

## CREATING CIPS CLIENT ID NUMBERS

### AKA Register a client

When a client presents at an agency and it is determined BH(MH) services will be provided, demographic and services rendered claims must be entered. The first step is to search in CIPS to determine if the client is already in the application or if a CIPS Client ID must be created.

### Client Search

#### Navigation: Client> Search

The screenshot displays the CIPS Client Search interface. At the top, it identifies the user as 'User Name: KDTEST1 KDTEST1' and the agency as 'Family Services of Western Pennsylvania'. The search criteria section is active, showing options to search by 'Client Characteristics' and 'Include AKA's'. Fields for 'First Name', 'Middle Name', and 'Last Name' are present, each with a 'Starts With' dropdown menu. There are also fields for 'Date Of Birth (From/To)' and 'Gender'. Below these are checkboxes for 'SSN', 'MCI ID', 'Client ID', and 'MH Recipient ID (MHX Number)'. The search results section is currently empty, with buttons for 'Search', '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):**

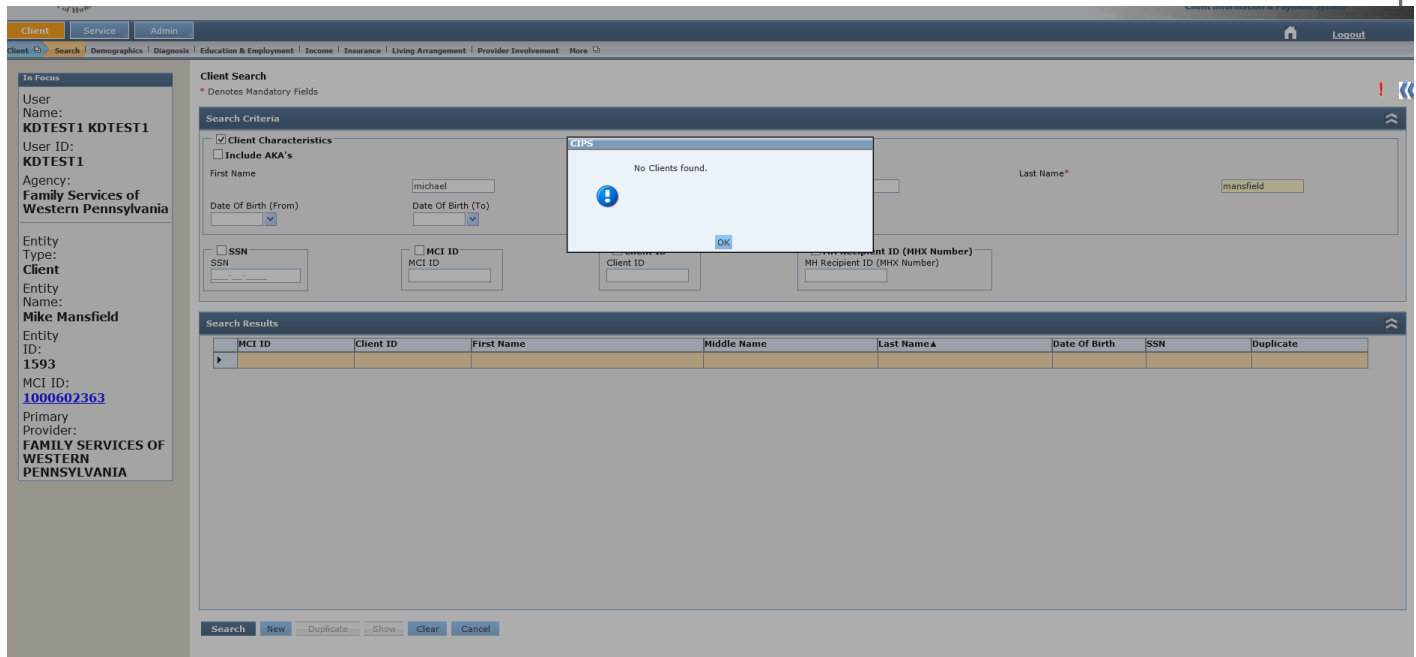
- Include AKA's (check box): Check to include alias name records in the search results.
- First Name: Select a filter.
  - Starts With = Allows for partial name searches - *First three letters*.
  - Sounds Like = Allows for phonetic searches.
  - Is = Allows for exact match searches.
- First Name (text 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 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.

The screenshot displays the 'Client Information & Payment System' interface. On the left, the 'In Focus' sidebar shows client details: User Name: KDTEST1 KDTEST1, User ID: KDTEST1, Agency: Family Services of Western Pennsylvania, Entity Type: Client, Entity Name: April Showers, Entity ID: 2887, MCI ID: 1000609918, and Primary Provider. The main content area is titled 'Client Demographics' and includes a 'Core Demographics' section with fields for First Name (April), Middle Name, Last Name, SSN, Date of Birth (01/01/1985), Race, Gender, US Citizen, Other Ethnicity, and Date of Death. A 'Select' button is visible below the Race field. Below this is the 'Additional Information' section with fields for Transgender, Veteran Status, Primary Language, Secondary Language, MH Recipient ID (MHX Number), and MA Recipient Number. An 'Other Names' section is partially visible at the bottom. A modal dialog box titled 'CIPS' is centered on the screen, displaying the message 'Client registered successfully.' with an 'OK' button.



## **PREVENTION for Duplicate Client ID creation**

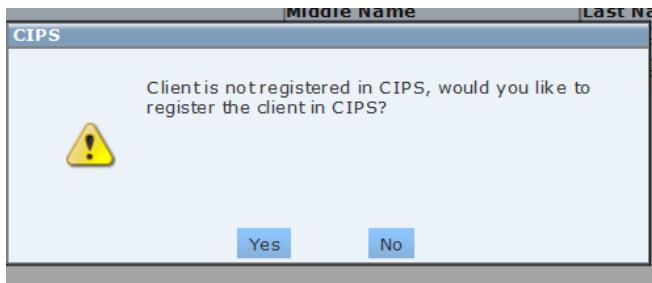
### **Client with MCI ID only**

- 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        |

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

- 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        |

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

**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.**