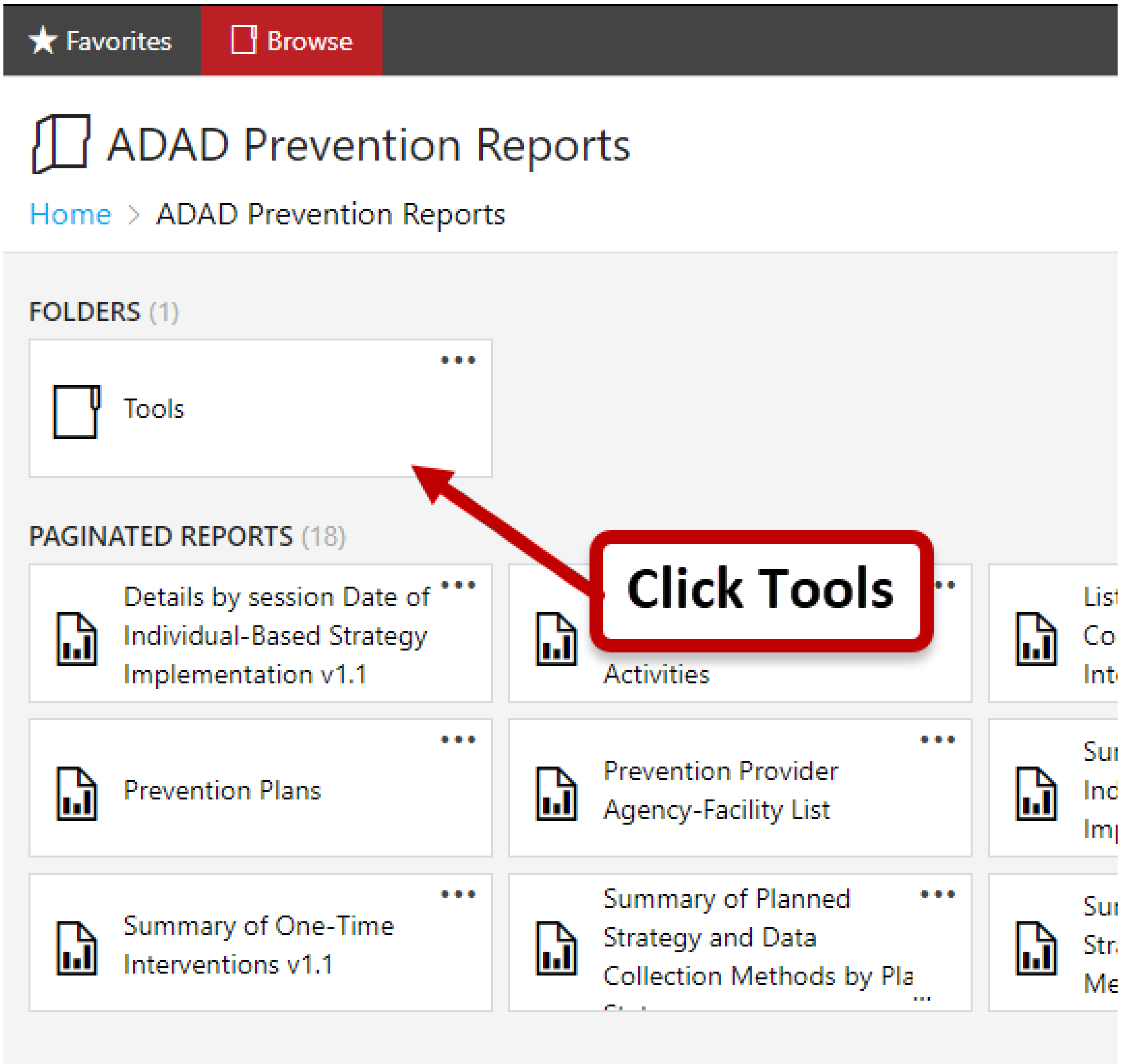
1. **Use SSRS Report to Identify Duplicate Clients –** The User must have access to SSRS.
   a. To run the SSRS Agency Client List v2.0 report , click on **SSRS Reports** located at the top of the screen.



