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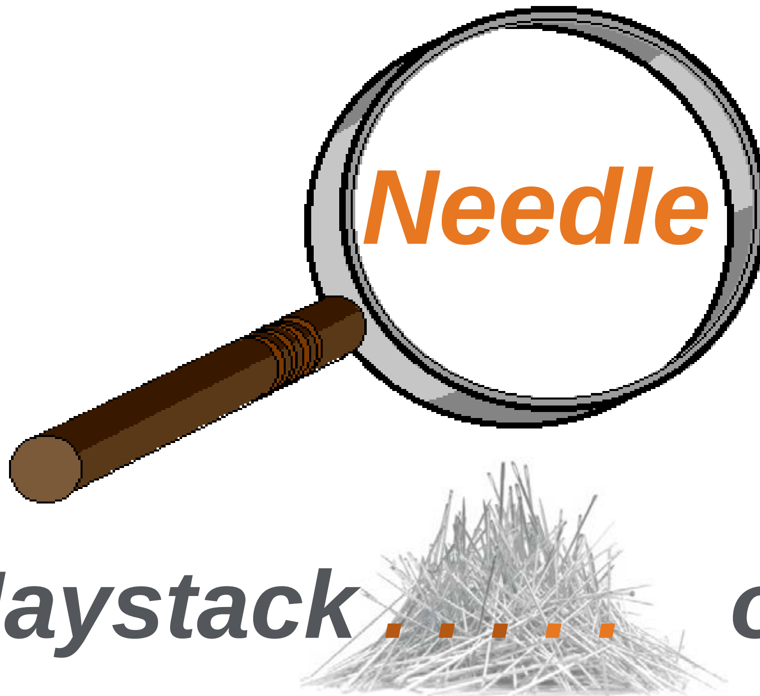
COUNTY OF SAN DIEGO
HHSA
HEALTH AND HUMAN SERVICES AGENCY

# *Looking for a*

# ***Needle***



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

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

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

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?”

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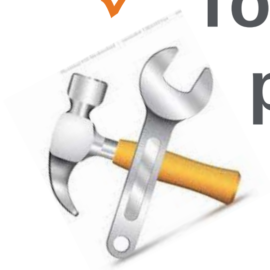
# 1) “Why do we need to talk about searching and duplicates AGAIN? Already heard that, already do it?”

✓ 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

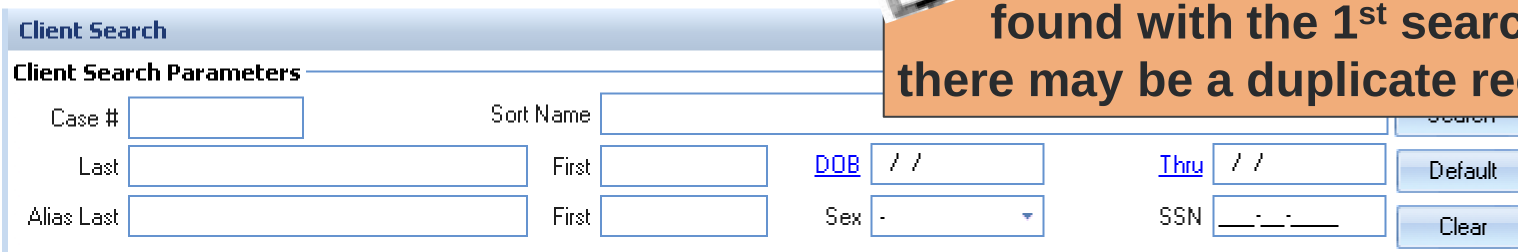


✓ To know how to find duplicate records that may already exist for a client

# 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?


Search multiple ways, even if the client is found with the 1st 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.


Only use 2 data points when searching

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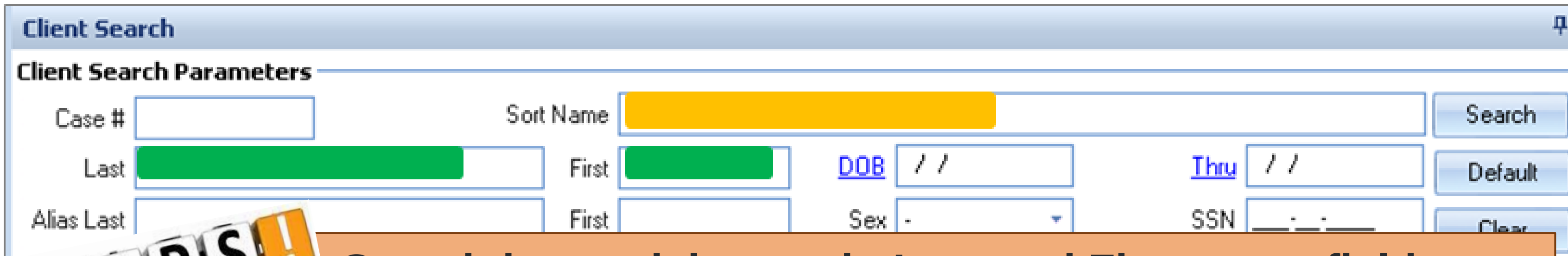
# *5 Effective Ways to Search in CCBH*

