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 <u>DOH.ADAD.WITSHELP@doh.hawaii.gov</u> 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.

HI-V 23.6.0	NITS Training ♀				\frown	Generate Report SSRS Reports	Snapshot
CD	DVILLE, Cruell	a E.	46 8/4/1977 Unknown DOB SEX		Click SSRS Reports		
企	Client List	Intake Case Informat	tion				
Home Page	> Client Profile						
_ 🖽 🔤	Linked Consents	A Hide Context Information					
Agency	Payor Group Enrol	Case # 1					
8	Non-Episode Cont	Created By	Created Data	Undeted Dr	Undeted Date		

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

★ Favorites 📑 Browse		
Home	1. Click Browse	
FOLDERS (4)		
ADAD Prevention Repor	My Reports	Prevention Provider Reports
PAGINATED REPORTS (14)	Prevention	
08-03. # of ADAD Follow *** Up Clients With Stable Living Arrangements	08-05 Up Cl Reports Substant Up Clients Who Have Not Been Hospitalized for	of ADAD Admissions v2
Clients Served Fiscal Year- *** Age Group-Modality and Island(1)	Encounter	

d. Click on the Tools folder.



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

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Tools	s > Tools		
PAGINATED REPORTS (11)			
* ••• Agency Client List v2.0	Agence (Case	Click Agency Client List v2.0	nt of Group S nts by Race ar
••• Missing Ethnicity	Missin	folder	e TIme Race Co niversal Direct

- 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.

★ Favorites 🔲 Brows	1. Select the appropriate Agency			
Home > ADAD Prevent	tion Reports > Tools > Age	ncy Client List v2.0		
Agency Name PREV-Test Pr	revention Provider Cre	ated Date 01/01/2024	Created Date1 06/19/2024	View Report
La ca	}			
	2. Enter a report start date]	3. Enter a report end date	4. Click 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

★ Favorites 🛛 Browse					olumn Lists
Home > ADAD Prevention Rep	orts > Tools > /	Agency Client	List v2.0		
Agency Name PREV-Test Prevention	Provider 💌	Created Dat	01/01/2024		Created Date1 06/
$ \triangleleft$ < 1 of 1 >	DI O	€ 100	% 🗸		品 Find
Agency Client	list				
Full Name	Unique Client Number	Agency Client Number	Birth Date	Number of Intakes	Created System Account Name

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**.

Client List	3. Client Search	Select the blank		4. Enter names
Linked Consents	Facility	First Name	Last Name	Unique Client Number
Agency 1. Click	SSN	DOB	HI-WITS Training Client Id	Provider Client ID
	Agency	Primary Care Staff	Treatment Staff	Intake Staff
1.S Clinical Epirode List Dashboard	PREV-Test Prevention Provider	Ves No	Other Number	Include Only Active Consents
	All Clients 🔹			Yes No
Client List System Administration Reports 6. Click Search Support Tick	Search Advanced Search	2. Click dvanced Search	5. Select A Clients	

- 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.

Clients	Utter Number	Include Unity Active Consents			
Advanced Search A X Clear					
Client List + Add Client	1	L. Copy the Unique	2. Hover over and click	r the three dots Activity List	J
Full Name 🗸	CI	ient #s involved for		ssn \checkmark	
CD DEVILLE, Cruella E. 8/4/1977 Female	L	the action	CEDE0804772		:
CD DVILLE, Cruella E. 8/4/1977 Unknown			CEDV0804777	Profile	1
				Activity List Delete Record	:

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**.

CD	DVILLE, Cruella	E.	4	6					
	CEDV0804777 UNIQUE CLIENT ID		8, D	/4/1977 Unknown 08 SEX		(Hover over t	the three dots and	
Horne Parce	Client List	Please select :	a case, or click Star	t New Episode.			clic	k Review	×
	> Client Profile								
Agency	Payor Group Earol								
器	Non-Episode Cont	Episode Li	st						
Group List	> Activity List	+ Start New Ep	isode						
Clinical Deshboard	Episode List	Case # 🗸	Status 🗸	Facility 🗸	Intake By 🗸	Intake Date 🗸	Closed Date 🗸	Latest PE 🗸	Domains 🗸
1		1	Closed	Test Facility	Owens, Jerrica; Administrator	6/12/2024	6/12/2024	Test Facility/Prevention : 6/12/2024 - 6/12/2024	Prever Eview
Clent List System Administration Reports Support Ticket									

- 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.

