

# *Enter Transactions from Client Management and Change Provider ID or Tracking ID*

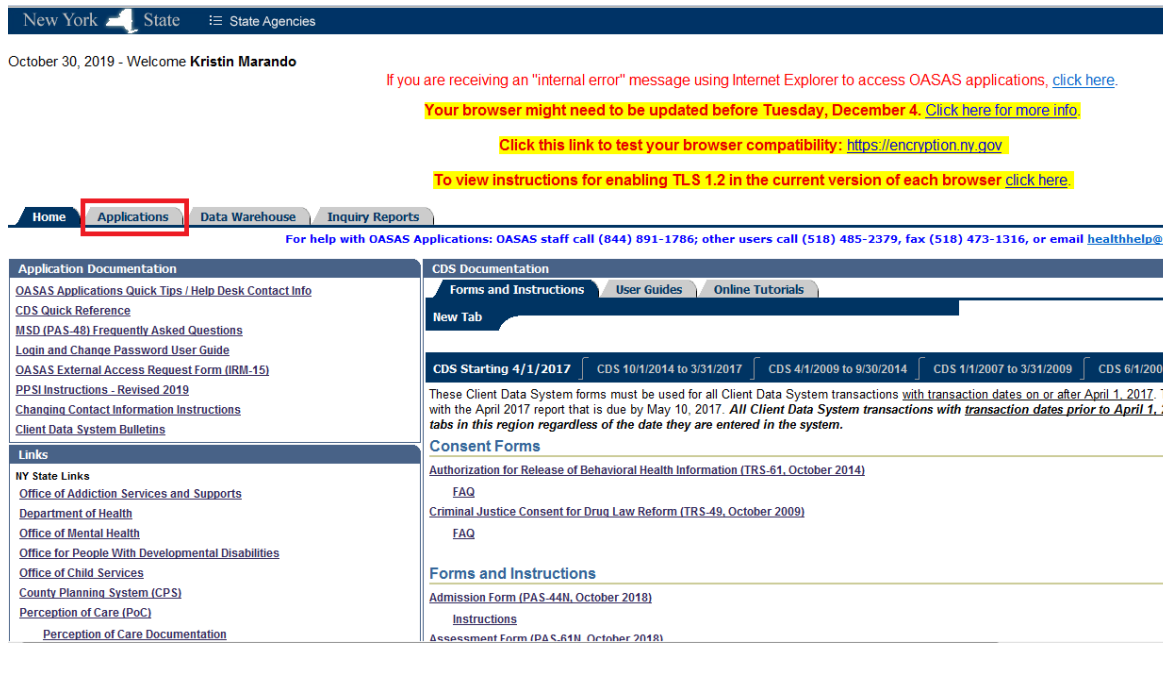
## **Summary**

**NOTE:** Due to the dynamics of state government and the changing needs for the OASAS CDS (Client Data System), some items in this user guide might have been removed from the live CDS. Similarly, some new items may appear in the live system that are not reflected in this user guide. To find the most updated versions of CDS forms and instructions, click the Forms and Instructions tab on the [OASAS Applications Home page](#), located under CDS Documentation.

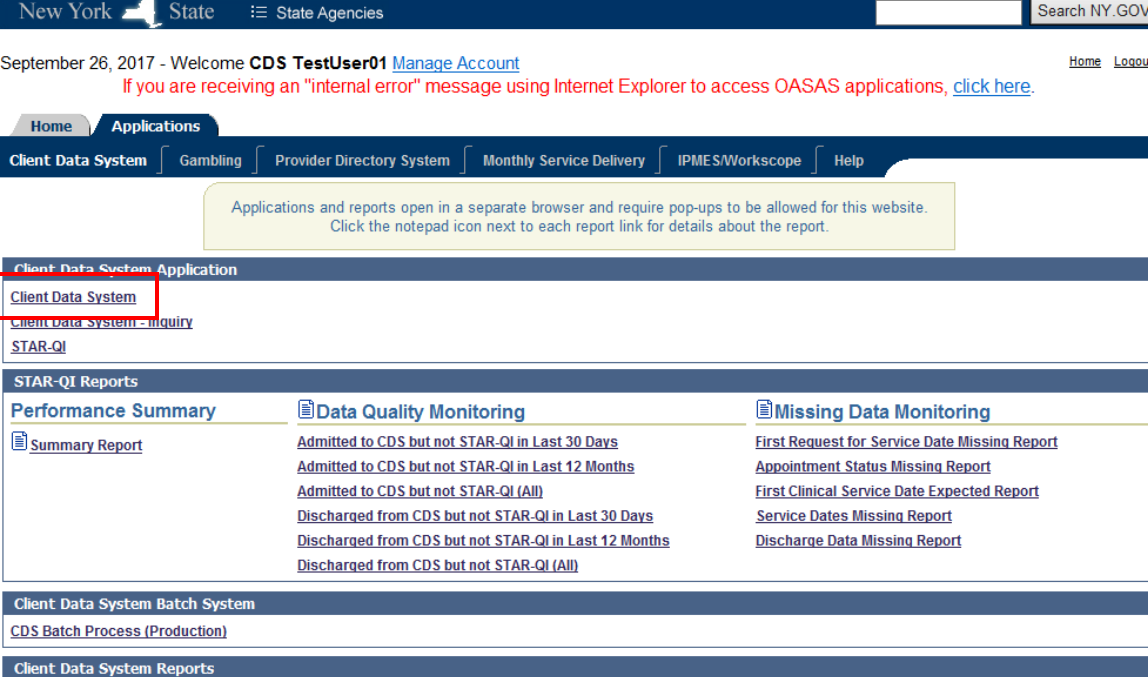
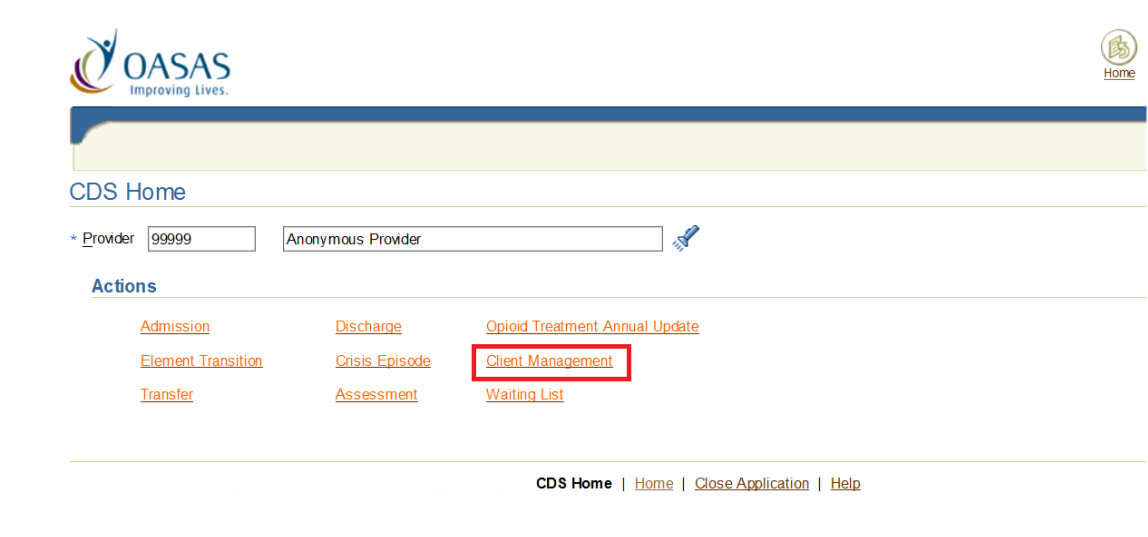
This User Guide will show you how to enter transactions from the Client Management section of the CDS System, including how to change a client's ID assigned by the provider or change a client's Tracking ID.

You can use the Client Management features to perform actions for clients who either are currently on the program's roster or have been in the past (i.e., are either active or inactive clients). This allows you to change existing client information, update existing transactions, or enter new transactions for existing clients.

## Open the CDS Application

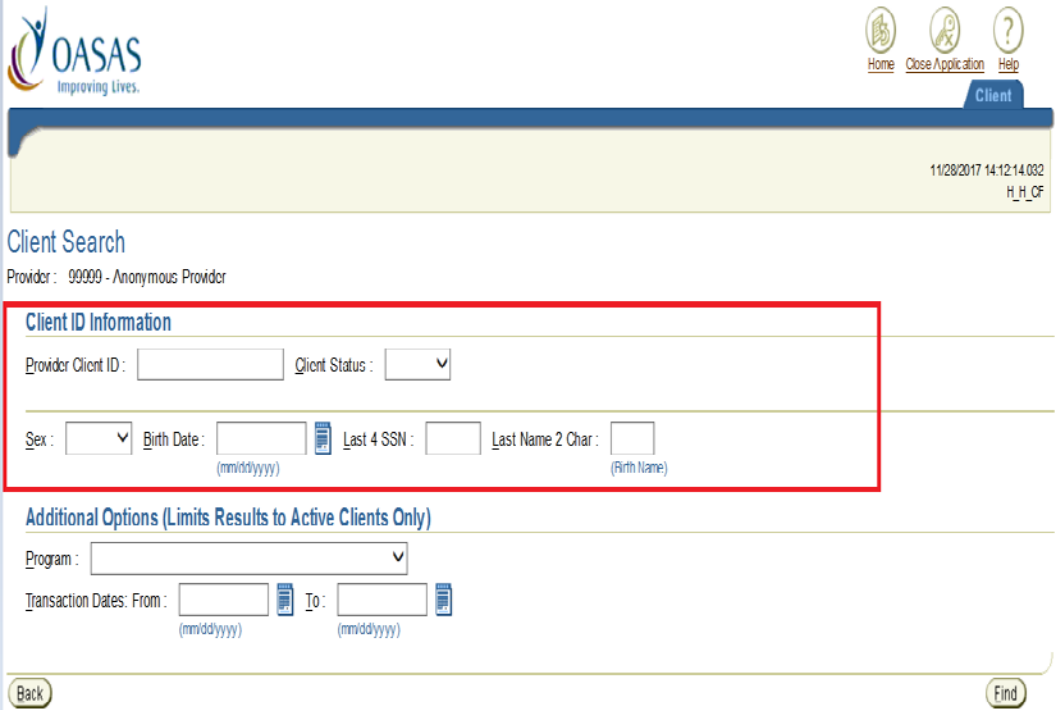
Step	Instructions	Image
1	<p>After you log into the OASAS Applications, you will be taken to the <i>OASAS Applications</i> page.</p> <p>To access OASAS Applications, you will click the <b>Applications</b> tab.</p>	 <p>The screenshot shows the OASAS Applications page for New York State. At the top, there is a navigation bar with 'New York State' and 'State Agencies'. Below this, a welcome message for Kristin Marando is displayed. A red box highlights the 'Applications' tab in the main navigation menu. The page content is divided into two columns: 'Application Documentation' on the left and 'CDS Documentation' on the right. The 'Application Documentation' column includes links for 'OASAS Applications Quick Tips / Help Desk Contact Info', 'CDS Quick Reference', 'MSD (PAS-48) Frequently Asked Questions', 'Login and Change Password User Guide', 'OASAS External Access Request Form (IRM-15)', 'PPSI Instructions - Revised 2019', 'Changing Contact Information Instructions', and 'Client Data System Bulletins'. The 'CDS Documentation' column includes 'Forms and Instructions', 'User Guides', and 'Online Tutorials'. A 'New Tab' button is visible. Below the navigation, there are several date-based filters for CDS data, such as 'CDS Starting 4/1/2017'. A warning message states: 'These Client Data System forms must be used for all Client Data System transactions with transaction dates on or after April 1, 2017. The with the April 2017 report that is due by May 10, 2017. All Client Data System transactions with transaction dates prior to April 1, 2017 tabs in this region regardless of the date they are entered in the system.' Below this, there are sections for 'Consent Forms' (including 'Authorization for Release of Behavioral Health Information (TRS-61, October 2014)' and 'Criminal Justice Consent for Drug Law Reform (TRS-49, October 2009)') and 'Forms and Instructions' (including 'Admission Form (PAS-44N, October 2018)' and 'Assessment Form (PAS-61N, October 2018)').</p>