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

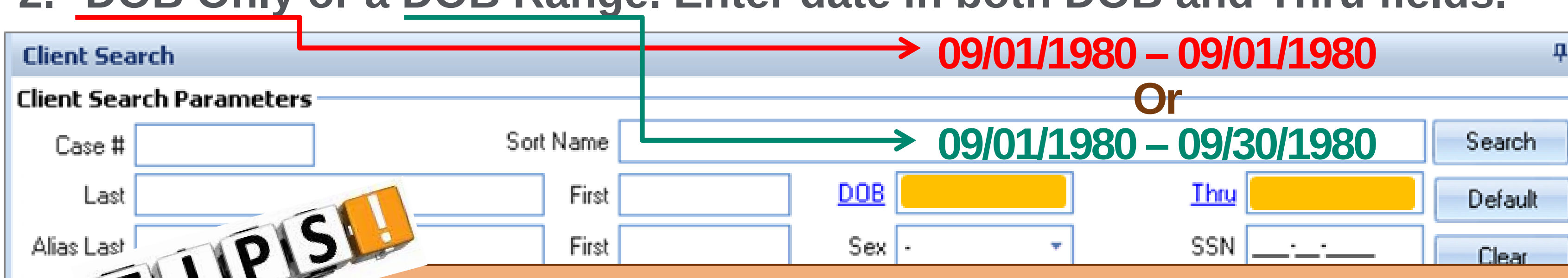
**1. Name - Sort Name. Last and First fields. Reminder: USE CAPS**




TIPS!

**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.**




TIPS!

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

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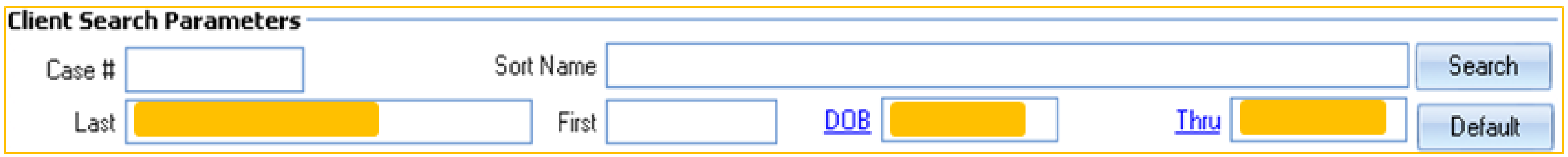
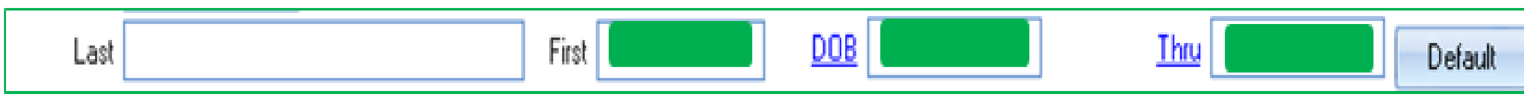
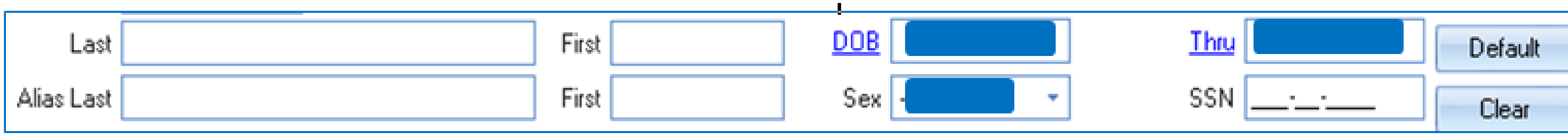
# *5 Effective Ways to Search*

