

# *“Delete an Existing Transaction” User Guide*

## **Summary**

**NOTE:** Due to the dynamics of state government and the changing needs for the OASAS CDS (Client Data System), some items in this tutorial might have been removed from the live CDS. Similarly, some new items may appear in the live system that are not reflected in this tutorial. 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.

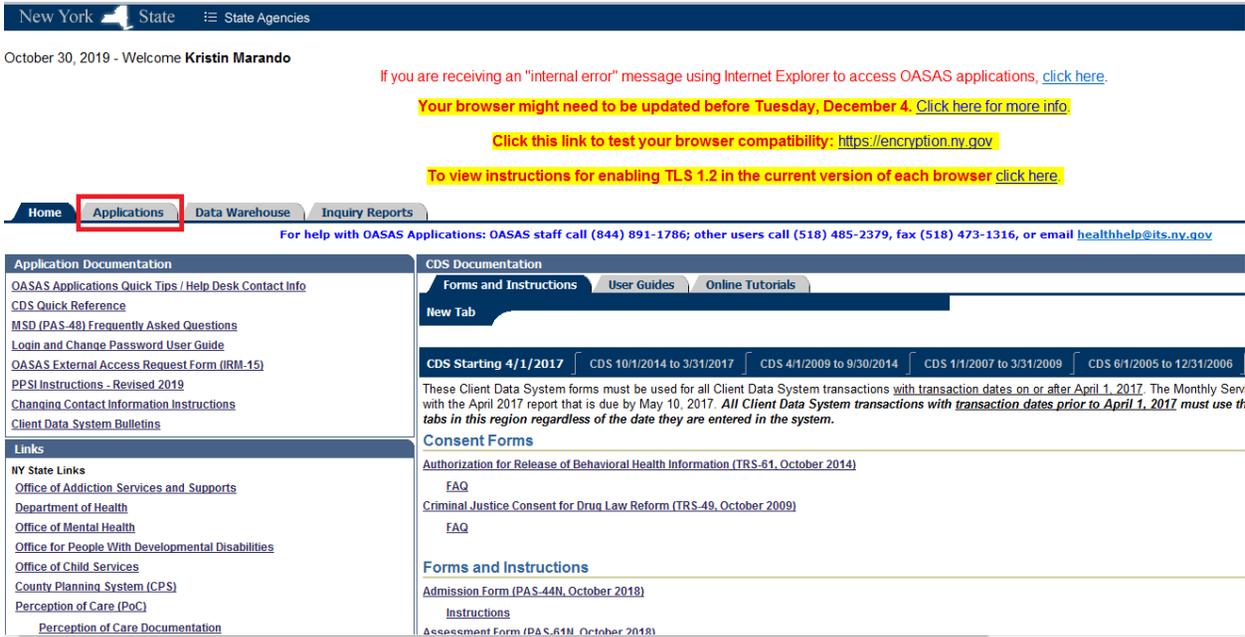
This User Guide will show the user how to delete an existing transaction in the Client Data System (CDS) for an existing client.

Any deleted transactions are permanently removed from the database. There is no way to retrieve these data.

NOTE: You will need to be logged into the OASAS Client Data System application to follow this user guide. For more information on logging into the OASAS Client Data System application, please review the Login and Change Password Tutorial or User Guide on the OASAS Applications site, located at <https://apps.oasas.ny.gov>.

