"Delete an Existing Transaction" User Guide

Summary

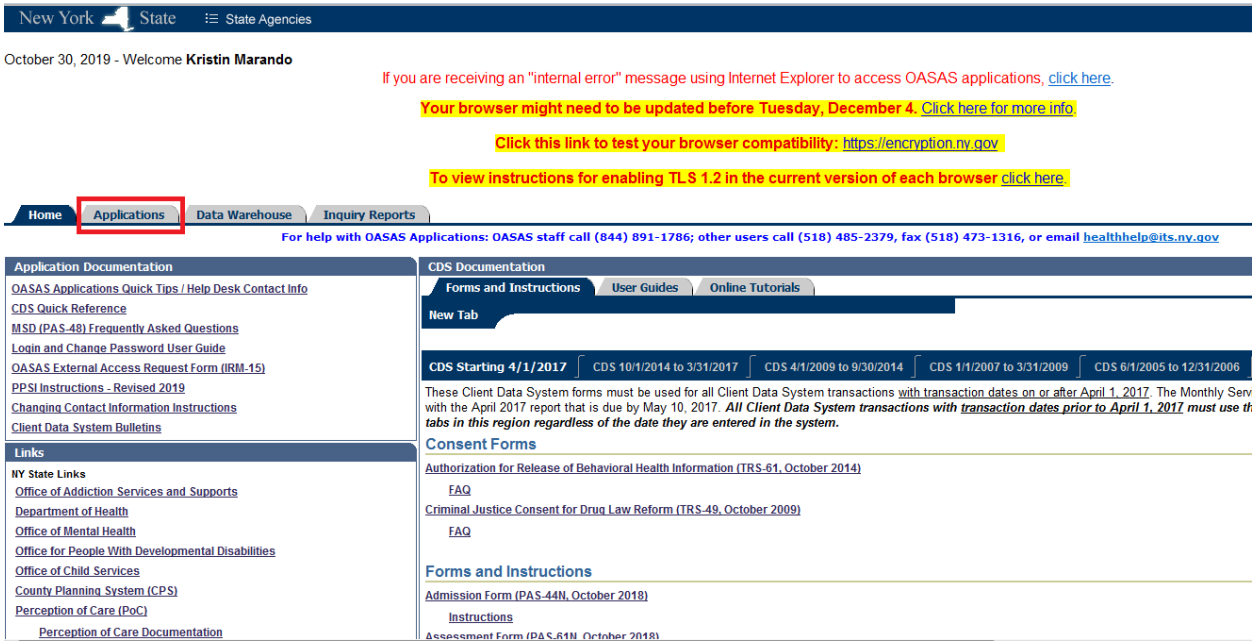
NOTE: Due to the dynamics of state government and the changing needs for the OASAS CDS (Client Data System), some items in this tutorial might have been removed from the live CDS. Similarly, some new items may appear in the live system that are not reflected in this tutorial. To find the most updated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

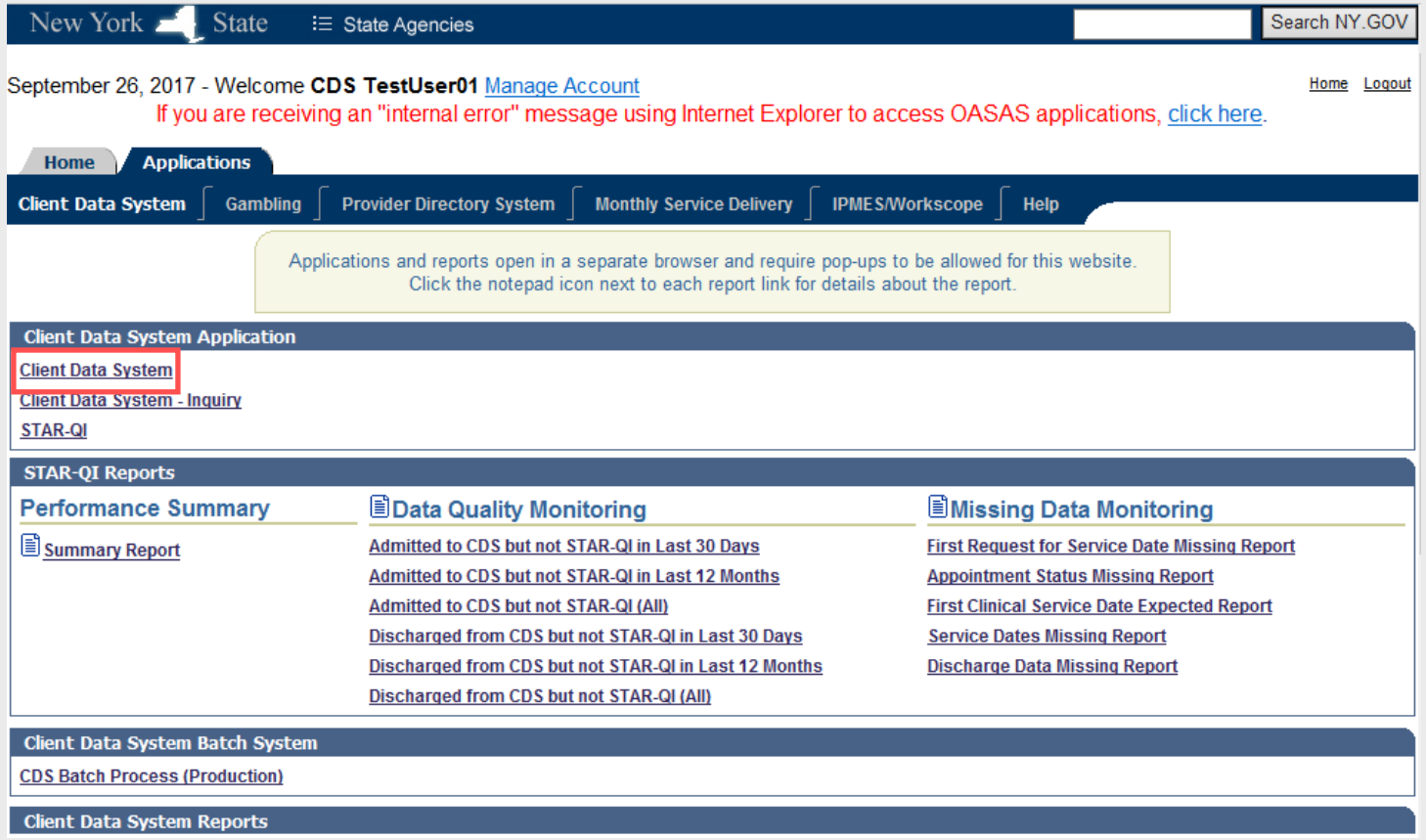
This User Guide will show the user how to delete an existing transaction in the Client Data System (CDS) for an existing client.

