### THEO Release Notes for Babies First! and CaCoon Programs, 5/16/2022

Changes will appear in the THEO database on Monday, 5/16/2022. Below are descriptions of the changes. Please contact <u>theo.support@dhsoha.state.or.us</u> if you have any questions or comments.

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## **New Features and Improvements**

### 1. New THEO login page

The website address for THEO has changed. Please log in from the new website address. Remember to update any saved bookmarks and desktop icons.

New! THEO Login Page – https://clara-oregon.vistalogic.net/

### 2. New and simpler way to enroll new clients in a family's Case ("Add Member")

THEO has a new and simpler way to enroll another family/household member into an existing Case. Instead of adding a New Application from the Care Menu, you may select "Add Member" from any other family member's Care Plan. Once someone in a family has enrolled in a program, anyone else from the same family/household who enrolls in the same program, can be added from the other family member's Care Plan.

You may continue to enroll new members into a family's Case the old way, but the new method offers some advantages.

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- You don't have to remember to add the caregiver first on the New Application. "Add Member" opens an Application with the caregiver already included. You add only the new client(s).
- It is faster than the old method.

The most common reason for adding a new client to a Case is enrolling a newborn after a mother's prenatal enrollment. Other common reasons to add a new family member to a Case include changing the caregiver in a Case or enrolling additional children.

THEO TEST						azukowski, laura 🔹 🔳 🔹 🧐	
			😑 🚳 ZUKOWSKI, LI				
			•	S ACTIVE CARE PLANS		WORK ITEMS	
	Q	+				Convice Dequests Dending Deview	
Clients	Q	+	Zukowski,	TEST-0000203 : Acosta Testing, Adele 01/15/2022	6	Service Requests - Pending Approval 0	
Applications	Q	+	Laura	TEST-0000202 : Acosta Testing, Anna	Þ A	Service Requests - Pending Completion 0	
		۹	THEO TEST	01/15/2022		Referrals - Pending Review 0 Referrals - Pending Approval 0	
🖪 Enrollment Status		۹		TEST-0000206 : Brown, Angelo	Referrals - Pending Completion 0		
		۹		01/10/2022		Applications - Submitted <b>2</b>	
	۹	+	CLIENTS	TEST-0000204 : Brown, Danielle 06/30/2021	6 0	Enrollments - Expiring (0)	
👽 Care Plans		٩	11				
🖻 Cases	Q	+	CASES	TEST-0000217 : Client, Caregiver 09/01/2021	<b>D</b>		
Enrollments	٩	+	7	TEST-0000218 : FakeClient, Mama	<b>⊳</b> 0		

Open a Care Plan from the home visitor's dashboard by clicking on the Open icon.

Care Plan opens.

- Hold your cursor over the Gear/Daisy icon to open the Actions menu.
- Click on "Add Member".

							🚢 ZUKOWSKI, L	AURA 🔻 🗐 🔻 丨	9 0
😑 🕫 CARE PLAN TEST-		CLIENT, CAREGIVER - 09/						# • 🔅 •	٩
0	-	Care Plan 🛛 🙆	4				160 E	D History	+-
	☆	🚔 CASES 🥅				DEC 24	Pregnancy	<b>≵</b> Download	0
Client, Caregiver	a	▶ 6517758			¢	I T	▶ 6517755	Add Member	E dd Member
Born 3/22/1990 32 year old Female		🚯 ENROLLMENT 🥅				SEP 01	Client Survey	Complete	B
CARE PLAN 😻	0	Babies First!	START DATE 09/01/2021	4 Active	ø		<ul> <li>Babies First! and CaCoon - Every Visit Survey</li> </ul>	SURVEY DATE 09/01/2021	1 🥖
CLIENT O	ß	PREGNANCIES 🥅 🕂				SEP 01	Client Survey	Complete	В
CONTACT 🔳		▶ 6517755	BIRTH/END DATE 12/24/2021	Complete	¢		CaCoon - Caregiver Survey	SURVEY DATE <b>09/01/2021</b>	
CASE 🚔		🙆 CLIENTISSUES 🚍 📥	,,,,,,,,,,			SEP 01	Client Survey Babies First! and	Complete SURVEY DATE 09/01/2021	

The Application workflow opens.