Delete an Existing Transaction

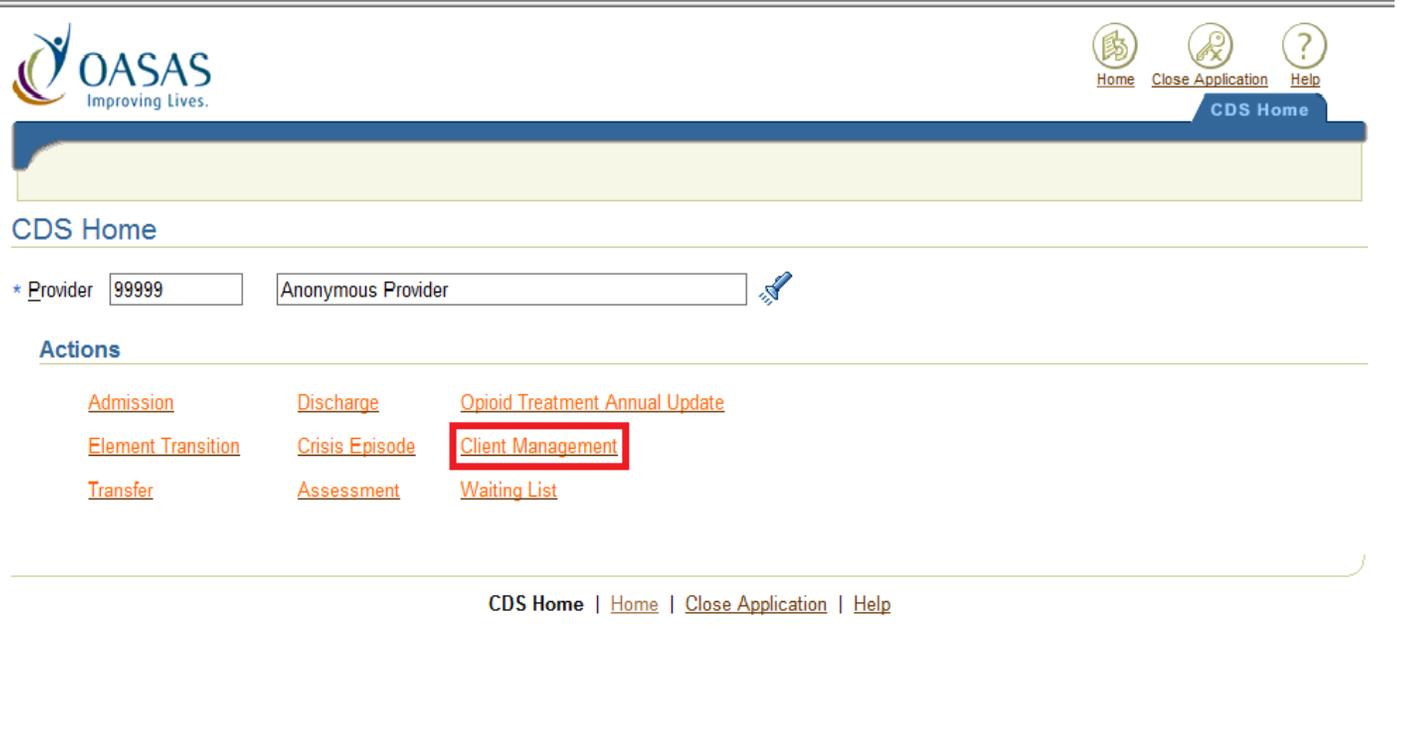
## Open the CDS Application

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 header with 'New York State' and 'State Agencies'. Below the header, the date 'October 30, 2019' and the user name 'Kristin Marando' are displayed. A red box highlights the 'Applications' tab in the navigation menu. The page contains several sections: 'Application Documentation' with links like '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'; 'Links' with links to 'NY State Links', 'Office of Addiction Services and Supports', 'Department of Health', 'Office of Mental Health', 'Office for People With Developmental Disabilities', 'Office of Child Services', 'County Planning System (CPS)', 'Perception of Care (PoC)', and 'Perception of Care Documentation'; 'CDS Documentation' with tabs for 'Forms and Instructions', 'User Guides', and 'Online Tutorials'; and 'Forms and Instructions' with links to 'Admission Form (PAS-44N, October 2018)' and 'Assessment Form (PAS-61N, October 2018)'. There are also several informational messages, including one about browser updates and another about TLS 1.2 instructions.</p>

Delete an Existing Transaction

Step	Instructions	Image
2	<p>To open the CDS Application, click the <b>Client Data System</b> link to go to the “CDS Home” page.</p>	<p>The screenshot shows the New York State Client Data System application interface. At the top, there is a header with 'New York State' and 'State Agencies'. Below the header, there is a date 'September 26, 2017' and a welcome message for 'CDS TestUser01'. A navigation menu includes 'Home', 'Applications', 'Client Data System', 'Gambling', 'Provider Directory System', 'Monthly Service Delivery', 'IPMES/Workscope', and 'Help'. A yellow box contains a message: '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.' The main content area is titled 'Client Data System Application' and contains a red box around the 'Client Data System' link, along with 'Client Data System - Inquiry' and 'STAR-QI'. Below this, there are three columns of links under 'STAR-QI Reports': 'Performance Summary' (with a 'Summary Report' link), 'Data Quality Monitoring' (with links for 'Admitted to CDS but not STAR-QI in Last 30 Days', 'Admitted to CDS but not STAR-QI in Last 12 Months', 'Admitted to CDS but not STAR-QI (All)', 'Discharged from CDS but not STAR-QI in Last 30 Days', 'Discharged from CDS but not STAR-QI in Last 12 Months', and 'Discharged from CDS but not STAR-QI (All)'), and 'Missing Data Monitoring' (with links for 'First Request for Service Date Missing Report', 'Appointment Status Missing Report', 'First Clinical Service Date Expected Report', 'Service Dates Missing Report', and 'Discharge Data Missing Report'). At the bottom, there is a section for 'Client Data System Batch System' with a 'CDS Batch Process (Production)' link, and a 'Client Data System Reports' section.</p>

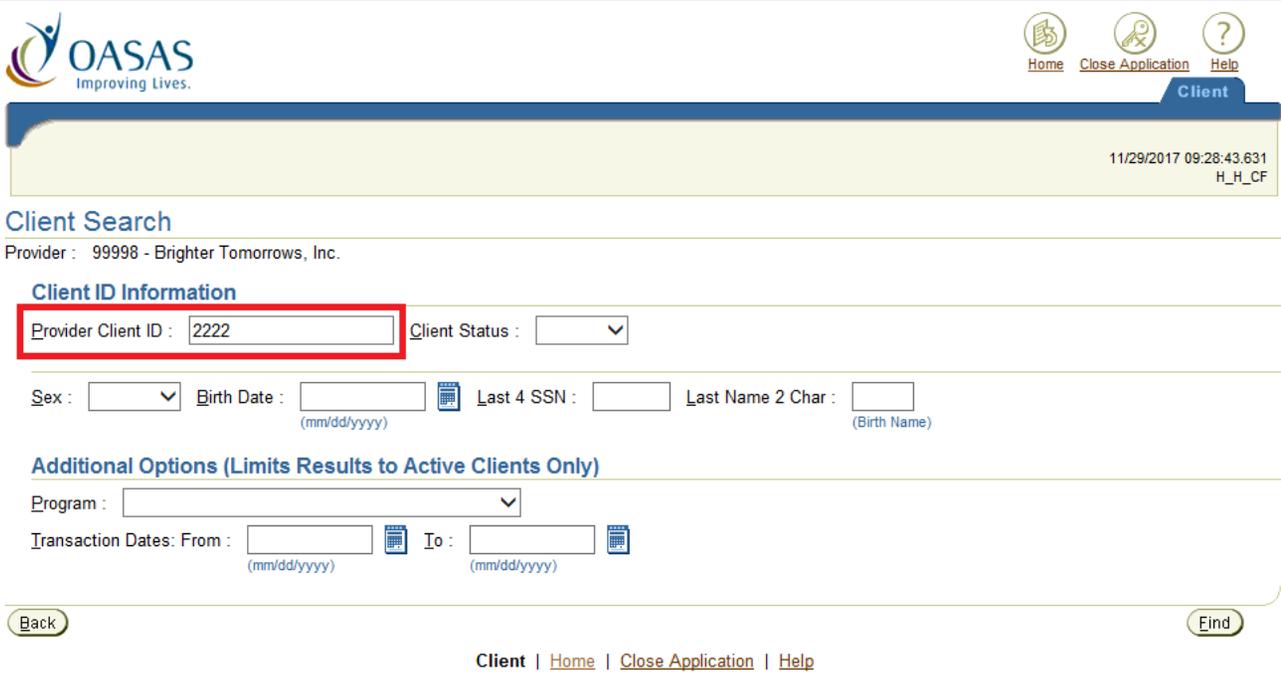
Delete an Existing Transaction

Step	Instructions	Image
3	<p>This is the “CDS Home” page. From here you can choose any of the links available under the “Actions” section.</p> <p>To delete an existing transaction, you will first need to click the <b>Client Management</b> link to open the “Client Search” page.</p>	