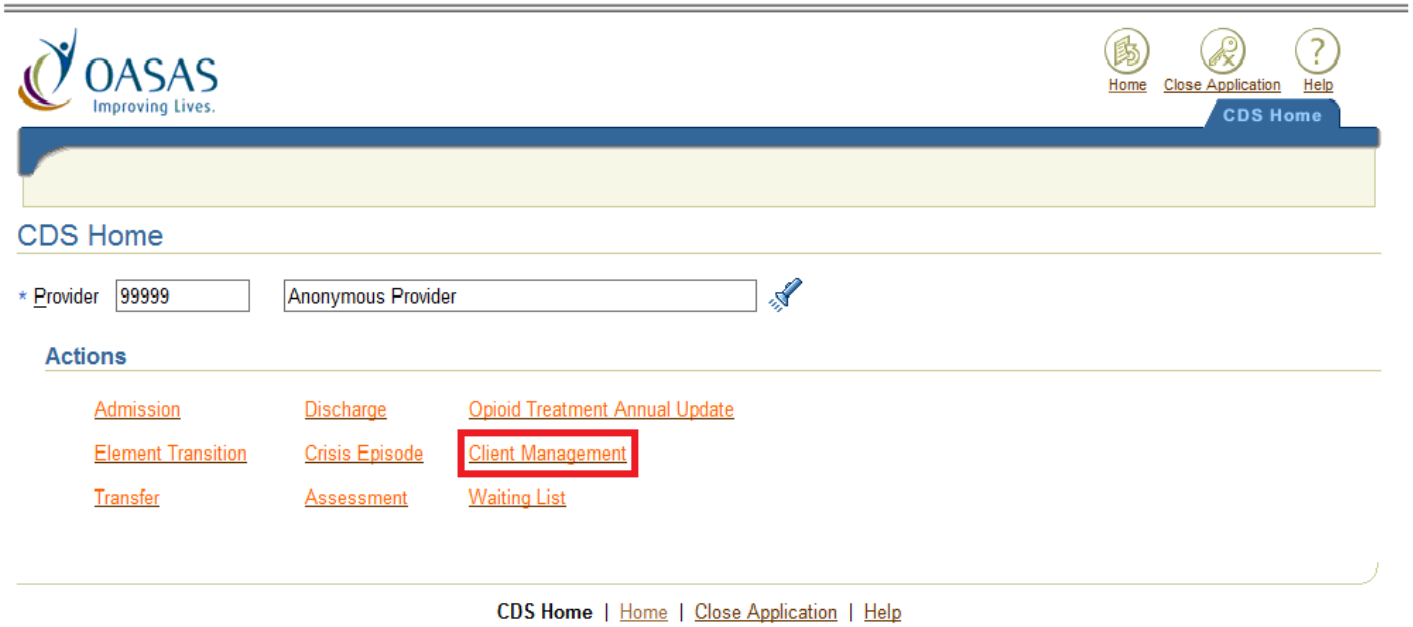
Any deleted transactions are permanently removed from the database. There is no way to retrieve these data.