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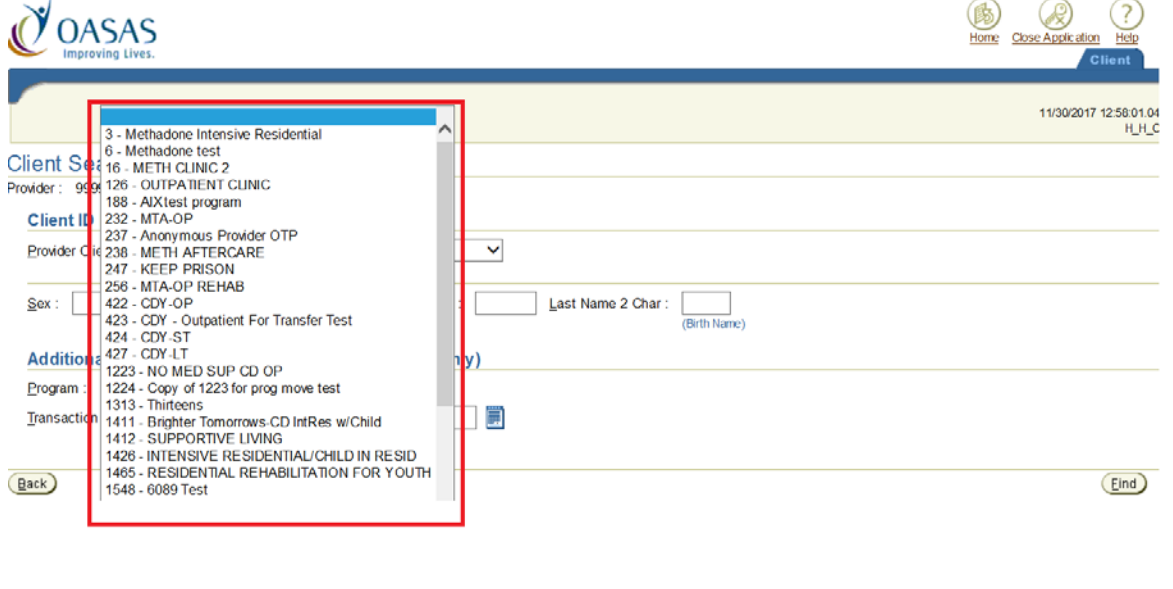
Step	Instructions	Image
2	To open the CDS Application, click the Client Data System link to go to the “CDS Home” page.	 <p>The screenshot shows the CDS Application Home page. At the top, there is a navigation bar with 'New York State' and 'State Agencies'. Below that, a welcome message for 'CDS TestUser01' is displayed. A navigation menu includes 'Client Data System', 'Gambling', 'Provider Directory System', 'Monthly Service Delivery', 'IPMES/Workscope', and 'Help'. A yellow box contains the text: 'Applications and reports open in a separate browser and require pop-ups to be allowed for this website. Click the notepad icon next to each report link for details about the report.' Under the 'Client Data System Application' section, the 'Client Data System' link is highlighted with a red box. Below this, there are sections for 'STAR-QI Reports' (Performance Summary, Data Quality Monitoring, Missing Data Monitoring) and 'Client Data System Batch System' (CDS Batch Process (Production)).</p>
3	This is the “CDS Home” page, click the Client Management link to open the “Client Search” page, where you can search for the client(s) who require an action.	 <p>The screenshot shows the CDS Home page. At the top, there is the OASAS logo with the tagline 'Improving Lives.' and a 'Home' button. Below the logo, there is a search bar for 'CDS Home' with a dropdown menu showing '* Provider 99999' and 'Anonymous Provider'. Under the 'Actions' section, there are several links: Admission, Discharge, Opioid Treatment Annual Update, Element Transition, Crisis Episode, Client Management (highlighted with a red box), Transfer, Assessment, and Waiting List. At the bottom, there is a footer with 'CDS Home   Home   Close Application   Help'.</p>

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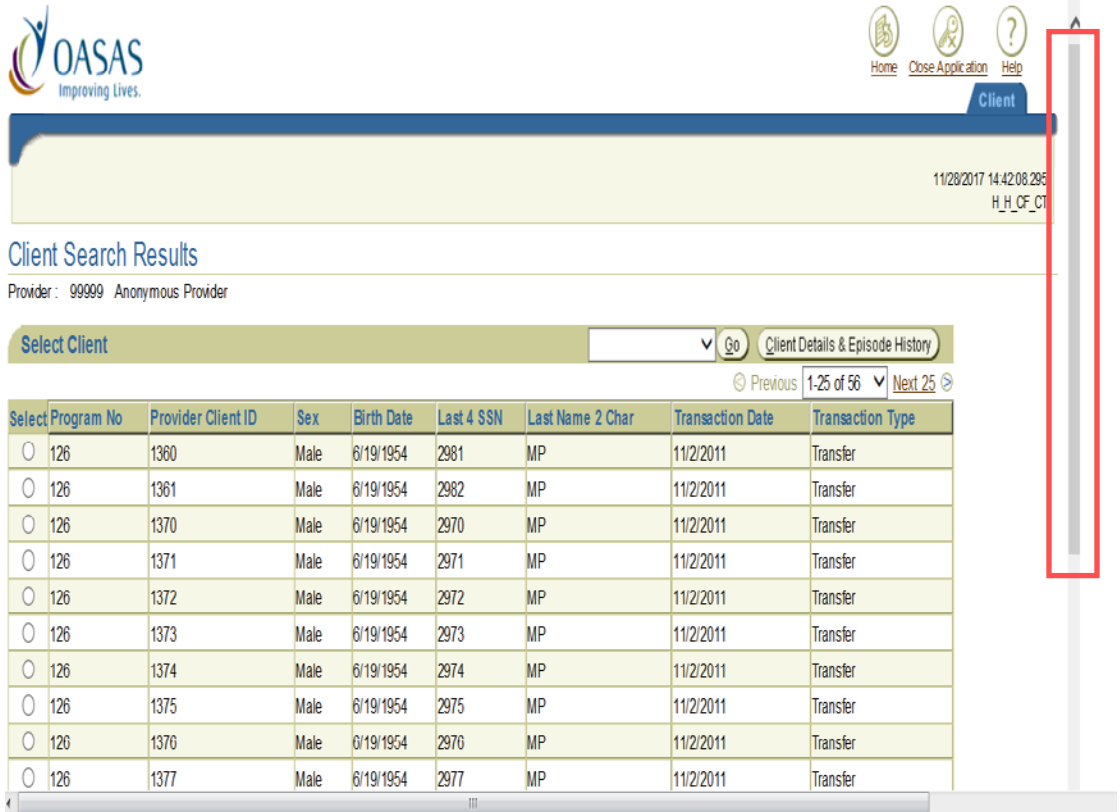
Step	Instructions	Image
4	<p>Now you see the “<i>Client Search</i>” page, where you can enter specific search criteria to produce one client record or a list of clients meeting the selected criteria.</p> <p>If you want a list of all clients for the provider (past and present), leave all search criteria blank.</p>	<p>The screenshot shows the OASAS Client Search interface. At the top right, there are icons for Home, Close Application, and Help. Below the header, the page title is 'Client Search' and the provider is identified as '99999 - Anonymous Provider'. The search criteria section includes fields for Client ID Information (Provider Client ID and Client Status), Sex, Birth Date, Last 4 SSN, and Last Name 2 Char. There are also Additional Options for Program and Transaction Dates. Navigation buttons for Back and Eind are visible at the bottom.</p>

Step	Instructions	Image
5	<p>Alternatively, the “<i>Client Search</i>” page contains potential search criteria including the <a href="#">Provider Client ID</a>, <a href="#">Client Status</a>, <a href="#">Sex</a>, <a href="#">Birth Date</a>, <a href="#">Last 4 SSN</a>, and <a href="#">Last Name 2 Char</a> to help limit your search.</p> <p>If you choose to search by <a href="#">Program</a> or <a href="#">Transaction Dates (Admission/Transfer)</a>, only Active (current) clients will be selected.</p>	 <p>The screenshot shows the OASAS Client Search interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. To the right are navigation icons for Home, Close Application, and Help. A 'Client' tab is selected. The main content area is titled 'Client Search' and shows 'Provider: 99999 - Anonymous Provider'. A red box highlights the 'Client ID Information' section, which contains the following fields: 'Provider Client ID' (text input), 'Client Status' (dropdown), 'Sex' (dropdown), 'Birth Date' (text input with a calendar icon, format '(mm/dd/yyyy)'), 'Last 4 SSN' (text input with a calendar icon), and 'Last Name 2 Char' (text input, format '(First Name)'). Below this is the 'Additional Options (Limits Results to Active Clients Only)' section, which includes 'Program' (dropdown) and 'Transaction Dates: From' and 'To' (text inputs with calendar icons, format '(mm/dd/yyyy)'). At the bottom left is a 'Back' button and at the bottom right is a 'Find' button.</p>

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6	<p>To select clients from a specific program, select the appropriate <b>Program</b> from the dropdown list.</p> <p>You can leave the other search criteria blank to select both active and inactive clients from that program.</p>	 <p>The screenshot shows the OASAS Client Management interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. At the top right are navigation icons for Home, Close Application, and Help, along with the text 'Client'. Below this is a header bar with the date and time '11/30/2017 12:58:01.04' and the user 'HL_H_C'. The main area contains search criteria: 'Client Search', 'Provider: 999', 'Client ID', 'Provider Clinic', 'Sex', 'Additional', 'Program', and 'Transaction'. A dropdown menu is open for the 'Program' field, listing various programs such as '3 - Methadone Intensive Residential', '6 - Methadone test', '16 - METH CLINIC 2', '126 - OUTPATIENT CLINIC', '188 - AIXtest program', '232 - MTA-OP', '237 - Anonymous Provider OTP', '238 - METH AFTERCARE', '247 - KEEP PRISON', '256 - MTA-OP REHAB', '422 - CDY-OP', '423 - CDY - Outpatient For Transfer Test', '424 - CDY-ST', '427 - CDY-LT', '1223 - NO MED SUP CD OP', '1224 - Copy of 1223 for prog move test', '1313 - Thirteens', '1411 - Brighter Tomorrows.CD IntRes w/Child', '1412 - SUPPORTIVE LIVING', '1426 - INTENSIVE RESIDENTIAL/CHILD IN RESID', '1465 - RESIDENTIAL REHABILITATION FOR YOUTH', and '1548 - 6089 Test'. The dropdown is highlighted with a red box. At the bottom left is a 'Back' button and at the bottom right is an 'End' button.</p>

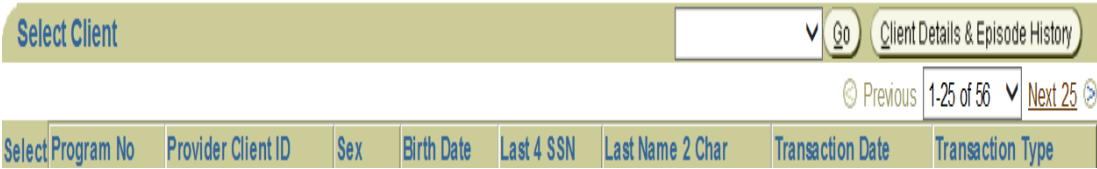
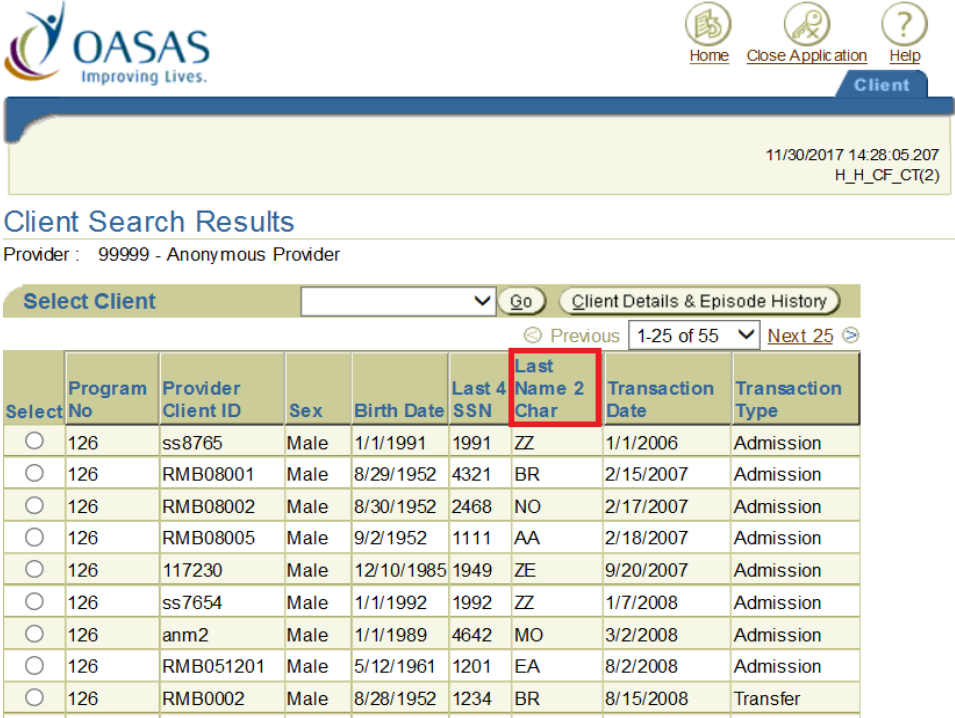
Step	Instructions	Image
7	Click the <b>Find</b> button to complete the search for clients.	<p>The screenshot shows the OASAS Client Search interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. To the right are navigation icons for Home, Close Application, and Help. Below these is a 'Client' tab. A yellow box displays the date and time '11/30/2017 12:58:01.049' and the user 'H_H_CF'. The main section is titled 'Client Search' and shows 'Provider : 99999 - Anonymous Provider'. Under 'Client ID Information', there are input fields for 'Provider Client ID' and a dropdown for 'Client Status'. Below that are fields for 'Sex', 'Birth Date' (with a calendar icon), 'Last 4 SSN', and 'Last Name 2 Char'. The 'Additional Options (Limits Results to Active Clients Only)' section includes a 'Program' dropdown set to '126 - OUTPATIENT CLINIC' and 'Transaction Dates' fields with 'From' and 'To' sub-fields, each with a calendar icon. At the bottom, there is a 'Back' button on the left and a 'Find' button on the right, which is highlighted with a red box. A footer at the bottom right contains the text 'Client   Home   Close Application   Help'.</p>