- The caregiver or the other family member, who enrolled previously, is listed automatically at the top of the Application.
- Enter the new client's information in the fields along the left margin of the screen.
- Click on the orange Save & Continue button. Follow remaining instructions on the screen to complete the application.

Client, Caregiver	∲ Female   DOB: 03/22/1990   TEST-0000217
Add New Client Information or Q Select an Existing Client	
REQUIRED FIELDS	
Last Name	
First Name	
Middle Name	
Prefix	
Suffix	
	•
Save & Continue 🔶	

Additional changes have occurred in the Application workflow to simplify it. Both the old Add New Application method and the new Add Member method of enrollment have these improvements.

- Fewer steps! There is no longer a "Screening" step in the workflow. All fields that were on the "Screening" tab are removed from the workflow. "Client", "Eligibility", and "Enrollment" steps remain, with the minimum fields required for data collection.
- List of relationships on the "Client" step shows the first name then last name of each client, which is more like natural speech.
- The Guardian field has been removed from the "Client" step also.

Williams, Test Mom	Female   DOB: 01/05/1992   0002983
Relationships	
Please define relationships for Newborn Williams Newborn Williams is  To Test Mom Williams Primary Contact for Newborn Williams  Test Mom Williams	

### 3. Pregnancies and Enrollment sections added to the main page of Care Plan

Pregnancies and Enrollment sections are located on the main part of the Care Plan now to make them easier to find and quicker to access.

Click on the update icon in each of these sections to add or edit data.

- When someone disenrolls, always update the Enrollment record by adding the Enrollment End Date.
- After a baby is born and enrolls, please update the caregiver's Pregnancy record by adding the Birth Outcome and Birth/End Date.
- See section, "5. New Pregnancy Outcomes", <u>page 6</u>, for more information about other changes to the pregnancy data fields.



#### 4. Other changes to Pregnancies section

The Pregnancies section is visible on a client's Care Plan only when the client has a Pregnancy record. The Care Plan below does not have a Pregnancies section, which would appear directly below the Enrollment section.

To add a pregnancy record to a client's Care Plan, when the Pregnancies section is not visible on the Care Plan, hold your cursor over the Attached Records icon to open the menu. Select the Add New Pregnancies icon, to the right of Pregnancies on the menu.

THEO TEST EHS TEST AREA						<b>&amp;</b> 2	ZUKOWSKI, LAURA 🔻	2	6
😑 💖 CARE PLAN 0002983 : WILLIA							G	<b>*</b> •	٩
	••	Care Plan <u>&amp; overview</u>	* ACTION PLAN			Eligibility Screening Survey Outputs	0	Attached Re	+ -
		🚔 CASES 🧱			DEC 1	Pathway	0 🔳	leted	¢ ^
Williams Test Mom	m	▶ 4199062 <mark>&gt;&gt;</mark>		¢		Client	0 = +	12/15/2021	
0002983					DEC (	Products		leted	0
30 year old Female	ø		START DATE			Cases	3	12/01/2021	
		<ul> <li>MIECHV Early Head Start</li> </ul>	09/01/2021 <b>7 Active</b>	Ŷ	NOV	Enrollment	3 🔳	leted	0
CARE PLAN 😵		CLIENT ISSUES      +				A Alorts		11/15/2021	
CLIENT		No client issues.			NOV (	A Alerts		leted	0
						Pregnancies	0 [+	11/01/2021	
		No client strengths.			OCT 1	Pregnancy	0	leted	0
CASE 🚔		-				Home Visit		DATE 10/15/2021	
		<ul> <li>CLIENT RISKS</li></ul>			осто		it 👩	ompleted	0
MIECHV Early Head Start - 09/01/2021 🖭 Williams, Test Mom						<ul> <li>Home Visit</li> </ul>		DATE 10/01/2021	

New Pregnancy record opens. Add **Due Date** and **Number of Babies Expected**. Click on the orange Save & Close button.