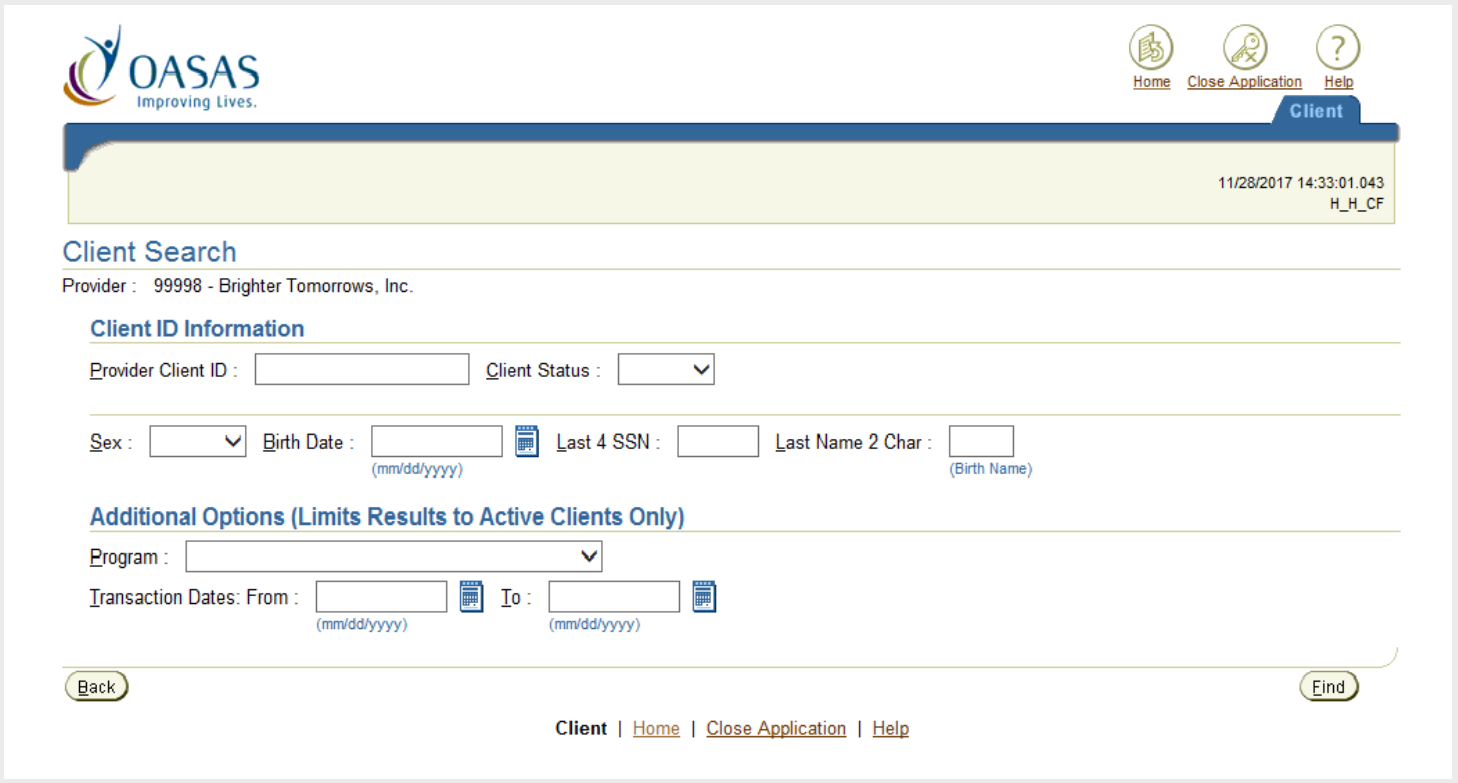
NOTE: You will need to be logged into the OASAS Client Data System application to follow this user guide. For more information on logging into the OASAS Client Data System application, please review the Login and Change Password Tutorial or User Guide on the OASAS Applications site, located at https://apps.oasas.ny.gov.

