

CREATING CIPS CLIENT ID NUMBERS

AKA Register a client

Client Search

Navigation: Client> Search

The screenshot shows the CIPS Client Search interface. At the top, there is a navigation bar with 'Client', 'Service', and 'Admin' tabs. Below this is a search bar. The main content area is titled 'Client Search' and includes a 'Search Criteria' section. This section has a 'Client Characteristics' checkbox, an 'Include AKA's' checkbox, and several search filters: First Name, Middle Name, Last Name, Date Of Birth (From/To), and Gender. There are also checkboxes for SSN, MCI ID, Client ID, and MH Recipient ID (MHX Number). At the bottom, there is a 'Search Results' section with a search button and options like 'New', 'Duplicate', 'Show', 'Clear', and 'Cancel'.

Note: It is recommended that you search first by entering the client's social security number.

- SSN (check box): Check to search by the client's social security number.
- SSN (text box): Type the client's nine-digit social security number.

If the client is not found, enter the following. It is best to do a broad search.

Client Characteristics (check box):

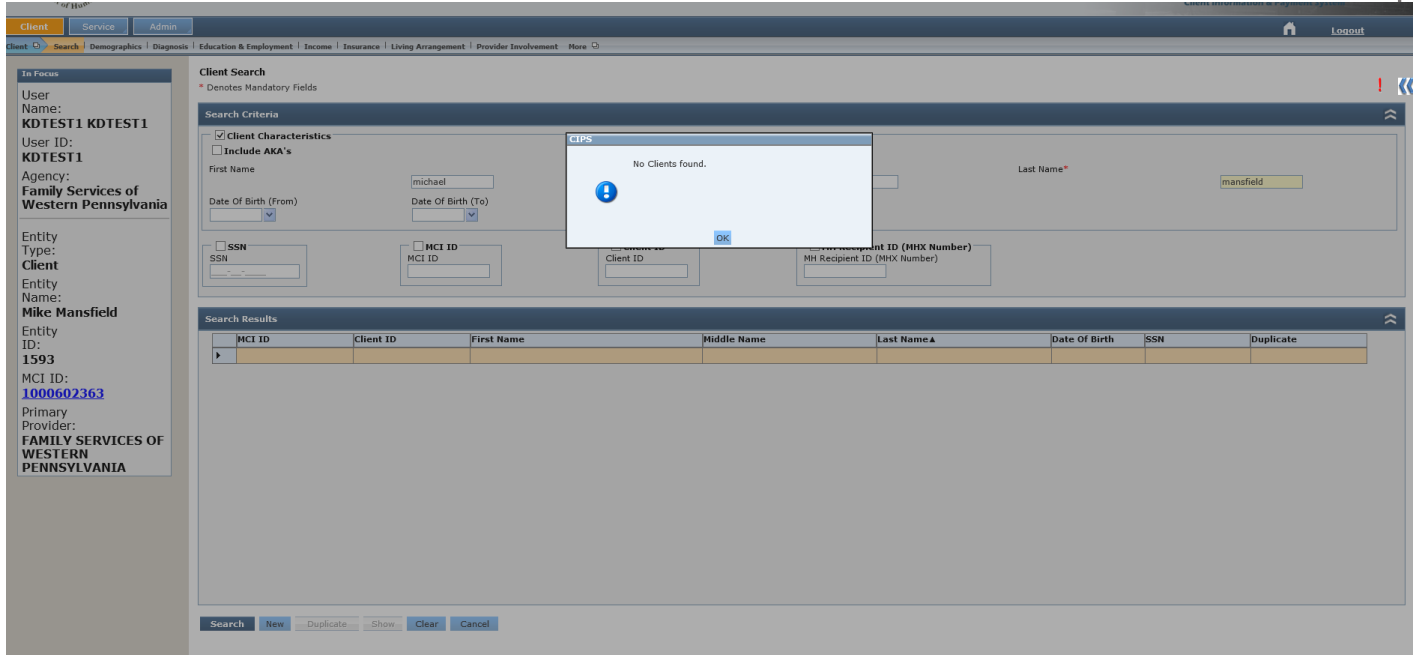
- Include AKA's (check box): Check to include alias name records in the search results.
- First Name: Select a filter.
 - Starts With = Allows for partial name searches - *First three letters*.
 - Sounds Like = Allows for phonetic searches.
 - Is = Allows for exact match searches.
- First Name (text box): Type the client's first name, if applicable.
- Middle Name: Select a filter.
 - Starts With = Allows for partial name searches.
 - Sounds Like = Allows for phonetic searches.
 - Is = Allows for exact match searches.
- Middle Name (text box): Type the client's secondary name, if applicable.
- Last Name: Select a filter.
 - Starts With = Allows for partial name searches. First three letters.
 - Sounds Like = Allows for phonetic searches.
 - Is = Allows for exact match searches.
- Last Name <text box>: Type the client's surname. This is a mandatory field.