Pregnancy						
4202372 - 04/01/2022						
PERSON 2NewApp, Mama : 4200897 🔞	PREGNANCY 4202372	DUE DATE 4/1/2022	NUMBER OF BABIES EXPECTED	BIRTH OUTCOME	BIRTH/END DATE	
REQUIRED FIELDS						
Due Date						
4/1/2022	<b>***</b>					
Number of Babies Expected						
2						
Birth Outcome						
					<b>•</b> Q	
Birth/End Date						
	<b>m</b>					
Date pregnancy ends. The inp	ut of this date	requires that	an Outcome be entered.			
Ci Undato & Class		Y Cancol			Ø Edite	0
Update & Close		Cancel			& Edit	0

"Pregnancies" section appears on the client's Care Plan after the first pregnancy record for a client has been created.

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≡ 🧐 CARE PLAN 0002983 : WILLIA						# - <	}- C	G
	<b>%</b>	Care Plan		1 C	. ⊝	<b>∞⁰ </b>	20	+-
		🚔 CASES 🔚						
Williams Test Mom	<b>#</b>	▶ 4199062 🍃	¢					
0002983 Born 1/5/1992 30 year old Female	0	🚯 ENROLLMENT 🧰						
		► MIECHV Early Head Start 5178T DATE 09/01/2021 7 Active	0					
CARE PLAN	0	PREGNANCIES C						
CLIENT		▶ 4202382 DUE DATE 94/01/2022 <b>† Active</b>	0			Loading Activity Timeline		
CONTACT 📰								
CASE 🚔		ILENT ISSUES In the second						

#### 5. New Pregnancy Outcomes section on Care Plan

The Pregnancy Outcomes record was added to the main page of a client's Care Plan to collect more accurate data about the births of twins and triplets. The new fields allow THEO to collect a separate outcome for each baby in a multiple birth. The new Pregnancy Outcomes section appears onscreen after you update a Pregnancy by entering and saving a Birth Outcome and Birth/End Date. When a pregnant caregiver was expecting one baby, only one row will be added to the Pregnancy Outcomes section; when a caregiver was expecting 2 or 3 babies, then 2 or 3 rows will be added to the Pregnancy Outcomes section.

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≡ CARE MENU		🚍 🚳 ZUKOWSKI, LAURA				
✓ RECORDS		₽-	🛗 APR 27 – MAY 1, 2022		🛱 TODAY	* PREV 5 DAYS NEXT 5 DAYS »
Contacts	۹ +		WED THU	FRI	SAT	SUN 01
Clients	Q +	Zukowski, Laura	27 28	29	30	01
Applications	Q +	THEO TEST				
Client Identifiers	Q	EHS Test Area				
⊖ Referrals	Q +					
🖪 Enrollment Status	۹	CLIENTS	🕫 ACTIVE CARE PLANS		WORK ITEMS	
Ø Service Requests	Q +	07				
😵 Care Plans	۹	37	0003008 : Mouse, Minnie 12/01/2021		Service Requests - Pen Service Requests - Pen	ding Review (19) ding Approval (4)
Cases	Q +		0003033 : NewApp, Madre	B 0	Service Requests - Pen	ding Completion
R Encollments	0 +	CASES	03/21/2021	100 M	-	

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Click on the Open icon next to the client whose pregnancy record you wish to update.

#### Client's Care Plan opens and shows a Pregnancy record.

• Click on the Update Pregnancy icon.

THEO TEST EHS TEST AREA						🚢 ZUKOWSKI, LAU	ra 🕶 📾 🔻 🖹 🥝
E 🕏 CARE PLAN 0003008 : MOUSE							≛- <b>≎</b> - Q
	<b>\$</b>	Care Plan <u>&amp; overview</u>	ACTION PLAN		S	o o <b>c</b> i <b>e</b>	¢° 🕑 🕂 -
		🚔 CASES 📕			FEB 22 😗	Pregnancy	7 Active
Mouse Minnie	ren a	♦ 4200157 >>>		¢		▶ 4200154	DUE DATE 02/22/2022
0003008 Born 1/19/1999 23 year old Female	ø	🖒 ENROLLMENT 🥫			DEC 01 🕑	Client Survey M1 - MIECHV Enrollment - Index Parent	Complete
		MIECHV Early Head Start	START DATE <b>7 Active</b>	۰ 🌔	DEC 01 5	Enrollment	7 Active
CARE PLAN 💖		PREGNANCIES 🥅 🕂				MIECHV Early Head Start	START DATE 12/01/2021
CLIENT		▶ 4200154	DUE DATE 7 Active				
CONTACT 🖪				$\mathbf{}$			
CASE 🚔		CLIENT ISSUES  No client issues.					