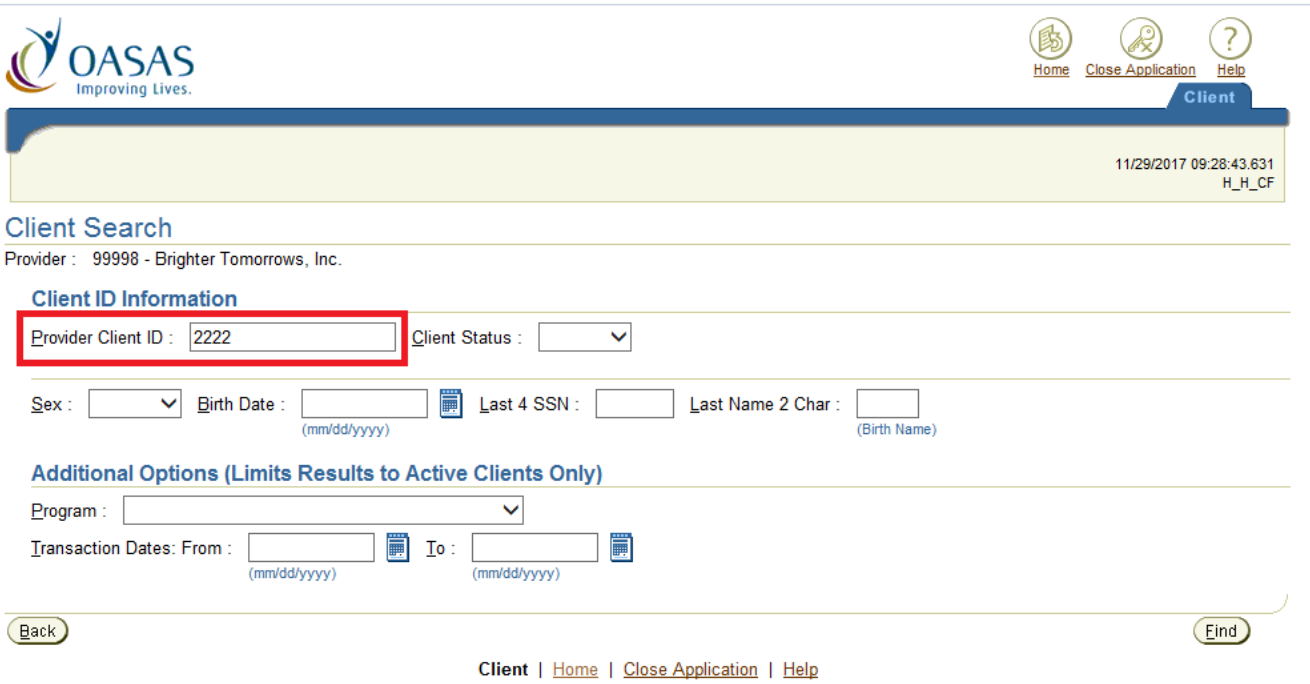
Open the CDS Application

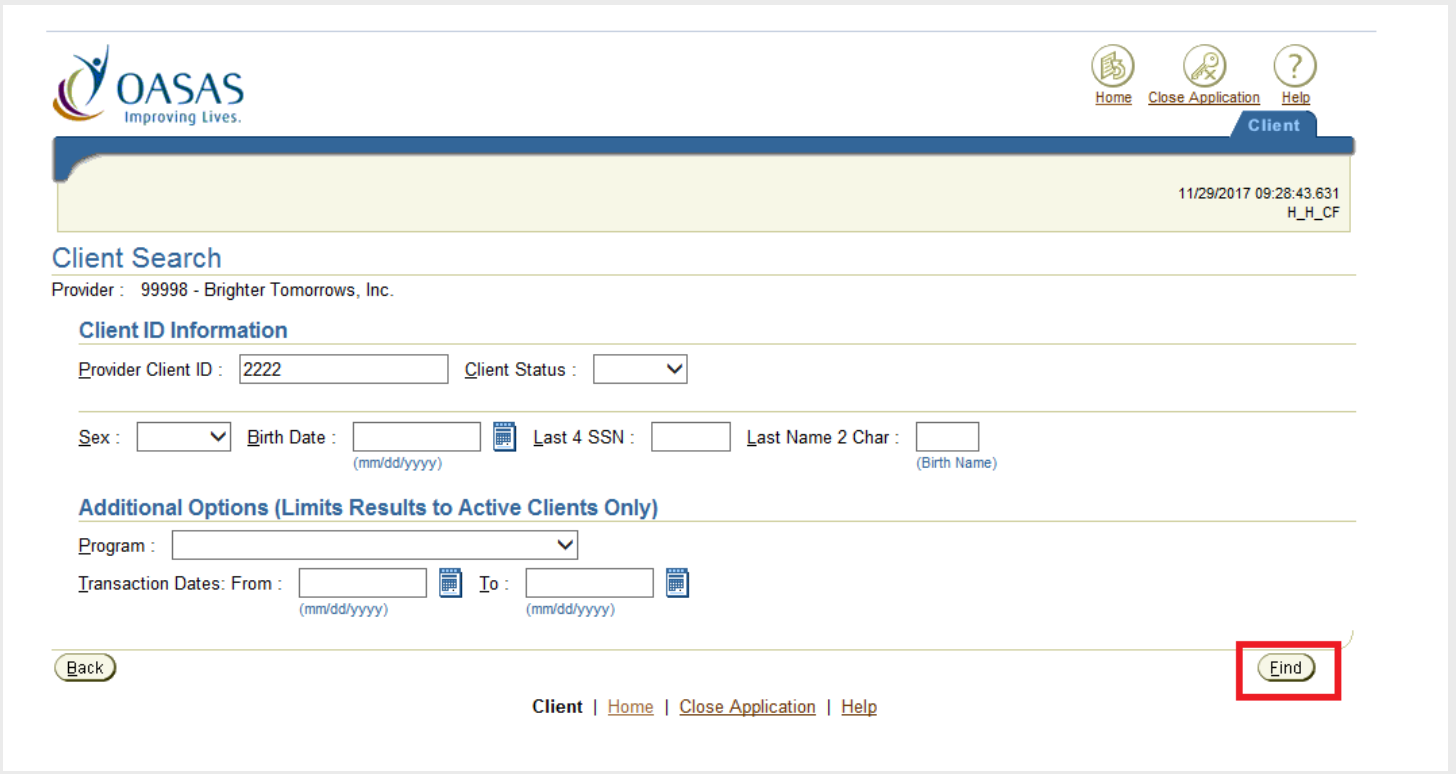
Step	Instructions	Image
1	After you log into the OASAS Applications, you will be taken to the *OASAS Applications* page. To access OASAS Applications, you will click the **Applications** tab.	

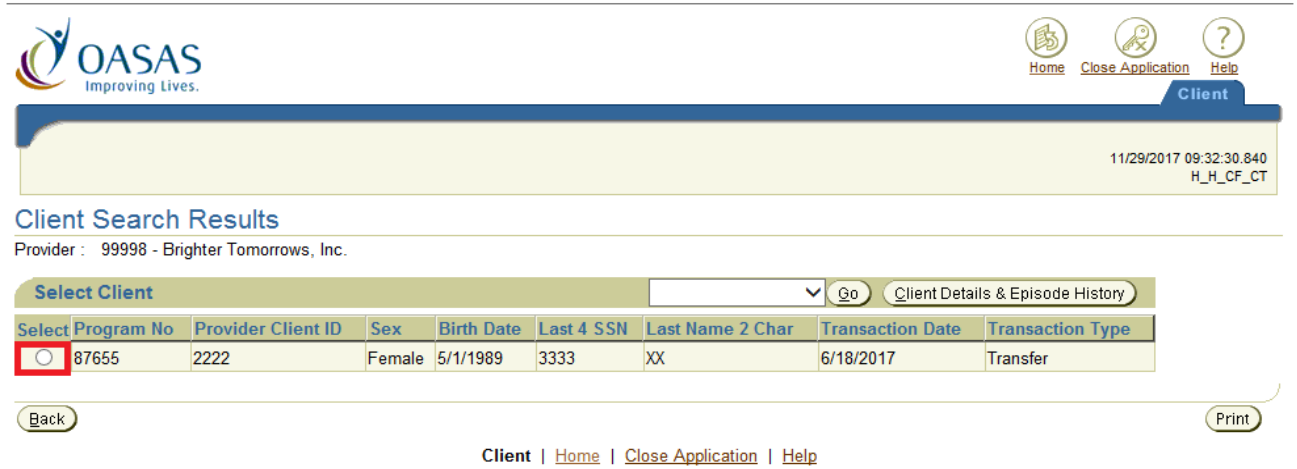
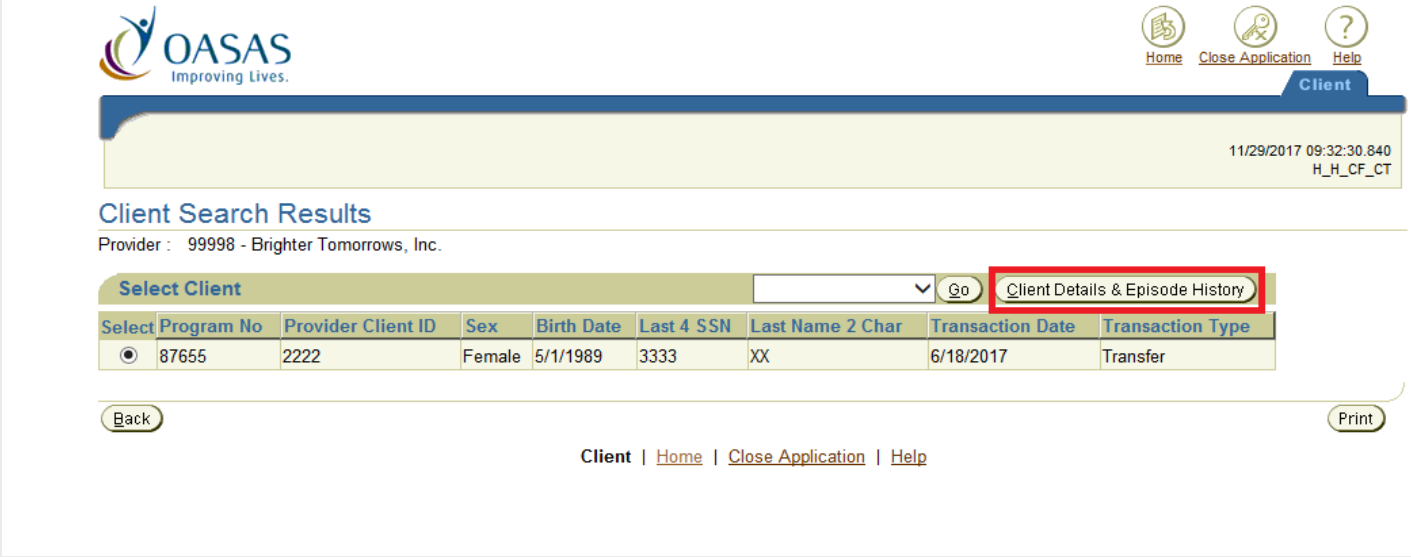
Step	Instructions	Image
2	To open the CDS Application, click the **Client Data System** link to go to the "*CDS Home*" page.	

