

Select originating cluster

Mary Lee Fay, Administrator
Authorized Signature

Number: SPD-IM-04-034
Issue Date: 04/27/2004

Topic: Other

Subject: Type A AAA Procedure for Deleting Duplicate Clients in Oregon ACCESS Database

Applies to (check all that apply):

- | | |
|--|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Children, Adults and Families | <input type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Other (please specify): |

Message:

In the past, Type A Area Agencies on Aging (AAA) have not had a clear procedure for deleting duplicate person records that are identified in Oregon ACCESS. SPD is providing this information memorandum to outline the Type A AAA Process for deleting duplicate cases in ACCESS.

When a duplicate person is identified, AAA staff should refer to the attached Process entitled "Process for Deletion of Duplicate Persons on Oregon ACCESS". This process outlines the specific tasks that must be completed by the Type A AAA office when a duplicate person record is discovered. When the AAA office has completed the steps outlined, a referral should be made to Amy Evenson, via email at Amy.R.Evenson@state.or.us or by phone at (503) 945-5734. Once the duplicate person referral information is obtained, SPD will begin the internal process for deleting the duplicate person from the ACCESS database.

If you have any questions about this process, please feel free to contact the SPD contacts listed below.

If you have any questions about this information, contact:

Contact(s):	Amy Evenson, OAA/OPI Program Coordinator Dawn Andersson, SPD Business Analyst		
Phone:	Amy- (503) 945-5734 Dawn - (503) 945-5815	Fax:	Amy - (503) 373-7902
E-mail:	Amy.R.Evenson@state.or.us		

Dawn.C.Andersson@state.or.us

PROCESS FOR DELETION OF DUPLICATE PERSONS ON OREGON ACCESS for Type A AAA Offices

THIS SECTION TO BE COMPLETED BY AAA OFFICE:

How to determine which is the “duplicate” person?

- The OAA Worker identifies two person records on OA they believe to be the same person.
- Review Call, Screening, Primary Applicant (Case) and Resource Assessment (RA) Modules associated with both persons.
- Determine which person you will keep. If one of the person records has case with any Medicaid data on the Service Tab, CA/PS Assessment section, Case Overview Tab or has an RA Module, this is the record you must keep.

Changes to the Primary Applicant (Case) Module

- Copy any relevant data from this Module to the correct person’s Primary Applicant (Case) Module. Remember to look on all the tabs.
- Copy the narrative to the correct Primary Applicant (Case) Module. Remember to retrieve any narrative that is older than 12 months.
- The person you will be deleting will need the assigned workers removed and check the unassigned worker box on the Case Overview Tab found in the Benefits Section.
- Change all program selections at the bottom of the Case Overview Tab to NA (not applicable).

Changes to the Call Module

- Search the Call Module by person name, date of birth (DOB) and/or social security number (SSN) to confirm no Calls are linked to the person you are about to delete. If no calls found, you are done.
- If calls are found and linked to the person you are going to delete they must be detached from the person. The detachment of linked calls to any person being deleted from OA is necessary to prevent future problems with the Data Base.
- Unlinked Calls can remain on OA without causing complications to the Data Base.
- If the worker wants to link this call to the remaining person on OA they may do so. They will need to change the client name, DOB and/or SSN to match the remaining person records and click on Link Call to Person button.

Changes to the Screening Module

- If a screening exist copy any relevant data from this Module to the correct person's Screening Module. If the correct person does not have a screening copy data into the Primary Applicant (Case) Module. Remember to look on all the tabs.
- Copy the narrative to the correct Screening. If the correct person does not have a screening copy data into the Primary Applicant (Case) Module. Remember to retrieve any narrative that is older than 12 months.

Changes to the Person Record

- Do a Person Search for the record to be deleted, make sure you are searching local ACCESS only.
- Confirm you pulled up the correct person record.
- Change the client first name to Duplicate Person and leave the last name alone. Example: Duplicate Person Kimmerson.
- Delete the SSN if one is entered on the Person Detail section. If the SSN is valid add it to the correct case record, the one you are keeping.

Delete OA Modules for the “duplicate” Person

- Contact Amy Evenson at Central Office for duplicate person Modules to be deleted. Amy can be reached by phone at 503-945-5734 or via Email Amy.R.Evenson@state.or.us.
- The phone message or email should include the following information:
 - Brief explanation of how the duplicate occurred and/or was discovered
 - Workers Name, Branch Office and Phone Number
 - Name of person to be deleted and Branch Office
 - Name of remaining person, Branch Office and SSN if available
- Example: The duplicate record was created by myself. I did a search on Jan Kimmerson did not find a match. I later found out the name is Jane Kimmerson , who was an OAA client at 1517.
 - Dawn Andersson , 1717, 541-463-3961 x 247
 - Duplicate Person Kimmerson, 1717
 - Jane Kimmerson, 1717, 542-64-9125

THIS SECTION TO BE COMPLETED BY SPD CENTRAL OFFICE STAFF ONLY:

Review of “Duplicate” Person Deletion Request

- Amy will review the Modules for both the person to be deleted and remaining person on OA. She will confirm the appropriate person is being deleted.
- If Amy finds any of the proceeding steps were not taken , she will contact the worker to complete the necessary actions prior to deleting any Modules
- When Amy is satisfied that all necessary steps have been completed correctly she will delete the duplicate persons attached screening and Primary Applicant (Case) Module.

Deletion of “duplicate” Person Modules on OA

- Do a Person Search in the branch office of the person to be deleted. Example: Duplicate Person Kimmerson at 1717.
- Highlight the duplicate person and click the View button. This will display the Person Detail Screen for the duplicate person (see bottom of the screen).
- If the case is marked as Inactivate, highlight the case and select Status on the toolbar, and click on Activate. Repeat this for the Primary Applicant (Case) Module, if needed.
- Highlight the Screening Module, if one exists, click on Select from the toolbar, and click Housekeeping, Click Delete Screening. Repeat this for the Primary Applicant (Case) Module.

Delete “Duplicate” Person from OA Data Base

- Amy will contact the Help Desk 503-945-5623 to create a ticket.
- Amy will need to give the duplicate person name (Ex: Duplicate Person Kimmerson). She may want to remind the Help Desk that an All ACCESS search will be required, since the person is no longer attached to a specific branch office.
- The Help Desk will assign the request to OA OIS Staff.
- OA OIS Staff will delete the duplicate person from the Data Base.