#### Client's Pregnancy record opens. Note: Number of Babies Expected field shows this caregiver is expecting 2 babies (twins).

Pregnancy						
4200154-02/22/2022						
	DECHANCY	DUEDATE	MUMPER OF DARIES EVECTED	DISTU OUTCOME	DIDTH (END. DATE)	
Mouse, Minnie : 4200148	4200154	2/22/2022	2	-	-	
REQUIRED FIELDS						
Duo Data						
Due Date						
2/22/2022	<b>#</b>					
Number of Babies Expected	1					
Birth Outcome						
					• •	
Pinth (End Data						
birth/thd bate						
MM/DD/YYYY	<u> </u>					
Date pregnancy ends. The in	out of this dat	e requires tha	t an Outcome be entered.			

Click on the Birth Outcome field to open the list of choices:

- Select "Live Birth", "SAB", "Stillbirth", or "TAB" if the outcome for both babies was the same. For example, both babies had the outcome "Live Birth".
- Select "Multiple Birth Outcomes" if you need to record a different birth outcome for each baby.
- Also enter the Birth/End Date of the Pregnancy, which is directly below the Birth Outcome field and not visible in the screenshot.
- Click on the orange Update & Close button.

Pregnancy						
4200154 - 02/22/202	2					
PERSON Mouse, Minnie : 4200148 🚯	PREGNANCY 4200154	2/22/2022	2	BIRTH OUTCOME	BIRTH/END DATE	
REQUIRED FIELDS						
Due Date						A
2/22/2022	<b>m</b>					
Number of Babies Expec	ed					
2						
Birth Outcome						
					• @	
Live Birth						
Multiple Birth Outcon SAB - Miscarriage	ies					
Stillbirth						
TAB - Termination		•				
						-
🗘 Update & Clo	• •	× Cancel			🖋 Edit 🕜	

Pregnancy record closes. Pregnancy Outcomes section appears on the Care Plan. In this example, I selected "Live Birth" in the Birth Outcome field for the twins. THEO created an outcome

for each baby and displays "Live Birth" on both Pregnancy Outcomes records.

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		.≛- ¢- Q				
Care Plan	ĸs	° ⊕° <b>⊡<sup>9</sup> ≜</b> ° ¢° (≥° <b>+</b> -				
🚔 CASES 🛅	▲ FEB 23 ♥	Pregnancy Outcome				
► 4200157 🕞		▶ 4200154 2 BIRTH/END DATE 02/23/2022				
🖪 ENROLLMENT 🥽	FEB 23	Pregnancy Outcome         Live Birth         \$           + 4200154         1         Birth/END DATE 02/23/2022				
MIECHV Early Head Start START DATE 7 Active	FEB 23 🥑	Pregnancy Complete				
pregnancies 🥅 🔶		R Cliest Course				
★ 4200154 Live Birth     DATE     O2/23/2022     Complete	DELOT	M1-MIECHV Enrollment- Index Parent SURVEY DATE 12/01/2021				
PREGNANCY OUTCOMES	DEC 01 😗	Enrollment     Active     Active     MIECHV Early Head Start     START DATE 12/01/2021				
	E-12/01/2021 Care Plan	E-12/01/2021 Care Plan <u>&amp; OVERVIEW</u> ↑ ACTION PLAN CASES + 4200157 + 4200157 MIECHV Early Head Start <u>12/01/2021</u> ↑ Active MIECHV Early Head Start <u>12/01/2021</u> ↑ Active PREGNANCIES + 4200154 Live Birth <u>Date</u> + 4200154 1 <u>BATE WERD</u> + 4200154 2 <u>BATE WERD</u> O2/23/2022 Live Birth O				

In this example, I updated the Pregnancy record by selecting "Multiple Birth Outcomes" in the Birth Outcome field and entering a Birth/End Date. THEO created an outcome record for each baby, but "(Unknown)" displays on both outcome records.