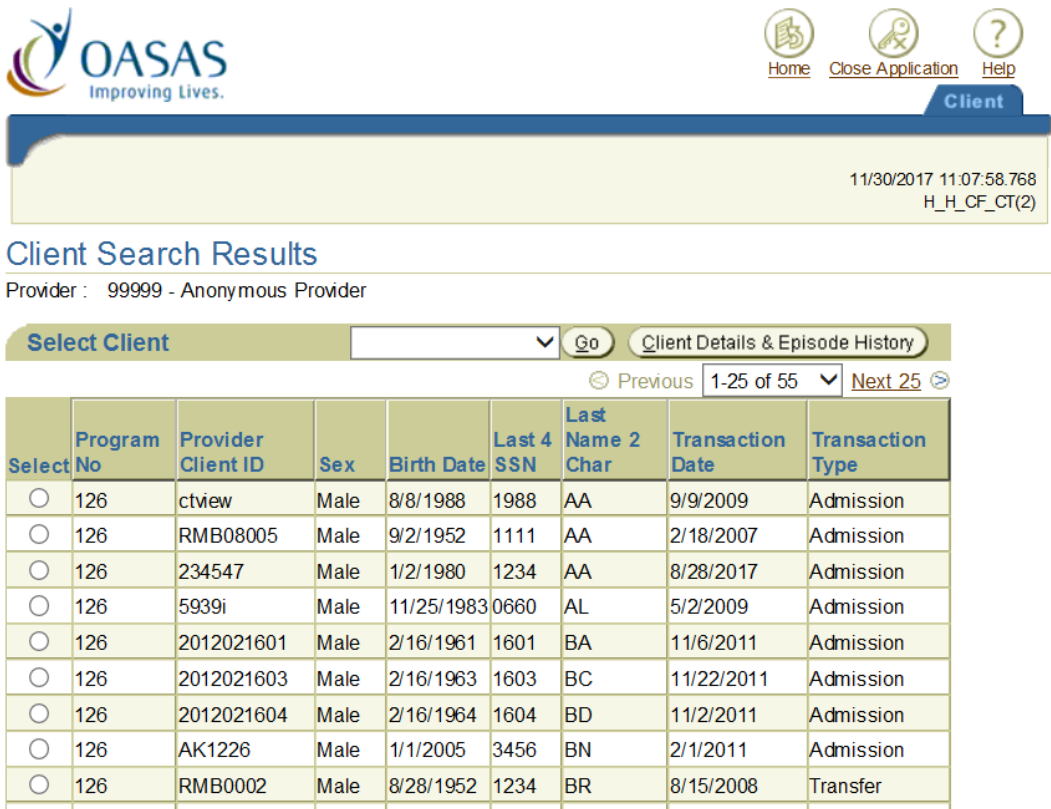
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<p><b>8</b></p>	<p>You will then see the resulting list of clients matching the search criteria.</p> <p>If the list is longer than the size of the screen, you can scroll down through the list of clients using the scroll bar, which appears on the right side of the screen. Click on the scroll bar and drag it up or down, as needed.</p>	 <p>The screenshot displays the OASAS 'Client Search Results' page. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links. Below this, a 'Client' tab is active. The page shows a search result for 'Provider: 99999 Anonymous Provider'. A search bar contains 'Select Client' and a 'Go' button. Below the search bar, there are pagination controls: 'Previous', '1-25 of 56', and 'Next 25'. The main content is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr><td><input type="radio"/></td><td>126</td><td>1360</td><td>Male</td><td>6/19/1954</td><td>2981</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1361</td><td>Male</td><td>6/19/1954</td><td>2982</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1370</td><td>Male</td><td>6/19/1954</td><td>2970</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1371</td><td>Male</td><td>6/19/1954</td><td>2971</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1372</td><td>Male</td><td>6/19/1954</td><td>2972</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1373</td><td>Male</td><td>6/19/1954</td><td>2973</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1374</td><td>Male</td><td>6/19/1954</td><td>2974</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1375</td><td>Male</td><td>6/19/1954</td><td>2975</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>120</td><td>1376</td><td>Male</td><td>6/19/1954</td><td>2976</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>1377</td><td>Male</td><td>6/19/1954</td><td>2977</td><td>MP</td><td>11/2/2011</td><td>Transfer</td></tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	1360	Male	6/19/1954	2981	MP	11/2/2011	Transfer	<input type="radio"/>	126	1361	Male	6/19/1954	2982	MP	11/2/2011	Transfer	<input type="radio"/>	126	1370	Male	6/19/1954	2970	MP	11/2/2011	Transfer	<input type="radio"/>	126	1371	Male	6/19/1954	2971	MP	11/2/2011	Transfer	<input type="radio"/>	126	1372	Male	6/19/1954	2972	MP	11/2/2011	Transfer	<input type="radio"/>	126	1373	Male	6/19/1954	2973	MP	11/2/2011	Transfer	<input type="radio"/>	126	1374	Male	6/19/1954	2974	MP	11/2/2011	Transfer	<input type="radio"/>	126	1375	Male	6/19/1954	2975	MP	11/2/2011	Transfer	<input type="radio"/>	120	1376	Male	6/19/1954	2976	MP	11/2/2011	Transfer	<input type="radio"/>	126	1377	Male	6/19/1954	2977	MP	11/2/2011	Transfer
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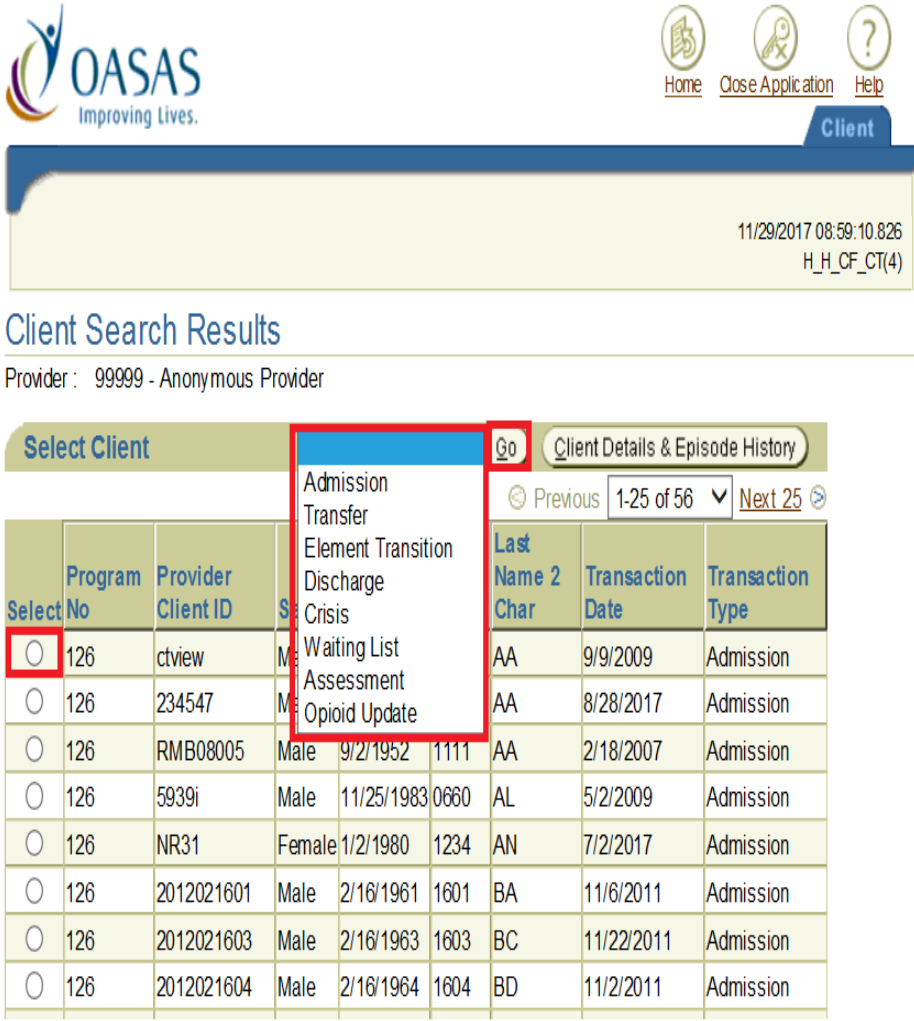
Step	Instructions	Image
<p><b>9</b></p>	<p>The maximum number of records that can be viewed from the search results is 1000. The <a href="#">Selected Records</a> dropdown list, located below the <b>Client Details &amp; Episode History</b> button, shows the actual number of clients found in the search results (e.g., 56 in this search results).</p> <p>Trying to locate records past the 1000 mark in the <a href="#">Selected Records</a> dropdown list will result in a “No rows found” message.</p> <p>Also, note that you can click on the <a href="#">Selected Records</a> dropdown list, the <a href="#">Previous</a> link, the <a href="#">Next 25</a> link or the arrow buttons as ways to move between sets of client records.</p>	<p>The screenshot displays the OASAS web application interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. To the right are navigation icons for Home, Close Application, and Help. A 'Client' tab is active. The main content area shows 'Client Search Results' for 'Provider : 99999 - Anonymous Provider'. Below this is a search bar with a 'Select Client' dropdown and a 'Go' button. A 'Client Details &amp; Episode History' button is also present. A pagination control shows 'Previous', '1-25 of 55', and 'Next 25'. At the bottom, a table header is visible with columns: Select, Program No, Provider Client ID, Sex, Birth Date, Last 4 SSN, Last Name 2 Char, Transaction Date, and Transaction Type.</p>