**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.



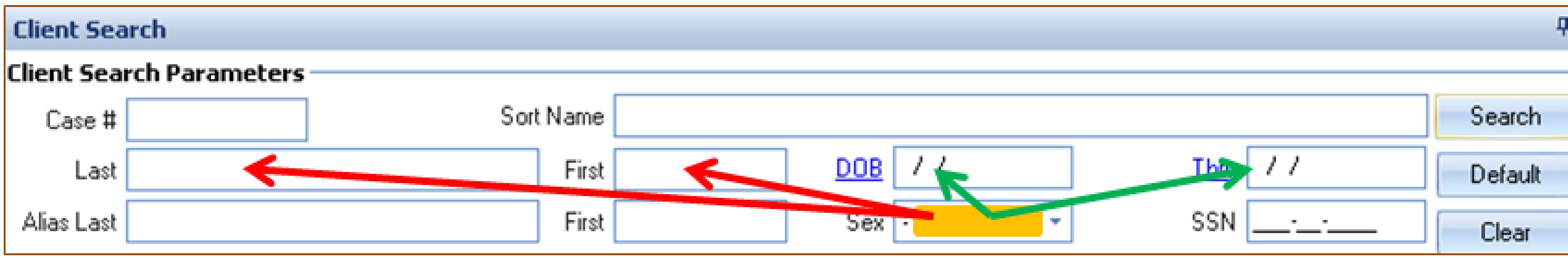


***When using DOB field ALWAYS enter date in both DOB & Thru fields. DO NOT enter only in DOB field.***

# *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**




**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**



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

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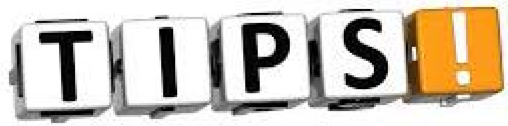


# Think of Client Lookup like you would Google

**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.**

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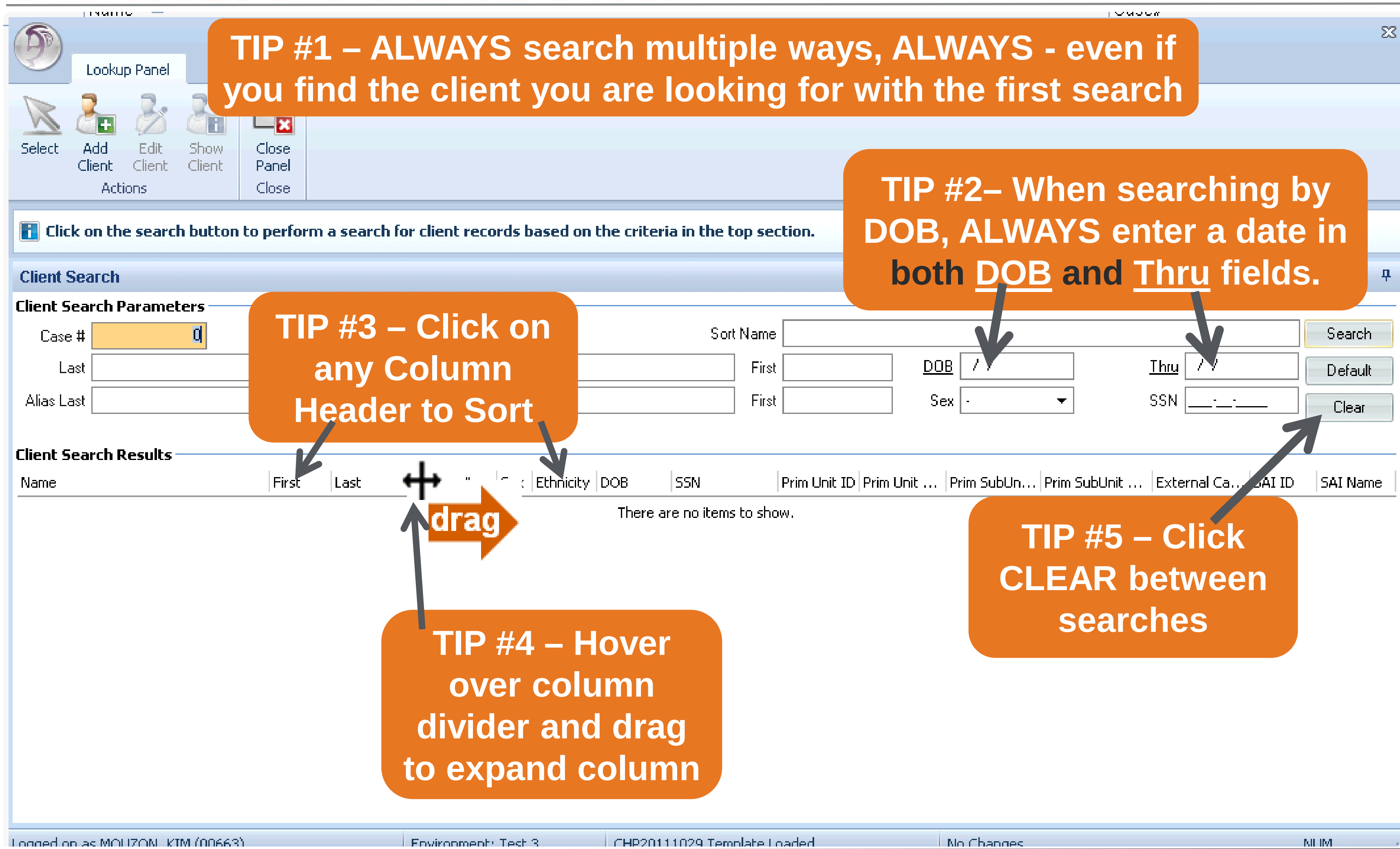
# CLIENT LOOKUP TIPS!