• To enter an outcome on both "Pregnancy Outcomes" records, click on the Update Pregnancy Outcomes icon on each record.

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≡ 🧐 CARE PLAN 0003008 : MOUSE								۲.
	<b>%</b>	Care Plan <u>&amp; overview</u>	ACTION PLAN		S	° ⊖° ⊽ <b>9 ≜</b>	• ¢• @ +	•
		🚔 CASES 🥫	FEB 23	Pregnancy Outcome	(Unknown)	¢.		
Mouse, Minnie	Ê	▶ 4200157 >>>		0	Ī	▶ <b>4200154</b> 2	BIRTH/END DATE 02/23/2022	
0003008 Born 1/19/1999 23 year old Female	ø	🖪 ENROLLMENT 🥅			FEB 23	Pregnancy Outcome + 4200154 1	(Unknown) BIRTH/END DATE 02/23/2022	¢
	<b></b>	MIECHV Early Head Start	START DATE 12/01/2021 <b>9 Active</b>	0	FEB 23 🕑	Pregnancy	Complete	φ
CARE PLAN 😵		PREGNANCIES 🚍 🕂				4200154 Multiple Birth Outcomes	BIRTH/END DATE 02/23/2022	_
CLIENT O CONTACT E	-	▶ 4200154 Multiple Birth Outcomes	BIRTH/END DATE 02/23/2022 Complete	•	DEC 01 🕑	Client Survey M1-MIECHV Enrollment - Index Parent	Complete SURVEY DATE 12/01/2021	0
CASE 🚔	2	PREGNANCY OUTCOMES			DEC 01 🦻	🖪 Enrollment	4 Active	¢
		▶ 4200154 1	BIRTH/END DATE 02/23/2022 (Unknown)			MIECHV Earty Head Start	START DATE <b>12/01/2021</b>	
MIECHV Early Head Start - 12/01/2021 IEI Mouse, Minnie		▶ <b>4200154</b> 2	BIRTH/END DATE 02/23/2022 (Unknown)					

Pregnancy Outcome record opens.

- Enter the Outcome for the first baby. Click on the orange Update & Close button.
- Repeat steps to update the Pregnancy Outcome for the second baby.

Pregnancy Outcome
4200154 - 1
PREGNANCY PREGNANCY OUTCOME INDEX PREGNANCY OUTCOME COMMENTS 4200154 1 Live Birth -
REQUIRED FIELDS
Pregnancy Outcome
Live Birth 🔍
Live Birth SAB - Miscarriage Stillbirth TAB - Termination
🗘 Update & Close 🔸 🔭 X Cancel



#### The Pregnancy Outcome section displays a different outcome for each baby.

### 6. New response "Declined to self-identify" in the Gender field

"Declined to self-identify" is a new response in the Gender field and allows you to record when a client prefers not to answer this question. Expect to see more changes in the THEO's Gender, Ethnicity, and Race fields coming in 2023. Responses in these fields will incorporate Oregon's Race, Ethnicity, Language, and Disability (REALD) guidelines and the CDC's Sexual Orientation and Gender Identity Information (SOGI) guidelines for data collection.

### **Bug Fixes**

There are no new bug fixes in this release.

# Known Bugs That Are Not Fixed

### 1. "Add Member" will not re-enroll clients

The new way to enroll someone, by adding them to their family's existing Case, does not work correctly with clients who have previous enrollments. If you are aware that someone has been enrolled previously, please enroll them by adding a New Application from the Care Menu.

### 2. Potential errors when enrolling clients

It's possible that THEO could display an error message when you are enrolling a Client. Things appeared to be working correctly during testing, but real life sometimes creates more complicated situations that what are on test plans.