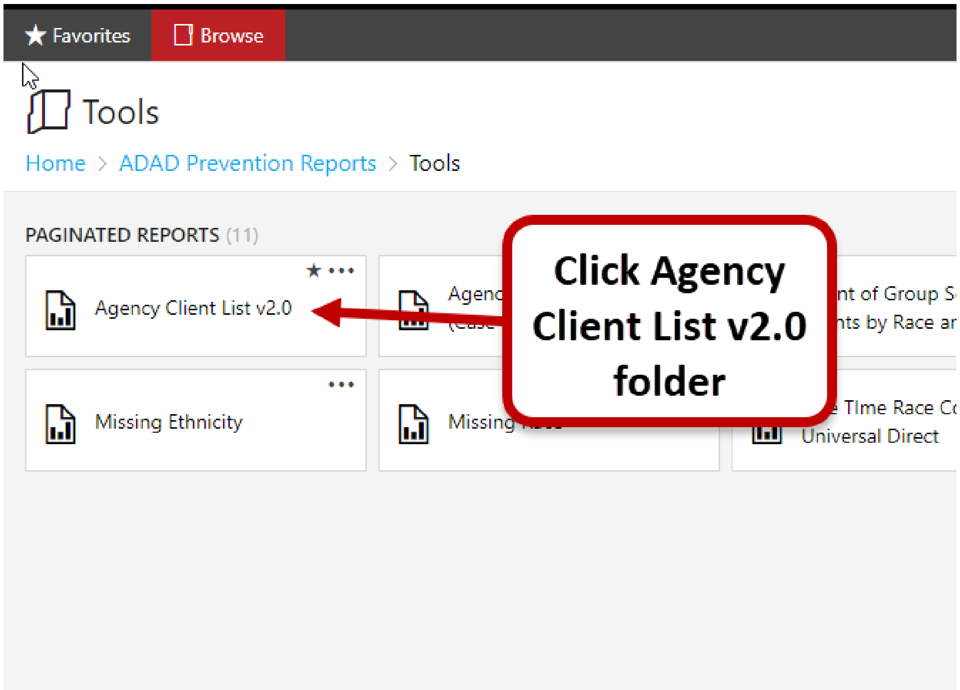

   b. Click on the **Browse** folder at the top of the screen.
   c. Click on the **ADAD Prevention Reports** folder.



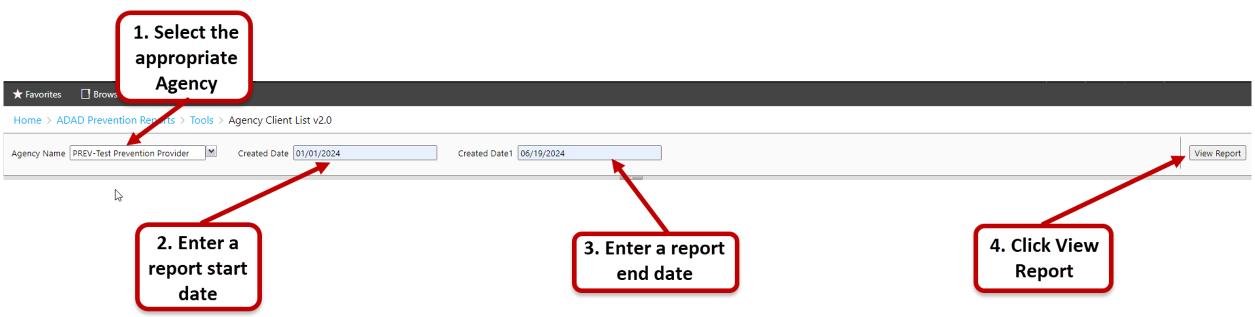
d. Click on the **Tools** folder.



e. Click on the **Agency Client List v2.0**.



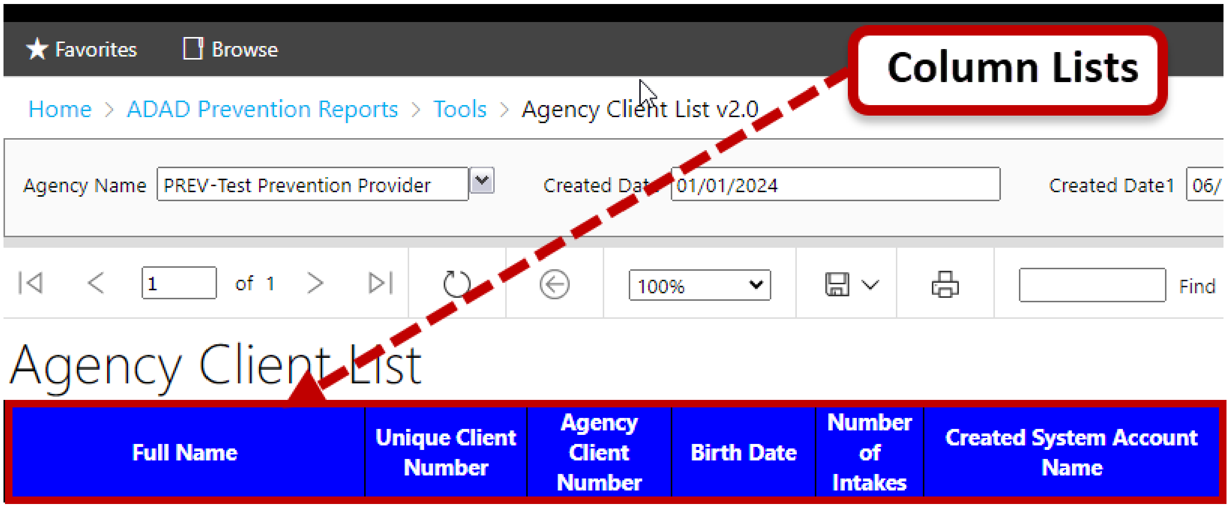

f. Select the appropriate **Agency Name** from the the drop-down menu.
g. Enter a date to start the report in the **Created Date** field.
h. Enter a date to end the report in the **Created Date1** field.
i. Click on **View Report**.