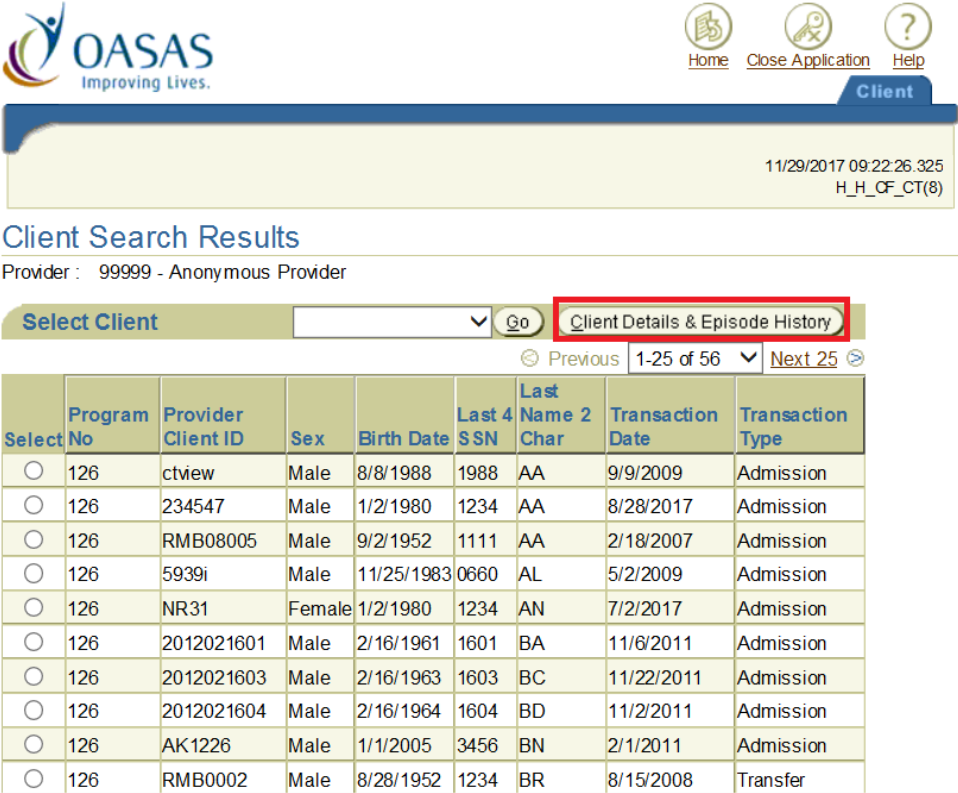
Step	Instructions	Image																																													
<p><b>10</b></p>	<p>If the resulting list of clients has less than 25 entries, then the <a href="#">Selected Records</a> dropdown list will not appear, as shown on this screen.</p>	<p>The screenshot displays the OASAS Client Search Results interface. At the top, there is the OASAS logo with the tagline 'Improving Lives.' and navigation icons for Home, Close Application, and Help. A 'Client' tab is active. The search results are for Provider: 99999 - Anonymous Provider. Below the search bar, there is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>1223</td> <td>1250</td> <td>Male</td> <td>6/23/1954</td> <td>2983</td> <td>MI</td> <td>4/10/2017</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1223</td> <td>1258</td> <td>Female</td> <td>1/1/1955</td> <td>1258</td> <td>MM</td> <td>4/5/2017</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1223</td> <td>123tN</td> <td>Male</td> <td>2/18/1967</td> <td>1234</td> <td>NI</td> <td>7/28/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1223</td> <td>NR31</td> <td>Female</td> <td>1/2/1980</td> <td>1234</td> <td>AN</td> <td>11/30/2017</td> <td>Transfer</td> </tr> </tbody> </table> <p>At the bottom of the page, there are 'Back' and 'Print' buttons, and a navigation bar with links for Client, Home, Close Application, and Help.</p>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	1223	1250	Male	6/23/1954	2983	MI	4/10/2017	Transfer	<input type="radio"/>	1223	1258	Female	1/1/1955	1258	MM	4/5/2017	Transfer	<input type="radio"/>	1223	123tN	Male	2/18/1967	1234	NI	7/28/2009	Admission	<input type="radio"/>	1223	NR31	Female	1/2/1980	1234	AN	11/30/2017	Transfer
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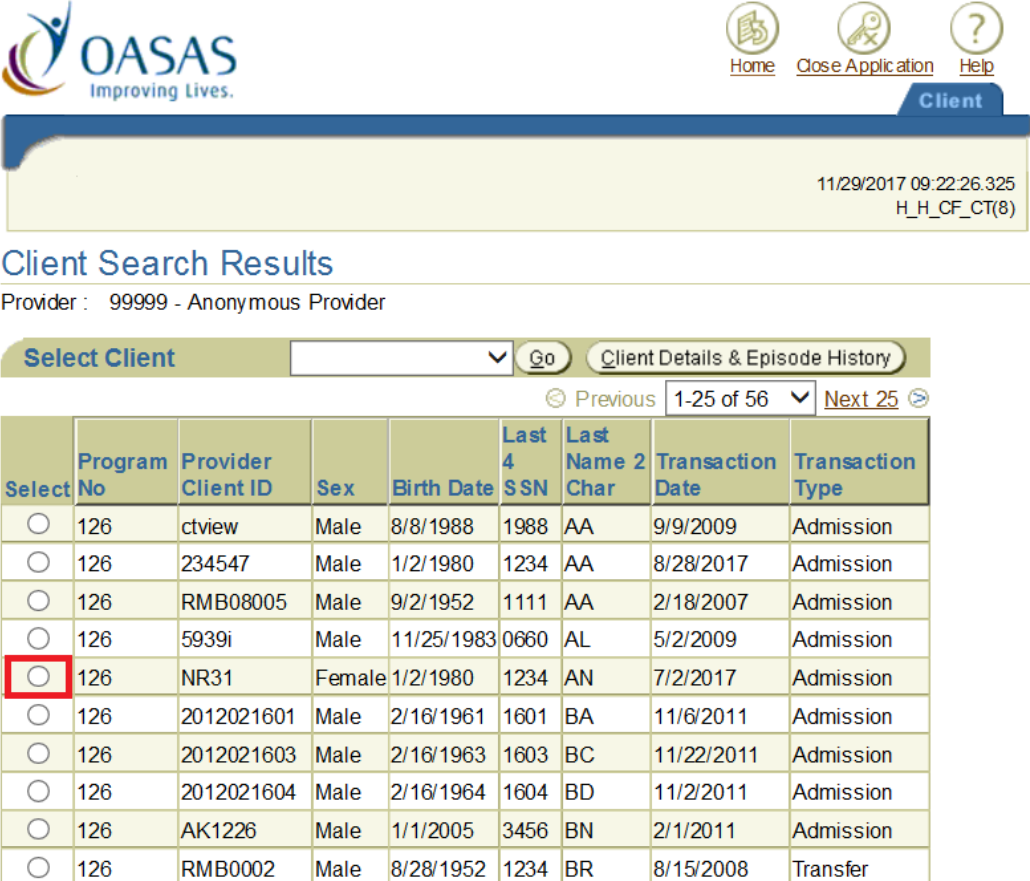
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11	<p>If the search results list is too long to easily find the client requiring an action, you can sort the list results by clicking one of the shaded field headings shown at the top of each column.</p>																																																																																											
12	<p>Clicking once on the column heading sorts the records in ascending order by that field. Clicking it again reverses the direction of the sort.</p> <p>In this example, you would click the shaded column heading <b>Last Name 2 Char</b> to sort the client records in ascending order by <b>Last Name 2 Char</b>.</p>	 <p><b>Client Search Results</b>          Provider : 99999 - Anonymous Provider</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr><td><input type="radio"/></td><td>126</td><td>ss8765</td><td>Male</td><td>1/1/1991</td><td>1991</td><td>ZZ</td><td>1/1/2006</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB08001</td><td>Male</td><td>8/29/1952</td><td>4321</td><td>BR</td><td>2/15/2007</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB08002</td><td>Male</td><td>8/30/1952</td><td>2468</td><td>NO</td><td>2/17/2007</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB08005</td><td>Male</td><td>9/2/1952</td><td>1111</td><td>AA</td><td>2/18/2007</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>117230</td><td>Male</td><td>12/10/1985</td><td>1949</td><td>ZE</td><td>9/20/2007</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>ss7654</td><td>Male</td><td>1/1/1992</td><td>1992</td><td>ZZ</td><td>1/7/2008</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>anm2</td><td>Male</td><td>1/1/1989</td><td>4642</td><td>MO</td><td>3/2/2008</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB051201</td><td>Male</td><td>5/12/1961</td><td>1201</td><td>EA</td><td>8/2/2008</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB0002</td><td>Male</td><td>8/28/1952</td><td>1234</td><td>BR</td><td>8/15/2008</td><td>Transfer</td></tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	ss8765	Male	1/1/1991	1991	ZZ	1/1/2006	Admission	<input type="radio"/>	126	RMB08001	Male	8/29/1952	4321	BR	2/15/2007	Admission	<input type="radio"/>	126	RMB08002	Male	8/30/1952	2468	NO	2/17/2007	Admission	<input type="radio"/>	126	RMB08005	Male	9/2/1952	1111	AA	2/18/2007	Admission	<input type="radio"/>	126	117230	Male	12/10/1985	1949	ZE	9/20/2007	Admission	<input type="radio"/>	126	ss7654	Male	1/1/1992	1992	ZZ	1/7/2008	Admission	<input type="radio"/>	126	anm2	Male	1/1/1989	4642	MO	3/2/2008	Admission	<input type="radio"/>	126	RMB051201	Male	5/12/1961	1201	EA	8/2/2008	Admission	<input type="radio"/>	126	RMB0002	Male	8/28/1952	1234	BR	8/15/2008	Transfer
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<p><b>13</b></p>	<p>Here you see the resulting list of clients resorted by <a href="#">Last Name 2 Char</a>.</p> <p>In addition to the list of clients, the “Client Search Results” page contains links to other pages, where you can perform further actions for a selected client.</p> <p>This can include actions such as:</p> <ul style="list-style-type: none"> <li>• Enter Admissions, Discharges, Transfers, Element Transitions, OTAU’s</li> <li>• Change Client ID information</li> <li>• Update existing client transactions</li> <li>• Delete existing client transactions</li> <li>• Add/Update/Check-out/Delete - Children in Residence</li> </ul>	 <p><b>Client Search Results</b>          Provider : 99999 - Anonymous Provider</p> <p>Select Client [dropdown] [Go] Client Details &amp; Episode History</p> <p>Previous 1-25 of 55 Next 25</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>126</td> <td>ctview</td> <td>Male</td> <td>8/8/1988</td> <td>1988</td> <td>AA</td> <td>9/9/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>RMB08005</td> <td>Male</td> <td>9/2/1952</td> <td>1111</td> <td>AA</td> <td>2/18/2007</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>234547</td> <td>Male</td> <td>1/2/1980</td> <td>1234</td> <td>AA</td> <td>8/28/2017</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>5939i</td> <td>Male</td> <td>11/25/1983</td> <td>0660</td> <td>AL</td> <td>5/2/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021601</td> <td>Male</td> <td>2/16/1961</td> <td>1601</td> <td>BA</td> <td>11/6/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021603</td> <td>Male</td> <td>2/16/1963</td> <td>1603</td> <td>BC</td> <td>11/22/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021604</td> <td>Male</td> <td>2/16/1964</td> <td>1604</td> <td>BD</td> <td>11/2/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>AK1226</td> <td>Male</td> <td>1/1/2005</td> <td>3456</td> <td>BN</td> <td>2/1/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>RMB0002</td> <td>Male</td> <td>8/28/1952</td> <td>1234</td> <td>BR</td> <td>8/15/2008</td> <td>Transfer</td> </tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	ctview	Male	8/8/1988	1988	AA	9/9/2009	Admission	<input type="radio"/>	126	RMB08005	Male	9/2/1952	1111	AA	2/18/2007	Admission	<input type="radio"/>	126	234547	Male	1/2/1980	1234	AA	8/28/2017	Admission	<input type="radio"/>	126	5939i	Male	11/25/1983	0660	AL	5/2/2009	Admission	<input type="radio"/>	126	2012021601	Male	2/16/1961	1601	BA	11/6/2011	Admission	<input type="radio"/>	126	2012021603	Male	2/16/1963	1603	BC	11/22/2011	Admission	<input type="radio"/>	126	2012021604	Male	2/16/1964	1604	BD	11/2/2011	Admission	<input type="radio"/>	126	AK1226	Male	1/1/2005	3456	BN	2/1/2011	Admission	<input type="radio"/>	126	RMB0002	Male	8/28/1952	1234	BR	8/15/2008	Transfer
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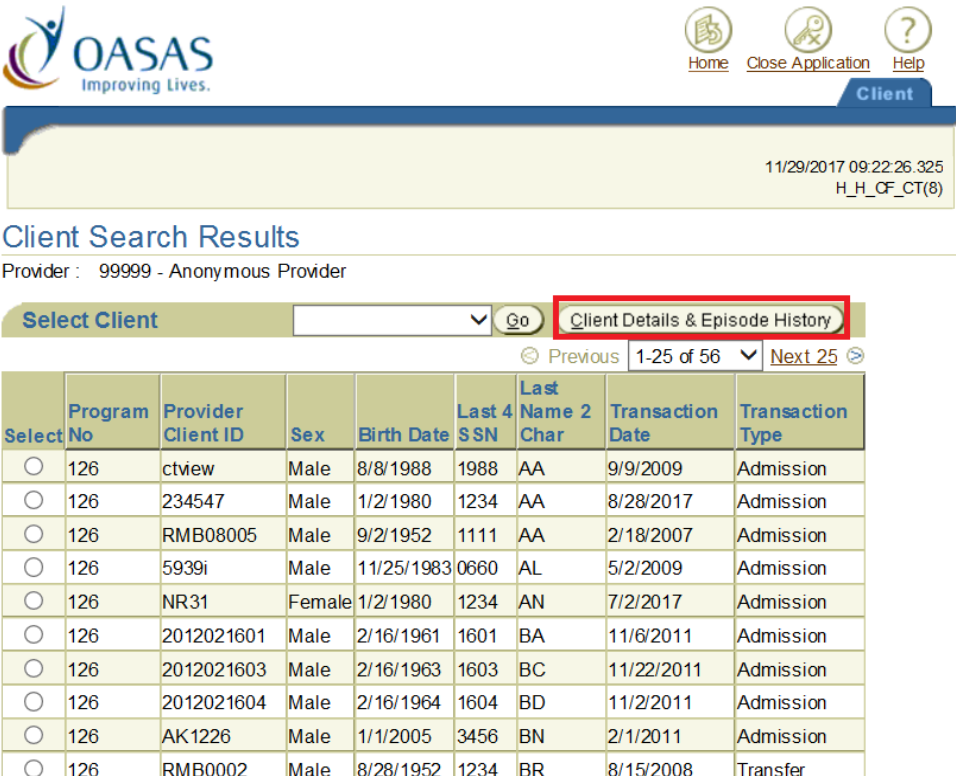
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<p><b>14</b></p>	<p>There are two main types of links found on the “<i>Client Search Results</i>” page:</p> <ul style="list-style-type: none"> <li>• <b>Dropdown list</b> box and <b>Go</b> button, which together allow you to create/enter new transactions for a selected client, and</li> <li>• <b>Client Details &amp; Episode History</b> button, which opens a “<i>Client Information</i>” page, where you can view, modify, or delete different types of existing information or transactions.</li> </ul> <p>NOTE: You must first select the client before initiating any action from this page.</p>	<p>Client Search Results</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Select Client <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Client Details &amp; Episode History"/></p> <p>Previous 1-25 of 56 Next 25</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>126</td> <td>ctview</td> <td>Male</td> <td>8/8/1988</td> <td>1988</td> <td>AA</td> <td>9/9/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>234547</td> <td>Male</td> <td>1/2/1980</td> <td>1234</td> <td>AA</td> <td>8/28/2017</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>RMB08005</td> <td>Male</td> <td>9/2/1952</td> <td>1111</td> <td>AA</td> <td>2/18/2007</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>5939i</td> <td>Male</td> <td>11/25/1983</td> <td>0660</td> <td>AL</td> <td>5/2/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>NR31</td> <td>Female</td> <td>1/2/1980</td> <td>1234</td> <td>AN</td> <td>7/2/2017</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021601</td> <td>Male</td> <td>2/16/1961</td> <td>1601</td> <td>BA</td> <td>11/6/2011</td> <td>Admission</td> </tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	ctview	Male	8/8/1988	1988	AA	9/9/2009	Admission	<input type="radio"/>	126	234547	Male	1/2/1980	1234	AA	8/28/2017	Admission	<input type="radio"/>	126	RMB08005	Male	9/2/1952	1111	AA	2/18/2007	Admission	<input type="radio"/>	126	5939i	Male	11/25/1983	0660	AL	5/2/2009	Admission	<input type="radio"/>	126	NR31	Female	1/2/1980	1234	AN	7/2/2017	Admission	<input type="radio"/>	126	2012021601	Male	2/16/1961	1601	BA	11/6/2011	Admission
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<p><b>15</b></p>	<p>To create and enter a new transaction for a selected client (i.e., Admission, Transfer, Element Transition, Discharge, Crisis, Waiting List, Assessment, Opioid Treatment Annual Update), use the <b>Dropdown list</b> and then the <b>Go</b> button.</p> <p>Do the following to create a new transaction:</p> <ol style="list-style-type: none"> <li>1. Select the client in the list by clicking the <b>radio button</b> (<input type="radio"/>) in the “Select” column for that client.</li> <li>2. Click the <b>down arrow</b> in the dropdown list and select the appropriate type of transaction.</li> <li>3. Click the <b>Go</b> button (which will open the appropriate transaction form where you can then enter information).</li> </ol> <p>It is often useful to access certain forms via the <i>Client Management</i> link especially when entering data for new Transfers, Discharges, and Opioid Treatment Annual Update forms, since these clients are already active in the system. You can search for the relevant clients and then initiate new transactions without having to enter their ID numbers.</p> <p>For further details on how to enter data for these new transactions (forms), see the relevant Tutorials, User Guides, and other instructions available from the <i>OASAS Applications</i> website.</p>	 <p>The screenshot displays the OASAS interface. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links. Below this is a 'Client' tab and a search bar. The search results show 'Provider : 99999 - Anonymous Provider'. A 'Select Client' dropdown menu is open, showing a list of transaction types: Admission, Transfer, Element Transition, Discharge, Crisis, Waiting List, Assessment, and Opioid Update. The 'Go' button is highlighted in red. Below the dropdown is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program</th> <th>Provider Client ID</th> <th>Sex</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>126</td> <td>ctview</td> <td>M</td> <td>AA</td> <td>9/9/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>234547</td> <td>M</td> <td>AA</td> <td>8/28/2017</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>RMB08005</td> <td>Male</td> <td>9/2/1952 1111</td> <td>2/18/2007</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>5939i</td> <td>Male</td> <td>11/25/1983 0660</td> <td>5/2/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>NR31</td> <td>Female</td> <td>1/2/1980 1234</td> <td>7/2/2017</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021601</td> <td>Male</td> <td>2/16/1961 1601</td> <td>11/6/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021603</td> <td>Male</td> <td>2/16/1963 1603</td> <td>11/22/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021604</td> <td>Male</td> <td>2/16/1964 1604</td> <td>11/2/2011</td> <td>Admission</td> </tr> </tbody> </table>	Select	Program	Provider Client ID	Sex	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	ctview	M	AA	9/9/2009	Admission	<input type="radio"/>	126	234547	M	AA	8/28/2017	Admission	<input type="radio"/>	126	RMB08005	Male	9/2/1952 1111	2/18/2007	Admission	<input type="radio"/>	126	5939i	Male	11/25/1983 0660	5/2/2009	Admission	<input type="radio"/>	126	NR31	Female	1/2/1980 1234	7/2/2017	Admission	<input type="radio"/>	126	2012021601	Male	2/16/1961 1601	11/6/2011	Admission	<input type="radio"/>	126	2012021603	Male	2/16/1963 1603	11/22/2011	Admission	<input type="radio"/>	126	2012021604	Male	2/16/1964 1604	11/2/2011	Admission