If the system returns several results, then refine the search adding the following criteria:

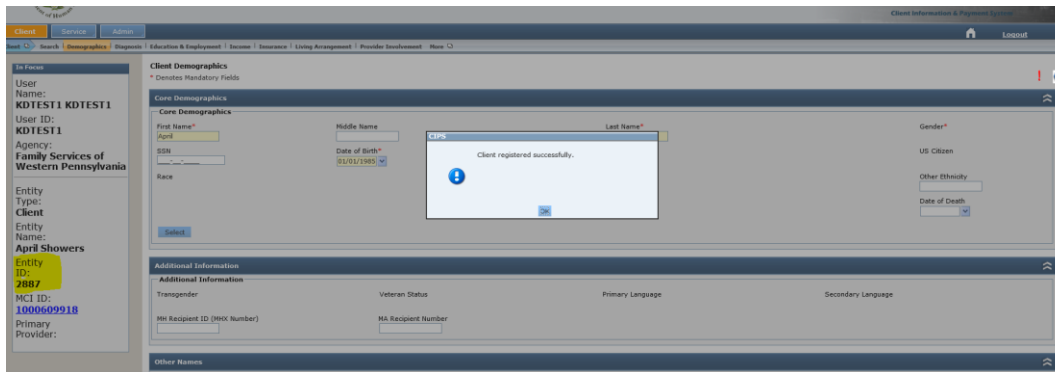
- Date of Birth (From): Enter or select a beginning date range for the birth date from the drop-down menu.
- Date of Birth (To): Enter or select an ending date range for the birth date from the drop-down menu.
- Gender: Select an orientation from the dropdown menu.
- Other searches:
 - MCI ID (check box): Check to search by the client's Master Client Index number. Type the Master Client Index number for the client.
 - MH Recipient ID (MHX Number) (check box): Check to search by the client's mental health identification number. Type the mental health identification number for the client.

Client Not found message:

- Click **OK**.
- Click **New** button.



- Complete all mandatory Core Demographic Information.
- Click the **Save** button.
- Click **OK**.
 - The Client information will show in the In-Focus box.
 - Entity ID is also known as the Client ID for CIPS.
 - An MCI ID is created for each client.



Validation for duplicate client ID:

This screen may appear when a user clicks on the **Save** button, while creating a new Client ID.

Person Search Results (The Person you are searching may already exist in the system.)

Name: Mason Simps DOB: 05/12/1945 Address:

Gender: Female SSN: 367-67-5525

Potential Matches

MCI ID	First	Middle	Last	Suffix	SSN	DOB	Gender	%
▶ 1000578162	Macon		Simpson		367-67-5525	5/12/1945	Female	98

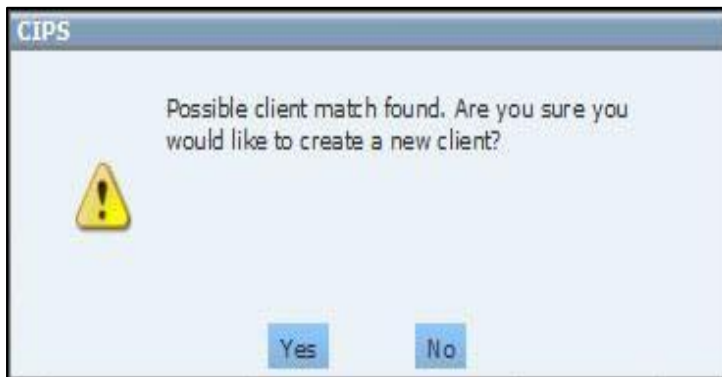
Detail Information

Client ID: 1481 MCI ID: 1000578162 Name: Macon Simpson Home Phone: () - -

SSN: 367-67-5525 Gender: Female Date of Birth: 5/12/1945 Work Phone: () - - Ext:

Address: Race: MH Recipient ID (MHX Number): Fax: () - -

Email Address:



- Compare the information in both grids.
 - Click SELECT in the Person Search Results grid if the information in the Potential Match grid is NOT the client searched.
 - Click SELECT in the Potential Matches grid if the information is for the client searched.
 - Click YES.

