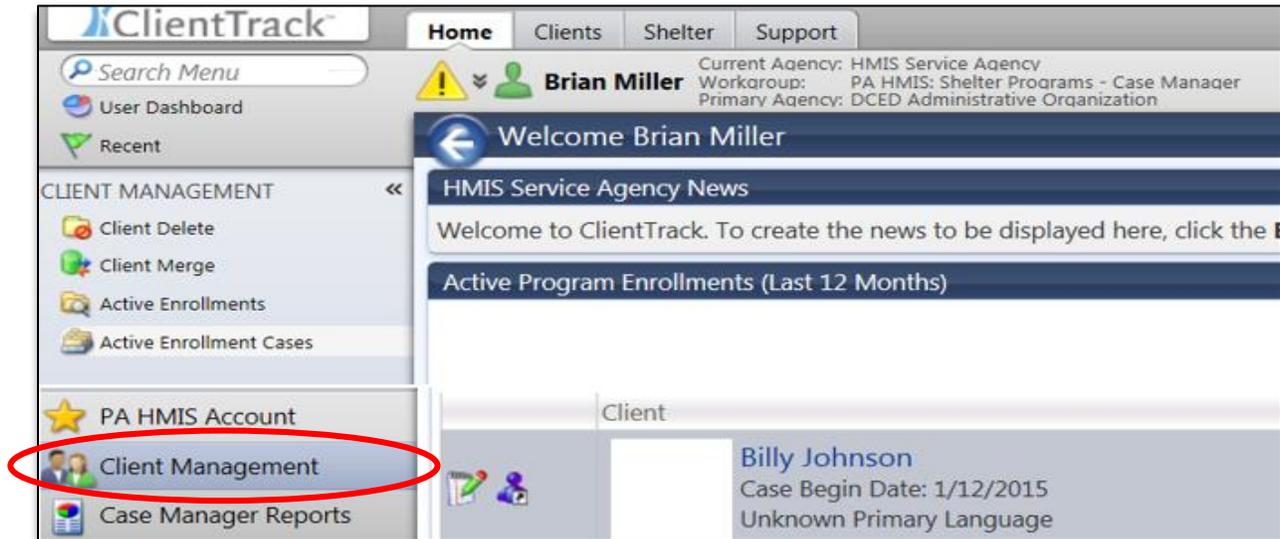
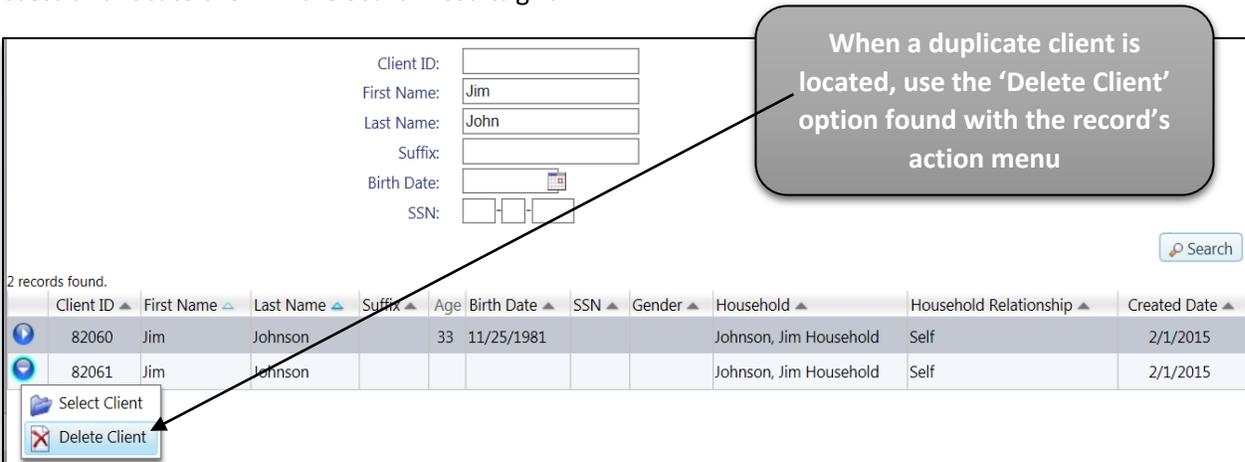


Client Management Toolkit Guide

The system now includes a Client Management folder, which includes a number of features that can assist in the management of each organization's client data, and are available to all users. This Client Management Toolkit can be found within the [Home](#) -> [Client Management](#) folder of the system within all Workgroups.