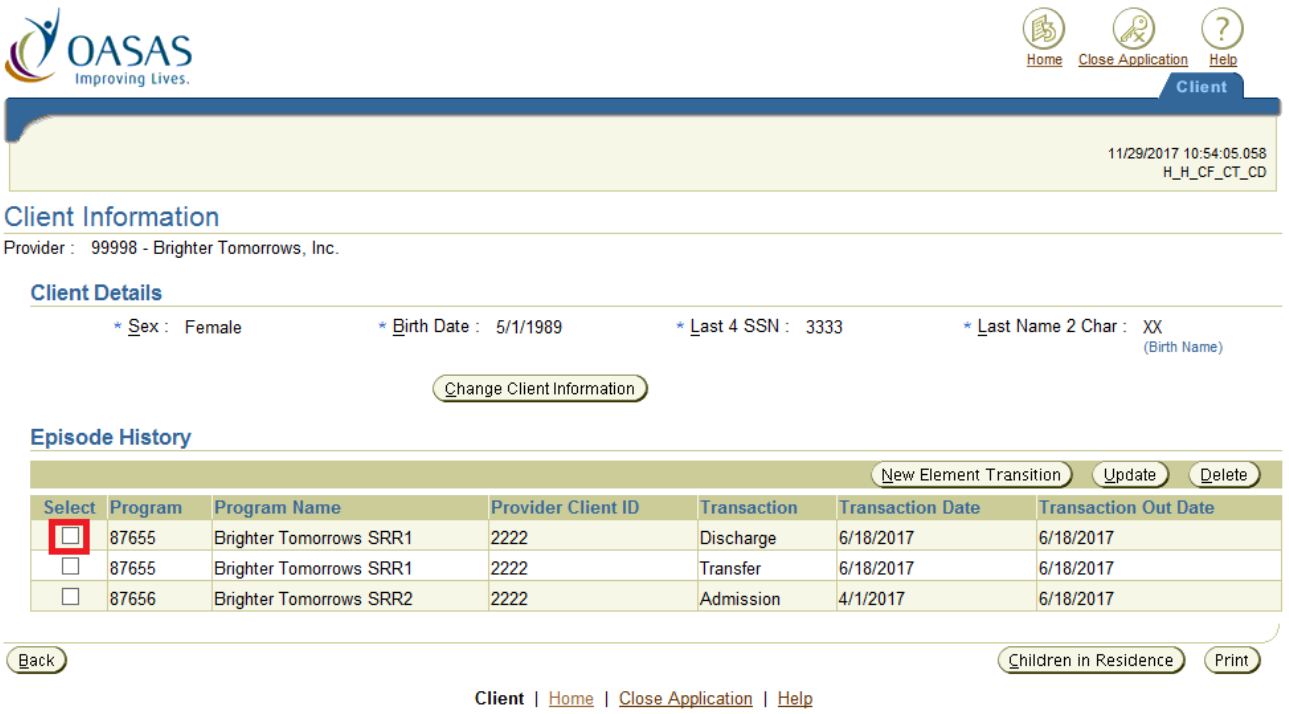
Step	Instructions	Image
3	This is the "*CDS Home*" page. From here you can choose any of the links available under the "Actions" section. To delete an existing transaction, you will first need to click the **Client Management** link to open the "*Client Search*" page.	