**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**

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

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

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

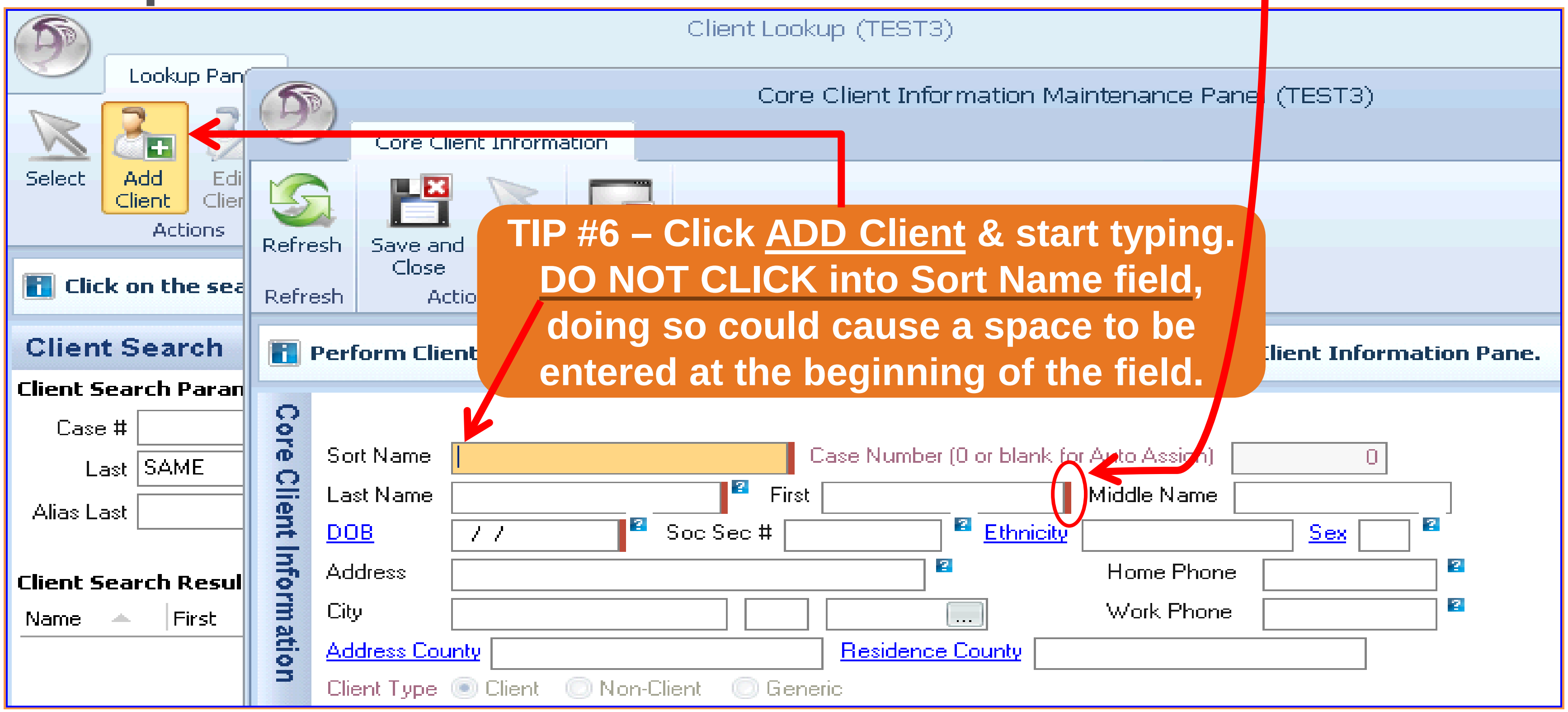
## What are the rules when adding a client?

- 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, ĩ, 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)



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





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

| Roadblocks (Prevents Combining Clients) | Required Action (HIMS, County QI, or Optum will advise action needed to combine clients) |
| --- | --- |
| Overlapping or Non-F/A'd Client Plans | County QI Dept will review and give instructions |
| Non-F/A'd Progress Notes | County QI Dept will review and give instructions |
| Non-F/A'd Assessments (i.e. Dem, Dx, BHA) | Forms must be F/A'd or deleted |
| Most current Demographics Form is in client going away | Form will be Voided, program will need to re-enter |
| Overlapping Assignments and/or Services | Delete or adjust dates so they do not overlap |
| Open Pre-Intake | Must be closed |
| UMDAPs in different months | Send to Billing Unit to correct |

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

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

- 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.**

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# 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