

*Looking for a*



*in a Haystack . . . . . of Needles*

**CCBH Users' Group Meeting  
September 15, 2015**

## Sound Familiar? – this is what we “hear”

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- 1) “Why do we need to talk about searching and duplicates AGAIN? Already heard that, already do it?”
- 2) “I know how to search, this must be for the person sitting next to me.”
- 3) “I add clients according to the County’s rules, I don’t create duplicates.”
- 4) “I didn’t create the duplicate, why am I being *punished* with having to fix it.”
- 5) “The other user entered the client’s name wrong, why is that record being kept?”

# 1) “Why do we need to talk about searching and duplicates AGAIN? Already heard that, already do it?”

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- ✓ Because adding the client’s record correctly is the foundation of our system



- ✓ To provide tools to help reduce the possibility of entering incorrect data or a duplicate record

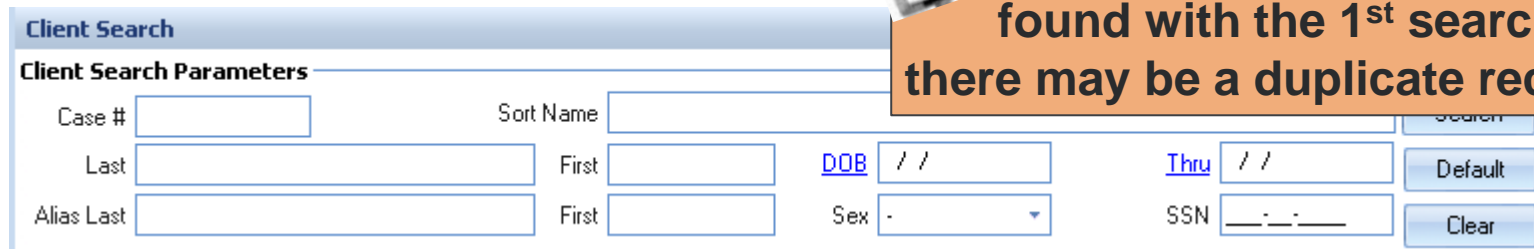


- ✓ To know how to find duplicate records that may already exist for a client



## 2) “I know how to search, this must be for the person sitting next to me.”

- How do you search?
- Which fields do you use?



**Client Search**

**Client Search Parameters**

Case #	<input type="text"/>	Sort Name	<input type="text"/>	<input type="button" value="Search"/>
Last	<input type="text"/>	First	<input type="text"/>	DOB <input type="text" value="//"/>
Alias Last	<input type="text"/>	First	<input type="text"/>	Sex <input type="text" value="."/>
				Thru <input type="text" value="//"/>
				SSN <input type="text" value=".-.-"/>
				<input type="button" value="Default"/>
				<input type="button" value="Clear"/>

**TIPS!** Search multiple ways, even if the client is found with the 1<sup>st</sup> search – there may be a duplicate record.

➤ Here are

### *5 Effective Ways to Search in CCBH*

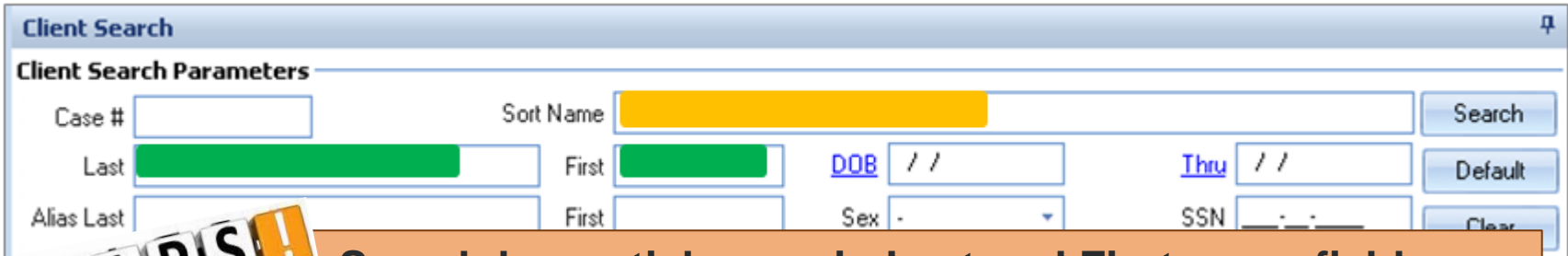
- These are not the only ways to search, but are 5 highly effective ways to find a client in CCBH.