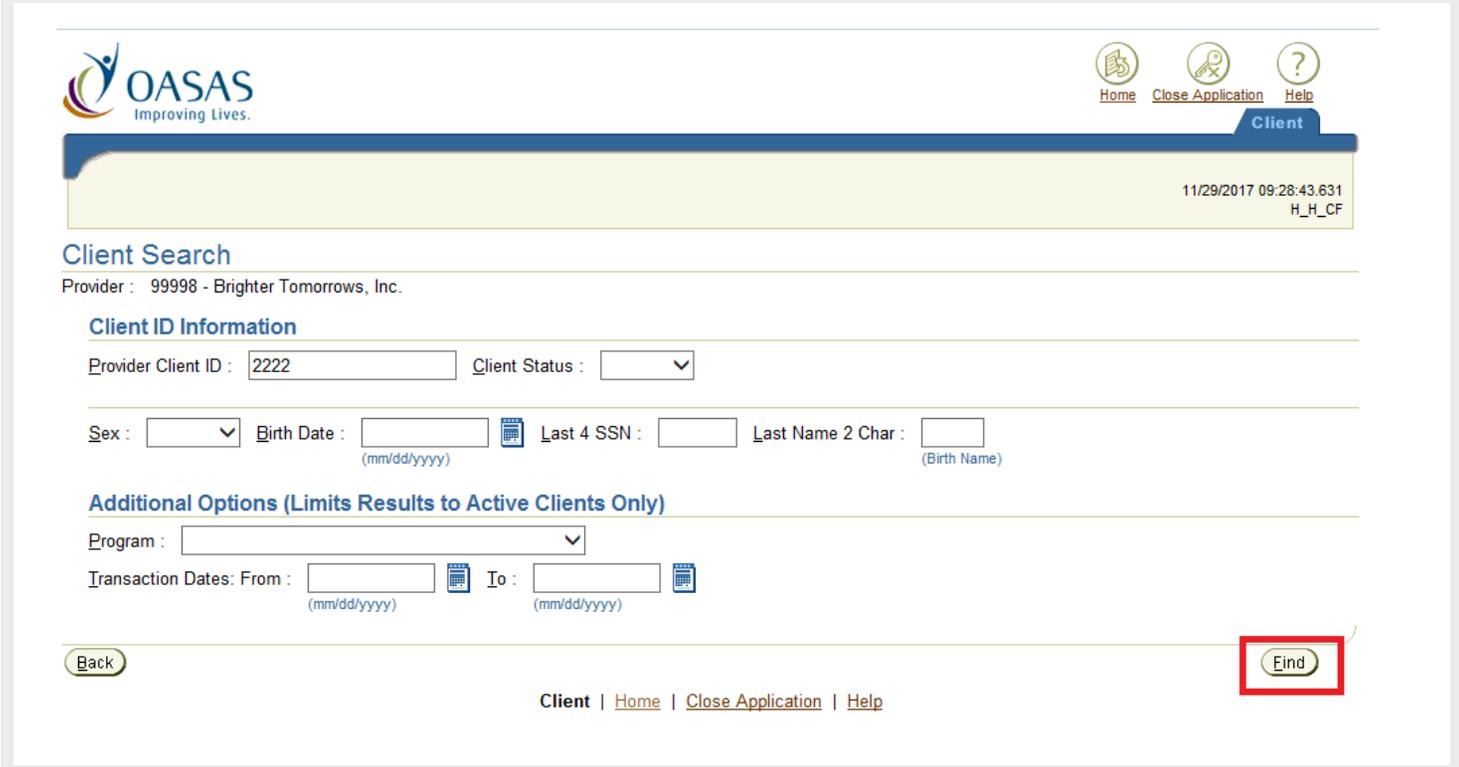
Delete an Existing Transaction

Step	Instructions	Image
4	<p>Here you see the “<i>Client Search</i>” page, where you can enter specific search criteria to return one client record or a list of clients meeting the selected criteria. Leaving all search criteria blank will return all clients for the provider (past and present).</p> <p>For more details on how to search for a client, see the “Enter Transactions from Client Management and Change Provider ID or Tracking ID” User Guide.</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 icons for Home, Close Application, and Help. A 'Client' tab is highlighted. Below the header, the search criteria are set to 'Provider : 99998 - Brighter Tomorrows, Inc.'. The 'Client ID Information' section contains the following fields: 'Provider Client ID' (text input), 'Client Status' (dropdown menu), 'Sex' (dropdown menu), 'Birth Date' (calendar icon and text input with '(mm/dd/yyyy)' format), 'Last 4 SSN' (text input with calendar icon), and 'Last Name 2 Char' (text input with '(Birth Name)' label). The 'Additional Options (Limits Results to Active Clients Only)' section contains: 'Program' (dropdown menu) and 'Transaction Dates: From' and 'To' (calendar icons and text inputs with '(mm/dd/yyyy)' format). At the bottom left is a 'Back' button and at the bottom right is an 'End' button. The footer contains the text 'Client   Home   Close Application   Help'.</p>