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<p><b>16</b></p>	<p>From the “<i>Client Search Results</i>” page, you can also use the <b>Client Details &amp; Episode History</b> button to view, update, and delete different types of existing client transaction information (i.e., Admission, Transfer, Element Transition, Discharge, Crisis, Waiting List, Assessment, and Opioid Treatment Annual Update).</p>	 <p>The screenshot shows the OASAS web application interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. On the top right, there are navigation icons for Home, Close Application, and Help, along with a 'Client' tab. Below the navigation is a header area with the date and time '11/29/2017 09:22:26.325' and the user identifier 'H_H_CF_CT(8)'. The main content area is titled 'Client Search Results' and shows the provider information 'Provider : 99999 - Anonymous Provider'. Below this is a search bar with a dropdown menu set to 'Select Client' and a 'Go' button. A red box highlights the 'Client Details &amp; Episode History' button. Below the search bar is a pagination control showing 'Previous', '1-25 of 56', and 'Next 25'. The main part of the screenshot is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr><td><input type="radio"/></td><td>126</td><td>ctview</td><td>Male</td><td>8/8/1988</td><td>1988</td><td>AA</td><td>9/9/2009</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>234547</td><td>Male</td><td>1/2/1980</td><td>1234</td><td>AA</td><td>8/28/2017</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB08005</td><td>Male</td><td>9/2/1952</td><td>1111</td><td>AA</td><td>2/18/2007</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>5939i</td><td>Male</td><td>11/25/1983</td><td>0660</td><td>AL</td><td>5/2/2009</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>NR31</td><td>Female</td><td>1/2/1980</td><td>1234</td><td>AN</td><td>7/2/2017</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>2012021601</td><td>Male</td><td>2/16/1961</td><td>1601</td><td>BA</td><td>11/6/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>2012021603</td><td>Male</td><td>2/16/1963</td><td>1603</td><td>BC</td><td>11/22/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>2012021604</td><td>Male</td><td>2/16/1964</td><td>1604</td><td>BD</td><td>11/2/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>AK1226</td><td>Male</td><td>1/1/2005</td><td>3456</td><td>BN</td><td>2/1/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB0002</td><td>Male</td><td>8/28/1952</td><td>1234</td><td>BR</td><td>8/15/2008</td><td>Transfer</td></tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	ctview	Male	8/8/1988	1988	AA	9/9/2009	Admission	<input type="radio"/>	126	234547	Male	1/2/1980	1234	AA	8/28/2017	Admission	<input type="radio"/>	126	RMB08005	Male	9/2/1952	1111	AA	2/18/2007	Admission	<input type="radio"/>	126	5939i	Male	11/25/1983	0660	AL	5/2/2009	Admission	<input type="radio"/>	126	NR31	Female	1/2/1980	1234	AN	7/2/2017	Admission	<input type="radio"/>	126	2012021601	Male	2/16/1961	1601	BA	11/6/2011	Admission	<input type="radio"/>	126	2012021603	Male	2/16/1963	1603	BC	11/22/2011	Admission	<input type="radio"/>	126	2012021604	Male	2/16/1964	1604	BD	11/2/2011	Admission	<input type="radio"/>	126	AK1226	Male	1/1/2005	3456	BN	2/1/2011	Admission	<input type="radio"/>	126	RMB0002	Male	8/28/1952	1234	BR	8/15/2008	Transfer
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17	<p>Here, you will see how to update a client's information. To do this, you will first select a client before using the <b>Client Details &amp; Episode History</b> button to go to the "<i>Client Information</i>" page, where you can perform other actions for that client.</p> <p>First, click the <b>radio button</b> (<input type="radio"/>) under the "Select" column next to the appropriate client.</p>	 <p>The screenshot shows the OASAS interface. At the top, there is a logo for OASAS (Improving Lives.) and navigation icons for Home, Close Application, and Help. A 'Client' tab is active. Below the header, the date and time '11/29/2017 09:22:26.325' and user 'H_H_CF_CT(8)' are displayed. The main section is titled 'Client Search Results' and shows 'Provider : 99999 - Anonymous Provider'. There is a search bar with 'Select Client' and a dropdown menu. Below the search bar, there are navigation links: 'Previous', '1-25 of 56', and 'Next 25'. The search results are displayed in a table with the following columns: Select, Program No, Provider Client ID, Sex, Birth Date, Last 4 SSN, Last Name 2 Char, Transaction Date, and Transaction Type. The row with Program No 126 and Provider Client ID NR31 is highlighted with a red box around the radio button in the 'Select' column.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>126</td> <td>ctview</td> <td>Male</td> <td>8/8/1988</td> <td>1988</td> <td>AA</td> <td>9/9/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>234547</td> <td>Male</td> <td>1/2/1980</td> <td>1234</td> <td>AA</td> <td>8/28/2017</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>RMB08005</td> <td>Male</td> <td>9/2/1952</td> <td>1111</td> <td>AA</td> <td>2/18/2007</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>5939i</td> <td>Male</td> <td>11/25/1983</td> <td>0660</td> <td>AL</td> <td>5/2/2009</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>NR31</td> <td>Female</td> <td>1/2/1980</td> <td>1234</td> <td>AN</td> <td>7/2/2017</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021601</td> <td>Male</td> <td>2/16/1961</td> <td>1601</td> <td>BA</td> <td>11/6/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021603</td> <td>Male</td> <td>2/16/1963</td> <td>1603</td> <td>BC</td> <td>11/22/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>2012021604</td> <td>Male</td> <td>2/16/1964</td> <td>1604</td> <td>BD</td> <td>11/2/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>AK1226</td> <td>Male</td> <td>1/1/2005</td> <td>3456</td> <td>BN</td> <td>2/1/2011</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>126</td> <td>RMB0002</td> <td>Male</td> <td>8/28/1952</td> <td>1234</td> <td>BR</td> <td>8/15/2008</td> <td>Transfer</td> </tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	ctview	Male	8/8/1988	1988	AA	9/9/2009	Admission	<input type="radio"/>	126	234547	Male	1/2/1980	1234	AA	8/28/2017	Admission	<input type="radio"/>	126	RMB08005	Male	9/2/1952	1111	AA	2/18/2007	Admission	<input type="radio"/>	126	5939i	Male	11/25/1983	0660	AL	5/2/2009	Admission	<input type="radio"/>	126	NR31	Female	1/2/1980	1234	AN	7/2/2017	Admission	<input type="radio"/>	126	2012021601	Male	2/16/1961	1601	BA	11/6/2011	Admission	<input type="radio"/>	126	2012021603	Male	2/16/1963	1603	BC	11/22/2011	Admission	<input type="radio"/>	126	2012021604	Male	2/16/1964	1604	BD	11/2/2011	Admission	<input type="radio"/>	126	AK1226	Male	1/1/2005	3456	BN	2/1/2011	Admission	<input type="radio"/>	126	RMB0002	Male	8/28/1952	1234	BR	8/15/2008	Transfer
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18	Now, click on the <b>Client Details &amp; Episode History</b> button to move to the next step.	 <p>The screenshot shows the OASAS interface. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' buttons. Below this is a 'Client' tab and a timestamp '11/29/2017 09:22:26.325 H_H_CF_CT(8)'. The main section is titled 'Client Search Results' and shows 'Provider : 99999 - Anonymous Provider'. There is a search bar with 'Select Client' and a 'Go' button. A button labeled 'Client Details &amp; Episode History' is highlighted with a red box. Below the search bar is a pagination control showing 'Previous', '1-25 of 56', and 'Next 25'. A table of search results is displayed below.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr><td><input type="radio"/></td><td>126</td><td>ctview</td><td>Male</td><td>8/8/1988</td><td>1988</td><td>AA</td><td>9/9/2009</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>234547</td><td>Male</td><td>1/2/1980</td><td>1234</td><td>AA</td><td>8/28/2017</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB08005</td><td>Male</td><td>9/2/1952</td><td>1111</td><td>AA</td><td>2/18/2007</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>5939i</td><td>Male</td><td>11/25/1983</td><td>0660</td><td>AL</td><td>5/2/2009</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>NR31</td><td>Female</td><td>1/2/1980</td><td>1234</td><td>AN</td><td>7/2/2017</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>2012021601</td><td>Male</td><td>2/16/1961</td><td>1601</td><td>BA</td><td>11/6/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>2012021603</td><td>Male</td><td>2/16/1963</td><td>1603</td><td>BC</td><td>11/22/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>2012021604</td><td>Male</td><td>2/16/1964</td><td>1604</td><td>BD</td><td>11/2/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>AK1226</td><td>Male</td><td>1/1/2005</td><td>3456</td><td>BN</td><td>2/1/2011</td><td>Admission</td></tr> <tr><td><input type="radio"/></td><td>126</td><td>RMB0002</td><td>Male</td><td>8/28/1952</td><td>1234</td><td>BR</td><td>8/15/2008</td><td>Transfer</td></tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	126	ctview	Male	8/8/1988	1988	AA	9/9/2009	Admission	<input type="radio"/>	126	234547	Male	1/2/1980	1234	AA	8/28/2017	Admission	<input type="radio"/>	126	RMB08005	Male	9/2/1952	1111	AA	2/18/2007	Admission	<input type="radio"/>	126	5939i	Male	11/25/1983	0660	AL	5/2/2009	Admission	<input type="radio"/>	126	NR31	Female	1/2/1980	1234	AN	7/2/2017	Admission	<input type="radio"/>	126	2012021601	Male	2/16/1961	1601	BA	11/6/2011	Admission	<input type="radio"/>	126	2012021603	Male	2/16/1963	1603	BC	11/22/2011	Admission	<input type="radio"/>	126	2012021604	Male	2/16/1964	1604	BD	11/2/2011	Admission	<input type="radio"/>	126	AK1226	Male	1/1/2005	3456	BN	2/1/2011	Admission	<input type="radio"/>	126	RMB0002	Male	8/28/1952	1234	BR	8/15/2008	Transfer
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**19** Once you click on the **Client Details & Episode History** button, you will go to the Client Information page for that client.