j. The SSRS Report columns are as listed:

**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

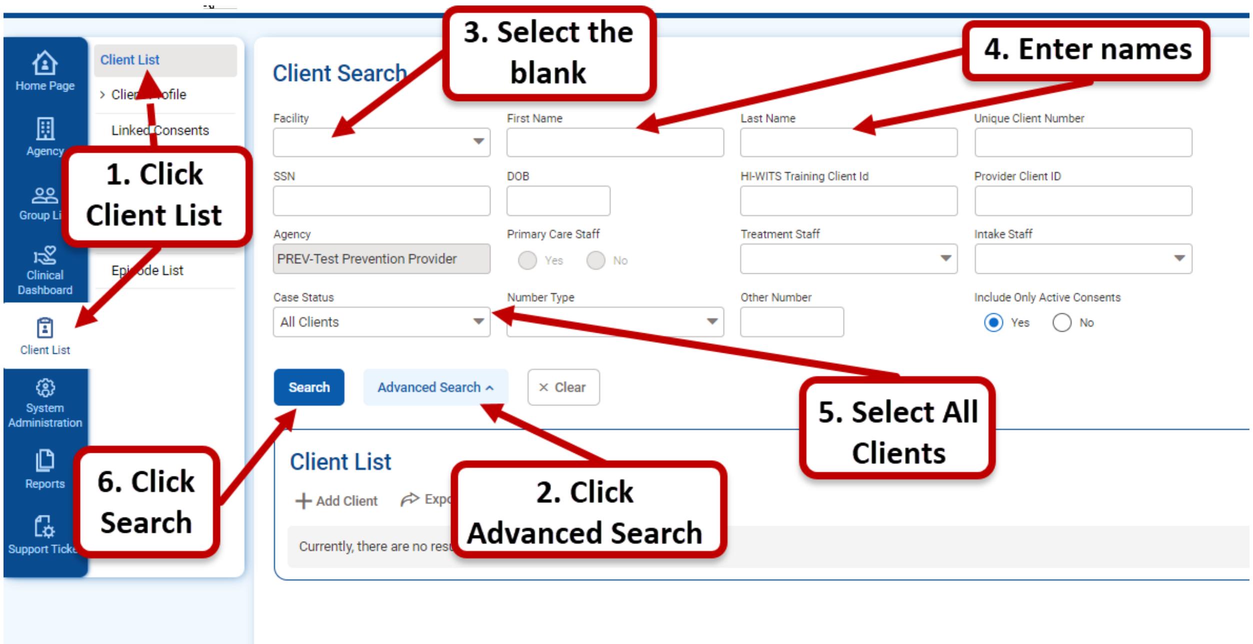
**Number of Intakes** – The total number of Intakes for the Unique Client ID#
**Created by Agency Staff Name** – Name of Staff Member who entered the Client into WITS



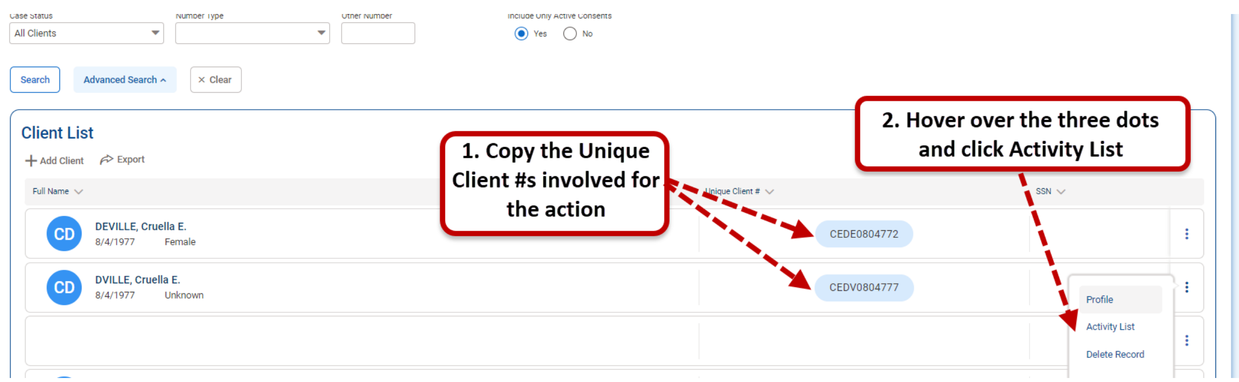

2. **Wildcard Search –** Wildcard Search is done to check to see if a Client already exists in WITS.