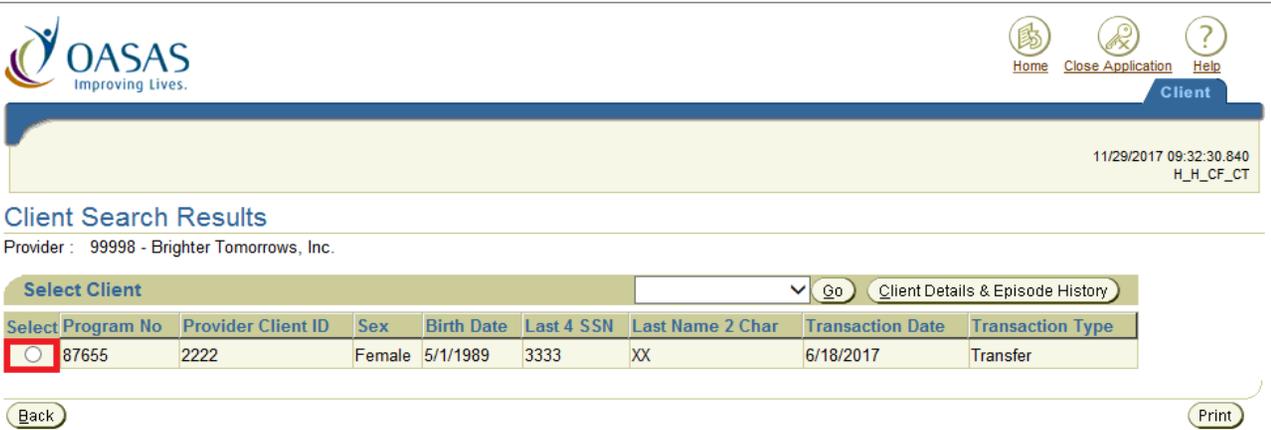
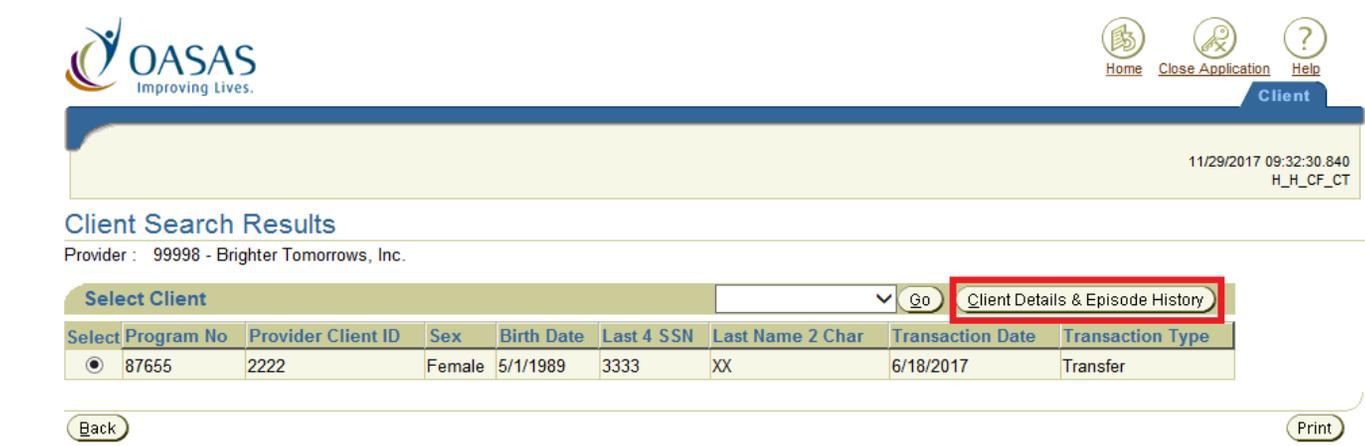
Delete an Existing Transaction

Step	Instructions	Image
5	<p>In the “<i>Client Search</i>” page, it is first necessary to enter any applicable search criteria.</p> <p>In this User Guide example, search criteria entered for a specific client was limited to one criterion field (i.e., <a href="#">Provider Client ID</a>) and all other fields were left blank.</p> <p>This field, <a href="#">Provider Client ID</a>, is a unique client identification number assigned to the client by the program.</p>	 <p>The screenshot shows the OASAS Client Search 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 a 'Client' tab. Below the header, the date and time '11/29/2017 09:28:43.631 H_H_CF' are displayed. The main section is titled 'Client Search' and shows the provider '99998 - Brighter Tomorrows, Inc.'. Under the 'Client ID Information' section, the 'Provider Client ID' field is highlighted with a red box and contains the value '2222'. The 'Client Status' field is a dropdown menu. Below this, there are fields for 'Sex', 'Birth Date', 'Last 4 SSN', and 'Last Name 2 Char'. The 'Additional Options (Limits Results to Active Clients Only)' section includes a 'Program' dropdown and 'Transaction Dates' fields for 'From' and 'To'. At the bottom, there are 'Back' and 'Find' buttons, and a footer with navigation links: 'Client   Home   Close Application   Help'.</p>

