

# **CMS Net**

# **Patient ID**

## Table of Contents

---

<b>Table of Contents</b>	<b>ii</b>
<b>Legend</b>	<b>iii</b>
<b>Patient Identification within CMS Net</b>	<b>1</b>
<b>Patient Identification within CMS Net</b>	<b>1</b>
<b>What is the search criteria?</b>	<b>1</b>
<b>Patient Identification Screen</b>	<b>2</b>
<b>How do I access the Patient Identification screen?</b>	<b>2</b>
<b>Patient Identification Screen</b>	<b>4</b>
<b>Field Descriptions and Requirements.</b>	<b>6</b>
<b>Data Entry Steps</b>	<b>8</b>
<b>Search by one or more the following: Patient Name, Date of Birth, Gender, Current Legal County</b>	<b>10</b>
<b>Standard Patient Identification Pick List</b>	<b>11</b>
<b>If no patient is found</b>	<b>12</b>
<b>If one patient is found</b>	<b>16</b>
<b>If patient displayed is correct</b>	<b>18</b>
<b>If patient displayed is not correct</b>	<b>18</b>
<b>If more than one patient is found</b>	<b>20</b>
<b>Cancel Patient Identification</b>	<b>23</b>
<b>To Select the Same Patient</b>	<b>24</b>
<b>To Select a New Patient</b>	<b>24</b>

---

**Legend**

In procedures on the following pages you will see various symbols used.

- The arrow indicates a content note.



## Patient Identification within CMS Net

---

### Patient Identification within CMS Net

Each time you access a particular function in CMS Net, you must select the patient record you want to work with. The Patient Identification screen allows several ways to select a patient.

---

### What is the search criteria?

A patient can be identified using the following:

- Patient Name; and/or
  - Birth date and/or Gender; and/or
  - Current Legal County (Registration Display Only)
  - California Children's Services (CCS) Number; or
  - Client Index Number (CIN); or
  - Social Security Number.
  - Primary Addressee
- 

➤ Once you have selected a specific patient, using one or more of the above identifiers, and have not left CMS Net or selected another patient, the name will always default to the original patient selected.

---

➤ **The CIN is a permanent part of the CMS Net patient record and cannot be deleted by the user.** It can be linked to another Statewide Client Index (SCI) record. If a duplicate SCI record/CIN is created, send the duplicate record information to the System Administrator via Mailman. Only an SCI Administrator can delete a CIN number.

---

*continued on next page*

**Patient Identification within CMS Net, Continued**

---

**Patient Identification Screen**

The Patient Identification screen is used to select a patient record from the option you selected (e.g., Narrative Entry/Edit).

---

**How do I access the Patient Identification screen?**

Any function in which a patient's case is affected, the Patient ID screen will appear (CMSPI-10), regardless of what menu option is selected.

- You will reach the Patient ID screen via the most menu options.



**Patient  
Identification  
Screen**

After pressing <Enter>, the Patient ID screen is displayed:

CMSNET	PATIENT IDENTIFICATION	CMSPI-10
<hr/>		
Enter one of the following identifiers:		
CCS Number:		
Pt Name:	Birthdate:	
Current Legal County: <i>(Registration Display only)</i>		Gender:
Client Index Number:		
Social Security Number:		
Primary Addressee:		



**Patient Identification within CMS Net, Continued**

**Field Descriptions and Requirements.**

The following is a table, which describes the fields and defines the requirements used in Patient Identification.

<b>Field</b>	<b>Description and Requirements</b>
CCS#	Enter CCS#, if known <ul style="list-style-type: none"> <li>• No other data required if this field is entered.</li> </ul>
Patient Name	LASTNAME APP, FIRSTNAME MI <ul style="list-style-type: none"> <li>• No other data required if this field is entered but if you choose to further refine your search criteria, you may use Date of Birth and/or Gender</li> <li>• Hints:                             <ul style="list-style-type: none"> <li>• You can type 2 letters of LASTNAME, comma, 2 letters of FIRSTNAME (helps to find names with a variety of spellings).</li> <li>• Asterisks are <b>NOT</b> allowed for search.</li> <li>• Periods are not allowed in a name.</li> <li>• Hyphens and apostrophes are acceptable.</li> <li>• When searching names, be sure to account for potential duplicate entries; e.g., Gonzalez, Gonzales, Gonsales</li> <li>• Appellations (e.g., JR) are typed after the LASTNAME and before the comma; e.g., HARPER JR, HOWARD R.</li> </ul> </li> </ul>
Date of Birth	MM/DD/YYYY or MM-DD-YYYY <ul style="list-style-type: none"> <li>• Examples are 1/1/1998 or 1-1-1998</li> <li>• If a 2-digit year is entered, the system will assume it is in the 1900s.</li> <li>• It is not necessary to enter leading zeroes.</li> </ul>
Gender	(M)ale or (F)emale, <ul style="list-style-type: none"> <li>• You must enter date of birth if you want to search on this field.</li> </ul>
CIN	Enter Client Index Number, if known <ul style="list-style-type: none"> <li>• No other data required if this field is entered.</li> </ul>
Social Security Number	NNN-NN-NNNN or NNNNNNNNNN <ul style="list-style-type: none"> <li>• Examples are 624-92-7555 or 624927555</li> <li>• No other data required if this field is entered.</li> </ul>
Primary Addressee	<ul style="list-style-type: none"> <li>• See instruction in Patient Search.</li> </ul>