   **Note**: If the Client exists, continue work as usual and add a New Episode if necessary, or contact your Agency WITS Administrator if you are having issues accessing a Client.

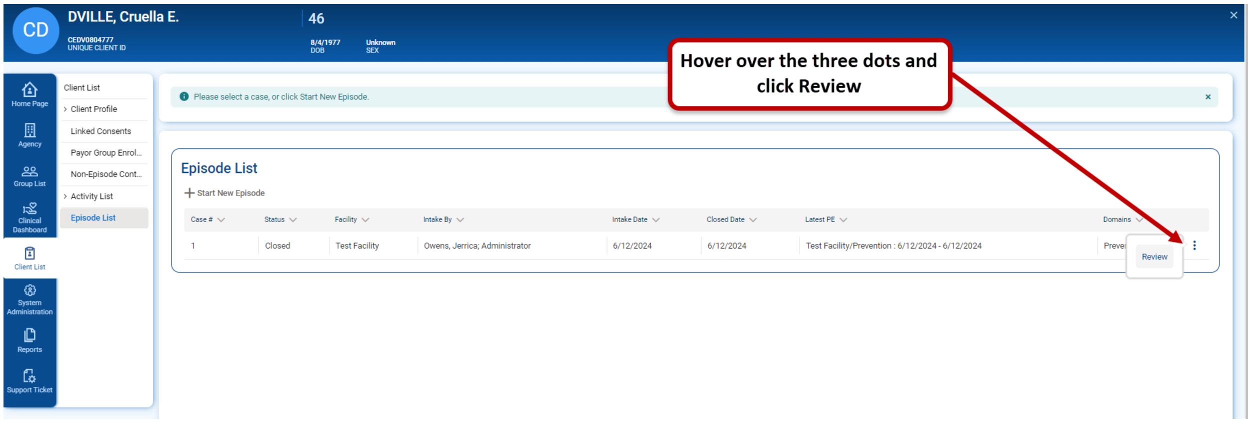
   a. Click on **Client List** from the Left Menu.
   b. Clear the **Facility field** by selecting the "blank" from the top of the dropdown menu.
   c. In the **First Name field**, add the first 3 letters of the first name, followed by an asterick.
   d. In the **Last Name field**, add the first 3 letters of the last name, followed by an asterick.
   e. Click on **Search**.




3. **Move Duplicate Intake –** In order to move the Duplicate Client Intake, the user must have the Records Management Role.
   a. Copy the **"From" and "To" Unique Client #s** from the Client List box. Keep the Unique Client #s on-hand to perform the actions.
   b. On the "From" client, hover over the three-dot menu to select **Activity List**.