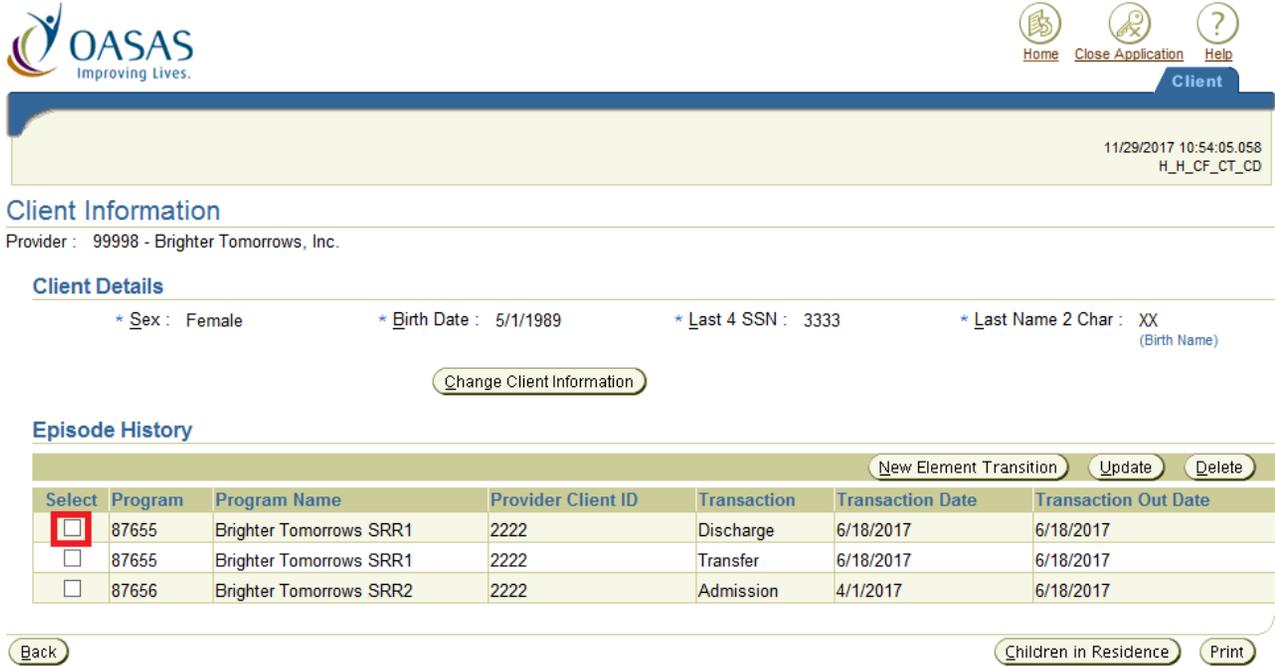
Delete an Existing Transaction

Step	Instructions	Image
6	Next, you must click the <b>Find</b> button to view the “ <i>Client Search Results</i> ” page.	 <p>The screenshot displays the OASAS Client Search interface. 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 '11/29/2017 09:28:43.631' and the user 'H_H_CF'. The main section is titled 'Client Search' and shows the provider '99998 - Brighter Tomorrows, Inc.'. Under 'Client ID Information', the 'Provider Client ID' is set to '2222' and 'Client Status' is a dropdown menu. Below this, there are fields for 'Sex' (dropdown), 'Birth Date' (calendar icon), 'Last 4 SSN' (calendar icon), and 'Last Name 2 Char' (dropdown). The 'Additional Options (Limits Results to Active Clients Only)' section includes a 'Program' dropdown and 'Transaction Dates' with 'From' and 'To' fields (both with calendar icons). At the bottom left is a 'Back' button, and at the bottom right is a 'Find' button, which is highlighted with a red rectangular box.</p>