The top of this page contains basic client identification information.

**Client Information**  
 Provider : 99999 - Anonymous Provider

**Client Details**  
 \* Sex : Female \* Birth Date : 1/2/1980 \* Last 4 SSN : 5123 \* Last Name 2 Char : AN  
 (Birth Name)

**Episode History**

Select	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date
<input type="checkbox"/>	1223	NO MED SUP CD OP	NR31	Transfer	11/30/2017	
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Admission	7/2/2017	11/30/2017
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	

**20** The bottom portion of the page contains an episode history of the client’s transactions with that provider (past and present). The most recent episode is listed first.

From this page, you can update or delete existing transactions, such as the following (only available through Client Management):

- Enter a new Element Transition
- Update existing client transactions (includes adding, deleting, updating “children in residence” data).
- Delete existing client transactions.
- Change client identifying information. (Example at end of User Guide)

**Episode History**

New Element Transition Update Delete

Select	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date
<input type="checkbox"/>	1223	NO MED SUP CD OP	NR31	Transfer	11/30/2017	
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Admission	7/2/2017	11/30/2017
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	

Back Children in Residence Print

Client | Home | Close Application | Help

**21** The **Update** button, located on the right-hand side of the “*Client Information*” page at the top of the Episode History section, allows you to make changes to a client’s existing information for a selected type of client transaction form (e.g., Admission, Transfer, Element Transition, Discharge, Crisis, Waiting List, Opioid Treatment Annual Update). This function is for changing information within existing transaction forms.

To do this, you would select the specific transaction under the client’s Episode History section and then click the **Update** button to continue.

For further details and instructions on using this **Update** function, see the Tutorial and related User Guide titled “Update an Existing Transaction (and Enter Children into Client Record).”

**OASAS**  
Improving Lives.

Home Close Application Help

Client

11/30/2017 14:42:12.019  
H\_H\_CF(2)\_CT\_CD

**Client Information**  
Provider : 99999 - Anonymous Provider

**Client Details**  
\* Sex : Female \* Birth Date : 1/2/1980 \* Last 4 SSN : 5123 \* Last Name 2 Char : AN (Birth Name)

Change Client Information

**Episode History**  
New Element Transition Update Delete

Select Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date
<input type="checkbox"/>	1223 NO MED SUP CD OP	NR31	Transfer	11/30/2017	
<input type="checkbox"/>	126 OUTPATIENT CLINIC	NR31	Admission	7/2/2017	11/30/2017
<input type="checkbox"/>	126 OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	

Back Children in Residence Print

Client | Home | Close Application | Help

**22** The **Delete** button, located next to the **Update** button, allows you to delete a client’s existing record containing information for a selected type of client transaction form (e.g., Admission, Transfer, Element Transition, Discharge, Crisis, Waiting List, Assessment, Opioid Treatment Annual Update).

To do this, you would select the specific transaction under the client’s Episode History section and then click the **Delete** button.

For further details and instructions on using this **Delete** function, see the Tutorial and related User Guide titled “Delete an Existing Transaction.”

**NOTE:** Deletes must be done in reverse chronological order, so the newest transaction must be deleted first.

The screenshot displays the OASAS web application interface. At the top, there is a navigation bar with the OASAS logo and links for Home, Close Application, and Help. Below this is a client header section with a 'Client' tab and a timestamp. The main content area is divided into sections: 'Client Information' (showing provider details), 'Client Details' (showing sex, birth date, SSN, and last name), and 'Episode History'. The 'Episode History' section contains a table with columns for 'Select Program', 'Program Name', 'Provider Client ID', 'Transaction', 'Transaction Date', and 'Transaction Out Date'. The 'Delete' button in the top right of the table is highlighted with a red box. At the bottom of the page, there are 'Back', 'Children in Residence', and 'Print' buttons, along with a footer navigation bar.

Select Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	
<input type="checkbox"/>	1223	NO MED SUP CD OP	NR31	Transfer	11/30/2017	
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Admission	7/2/2017	11/30/2017
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	

**23** The **Children in Residence** button, located on the bottom of the Client Information page below the Episode History section, allows you to add or delete children who are checked in to a residential program to which their parent was admitted or to change their existing data.

To add, delete, or update a child in residence record, select the specific transaction under the client’s Episode History section and then click the **Children in Residence** button to continue.

For further details and instructions on using this function, see the Tutorial and related User Guide titled “Update an Existing Transaction (and Enter Children into Client Record).”

OASAS Improving Lives. Home Close Application Help Client

11/30/2017 09:56:57.984  
H\_H\_CF\_CT(2)\_CD

**Client Information**  
Provider : 99999 - Anonymous Provider

**Client Details**  
\* Sex : Female \* Birth Date : 1/2/1980 \* Last 4 SSN : 5123 \* Last Name 2 Char : AN (Birth Name)

Change Client Information

**Episode History**  
New Element Transition Update Delete

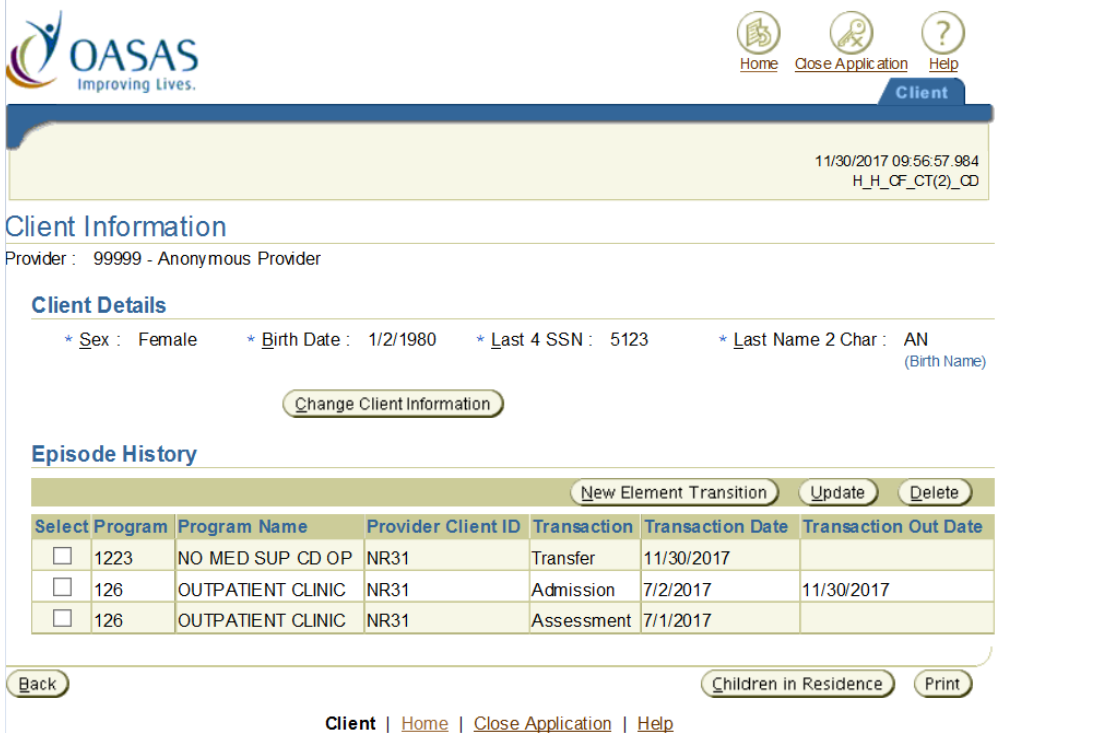
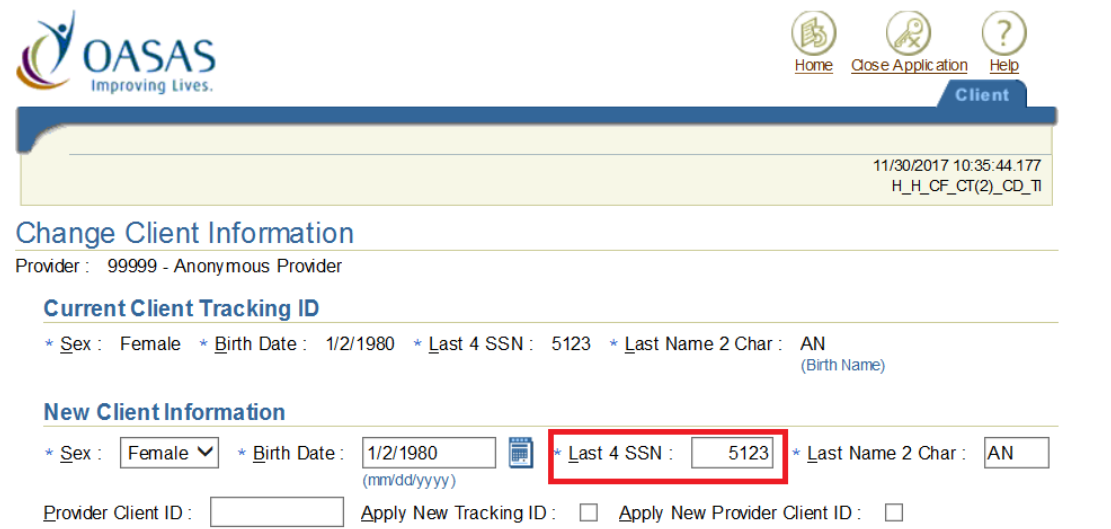
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<input type="checkbox"/>	1223	NO MED SUP CD OP	NR31	Transfer	11/30/2017	
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Admission	7/2/2017	11/30/2017
<input type="checkbox"/>	126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	

Back Children in Residence Print

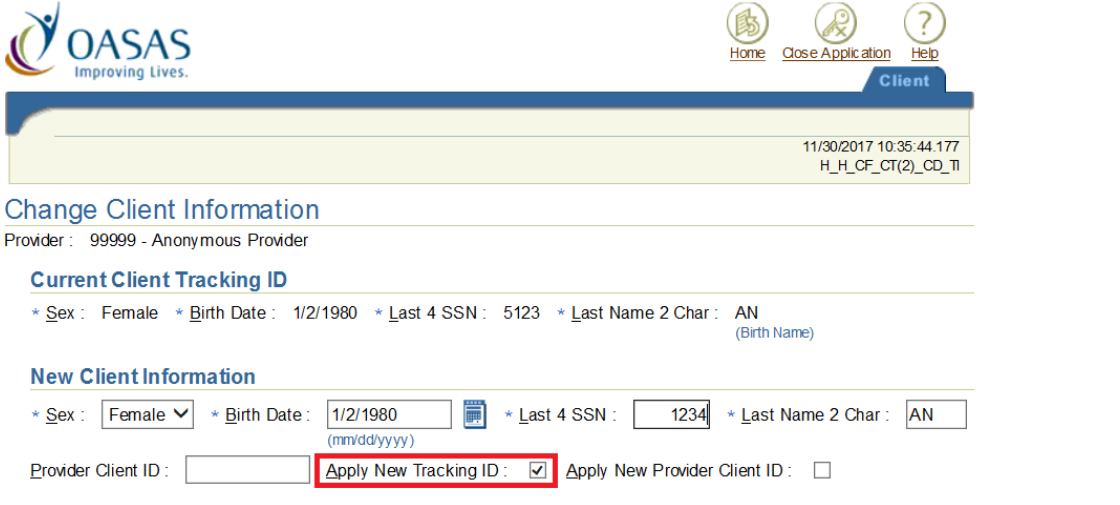
Client | Home | Close Application | Help