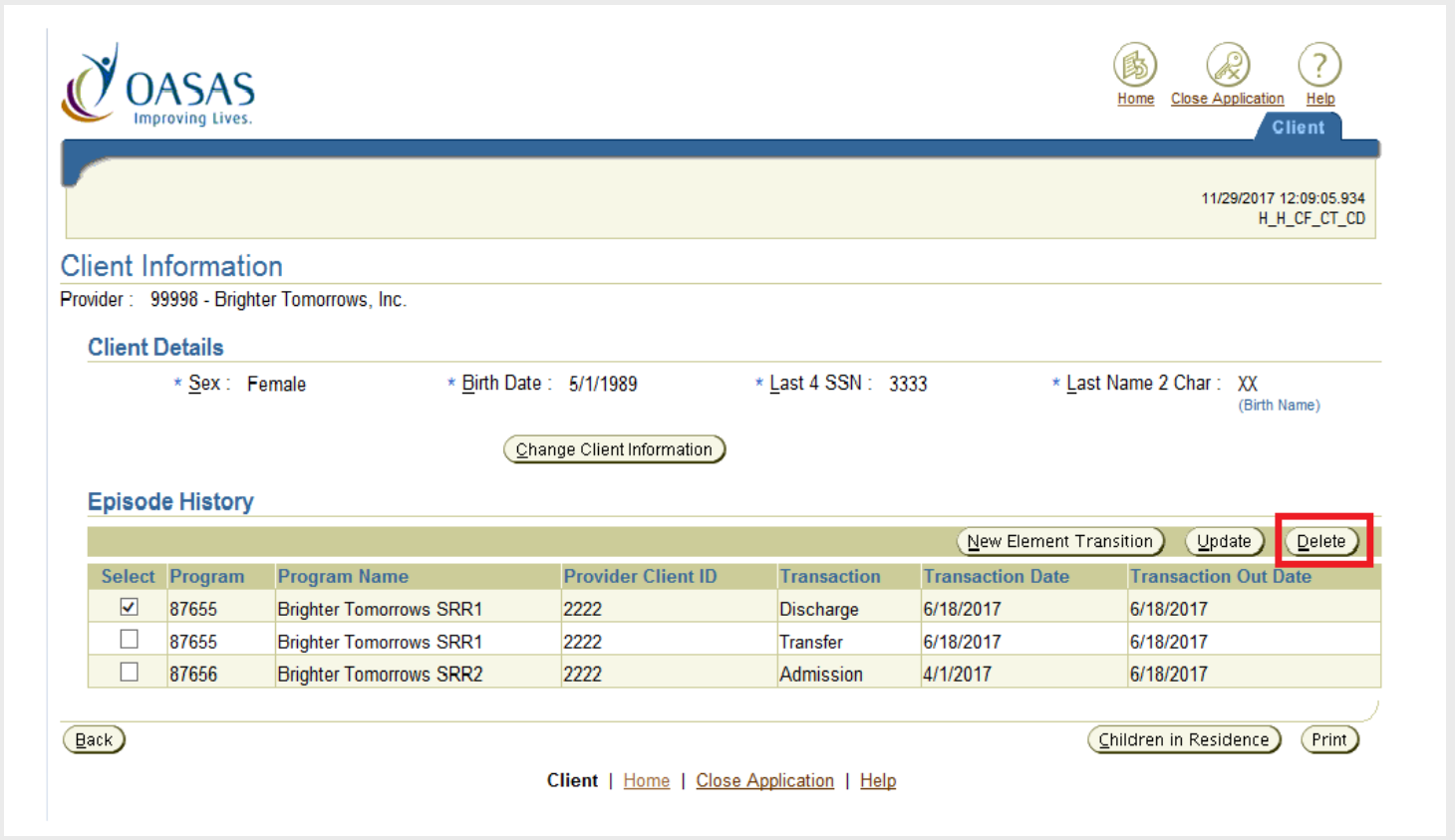
Step	Instructions	Image
4	Here you see the "*Client Search*" page, where you can enter specific search criteria to return one client record or a list of clients meeting the selected criteria. Leaving all search criteria blank will return all clients for the provider (past and present). For more details on how to search for a client, see the "Enter Transactions from Client Management and Change Provider ID or Tracking ID" User Guide.	

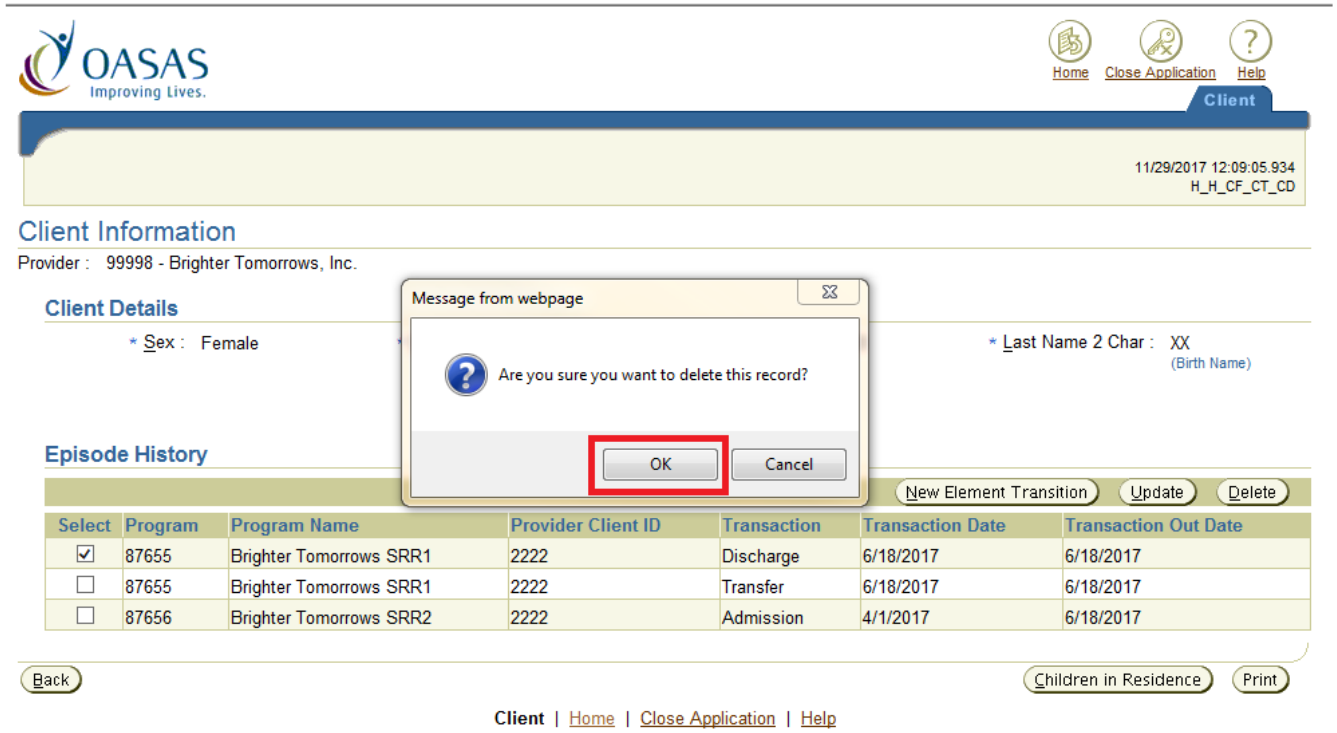
Step	Instructions	Image
5	In the "*Client Search*" page, it is first necessary to enter any applicable search criteria. In this User Guide example, search criteria entered for a specific client was limited to one criterion field (i.e., Provider Client ID) and all other fields were left blank. This field, Provider Client ID, is a unique client identification number assigned to the client by the program.	