Client Delete: this tool will allow users to delete mistakenly created or duplicate entered clients from the system. When selecting this option the user can search for clients for which their organization has access and locate them in the search results grid.



The system will only allow users to delete clients in which only their organization has access, and if a client is also accessible by another organization, their record will not be available for deletion.

Please note that the delete option should only be used when a client was mistakenly entered and no data has yet been associated to the record. If a duplicate is found and program-based data exists in both records please refer to the Client Merge tool for assistance.

Client Merge: this tool will allow users to merge two separate but duplicated clients into a single record. This is an important tool to assist organizations to ensure their clients are as de-duplicated as possible, which provides improved reporting accuracy and easier to maintain data.

Please note that during this initial release phase the Client Merge tool is only available for users that are Assistant Managers or Agency Managers.

When selecting this option the user is taken to the first step in the process, which includes searching for and selecting the two clients in which to merge. There is a **“Merge From”** client and a **“Merge Into”** client that need to be selected and entered into this step.

Merge From Client - all transactions for this client will be reassigned to the **Merge Into Client**. Afterwards, this client record will be removed from the system.

Merge From Client: * Johnson, Jim 

Merge From Client ID: * 82060

Age: 33

Birth Date: 11/25/1981

Social Security Number: 567-77-8888

Gender:

Household: Johnson, Jim Household

Relationship: Self

Date Created: 2/1/2015

Merge Into Client - this is the client into which the data will be merged. This client profile record will be unaltered and used going forward by your organization

Merge Into Client: Johnson, Jim 

Merge Into Client ID: * 82061

Age: 33

Birth Date: 11/25/1981

Social Security Number: 567-77-8888

By entering in a client's name (Last, First) or selecting the magnifying glass, the system will provide a search tool from which to locate and select the duplicate client(s)

With the Client Merge, while the merge process will merge completely all transactions for both clients, which includes enrollments, assessments, services, case notes, data sharing policies, etc., the system does not merge any client profile information. The system will take the client profile information within the “Client Into” record as the new default and will remove the “Client From” record from the system.

Please note that it is very important that the “Client Into” record contain the client profile information (i.e. Name, Birthdate, SSN, and Address) that is the most accurate and up to date.

Once you have selected the two duplicate client records, and the correct “Client Into” record has been identified, select the “Continue” button on the bottom of the screen to move to the next step.

For the next step, the system loads a record of the two previously selected clients for a final review. Once satisfied these clients are duplicated and a merge should take place, simply click the **merge icon** to finalize the process.

The system will prompt for one more confirmation, and once continuing the system will merge the client transactions together and the Merge To client will be for new client profile of record. The process cannot be undone after that point.

1 record found.

	From ID ▲	Merge From Client ▲	Age	Birthdate ▲	Soc Sec No ▲	Merge Into Client ▲	Into ID ▲	Age	Birthdate ▲	Soc Sec No ▲
	82060	Johnson, Jim	33	11/25/1981	567-77-8888	Johnson, Jim	82061	33	11/25/1981	567-77-8888

Once the final “Merge Client” icon has been selected, the system will prompt to user to ensure the merge should take place and once confirmed the two clients are merged. The system will provide a message to indicate the process has been completed.



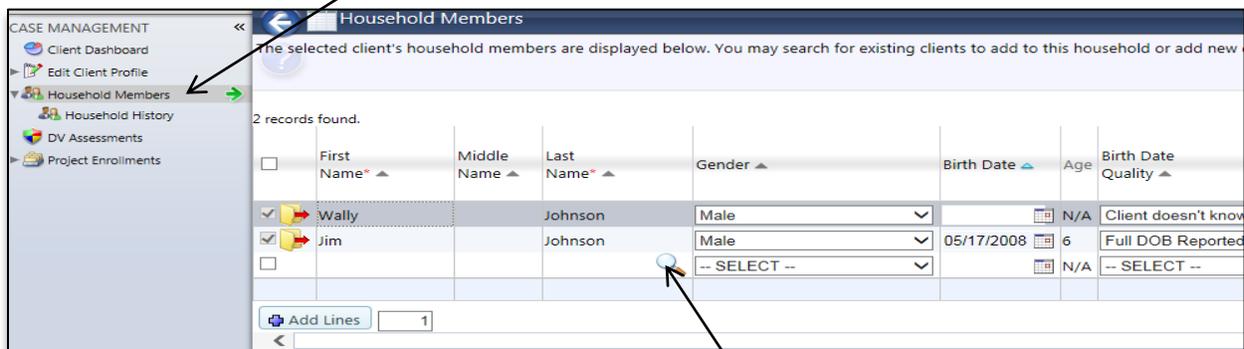
Please note that the Client Merge tool also contains a **Duplicate Client Report** that can provide a list of ‘possible’ duplicate clients from which your organization has access. To run the report, select your organization(s) and press the report button on the bottom of the report screen.