Client List	Intake Case Information				
> Client Profile	intake case information				
Linked Consents	 Hide Context Information 				
Payor Group Enrol	Case #	_			
Non-Episode Cont	1. Click Intake		Undated By		Undated Date
~ Activity List	evens, Jerrio		Owens, Jerrica		6/12/2024
Intake	I				
> Assessments	Intake Facility	Intake Staff		Case Status	
Program Enroll	Test Facility	Owens, Jerrica; Administra	ator	Closed	
> Notes	Initial Contact	Initial Contact Date		Intake Date	
Consent				6/12/2024	
Referrals	Source of Referral	Referral Contact			
Payments	Presenting Problem (In Client's Own Marda)				
Epicodo List	Presenting Problem (in Client's Own Words)				
	Risk Categories Abuse victims Already using substances abusers Drop-outs Economically disadvantaged Domains Date Closed 6/12/2024 Finish Actions Move Intake	(Move ake	Selected Risk Categorie Mental health prob	e lems	

- 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.

CD	DVILLE, Cruella CEDV0804777 1 UNIQUE CLIENT ID CASE :	a E. 46 # 8/4/15	177 Unknown SEX
Home Page	Client List	Enter Client # of Crient to	move this intake to
Agency OC Group List	Linked Consents Payor Group Enrol Non-Episode Cont ~ Activity List	Unique Client Number CXDE0804772 Go	1. Enter the "To" Unique Client Number
Clinical Dashboard	Intake Assessments Program Enroll	Move Intake to Client	2 Click Go
(3) System	Consent Verify lient	Cruella Last Name DeVille Date of Birth	
Info	mation	8/4/1977 Gender Female	
		× Cancel Save and Finish	4. Click 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.

CD	DEVILLE, Cruel	la	46						
	CXDE0804772 UNIQUE CLIENT ID		8/4/	977 Female SEX		Note the	"To" Clie	at info and	
企	Client List					the mo	ved Intak	e record.	
Home Page	> Client Profile	Episode Li	st						
.⊞	Linked Consents	+ Start New Epi	isode						
Agency	Payor Group Enrol	Case # >v	Status V	Facility >>			Intake Date	Closed Date	Latest PF V
Group List	Non-Episode Cont		010100					0000000000	
	> Activity List	1	Open Active	Training Facility	Owens, Jerrica; Admini	strator	5/28/2024		Training Facility/Prevention : 5/28/2024 -
Clinical Dashboard	Episode List	2	Closed	Test Facility	Owens, Jerrica; Admini	strator	6/12/2024	6/12/2024	Test Facility/Prevention : 6/12/2024 - 6/12/2024
Client List									
System Administration									
L Reports									

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.

★ Favorites 🛛 Browse						
Home > ADAD Prevention	n Reports > Tools > A	Agency Client	t List v2.0			
Agency Name PREV-Test Preve	ntion Provider	Created Date	01/01/2024		Created I	Date1 06/
< 1 of 1	U I⊲ <	6	0% 🗸		д	Find
Agency Clier	nt List					
Full Name	Unique Client Number	Agency Client Number	Birth Date	Number of Intakes	Created System A Name	ccount
						Delete ti
DeVille, Cruella	CEDE0804772		8/4/1977	1	Owens, Jerrica	Duplicat
	CXDE0804772		8/4/1977	2	Owens, Jerrica	
Doe, John	JXDO0101881		1/1/1988	0		indicated
Duck, Daffy	DXDU0102101		1/2/2010	1		tho "0"
	CED1/000/1777		0/4/1077		Owens Jarries	Line U

6/19/2024 5:45:04 PM

- 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.

Client List	Client Search	Select the blank		4. Enter names
Linked Consents	Facility	First Name	Last Name	Unique Client Number
1. Click	SSN	DOB	HI-WITS Training Client Id	Provider Client ID
Clinical Epirode List	Agency PREV-Test Prevention Provider	Primary Care Staff Yes No Number Time	Treatment Staff	Intake Staff
Client List	All Clients	vanibei type		Yes No
System Administration Reports G. Click Support Tick	Search Advanced Search	2. Click dvanced Search	5. Select A Clients	AII

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**.