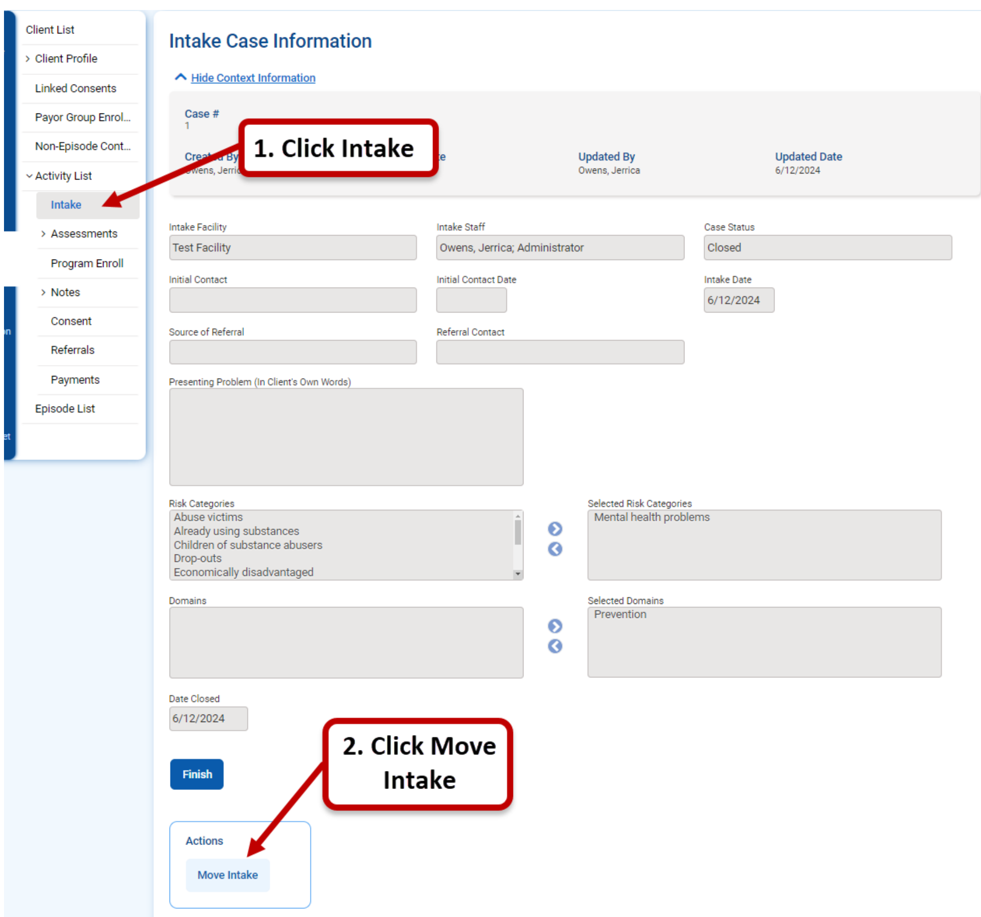


c. To view the Intake menu, in the Episode List, find the appropriate Episode to transfer. Hover over the three-dot menu and click on **Review**.




d. Click on **Intake** in the Left Menu.

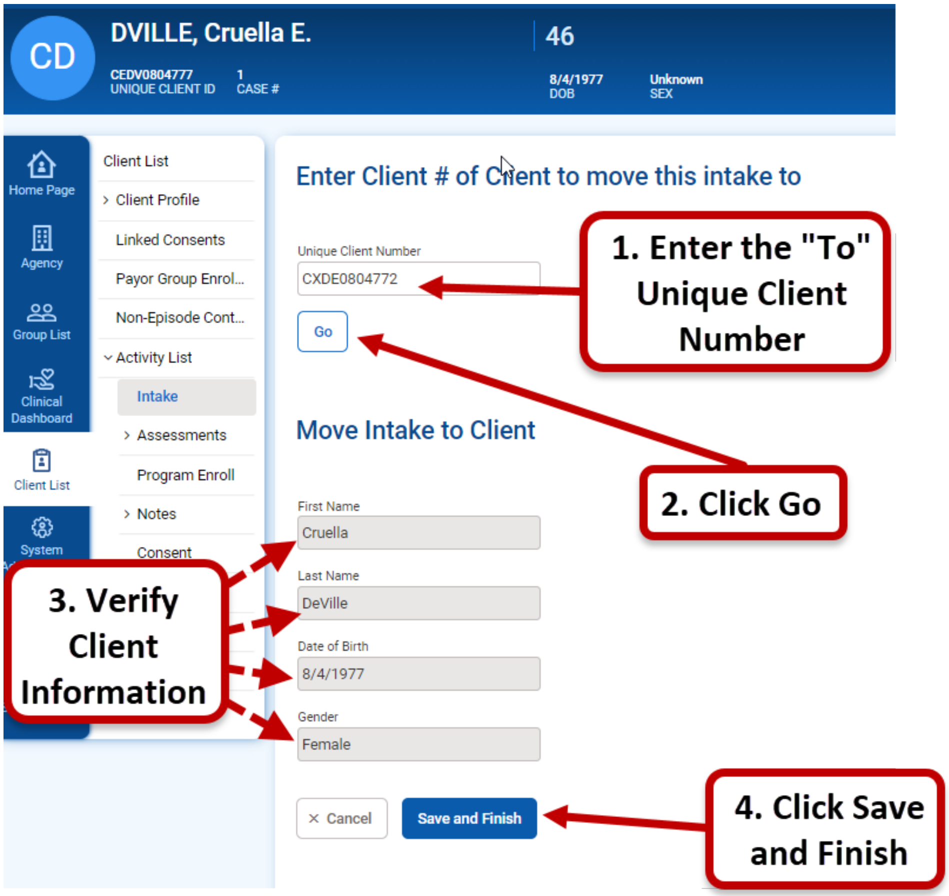
e. At the bottom of the Intake Case Information screen, click on **Move Intake** located in the Actions box.