The Duplicate Client Report can also be found under the Home -> Management Reports -> Client Management Reports folder.

Household Member Merge Note: when merging a single duplicated client together in the system, the only concern is choosing the proper “Client Into” record for which to retain profile information. However, when merging a duplicate client that belongs to a household with other household members please also be aware of the “Client Into” record and to which household it currently belongs.

The PA HMIS system only allows a single person to be merged at one time, and when you have a duplicated household (multiple members of the same household have duplicated records) it will be necessary to merge each of those household member records separately. When merging these household clients, one at a time, we recommend having each “Client Into” record reside in the same household. Otherwise you could finish the merge and have these clients exist in different households.

After you have performed a Client Merge, especially clients that exist in households with other members, we always recommend checking to ensure all of the persons exist together in the proper household. By going to the “Household Members” tool within one of the household members (on the Client tab), this will list all the clients together in that household.



If a household member(s) is missing, you can simply add them into the household member grid shown above (make sure to select the existing client through the last name search field and not create a new one) to place them into this household.

Active Enrollments: this tool allows users to search for and display all clients still actively enrolled in the programs they administer. To display actively enrolled clients, select a program from the list provided and the system will perform an automated search. You may also enter in an optional client name (Last, First) to minimize the results.

Search active enrollments by program

Client (Last, First):

Program: HMIS Service Agency - Transitional Housing Program

Search

6 records found.

	Client (Last, First) ▲	Enrollment ▲	Enroll Date ▲	Days Enrolled ▲	Last Service ▲	Active On Your Case Load ▲
	Aaron, Henry	HMIS Service Agency - Transitional Housing Program	01/06/2015	30	01/06/2015	Yes
	Aaron, Kimberly	HMIS Service Agency - Transitional Housing Program	01/06/2015	30	01/06/2015	Yes
	Johnson, Jim	HMIS Service Agency - Transitional Housing Program	01/22/2015	14		Yes

Once a program is selected the system will display each client that has an active enrollment (enrollment that has no exit date). Each enrollment displays the client name, enrollment date, total days enrolled, the date of the last service and whether the client enrollment is active on your Case Load.

While running a report (Client Program Usage) is the standard method for providing active enrollments, this tool provides an interface from which to view this information. You can also select the icon, and the system load that client in the system and you will be automatically navigated to their dashboard for easy access.

Active Enrollment Cases: similar to the active enrollments, the active enrollment cases will display all the active households still actively enrolled in your programs. To display actively enrolled cases, select a program from the list provided and the system will perform an automated search. You may also enter in an optional household name to minimize the results.

Case/Household Name:

Program: HMIS Service Agency - Permanent Supportive Housing

2 records found.

	Case/Household Name ▲	Case Members ▲	Program ▲
	Parker, Peter	1	HMIS Service Agency - Permanent Supportive Housing
	Paxton, Leonard	2	HMIS Service Agency - Permanent Supportive Housing

Once a program is selected the system will display each household case that has an active enrollment. Each enrollment case displays the household or case name and the number of household members associated to that case. You can also select the icon, and the system load that enrollment case's Head of Household client in the system, the icon will display all of the individual household members that are currently included in that case.

Please note a “Case” or “Enrollment Case” refers to a group of household members enrolled into the same program together during the same time period and is used heavily in reporting metrics specifically for household type (i.e. Adults Only, Adults and Children, etc.). When viewing your enrollment cases, if the case member number does not match the number of persons that should be enrolled together, please contact the PA HMIS helpdesk for assistance in correcting the issue.