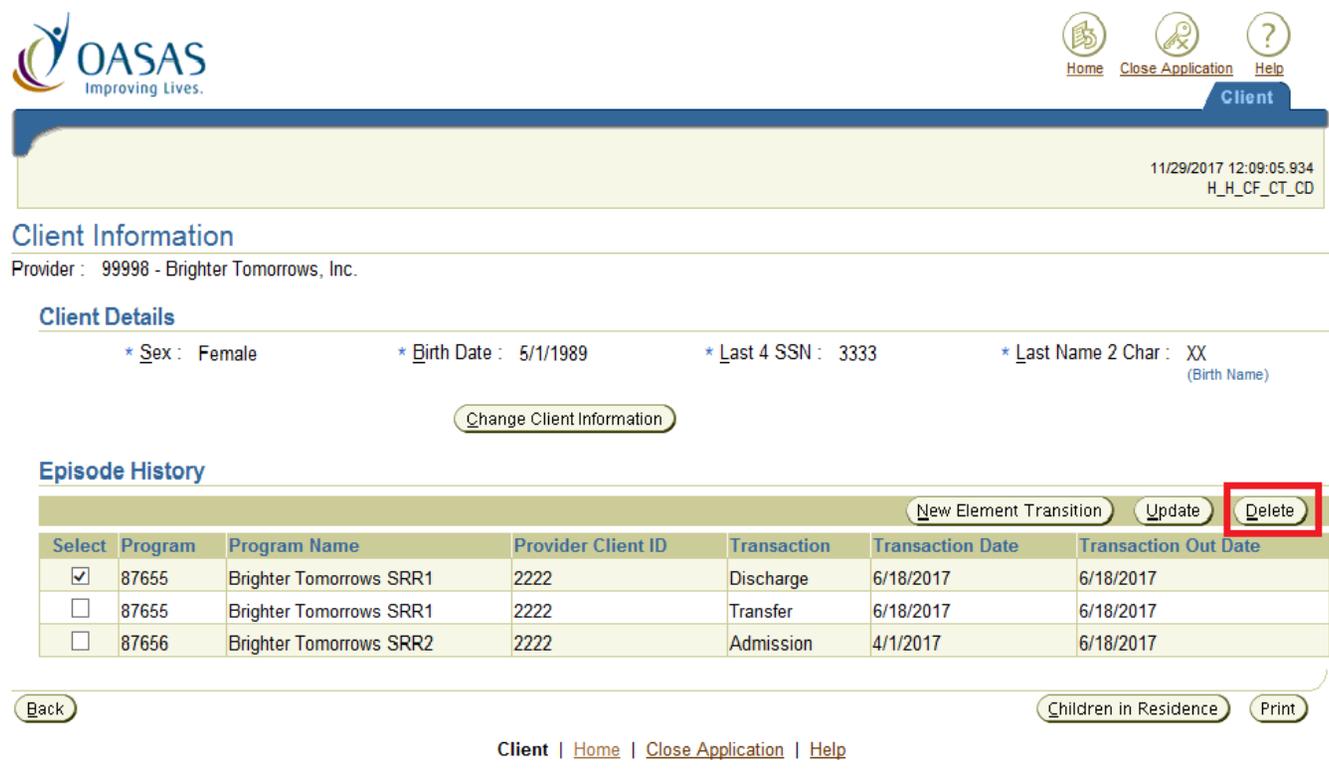
Delete an Existing Transaction

Step	Instructions	Image																		
7	<p>You now see the “<i>Client Search Results</i>” page. Here you must select one client using the radio button, even though this is the only client listed in this example. This is because we limited the search by using very specific criteria (i.e., a unique client ID number). Otherwise, there is usually a list of clients shown.</p> <p>Click the <b>radio button</b> (○) in the “Select” column next to the client whose transaction you want to delete.</p>	 <p>The screenshot shows the OASAS logo and navigation links (Home, Close Application, Help) in the top right. Below the logo is a header bar with the word 'Client' and a timestamp '11/29/2017 09:32:30.840 H_H_CF_CT'. The main content area is titled 'Client Search Results' and shows 'Provider : 99998 - Brighter Tomorrows, Inc.'. There is a search bar with a dropdown menu and a 'Go' button. Below the search bar 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>87655</td> <td>2222</td> <td>Female</td> <td>5/1/1989</td> <td>3333</td> <td>XX</td> <td>6/18/2017</td> <td>Transfer</td> </tr> </tbody> </table> <p>Buttons for 'Back' and 'Print' are visible at the bottom of the table. Navigation links 'Client   Home   Close Application   Help' are at the bottom of the page.</p>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	87655	2222	Female	5/1/1989	3333	XX	6/18/2017	Transfer
Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type												
<input type="radio"/>	87655	2222	Female	5/1/1989	3333	XX	6/18/2017	Transfer												
8	<p>Next you must click on the <b>Client Details &amp; Episode History</b> button to open the “<i>Client Information</i>” page for that selected client. It is in the upper right corner of the “<i>Client Search Results</i>” page next to the <b>Go</b> button.</p> <p>This will then open the “<i>Client Information</i>” page.</p>	 <p>The screenshot is similar to the previous one, but the 'Client Details &amp; Episode History' button next to the 'Go' button is highlighted with a red box. The table below it now has the radio button selected (filled circle):</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 checked="" type="radio"/></td> <td>87655</td> <td>2222</td> <td>Female</td> <td>5/1/1989</td> <td>3333</td> <td>XX</td> <td>6/18/2017</td> <td>Transfer</td> </tr> </tbody> </table> <p>The rest of the page layout remains the same.</p>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input checked="" type="radio"/>	87655	2222	Female	5/1/1989	3333	XX	6/18/2017	Transfer