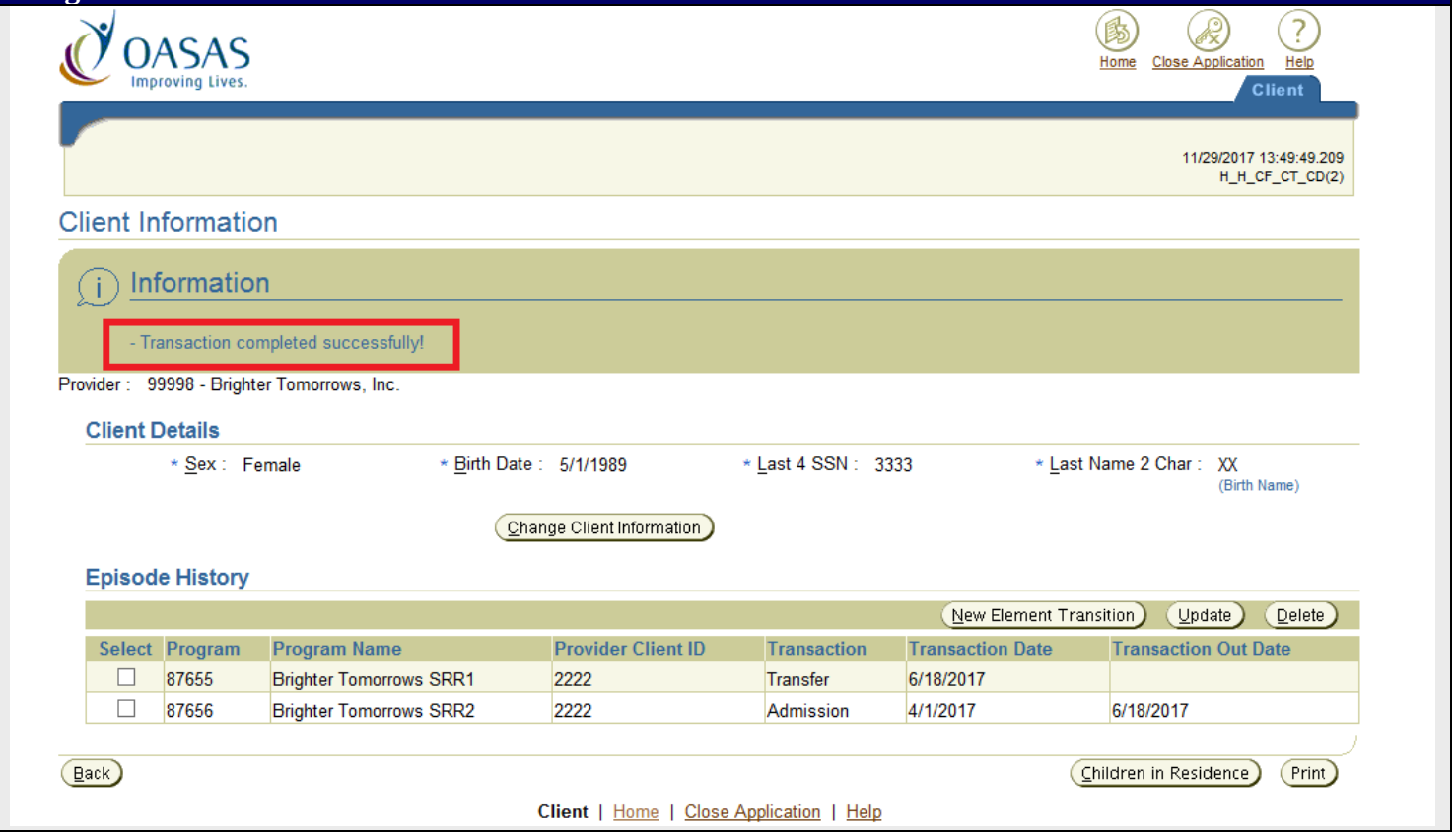
Step	Instructions	Image
6	Next, you must click the **Find** button to view the "*Client Search Results*" page.	