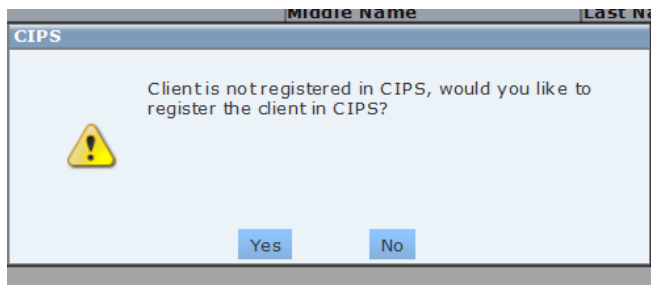
PREVENTION for Duplicate Client ID creation

Client with MCI ID only

- Search for a client.
 - If a client's information shows but there is not an CIPS client ID:
 - Compare information to determine if this is the client receiving services.

MCI ID	CLIENT ID	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	SSN	DUPLICATE
10000000009		Lin		Lo	01/01/1984	123-45-6666	NO

- If this is the correct client:
 - Click the SHOW button.
 - Click the YES button in the message (shown below).
 - CIPS Client ID will be assigned.
 - Access client information.



Client information showing is the same information

- Click the SHOW button on the row with the Client ID number
- Access client information

MCI ID	CLIENT ID	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	SSN	DUPLICATE
10000000001		Pitty		Pat	01/01/1985	123-45-6789	NO
10000000002	123456	Pitty		Pat	01/01/1985	123-45-6789	NO

Client information showing is the same or similar and each has a Client ID number

- Create an incident in ISERVICE with an explanation and a screen shot of the grid.
 - DHS staff will determine which number to indicate as a duplicate.

MCI ID	CLIENT ID	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	SSN	DUPLICATE
10000000003	891011	Lippy		Lip	01/01/1986	123-45-7623	NO
10000000004	123457	Lippy		Lip	01/01/1986	123-45-7623	NO

- The system will populate YES for the ID that DHS staff deemed as the duplicate.
 - Primary Provider status, Claim History and Recent Diagnosis/Priority Group are considered for the decision process.
 - The information on the duplicate client will become View only.
 - Click the SHOW button to view the client's information.
 - Click the DUPLICATE button to view information regarding the identification process (see screen shot below).

Duplicate Client Details

Duplicate Client Details

Duplicate Client?

Original Client ID: 186394

Associated Client ID(s): 152562

Notes: USE 186394 HAS THE MOST RECENT INFORMATION

Last Updated By: Patti Mansfield K001057

Date and Time: 08/04/2016 01:59 PM

Save Cancel

Client information showing is the same or similar, each has a Client ID number and one or more does not have a Client ID

- Create an incident in ISERVICE with an explanation and a screen shot of the grid.
 - DHS staff will determine which number to indicate as a duplicate.
- Do NOT create another Client ID.

MCI ID	CLIENT ID	FIRST NAME	MID DLE NAME	LAST NAME	DATE OF BIRTH	SSN	DUPLICATE
10000000005					01/01/1987	123-45-6790	NO
10000000006	123458	Po		Moe	01/01/1987	123-45-6790	NO
10000000007	123459	Po		Moe	01/01/1987	123-45-6790	NO

Search **New** **Duplicate** **Show** **Clear** **Cancel**

There are other instances of duplicate CIPS Client ID numbers that are not as clear cut as the above scenarios. For those:

- Create an incident in ISERVICE with an explanation and a screen shot of the grid
 - DHS staff will determine which number to indicate as a duplicate

PLEASE REMEMBER TO DO THOROUGH SEARCHES:

- **SEARCH BY SSN FIRST.**
- **NO SSN FOR A CLIENT, ENTER THE CORRECT SPELLING OF THE NAME.**
- **REFINE SEARCH IF SEVERAL RETURNS.**
- **IF CIPS PRODUCES A POSSIBLE MATCH, SELECT IT, IF THIS IS THE CLIENT YOU ARE SEARCHING FOR.**