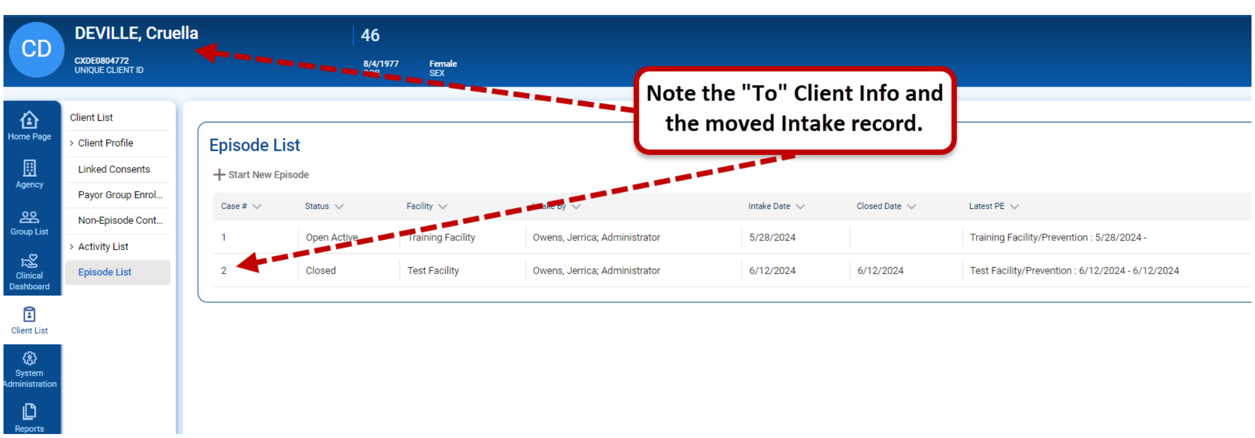
f. Enter the “To” **Unique Client Number** in the field, then click on **Go**.

g. Verify the **Move Intake to Client fields** are correct.

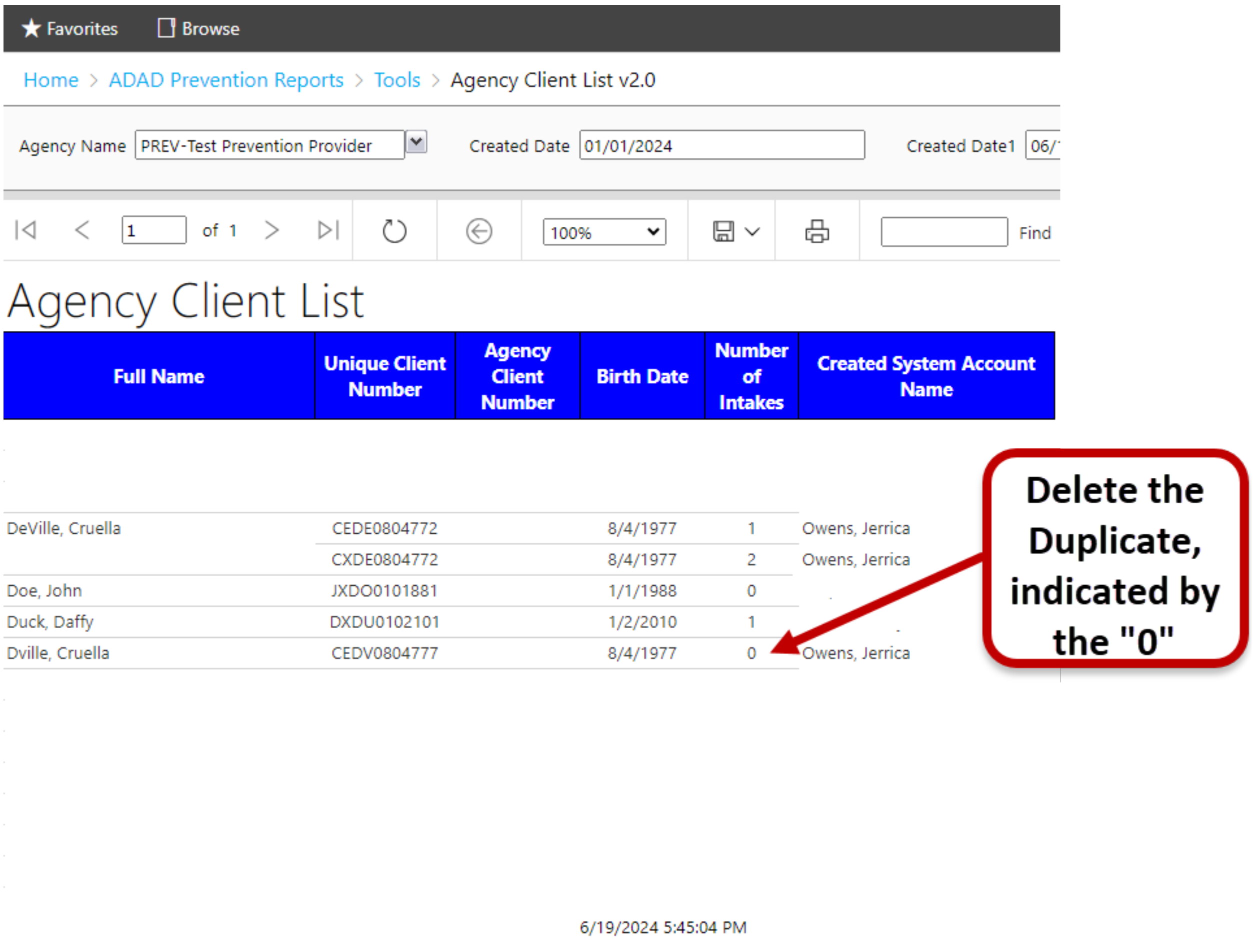
h. Click on **Save and Finish**.




i. The **“To” Client** is presented in the blue bar at the top of screen. Note the moved **Intake** in the Episode List.