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Simple error messages that occur when you forget to enter a response in a required field, for example, can be fixed by correcting the data entry in the field. More serious issues are not fixable under a login without special rights and should be reported to THEO Application Support, <u>theo.support@dhsoha.state.or.us</u>. These types of issues include the following:

- Error messages with the phrase "nullable event" or "Sequence contains more than one element";
- When a Care Plan button or a green "Enrolled" badge doesn't appear next to a client's name at the end of the Application workflow;
- When a Client doesn't appear on a home visitor's dashboard after enrollment.

# Tips to Simplify Using THEO

- Be sure to enter **Primary Spoken Language** for ALL Clients.
- Only add people to THEO when you are enrolling them. Please do not add Contacts to THEO for other family members who are NOT enrolling.
- Please do not add pregnancies to the system unless the caregiver intends to enroll the child in the program after birth.
- When a caregiver becomes pregnant <u>after</u> enrollment:
  - Add a new Pregnancy record with the Due Date and the Number of Babies Expected.
- When Exiting a Client, always:
  - Add an End Date (disenrollment date) to the Enrollment record for each client who leaves the program
  - Add a Closure Survey to **each client's** Care Plan (Survey Date = disenrollment date).
  - Also enter a Visit Survey if a disenrollment visit occurred. (Survey Date = disenrollment date)
- You can skip entering Addresses, Phone Numbers, and Email addresses even though the fields are marked as required. The two screenshots (below) show how to turn off these fields. Simply uncheck the checkboxes to the right of Addresses, Phone, and Email sections on the Client screen.

0	Allen, Gracie
L)	REQUIRED FIELDS
	<ul> <li>Addresses</li> <li>This person is homeless</li> <li>Enter separate mailing address</li> <li>HOME ADDRESS</li> </ul>
	Street 1 Street 2
	City

0	Allen, Gracie
L	REQUIRED FIELDS
	□ Addresses
_	
	Phone
	Email

- Occasionally, you discover that a client you are trying to enroll might already have a record in THEO. After you enter the client's demographic information and try to save, you see a message that says, "The information you entered closely matches other records within the system".
  - THEO lists any records that might be for the same client.
  - Click on **DETAILS** to see more information about each record.

Cleary, Beverly							春 Fema	le   DOB: 01/01/1985   00016	56
	O Cleary, Beverly	Potential Match	25						
	The information you entered closely matches other records within the system.								
Cleary, Beverly	Please review the pot If a match exists, you button. Otherwise, the	ential matches and may choose to over e new information v	indicate the app write the match vill be discarded.	ropriate merge de record with the ne	cision. If no reco w information b	rds match, then s y selecting the cl	elect "Contini heck box next	ue (without merging)". : to the "Merge & Continue"	
CLIENT ID LAST NAME FIRST NAME O001656 Cleary Beverly MIDDLE NAME PREPAX SUFEX	MERGE DECISION	PROBABILITY	IDENTIFIER	FIRST NAME	LAST NAME	BIRTHDATE	GENDER	SPOKEN LANGUAGE	
	Continue (with	out merging)							
ALSO KNOWN AS BIRTH DATE GENDER — 01/01/1985 Female PRIMARY SPOKEN LANGUAGE —	O Merge	0.90	000008	Beverly	Cleary	1/1/1985	Female		
SECONDARY SPOKEN LANGUAGE									I
PREFERRED WRITTEN LANGUAGE									1
REQUIRES INTERPRETIVE SERVICES									
ALTERNATE WRITTEN MATERIALS FORMAT 									
LOCAL CLIENT ID MEDICAID (DHP) NUMBER — — — — — — — — — — — CONTACT PREFERENCE SPECIAL INSTRUCTIONS — — — — — — — — — — — — — — — — — — —	Continue With	out Merging							

**DETAILS** shows you information about the possible match. If your client is a different client, click on the **Continue Without Merging** button.