**Patient Identification within CMS Net, Continued**

Field	Description and Requirements
Current Legal County	<p>This field displays only on the <b>Registration Display Patient Identification</b> screen</p> <ul style="list-style-type: none"> <li>• Patient Name and/or Date of Birth fields must be populated in combination with the Currently Legal County. If the Patient Name or Date of Birth is not populated the field will be bypassed.</li> <li>• Partial county name can be entered.</li> </ul>

**Data Entry Steps**

The following steps begin the search for a patient on CMS Net:

Step	Action
1	<p>Enter any one of the following sets of information into the Patient Identification Screen:</p> <ul style="list-style-type: none"> <li>• Patient Name (in upper case letters with no spaces between characters), <b>AND/OR</b></li> <li>• Birthdate <b>AND/OR</b> Gender, <b>AND/OR</b></li> <li>• Current Legal County (Registration Display only)</li> <li>• CCS Number, <b>OR</b></li> <li>• Client Index Number <b>OR</b></li> <li>• Social Security Number</li> </ul>
2	Press < Enter>.

- To move from one field to the next, press the **<down arrow>** key. To go back to a previous field, press the **<up arrow>** key.





Patient Identification within CMS Net, Continued

**Standard Patient Identification Pick List**

The data is from the most recent program eligibility period, regardless of the Patient Registration case status. It will be used on all patient identification screens *except* Edit/Duplicate Bad Record.

A patient may have one or more alias names The system will indicate if the name searched is [A] Alias or [B] Birth Name.

The example below displays with an Alias identifier [A].

**Alias**

```

Select Patient:
( ) WRONG,KID           Gender: M DOB: 08/06/1999      [A]
CCS#: 3266639 CIN: 90003945D 2  Legal County: SAN LUIS OBISPO
Reg=ACT Med=E F/R=E Pgrm End Dt: 12/31/1999  CCS Elig Stat:9R-HF;Over CCS
[More] [Previous] [Quit]
    
```

Below is an example of the Edit/Duplicate Bad Record pick list. It displays with a Birth Name identifier [B].

**Birthname**

```

Select Patient:
( ) WRONG,KID           Gender: M DOB: 08/06/1999      [B]
CCS#: 3266639 CIN: 90003945D 2  Legal County: SAN LUIS OBISPO
Reg=ACT Med=E F/R=E Pgrm End Dt: 12/31/1999  CCS Elig Stat: 9R- HF;Over CCS
Record Status= Dup of 3298654
[More] [Previous] [Quit]
    
```

*Continued on next page*

Patient Identification within CMS Net, Continued

---

4 After the User presses <Enter>, there are several options, which could happen. Each one will be described in the following pages.

- If no patient is found
  - If one patient is found
  - If patient displayed is correct
  - If patient displayed is incorrect
  - If more than one patient is found
  - To select a new patient
- 

**If no patient is found** If no patient is found, the following message will appear:

---

Patient not found or selected on CMS Net  
(?) Press Enter

**Patient Identification within CMS Net, Continued**

<b>Step</b>	<b>Action</b>
1	Press <Enter>. 4The cursor returns to the first field in <i>Pt. Name</i> .

After receiving “Patient not found or selected on CMS Net” message:

<b>Step</b>	<b>Action</b>
1	Press Action Menu key. PC = F2 The following drop down prompt would appear.

<p>Select One:</p> <p>( ) New Patient</p> <p>( ) Return Menu</p> <p>_____</p> <p>[Quit]</p>
---

*Continued on next page*

Patient Identification within CMS Net, Continued

---

Step	Action
1	Press the <Up Arrow> key to <i>New Patient</i> (or type N).
2	Press <Enter>.