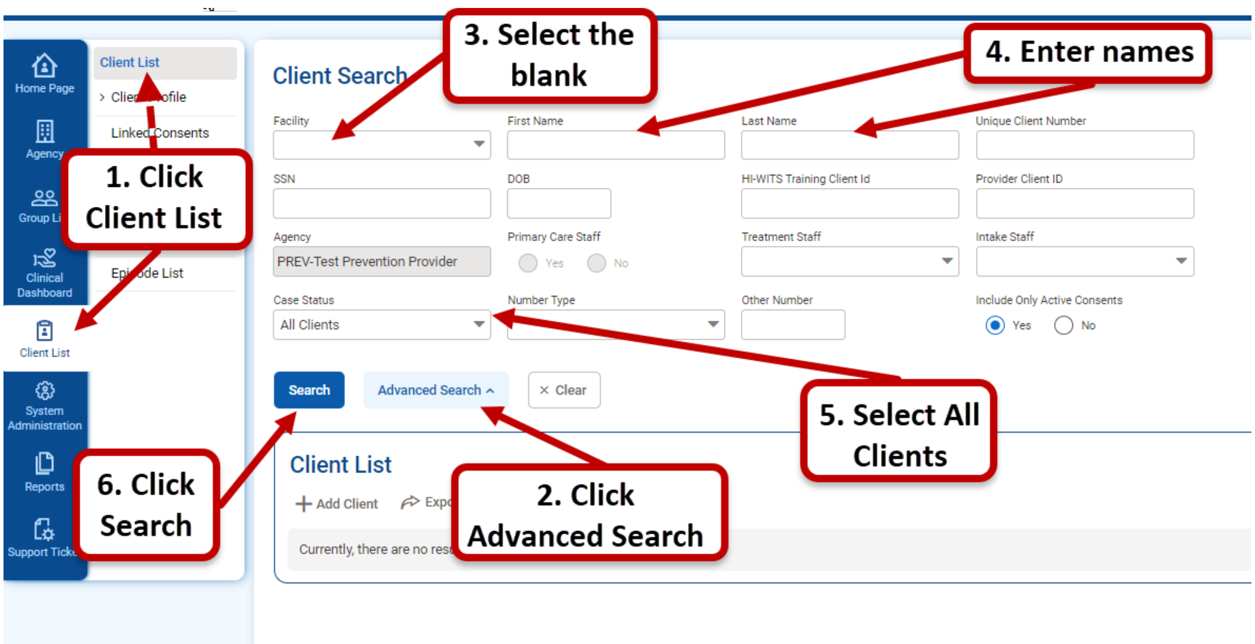
**Note**: After the Move, follow the steps to run the SSRS Report “Agency Client List v2.0.” Reference the “Delete Duplicate Client ” training to delete the Duplicate Client Record on the SSRS  Report that has “0” Intakes.