Cleary, Beverly	∯ Female   DOB: 01/01/1985   0001656
	Cleary, Beverly : Potential Matches
	The information you entered closely matches other records within the system.
Cleary, Beverly	Please review the potential matches and indicate the appropriate merge decision. If no records match, then select "Continue (without merging)". If a match exists, you may choose to overwrite the match record with the new information by selecting the check box next to the "Merge & Continue" button. Otherwise, the new information will be discarded.
CLIENTID LAST NAME FIRST NAME  0001655 Cleary Beverly	
MIDDLE NAME PREFIX SUFFIX	Continue (without merging)
ALSO KNOWN AS BIRTH DATE GENDER — 01/01/1985 Female	O Merge 0.90 0000008 Beverly Cleary 1/1/1985 Female
PRIMARY SPOKEN LANGUAGE	▼ DETAILS
SECONDARY SPOKEN LANGUAGE	CONTACT ID CLIENT ID AREA LIST NAME FIRST NAME MIDDLE NAME PREFIX SUFFIX ALSO KNOWN AS BIRTH DATE GENDER Cleany, Beverly : 3784969 0000008 EHS Practice Area Cleany Beverly – – – – – 01/01/1985 Female
	ETHNICITY PRIMARY SPOKEN LANGUAGE PREFERRED WRITTEN LANGUAGE REQUIRES INTERPRETIVE SERVICES ALTERNATE WRITTEN MATERIALS FORMAT LOCAL CLIENT ID Declined to self-identify Fondish
—	HEDICAD (OHD) NUMBER CONTACT PREFERENCE SPECIAL INSTRUCTIONS PRIMARY CONTACT
REQUIRES INTERPRETIVE SERVICES	– – – Cleany, Beverly : 3784969
ALTERNATE WRITTEN MATERIALS FORMAT	
-	
LOCAL CLIENT ID MEDICAID (OHP) NUMBER	
CONTACT PREFERENCE SPECIAL INSTRUCTIONS	Continue Without Merging

If your Client is the same person, click on Merge.

- The buttons at the bottom of the window will change. Click on **Merge & Continue** to combine the two client records.
- Also click on Overwrite identified Client with new information if you wish to keep the new information that you entered on the Client record. Leave the Overwrite identified Client with new information checkbox unchecked if you wish to keep the information from the existing Client record.

CLIENT INTAKE O CLIENT O SCREEM	
Cleary, Beverly	∳ Female   DOB: 01/01/1985   0001657
	Cleary, Beverly : Potential Matches
	The information you entered closely matches other records within the system.
Cleary, Beverly	Please review the potential matches and indicate the appropriate merge decision. If no records match, then select "Continue (without merging)". If a match exists, you may choose to overwrite the match record with the new information by selecting the check box next to the "Merge & Continue" button. Otherwise, the new information will be discarded.
CLIENT ID LAST NAME PRST NAME 0001657 Cleary Beverly MIDDLE NAME PREFIX SUFFIX — — — —	MERGE DECISION PROBABILITY IDENTIFIER FIRST NAME LAST NAME BIRTHDATE GENDER SPOKEN LANGUAGE
ALSO KNOWN AS BIRTH DATE GENDER — 01/01/1985 Female	Merge 0.90 0001656 Beverly Cleary 1/1/1985 Female
PRIMARY SPOKEN LANGLIAGE	♥ DE LAILS           CONTACTIO         CLENTID         AREA         LASTNAME         HIDDLE NAME         PREFOX         SUFFOX         ALSO INIOWINAS         BRITH DATE         GENOER
SECONDARY SPOKEN LANGUAGE PREFERRED WRITTEN LANGUAGE	Cleany, Beverly: +179234 0001656 HFA Practice Area Cleany Beverly 01/01/1985 Female EXTENSIVE PRIMARY SPOKEN LANGUAGE PREFERRED WRITTEN LANGUAGE REQUIRES INTERPRETIVE SERVICES ALTERNATE WRITTEN MATERIALS FORMAT LOCAL CLEANT ID Not his vac or Latino/a -
REQUIRES INTERPRETIVE SERVICES	MERCAD (CHP) TOTAL CONTACT PREFERENCE SPECIAL INSTRUCTIONS PRIMARY CONTACT CLEARLY, Beverly : 41/2324
ALTERNATE WRITTEN MATERIALS FORMAT	n STAILS
LOCAL CLIENT ID MEDICAID (OHP) NUMBER — — — — — — — — — — — — — — — — — — —	Merge & Continue