---

Select One:

**New Patient**

Return Menu

---

[Quit]

---

If Patient Registration option was selected, the SCI Search screen will appear.

- All patients on CMS Net now require a CIN. You cannot complete Patient Registration without first obtaining a CIN.
- 

Please refer to the Patient Identification within SCI section of this manual.



Patient Identification within CMS Net, Continued

---

If one patient  
is found

If one patient is found, the following will appear:

---

```
                Select Patient:

( ) WRONG,KID                               Gender: M DOB: 06/07/1991
CCS#: 3562686 CIN: 326596565A CL: 56Z00001 Legal County: VENTURA
Reg=ACT Med=E F/R=E Pgrm End Dt: 12/31/1999 CCS Elig Stat:9R-HF;Over CCS

_____

[Quit]
```

---

➤ You will have two (2) options with this information:



Patient Identification within CMS Net, Continued

---

**If patient displayed is correct**

If the patient displayed is the correct one, do the following:

---

<b>Step</b>	<b>Action</b>
1	Move Cursor with <up arrow> key to the ( ) in front of the <i>Patient Name</i> .
2	Press <Enter>.

---

**If patient displayed is not correct**

If the patient displayed is not the correct one, do the following:

---

<b>Step</b>	<b>Action</b>
1	With the Cursor on Quit.
2	Press <Enter>.



Patient Identification within CMS Net, Continued

If more than one patient is found

If more than one patient is found, a pick list will appear.  
For example:

```
                                Select Patient:
( ) VENTURA,TEN                      Gender: F DOB: 07/07/2001
   Case# T661983 CIN: 36218932A 8 CL: 560005 Lgl county: VENTURA
   Reg=PEN Med= F/R=
( ) VENTURA,THEODORE                  Gender: M DOB: 12/07/1999 [A]
   Case# 2567591 CIN: 95189495D 6 CL: 34BLUE Lgl county: SACRAMENTO
   Reg=ACT Med=E F/R=E Pgrm End Dt:01/18/2010 Aid code: 9N M/C only
( ) VENTURA,THIRTEEN                  Gender: F DOB: 03/03/2009
   Case# T661986 CIN: 37838932A 1 CL: 560008 Lgl county: VENTURA
   Reg=PEN Med= F/R=
( ) VENTURA,THIRTEEN                  Gender: M DOB: 08/31/2009
   Case# T661987 CIN: 36938932A 3 CL: 560002 Lgl county: VENTURA
   Reg=PEN Med= F/R=
( ) VENTURA,THREE                      Gender: F DOB: 09/30/2008
   Case# T661976 CIN: 39018932A 3 CL: 560003 Lgl county: VENTURA
   Reg=PEN Med= F/R=

                                [MORE] [QUIT]
```

Continued on next page

Patient Identification within CMS Net, Continued

---

To select the correct patient:

---

Step	Action
1	Press the <Up Arrow> key to move the cursor to the ( ) in front of the <i>Patient Name</i> .
2	Press <Enter>.

---

To see more selections, do the following:

---

Step	Action
1	Place the cursor (highlight) on [MORE].
2	Press <Enter>. The next selections will appear.

- 
- After you select a patient, the appropriate screen will appear for the option you are in.



**Patient Identification within CMS Net, Continued**

---

To quit without selecting any patients from the pick list, do the following:

---

<b>Step</b>	<b>Action</b>
1	Move the cursor (highlight) to [QUIT].
2	Press <Enter>.

---

**Cancel Patient Identification**

To cancel (or “escape”) from the Patient Identification screen, do the following:

---

<b>Step</b>	<b>Action</b>
1	Press Shift and F2 at the same time

---

When you return to the Patient Identification screen, the patient name that was last selected will appear.

---

*Continued on next page*

**Patient Identification within CMS Net, Continued**

---

**To Select the Same Patient**

To select the same patient, just press <enter>.

- Important note to remember. Until you delete that Patient Name and reenter a new one or logoff CMS Net, that Patient Name is what you will access as you continue working within CMS Net.
- 

**To Select a New Patient**

To select a new patient, press <F7> to clear the patient name field, then type in the new information.

---

- The last patient information will continue to appear until you logoff CMS Net or enter a new patient's name.
- 

You have completed searching CMS Net to identify your patient.



**NOTES**

---

*This page intentionally left blank for User notes.*