**TIPS!** Only use 2 data points when searching

# 5 Effective Ways to Search in CCBH

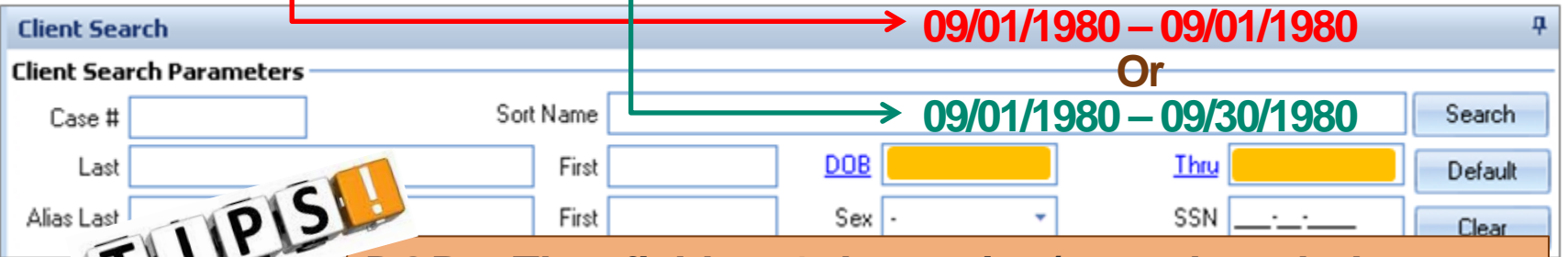
**ALWAYS SEARCH MULTIPLE WAYS,**  
even if you find the record you are looking for with your first search.

1. Name - Sort Name. Last and First fields. Reminder: USE CAPS



Search by partial name in Last and First name fields –  
i.e. if searching for TESTPERSON, CLIENT, enter TEST, CLI

2. DOB Only or a DOB Range. Enter date in both DOB and Thru fields.



DOB + Thru fields = 1 data point (even though they are 2 fields). The only fields ok to search by 1 data point.

# 5 Effective Ways to Search

**ALWAYS SEARCH MULTIPLE WAYS,**  
even if you find the record you are looking for with your first search.

3. **DOB with another field – DOB & Last. DOB & First. DOB & Sex.**

Client Search Parameters

Case #	<input type="text"/>	Sort Name	<input type="text"/>	Search
Last	<input type="text"/>	First	<input type="text"/>	<u>DOB</u> <input type="text"/>
			<u>Thru</u> <input type="text"/>	Default

Last	<input type="text"/>	First	<input type="text"/>	<u>DOB</u> <input type="text"/>	<u>Thru</u> <input type="text"/>	Default
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Last	<input type="text"/>	First	<input type="text"/>	<u>DOB</u> <input type="text"/>	<u>Thru</u> <input type="text"/>	Default
Alias Last	<input type="text"/>	First	<input type="text"/>	Sex <input type="text"/>	SSN <input type="text"/>	Clear

**TIPS!**

**When using DOB field ALWAYS enter date in both DOB & Thru fields. DO NOT enter only in DOB field.**

# 5 Effective Ways to Search

**ALWAYS SEARCH MULTIPLE WAYS,**  
even if you find the record you are looking for with your first search.

4. Sex with another field – Sex & First Name. Sex & DOB. Sex & Last name (if somewhat unique). Reminder: Enter Date in both DOB & Thru fields

The screenshot shows the 'Client Search' interface with the following fields and annotations:

- Case #**: Input field
- Sort Name**: Input field
- Search**: Button
- Last**: Input field with a red arrow pointing to it from the 'Sex' dropdown.
- First**: Input field with a red arrow pointing to it from the 'Sex' dropdown.
- DOB**: Input field with a green arrow pointing to it from the 'Sex' dropdown.
- Thru**: Input field with a green arrow pointing to it from the 'Sex' dropdown.
- Alias Last**: Input field
- First**: Input field
- Sex**: Dropdown menu with a yellow background, highlighted by a red arrow.
- SSN**: Input field
- Default**: Button
- Clear**: Button

5. Alias Last and First name fields – same searches as for Last and First name fields. Strongly suggest if you know the client goes by another name. **REMINDER: Only use 2 data points when searching**

This screenshot highlights the 'Alias Last' field in the search interface. The 'Alias Last' field is circled in orange and has a color-coded bar (yellow, blue, green, red) below it. Other fields include 'Last', 'First', 'DOB', 'Thru', 'Sex', and 'SSN', each with their respective color-coded bars or dropdown menus. The 'Default' and 'Clear' buttons are also visible.

**TIPS!**

**ALIAS fields – Searches Aliases that have been entered in the Alias section of the Demographics Form**

# TIPS!

## Think of Client Lookup like you would Google

Example: You want a red sweater for Christmas.

If you Google **Red Christmas Sweater with collar and round, green buttons** – what will you get? Only and exactly what you asked for. That's not a bad result. But if you enter Red Christmas Sweater – you will get ones with and without collars, with buttons of all shapes and colors (not only round and green), which actually could be something you like better.



When searching for clients, do it like you would a Google search, sometimes entering less will get you more. **Look for the many NEEDLES (not just the one) in the Haystack.** In other words, search as if you *believe* the client is already in the system and you are determined to find them. Use only 2 data points, such as First Name & DOB, not 3 or 4, such as First & Last Name, DOB, & SSN.