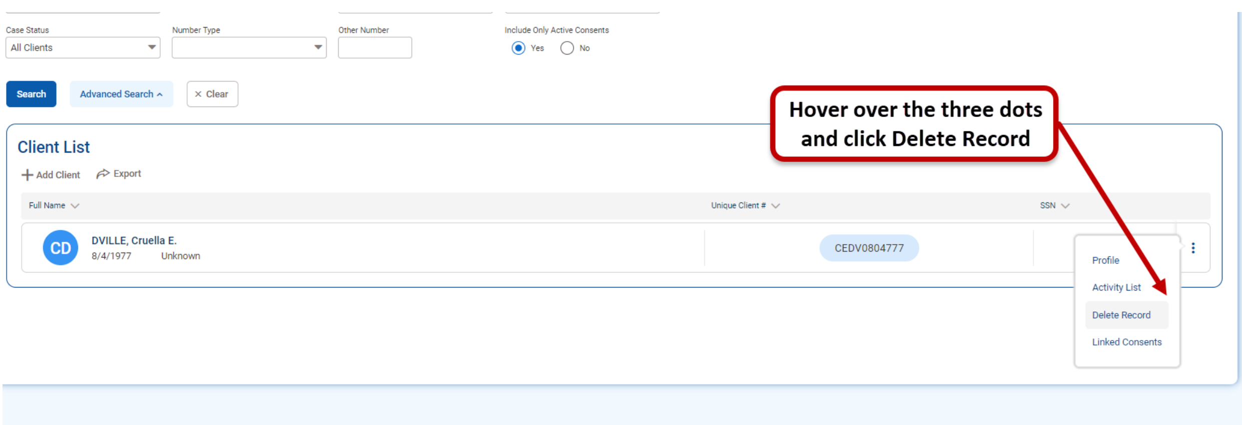

Agency Client List

| Full Name | Unique Client Number | Agency Client Number | Birth Date | Number of Intakes | Created System Account Name |
|---|---|---|---|---|---|
| DeVille, Cruella | CEDE0804772 | | 8/4/1977 | 1 | Owens, Jerrica |
| | CXDE0804772 | | 8/4/1977 | 2 | Owens, Jerrica |
| Doe, John | JXDO0101881 | | 1/1/1988 | 0 | |
| Duck, Daffy | DXDU0102101 | | 1/2/2010 | 1 | |
| Dville, Cruella | CEDV0804777 | | 8/4/1977 | 0 | Owens, Jerrica |

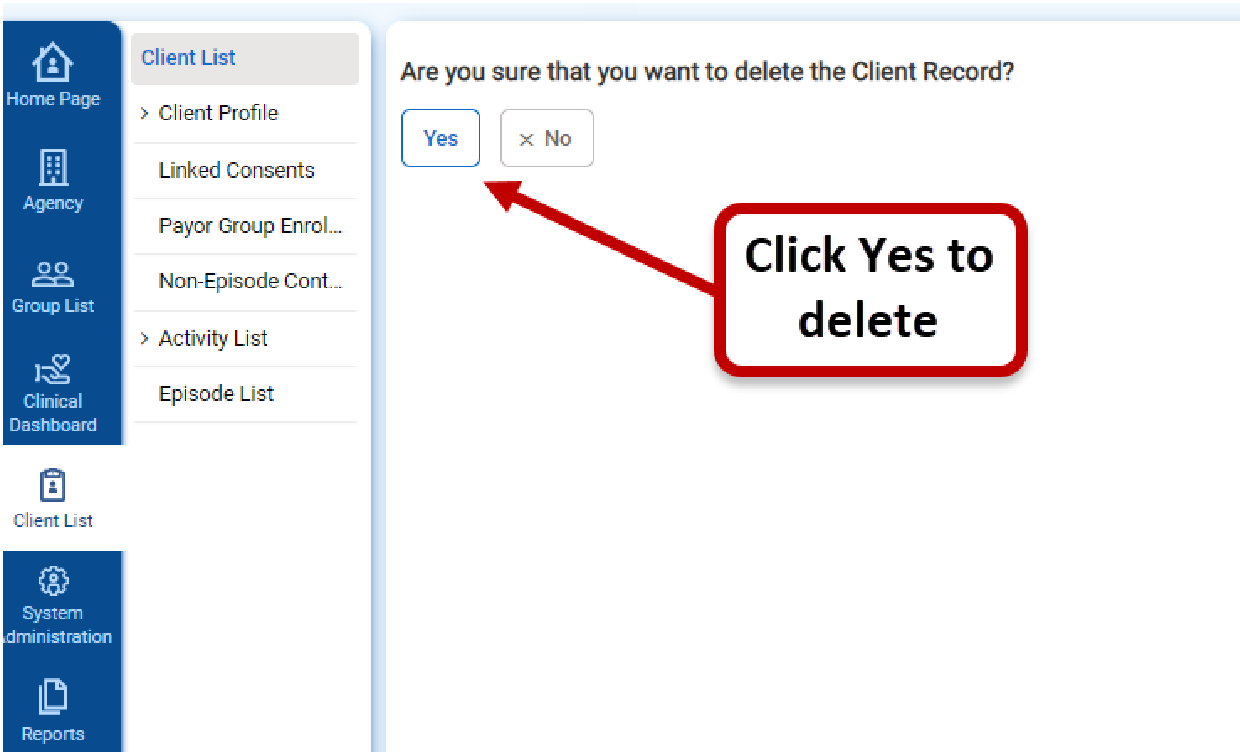
4. **Delete Duplicate Client –** In order to delete Duplicate Client Records, the user must have the Records Management Role. Click on Client List on the **Left Menu**.
   a. To locate the "From" Client, click on **Advanced Search**.
   b. In the **Facility** field, select the blank from the top of the drop-down menu.
   c. Complete the **First Name** and **Last Name** fields.
   d. In the **Case Status** field, select All Clients.
   e. Click on **Search**.




   f. Find the "From" Client. Hover over the three-dot menu and click on **Delete Record**.



g. To delete the “From” Client Record, click on **Yes**.




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