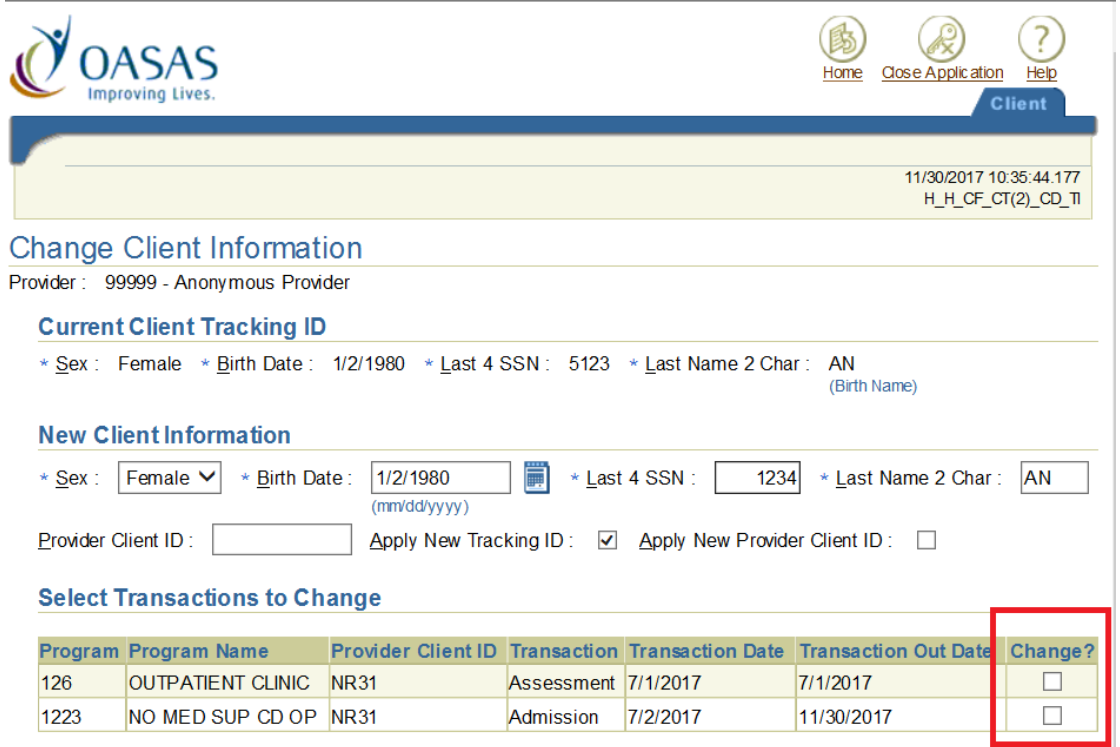
### Change Client Information

Step	Instructions	Image
24	<p>The next section of this User Guide will describe how to change a client’s identifying information from this “<i>Client Information</i>” page.</p> <p>For the client already selected (i.e., see Client Details section), first click the <b>Change Client Information</b> button to move to the “<i>Change Client Information</i>” page.</p>	<p>The screenshot displays the OASAS Client Information page. At the top left is the OASAS logo with the tagline 'Improving Lives.'. On the top right, there are navigation links for Home, Close Application, and Help, along with a 'Client' tab. A status bar shows the date and time: 11/30/2017 09:56:57.984 and the user ID H_H_CF_CT(2)_CD. The main heading is 'Client Information', followed by the provider name: 99999 - Anonymous Provider. Under 'Client Details', the following information is shown: Sex: Female, Birth Date: 1/2/1980, Last 4 SSN: 5123, and Last Name 2 Char: AN (Birth Name). A button labeled 'Change Client Information' is highlighted with a red rectangle. Below this is the 'Episode History' section, which includes a table with columns: Select Program, Program Name, Provider Client ID, Transaction, Transaction Date, and Transaction Out Date. The table contains three rows of data. At the bottom of the page, there are buttons for 'Back', 'Children in Residence', and 'Print', and a footer with links for Client, Home, Close Application, and Help.</p>

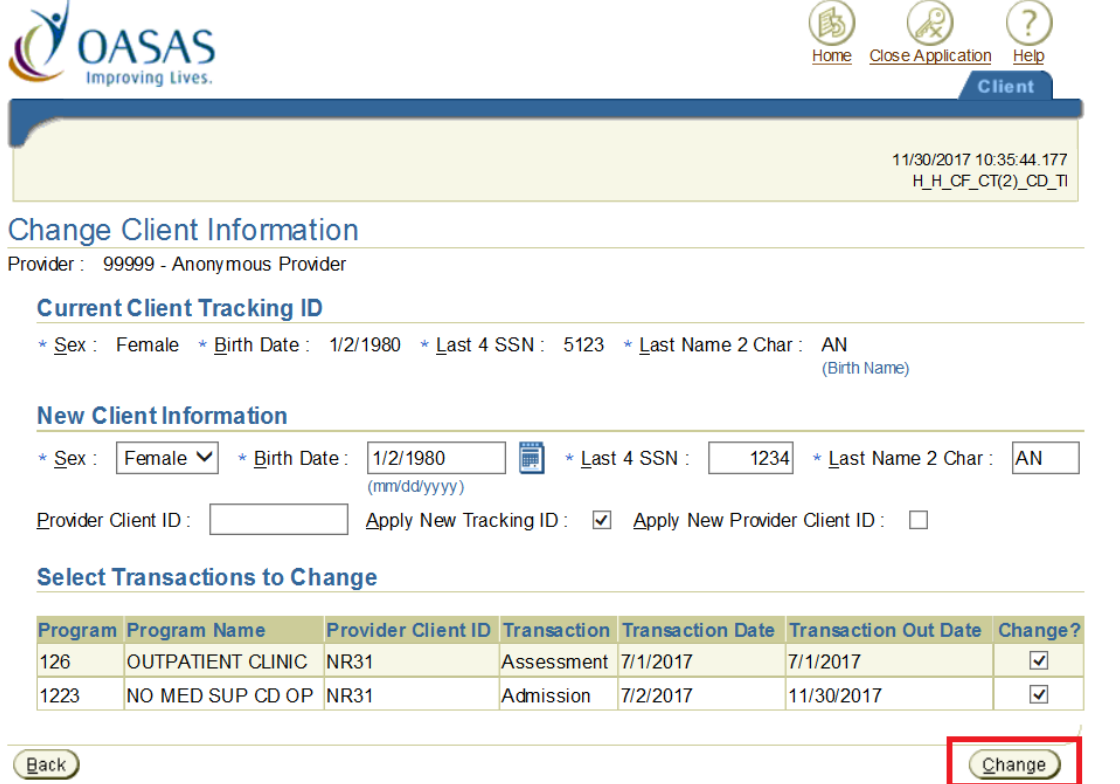
Step	Instructions	Image																								
<p><b>25</b></p>	<p>Here you see an example of the “<i>Change Client Information</i>” page, which contains a field that will be changed (i.e., <a href="#">Last 4 SSN</a>). Under the section heading <b>New Client Information</b>, you can change information for any of the client ID fields (which compose the current Client Tracking ID) or for the <a href="#">Provider Client ID</a>.</p>	 <p><b>Client Information</b> Provider : 99999 - Anonymous Provider</p> <p><b>Client Details</b> * Sex : Female * Birth Date : 1/2/1980 * Last 4 SSN : 5123 * Last Name 2 Char : AN (Birth Name)</p> <p><a href="#">Change Client Information</a></p> <p><b>Episode History</b></p> <table border="1"> <thead> <tr> <th>Select Program</th> <th>Program Name</th> <th>Provider Client ID</th> <th>Transaction</th> <th>Transaction Date</th> <th>Transaction Out Date</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 1223</td> <td>NO MED SUP CD OP</td> <td>NR31</td> <td>Transfer</td> <td>11/30/2017</td> <td></td> </tr> <tr> <td><input type="checkbox"/> 126</td> <td>OUTPATIENT CLINIC</td> <td>NR31</td> <td>Admission</td> <td>7/2/2017</td> <td>11/30/2017</td> </tr> <tr> <td><input type="checkbox"/> 126</td> <td>OUTPATIENT CLINIC</td> <td>NR31</td> <td>Assessment</td> <td>7/1/2017</td> <td></td> </tr> </tbody> </table> <p><a href="#">Back</a> <a href="#">Children in Residence</a> <a href="#">Print</a></p> <p>Client   <a href="#">Home</a>   <a href="#">Close Application</a>   <a href="#">Help</a></p>	Select Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	<input type="checkbox"/> 1223	NO MED SUP CD OP	NR31	Transfer	11/30/2017		<input type="checkbox"/> 126	OUTPATIENT CLINIC	NR31	Admission	7/2/2017	11/30/2017	<input type="checkbox"/> 126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	
Select Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date																					
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<input type="checkbox"/> 126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017																						
<p><b>26</b></p>	<p>In this example, the field <a href="#">Last 4 SSN</a> is changed to 1234 (from 5123), which will then be used to update the current Client Tracking ID.</p> <p>When changing this field in the live version of CDS, delete the original entry in the <a href="#">Last 4 SSN</a> field before entering the new SSN.</p>	 <p><b>Change Client Information</b> Provider : 99999 - Anonymous Provider</p> <p><b>Current Client Tracking ID</b> * Sex : Female * Birth Date : 1/2/1980 * Last 4 SSN : 5123 * Last Name 2 Char : AN (Birth Name)</p> <p><b>New Client Information</b> * Sex : Female * Birth Date : 1/2/1980 * Last 4 SSN : 5123 * Last Name 2 Char : AN</p> <p>Provider Client ID : <input type="text"/> Apply New Tracking ID : <input type="checkbox"/> Apply New Provider Client ID : <input type="checkbox"/></p>																								

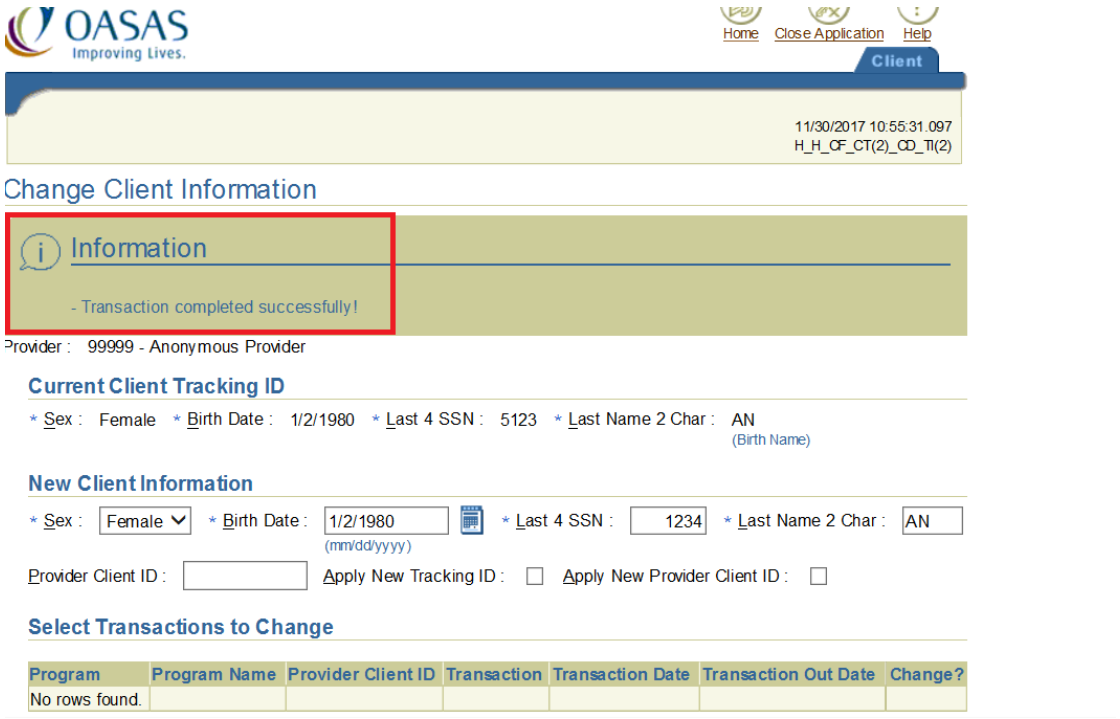


Step	Instructions	Image
27	<p>If any of the fields <b>Sex</b>, <b>Birth Date</b>, <b>Last 4 SSN</b>, or <b>Last Name 2 Char</b> are changed, you must then click the check box labeled “Apply New Tracking ID” (as in this example).</p> <p>If the field <b>Provider Client ID</b> is changed, you must click the check box labeled “Apply New Provider Client ID” to apply those changes to the new <b>Provider Client ID</b>.</p>	 <p>The screenshot shows the OASAS 'Change Client Information' interface. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' buttons. Below this, the 'Client' information is displayed, including a timestamp '11/30/2017 10:35:44.177' and a session ID 'H_H_CF_CT(2)_CD_TI'. The main section is titled 'Change Client Information' and shows the current provider as '99999 - Anonymous Provider'. Under 'Current Client Tracking ID', the fields are: * Sex: Female, * Birth Date: 1/2/1980, * Last 4 SSN: 5123, and * Last Name 2 Char: AN (Birth Name). Under 'New Client Information', the fields are: * Sex: Female (dropdown), * Birth Date: 1/2/1980 (calendar icon), * Last 4 SSN: 1234, and * Last Name 2 Char: AN. At the bottom, there are two checkboxes: 'Apply New Tracking ID' (checked and highlighted with a red box) and 'Apply New Provider Client ID' (unchecked).</p>