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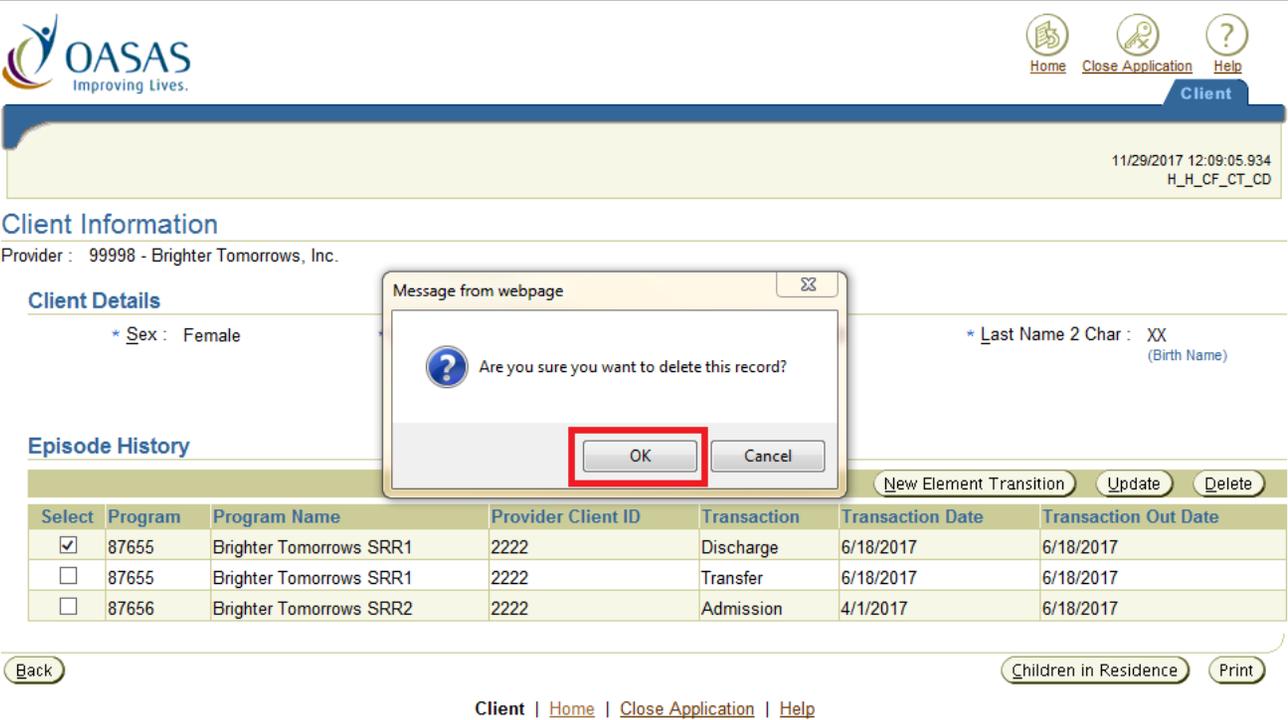
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9	<p>Here you see the “<i>Client Information</i>” page.</p> <p>Next, you must pick the transaction you want to remove. For this User Guide example, you will be deleting the client’s Discharge transaction.</p> <p>To delete a transaction, click the <b>check box</b> (<input type="checkbox"/>) in the “Select” column to select the appropriate transaction for that client.</p> <p>In this example, the Discharge transaction, located in the top row, is selected for deletion.</p>	 <p>The screenshot shows the OASAS 'Client Information' page. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links. Below this, the client's information is displayed, including 'Sex: Female', 'Birth Date: 5/1/1989', 'Last 4 SSN: 3333', and 'Last Name 2 Char: XX'. A 'Change Client Information' button is present. The 'Episode History' section contains a table with columns: Select, Program, Program Name, Provider Client ID, Transaction, Transaction Date, and Transaction Out Date. The first row, representing a 'Discharge' transaction on 6/18/2017, has its 'Select' checkbox checked. Other buttons like 'New Element Transition', 'Update', 'Delete', 'Back', 'Children in Residence', and 'Print' are also visible.</p> <table border="1" data-bbox="674 690 1921 836"> <thead> <tr> <th>Select</th> <th>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 checked="" type="checkbox"/></td> <td>87655</td> <td>Brighter Tomorrows SRR1</td> <td>2222</td> <td>Discharge</td> <td>6/18/2017</td> <td>6/18/2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>87655</td> <td>Brighter Tomorrows SRR1</td> <td>2222</td> <td>Transfer</td> <td>6/18/2017</td> <td>6/18/2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>87656</td> <td>Brighter Tomorrows SRR2</td> <td>2222</td> <td>Admission</td> <td>4/1/2017</td> <td>6/18/2017</td> </tr> </tbody> </table>	Select	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	<input checked="" type="checkbox"/>	87655	Brighter Tomorrows SRR1	2222	Discharge	6/18/2017	6/18/2017	<input type="checkbox"/>	87655	Brighter Tomorrows SRR1	2222	Transfer	6/18/2017	6/18/2017	<input type="checkbox"/>	87656	Brighter Tomorrows SRR2	2222	Admission	4/1/2017	6/18/2017
Select	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date																								
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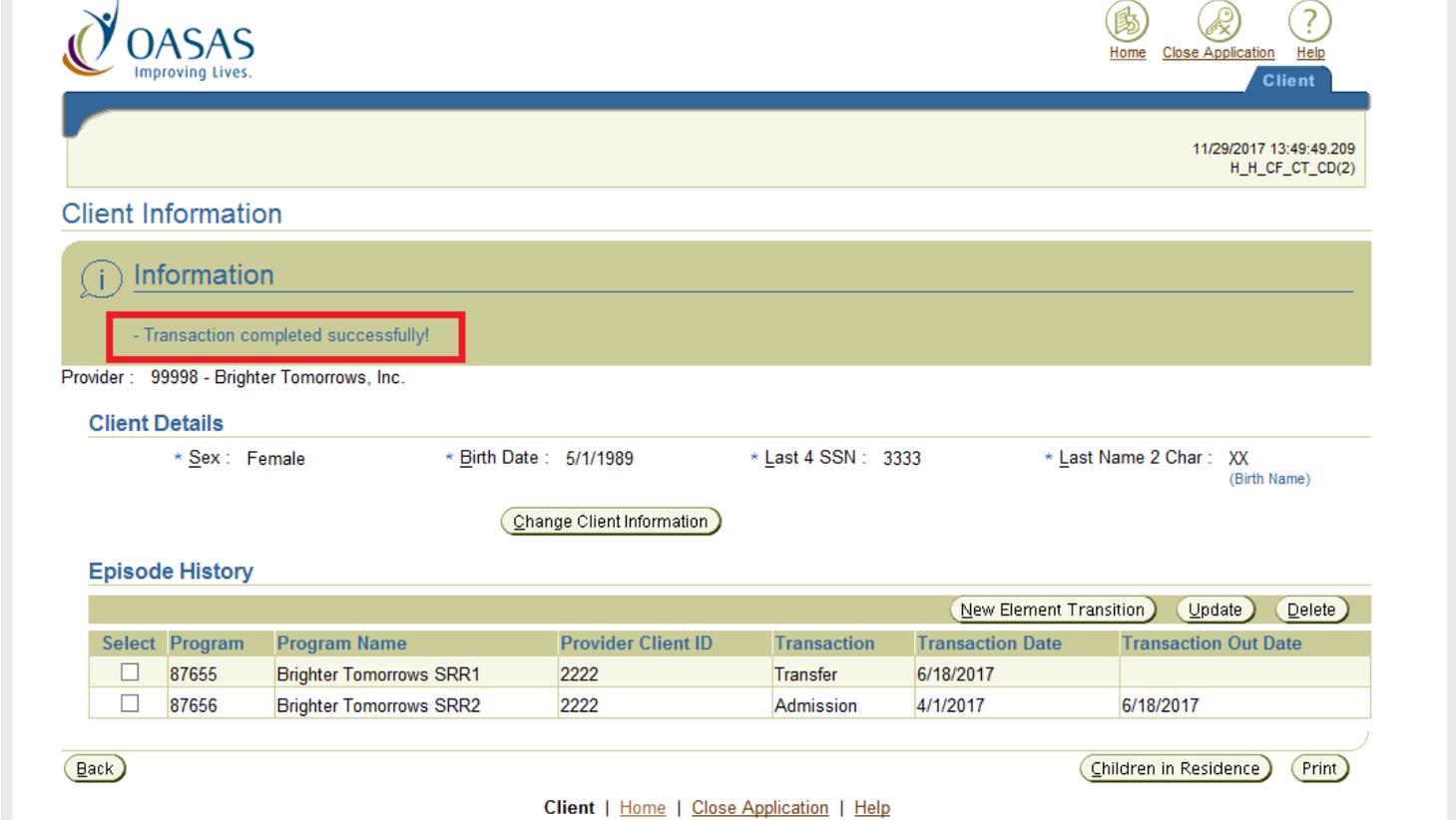
Delete an Existing Transaction