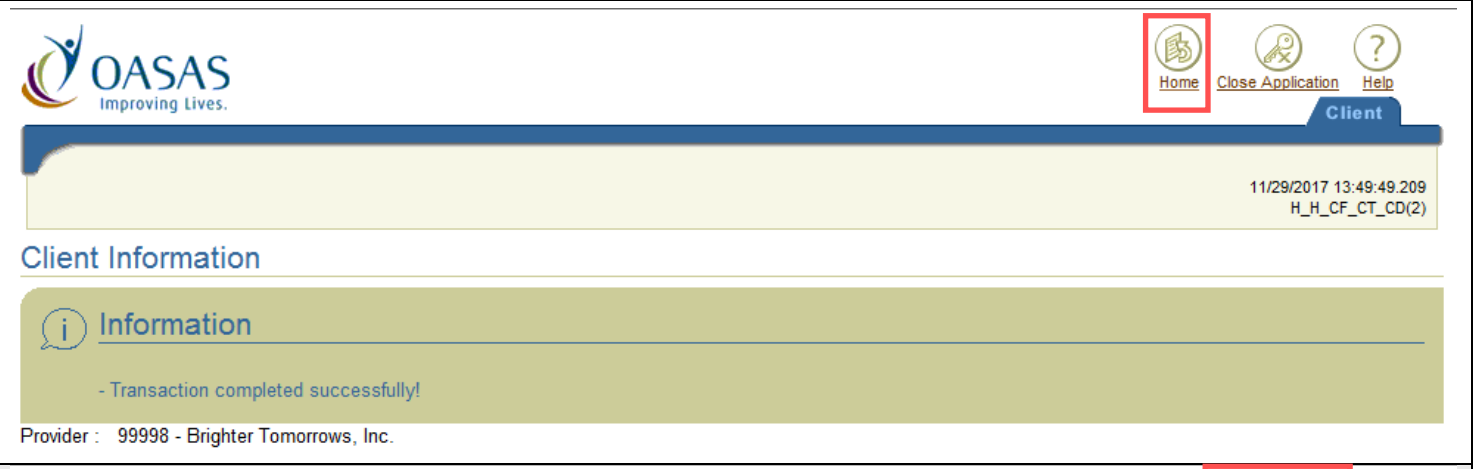
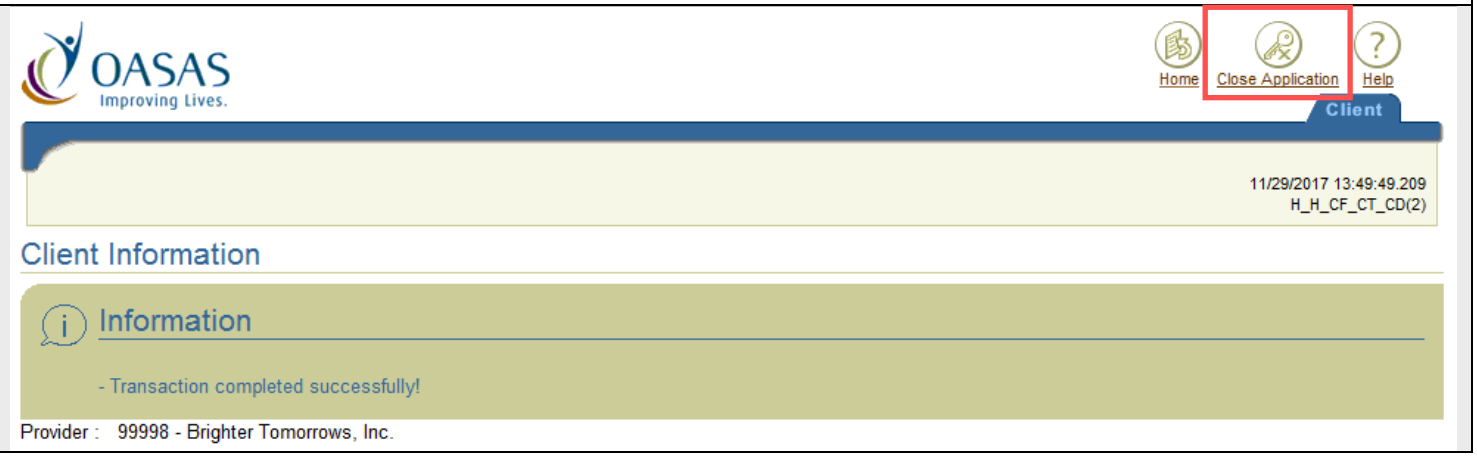
Step	Instructions	Image
7	You now see the "*Client Search Results*" page. Here you must select one client using the radio button, even though this is the only client listed in this example. This is because we limited the search by using very specific criteria (i.e., a unique client ID number). Otherwise, there is usually a list of clients shown. Click the **radio button** (○) in the "Select" column next to the client whose transaction you want to delete.	
8	Next you must click on the **Client Details & Episode History** button to open the "*Client Information*" page for that selected client. It is in the upper right corner of the "*Client Search Results*" page next to the **Go** button. This will then open the "*Client Information*" page.	

Step	Instructions	Image
9	Here you see the "*Client Information*" page. Next, you must pick the transaction you want to remove. For this User Guide example, you will be deleting the client's Discharge transaction. To delete a transaction, click the **check box** (☐) in the "Select" column to select the appropriate transaction for that client. In this example, the Discharge transaction, located in the top row, is selected for deletion.	

Step	Instructions	Image
10	Now, click the **Delete** button to delete the selected transaction for that client.	

Step	Instructions	Image
11	A dialog box will pop up asking you to confirm that you want to delete the selected transaction record. You must click the **OK** button to confirm and continue. Alternatively, you can click **Cancel** to cancel the deletion process.	

Step	Instructions	Image
12	Once the transaction has been deleted, you will see the "Transaction completed successfully" message. Notice also in this example that the deleted Discharge transaction has been removed from the screen and is, therefore, gone from the database. 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.	

Step	Instructions	Image
13	To return to the "*CDS Home*" page to perform a different task, you must click the **Home** button at the top of the page.	
14	Once you are finished deleting the transactions as needed, you can return to the *OASAS Applications* page by clicking on the **Close Application** button to exit the application.