Step	Instructions	Image																					
28	<p>Under the section heading “Select Transaction to Change,” you must indicate those transactions to be changed.</p> <p>To do this, click the relevant check boxes under the <b>Change</b> column heading to identify those transactions.</p> <p>NOTE: In cases where transactions have accidentally been entered against the wrong <b>Provider Client ID</b>, you can choose to update only those transactions, so that you do not have to re-enter the data for the correct <b>Provider Client ID</b>. Generally, when changing Client Information, you will want to change that information for all transactions for that client.</p>	 <p>The screenshot displays the OASAS web application interface. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links. Below this, the page title is 'Change Client Information'. The current client is identified as '99999 - Anonymous Provider'. There are sections for 'Current Client Tracking ID' and 'New Client Information', both showing fields for Sex, Birth Date, Last 4 SSN, and Last Name 2 Char. Below these is a table titled 'Select Transactions to Change' with columns: Program, Program Name, Provider Client ID, Transaction, Transaction Date, Transaction Out Date, and Change?. The 'Change?' column contains checkboxes for two transactions: 126 (OUTPATIENT CLINIC) and 1223 (NO MED SUP CD OP). A red box highlights these checkboxes.</p> <table border="1" data-bbox="877 834 1940 927"> <thead> <tr> <th>Program</th> <th>Program Name</th> <th>Provider Client ID</th> <th>Transaction</th> <th>Transaction Date</th> <th>Transaction Out Date</th> <th>Change?</th> </tr> </thead> <tbody> <tr> <td>126</td> <td>OUTPATIENT CLINIC</td> <td>NR31</td> <td>Assessment</td> <td>7/1/2017</td> <td>7/1/2017</td> <td><input type="checkbox"/></td> </tr> <tr> <td>1223</td> <td>NO MED SUP CD OP</td> <td>NR31</td> <td>Admission</td> <td>7/2/2017</td> <td>11/30/2017</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	Change?	126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	7/1/2017	<input type="checkbox"/>	1223	NO MED SUP CD OP	NR31	Admission	7/2/2017	11/30/2017	<input type="checkbox"/>
Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	Change?																	
126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	7/1/2017	<input type="checkbox"/>																	
1223	NO MED SUP CD OP	NR31	Admission	7/2/2017	11/30/2017	<input type="checkbox"/>																	

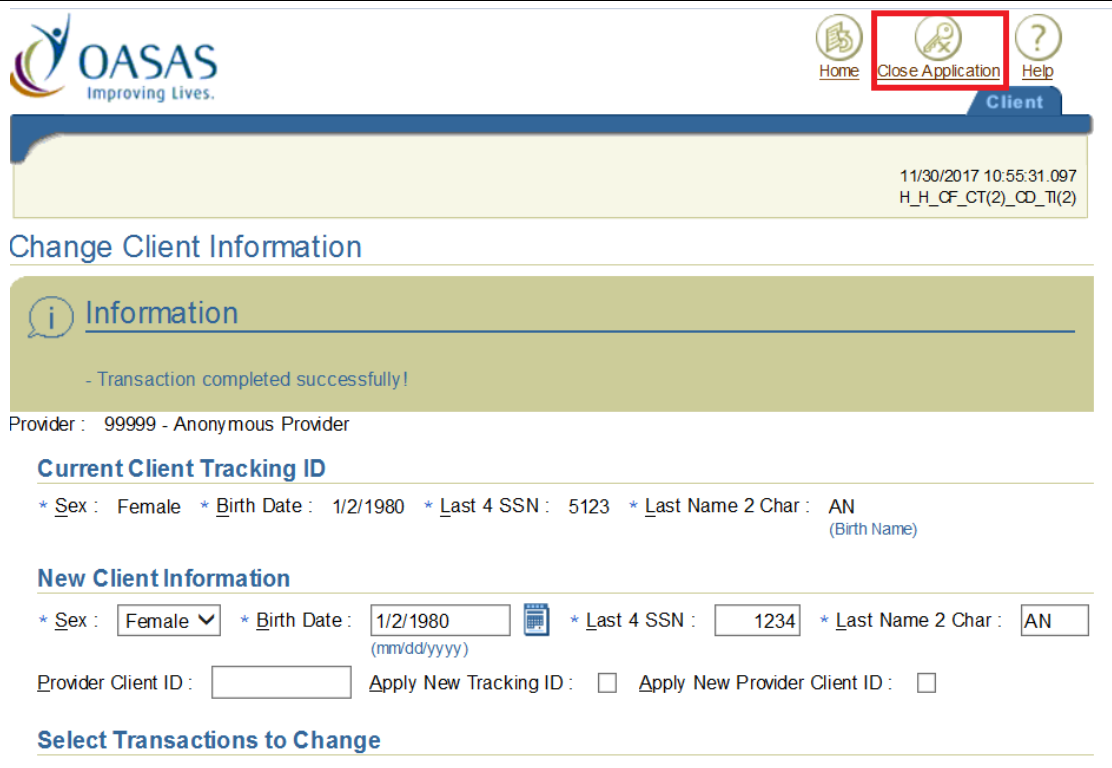
Step	Instructions	Image																					
<p><b>29</b></p> <p>In this example, <b>Last 4 SSN</b> is being modified, so the <b>Apply New Tracking ID</b> box is selected.</p> <p>In addition, the box is checked under the <b>Change</b> column for both the <b>Assessment</b> and <b>Admission</b> transactions for that client.</p> <p>This is what the page would look like when all of the transactions for this client are selected.</p>		<p><b>Change Client Information</b>          Provider : 99999 - Anonymous Provider</p> <p><b>Current Client Tracking ID</b>          * Sex : Female * Birth Date : 1/2/1980 * Last 4 SSN : 5123 * Last Name 2 Char : AN  <small>(Birth Name)</small></p> <p><b>New Client Information</b>          * Sex : Female * Birth Date : 1/2/1980 * Last 4 SSN : 1234 * Last Name 2 Char : AN  <small>(mm/dd/yyyy)</small></p> <p>Provider Client ID : <input type="text"/> Apply New Tracking ID : <input checked="" type="checkbox"/> Apply New Provider Client ID : <input type="checkbox"/></p> <p><b>Select Transactions to Change</b></p> <table border="1"> <thead> <tr> <th>Program</th> <th>Program Name</th> <th>Provider Client ID</th> <th>Transaction</th> <th>Transaction Date</th> <th>Transaction Out Date</th> <th>Change?</th> </tr> </thead> <tbody> <tr> <td>126</td> <td>OUTPATIENT CLINIC</td> <td>NR31</td> <td>Assessment</td> <td>7/1/2017</td> <td>7/1/2017</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>1223</td> <td>NO MED SUP CD OP</td> <td>NR31</td> <td>Admission</td> <td>7/2/2017</td> <td>11/30/2017</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p>Back <span style="float: right;">Change</span></p>	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	Change?	126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	7/1/2017	<input checked="" type="checkbox"/>	1223	NO MED SUP CD OP	NR31	Admission	7/2/2017	11/30/2017	<input checked="" type="checkbox"/>
Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	Change?																	
126	OUTPATIENT CLINIC	NR31	Assessment	7/1/2017	7/1/2017	<input checked="" type="checkbox"/>																	
1223	NO MED SUP CD OP	NR31	Admission	7/2/2017	11/30/2017	<input checked="" type="checkbox"/>																	

Step	Instructions	Image
30	Finalize the changes by clicking the <b>Change</b> button.	 <p>The screenshot displays the OASAS 'Change Client Information' interface. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links. Below this, the page title is 'Change Client Information' and the provider is identified as '99999 - Anonymous Provider'. The 'Current Client Tracking ID' section shows fields for Sex (Female), Birth Date (1/2/1980), Last 4 SSN (5123), and Last Name 2 Char (AN). The 'New Client Information' section contains input fields for Sex (set to Female), Birth Date (1/2/1980), Last 4 SSN (1234), and Last Name 2 Char (AN). There are also checkboxes for 'Apply New Tracking ID' (checked) and 'Apply New Provider Client ID' (unchecked). A table titled 'Select Transactions to Change' lists two transactions: one for 'OUTPATIENT CLINIC' and another for 'NO MED SUP CD OP'. At the bottom of the page, there are 'Back' and 'Change' buttons, with the 'Change' button highlighted by a red rectangular box.</p>

Step	Instructions	Image
<p><b>31</b></p>	<p>Once the change has been successfully completed, the screen will show the message “Transaction completed successfully.”</p> <p>NOTE: While the page continues to display the information for the selected client, there are no transactions left to display under the bottom section because they have been moved to the new <a href="#">Client Tracking ID</a>.</p> <p>You must go back to the list of clients in the <i>Client Search Results</i> page to see the ID changes.</p>	 <p>The screenshot shows the OASAS 'Change Client Information' page. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links, and a 'Client' tab. A timestamp '11/30/2017 10:55:31.097' and user ID 'H_H_OF_CT(2)_CO_TI(2)' are visible. The main heading is 'Change Client Information'. A red box highlights a message box with an information icon and the text 'Information - Transaction completed successfully!'. Below this, the 'Current Client Tracking ID' section shows client details: Sex: Female, Birth Date: 1/2/1980, Last 4 SSN: 5123, Last Name 2 Char: AN (Birth Name). The 'New Client Information' section has input fields for Sex (Female), Birth Date (1/2/1980), Last 4 SSN (1234), and Last Name 2 Char (AN). There are checkboxes for 'Apply New Tracking ID' and 'Apply New Provider Client ID'. At the bottom, the 'Select Transactions to Change' section shows a table with columns: Program, Program Name, Provider Client ID, Transaction, Transaction Date, Transaction Out Date, and Change?. The table currently contains the text 'No rows found.'</p>

**32** To return to the “CDS Home” page to perform a different task, click **Home** at the top of the page.

The screenshot displays the OASAS web application interface. At the top left is the OASAS logo with the tagline "Improving Lives." At the top right, there are three navigation icons: "Home" (a house icon, highlighted with a red box), "Close Application" (a key icon), and "Help" (a question mark icon). Below these icons is a blue "Client" button. A status bar on the right shows the date and time "11/30/2017 10:55:31.097" and the user ID "H\_H\_CF\_CT(2)\_OD\_TI(2)". The main content area is titled "Change Client Information" and features a green "Information" banner with a message: "- Transaction completed successfully!". Below this, it shows "Provider : 99999 - Anonymous Provider". There are two sections: "Current Client Tracking ID" and "New Client Information". The "Current Client Tracking ID" section displays: "\* Sex : Female \* Birth Date : 1/2/1980 \* Last 4 SSN : 5123 \* Last Name 2 Char : AN (Birth Name)". The "New Client Information" section contains input fields for: "\* Sex : Female" (dropdown), "\* Birth Date : 1/2/1980" (calendar icon), "\* Last 4 SSN : 1234", and "\* Last Name 2 Char : AN". At the bottom of this section are three checkboxes: "Provider Client ID : [input]", "Apply New Tracking ID : [input]", and "Apply New Provider Client ID : [input]". The page concludes with a link "Select Transactions to Change".

<p><b>33</b></p>	<p>Once you are finished performing Client Management transactions, you can return to the <i>OASAS Applications</i> page by clicking on the <b>Close Application</b> button to exit the application.</p>	 <p>The screenshot shows the OASAS web application interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. At the top right are three navigation icons: 'Home', 'Close Application' (highlighted with a red box), and 'Help'. Below the navigation bar is a blue header with the word 'Client' on the right. A yellow box displays the date and time '11/30/2017 10:55:31.097' and the user ID 'H_H_CF_CT(2)_CD_TI(2)'. The main content area is titled 'Change Client Information' and features a green 'Information' box with a message: '- Transaction completed successfully!'. Below this, the text 'Provider : 99999 - Anonymous Provider' is shown. The 'Current Client Tracking ID' section displays: '* Sex : Female * Birth Date : 1/2/1980 * Last 4 SSN : 5123 * Last Name 2 Char : AN (Birth Name)'. The 'New Client Information' section contains input fields for '* Sex : Female', '* Birth Date : 1/2/1980', '* Last 4 SSN : 1234', and '* Last Name 2 Char : AN'. At the bottom, there are checkboxes for 'Apply New Tracking ID' and 'Apply New Provider Client ID', and a section titled 'Select Transactions to Change'.</p>
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