Step	Instructions	Image
10	Now, click the <b>Delete</b> button to delete the selected transaction for that client.	 <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 links for 'Home', 'Close Application', and 'Help', along with a 'Client' tab. Below the navigation is a header bar with the date and time '11/29/2017 12:09:05.934' and the user ID 'H_H_CF_CT_CD'. The main content area is titled 'Client Information' and shows the provider as '99998 - Brighter Tomorrows, Inc.'. Under 'Client Details', there are fields for Sex (Female), Birth Date (5/1/1989), Last 4 SSN (3333), and Last Name 2 Char (XX). A 'Change Client Information' button is located below these details. 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 first row is selected with a checkmark. Above the table are buttons for 'New Element Transition', 'Update', and 'Delete', with the 'Delete' button highlighted in red. At the bottom of the page, there are 'Back', 'Children in Residence', and 'Print' buttons, and a footer with 'Client   Home   Close Application   Help'.</p>

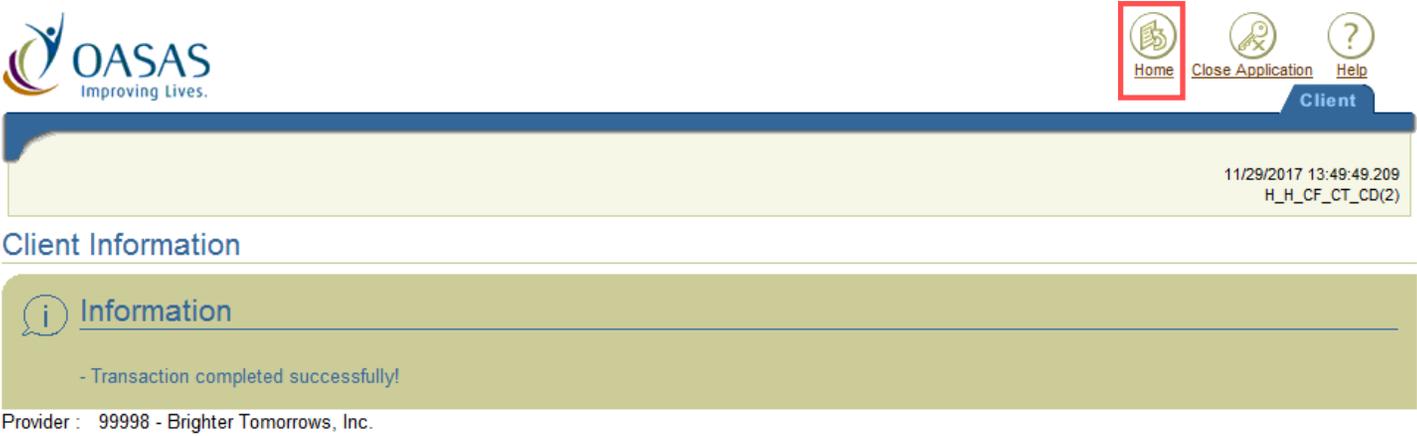
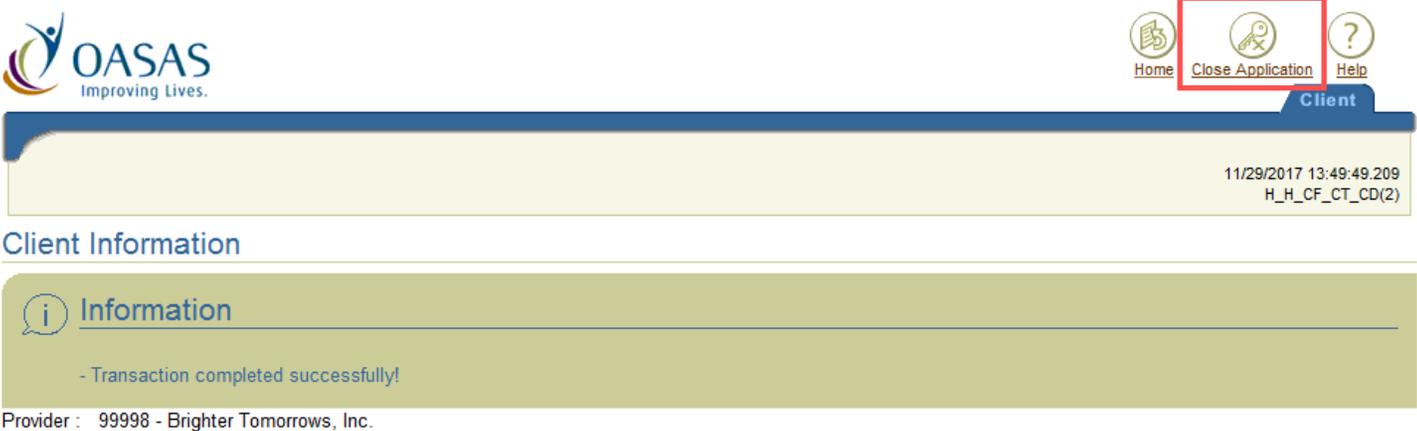
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11	<p>A dialog box will pop up asking you to confirm that you want to delete the selected transaction record. You must click the <b>OK</b> button to confirm and continue.</p> <p>Alternatively, you can click <b>Cancel</b> to cancel the deletion process.</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. The main content area shows 'Client Information' for a provider '99998 - Brighter Tomorrows, Inc.'. A 'Message from webpage' dialog box is overlaid on the page, asking for confirmation to delete a record. The 'OK' button in the dialog box is highlighted with a red rectangle. Below the dialog box, there is a table titled 'Episode History' with columns for 'Select', 'Program', 'Program Name', 'Provider Client ID', 'Transaction', 'Transaction Date', and 'Transaction Out Date'. The first row is selected, and the 'Delete' button is visible next to it.</p> <table border="1" data-bbox="667 727 1927 846"> <thead> <tr> <th>Select</th> <th>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 checked="" type="checkbox"/></td> <td>87655</td> <td>Brighter Tomorrows SRR1</td> <td>2222</td> <td>Discharge</td> <td>6/18/2017</td> <td>6/18/2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>87655</td> <td>Brighter Tomorrows SRR1</td> <td>2222</td> <td>Transfer</td> <td>6/18/2017</td> <td>6/18/2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>87656</td> <td>Brighter Tomorrows SRR2</td> <td>2222</td> <td>Admission</td> <td>4/1/2017</td> <td>6/18/2017</td> </tr> </tbody> </table>	Select	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	<input checked="" type="checkbox"/>	87655	Brighter Tomorrows SRR1	2222	Discharge	6/18/2017	6/18/2017	<input type="checkbox"/>	87655	Brighter Tomorrows SRR1	2222	Transfer	6/18/2017	6/18/2017	<input type="checkbox"/>	87656	Brighter Tomorrows SRR2	2222	Admission	4/1/2017	6/18/2017
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Step	Instructions	Image
12	<p>Once the transaction has been deleted, you will see the “Transaction completed successfully” message.</p> <p>Notice also in this example that the deleted Discharge transaction has been removed from the screen and is, therefore, gone from the database.</p> <p>NOTE: When deleting an existing transaction, ensure that the proper transaction is being deleted. An error message will occur if one transaction in a sequence is deleted. For example, a discharge will need to be deleted prior to deleting the corresponding admission.</p>	 <p>The screenshot shows the OASAS web interface. At the top left is the OASAS logo with the tagline "Improving Lives.". At the top right are navigation links for Home, Close Application, and Help, along with a "Client" tab. The main content area is titled "Client Information" and contains an "Information" section with a message: "- Transaction completed successfully!". Below this, the "Client Details" section shows fields for Sex (Female), Birth Date (5/1/1989), Last 4 SSN (3333), and Last Name 2 Char (XX). An "Episode History" table is also visible, listing two transactions: a Transfer on 6/18/2017 and an Admission on 4/1/2017.</p>

Delete an Existing Transaction

Step	Instructions	Image
<p><b>13</b></p>	<p>To return to the “<i>CDS Home</i>” page to perform a different task, you must click the <b>Home</b> button at the top of the page.</p>	 <p>The screenshot shows the OASAS application interface. At the top right, there are three navigation buttons: 'Home', 'Close Application', and 'Help'. The 'Home' button is highlighted with a red rectangular box. Below the navigation bar, the text 'Client' is visible. The main content area displays 'Client Information' and an 'Information' section with the message '- Transaction completed successfully!'. At the bottom, it shows 'Provider : 99998 - Brighter Tomorrows, Inc.'.</p>
<p><b>14</b></p>	<p>Once you are finished deleting the transactions as needed, 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 application interface, identical to the previous one. In this screenshot, the 'Close Application' button at the top right is highlighted with a red rectangular box. The rest of the interface, including the 'Client Information' and 'Information' sections, remains the same.</p>