# CLIENT LOOKUP

# TIPS!

**TIP #1 – ALWAYS search multiple ways, ALWAYS - even if you find the client you are looking for with the first search**

**TIP #2– When searching by DOB, ALWAYS enter a date in both DOB and Thru fields.**

**TIP #3 – Click on any Column Header to Sort**

**drag**

**TIP #4 – Hover over column divider and drag to expand column**

**TIP #5 – Click CLEAR between searches**

Click on the search button to perform a search for client records based on the criteria in the top section.

**Client Search Parameters**

Case #  Last  Alias Last  Sort Name  First  Last  DOB  Thru  Sex  SSN  Search  Default  Clear

**Client Search Results**

Name	First	Last	Ethnicity	DOB	SSN	Prim Unit ID	Prim Unit	Prim SubUnit	Prim SubUnit	External Ca.	SAI ID	SAI Name
There are no items to show.												

Logged on as MOUJON, KIM (00663) Environment: Test 3 CHP20111029 Template Loaded No Changes NIIM

### 3. “I add clients according to the County’s rules, I don’t create duplicates.”

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## What are the rules when adding a client?

- In the CCI enter Sort Name as: **LASTNAME, FIRSTNAME MIDDLE** (name or initial).
- If needed, make unique by adding DOB in **six digit** format: **mm/dd/yy** i.e. **01/01/80** or **12/03/00** – Do not use , - , . , or “DOB” before DOB in the Sort Name. Delete date from Middle Name field.
- Add name **without spaces, punctuation** (no hyphens, i.e. should be **DOESMITH** not **DOE-SMITH**) or **suffix** (no “Jr.” or “Sr.” or “II”)
- Only use English words. For example, do not use ñ, ã, á or ý (such as – **Muniz** not **Muñiz**)
- Double check for accuracy before clicking “Save”. Once the CCI is Saved you cannot edit. If changes are needed to the **Name, DOB, SSN** or **Sex** fields you must complete a BHS-025 Form A and send to HIMS\*. **DO NOT EDIT** these fields in the Demographics Form.

(\*Health Information Management Systems **aka** Medical Records)

# TIPS!

When Adding a New Client - Complete as many fields in the CCI as possible, not just the “red” required fields.

Client Lookup (TEST3)

Core Client Information Maintenance Pane (TEST3)

Core Client Information

Actions: Select, Add Client, Edit Client

Refresh, Save and Close, Refresh

Click on the search icon to perform a search

Client Search

Client Search Parameters

Case #   
Last   
Alias Last

Client Search Results

Name  First

Core Client Information

Sort Name  Case Number (0 or blank for Auto Assign)

Last Name  First  Middle Name

DOB  Soc Sec #  Ethnicity  Sex

Address  Home Phone

City  Work Phone

Address County  Residence County

Client Type  Client  Non-Client  Generic

**TIP #6 - Click ADD Client & start typing. DO NOT CLICK into Sort Name field, doing so could cause a space to be entered at the beginning of the field.**

## 4) “I didn’t create the duplicate, why am I being *punished* with having to fix it.”

### Roadblocks

(Prevents Combining Clients)

- **Overlapping or Non-F/A’d Client Plans**
- **Non-F/A’d Progress Notes**
- **Non-F/A’d Assessments (i.e. Dem, Dx, BHA)**
- **Most current Demographics Form is in client going away**
- **Overlapping Assignments and/or Services**
- **Open Pre-Intake**
- **UMDAPs in different months**

### Required Action

(HIMS, County QI, or Optum will advise action needed to combine clients)

- **County QI Dept will review and give instructions**
- **County QI Dept will review and give instructions**
- **Forms must be F/A’d or deleted**
- **Form will be Voided, program will need to re-enter**
- **Delete or adjust dates so they do not overlap**
- **Must be closed**
- **Send to Billing Unit to correct**

The focus is on the client. The goal is to have only **one correct** record for each client.

## 5) “The other user entered the client’s name wrong, why is that record being kept?”

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- ❖ In most cases we must keep the original record. If needed, corrections will be made.
- ❖ Prior to combining, must consider:
  - ✓ Which system record was created in
  - ✓ Has billing to the state has occurred
  - ✓ Can we clear the Roadblocks
  - ✓ How will reporting be impacted



# What should I do if I see duplicate records, or corrections need to be made for a client?

CCI is saved with an error or a Duplicate client record is created?

To be used to correct CCI:

## MHS-025 Form A

(Follow instructions on form)

- Spelling of Name or Name change
- Date of Birth (DOB)
- Social Security #
- Medi-Cal Policy #
- UMDAPs in different months

To be used to Combine Clients:

## MHS-025-Form B

(Follow instructions on form)

- Complete ALL Fields in all three columns as instructed
- Fax to HIMS w/o attachments
- HIMS will advise if supporting documentation is needed

It takes all of us working together to ensure client data integrity.

What if “I *THINK* this  
*MIGHT* be my client . . . ?



Not sure? Got questions? Please call  
**HIMS at (619)692-5700 x3**  
or call the  
**Optum Support Desk**  
at  
**(800)834-3792**



Is this the same  
person? I'll call  
HIMS or the  
Support Desk for  
help.