

## Alpha Search (Screen 00)

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It is essential to perform the Alpha Search for all new participants and for those returning to recertify, to check for and avoid creation of duplicate Patient Master Records. There are times when it is easier to locate a participant's record by using the Patient Master Alpha Search function on Screen 00, rather than trying to remember a Patient ID or WIC ID number.

Always double-check with the participant to be sure the first and last names are spelled correctly when searching in HSIS. If the name is entered incorrectly during a search or if the patient record was created with an incorrect spelling, duplicate records in HSIS may be created unintentionally.

When doing a search for a participant on the 00 Patient Master Alpha Search screen, the system is actually using an algorithm known as Soundex, which brings up names that are similar in sound but may be spelled differently. In order to bring up a complete listing of participant names, always type in the full last and first names when doing any search.

For those agencies that have been updated to access the HIS - HSIS interface in WIC/ADP, a CNDS ID search will be made through the Alpha Search 00 screen. For more information on the HIS - HSIS interface refer to Chapter 1, Section 10. For an explanation of HIS and CNDS, refer to the Introduction section of the WIC ADP manual.

```
HSA007A          NORTH CAROLINA HSIS - PATIENT MASTER ALPHA SEARCH          07501
NEXT RECORD: COUNTY 085  SCREEN 00  ID          DATE          ACTION I
MESSAGE: 017 ENTER CHANGES AND THEN PRESS "ENTER"

ENTER LAST NAME: _____
      FIRST NAME : _____
      SEX: _
      (MMDDCCYY)
(OPTIONAL) DOB: _____ PLUS OR MINUS ___ YEARS
      IF DOB IS NOT ENTERED ALL AGES WILL BE RETURNED.
      IF YOU ENTER DOB AND PLUS OR MINUS XXX YEARS THE SEARCH WILL
      BE CONFINED TO THOSE PARAMETERS.
```

The Patient Master Alpha Search may display different messages if the WIC program and site has been updated for CNDS and the HIS - HSIS interface.

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HSA007A          NORTH CAROLINA HSIS - PATIENT MASTER ALPHA SEARCH          07501
NEXT RECORD:  COUNTY 085  SCREEN 00  ID          DATE          ACTION I
MESSAGE: 699 For OPTIMAL search results enter FULL FIRST NAME

ENTER LAST NAME: _____
          FIRST NAME : _____
                SEX:  _
                (MMDDCCYY)
(OPTIONAL) DOB:  _____  PLUS OR MINUS  ___  YEARS

          IF DOB IS NOT ENTERED ALL AGES WILL BE RETURNED.

          IF YOU ENTER DOB AND PLUS OR MINUS XXX YEARS THE SEARCH WILL
          BE CONFINED TO THOSE PARAMETERS.

```

### Finding a Record Using the Participant's Name

Due to changes made to screen 00 in 2009, it is necessary to press the <Tab> key to move to the next field.

To locate a record using the participant's name:

- Screen = 00
- Action does not have to be entered
- Press the **ENTER** key.
- Last Name = applicant's/participant's complete last name
- Press the <Tab> key
- First Name = the participant's complete first name
- Press the <Tab> key
- Sex = the gender indicator (1 = male, 2 = female)
- Press the **ENTER** key.

The Last Name, First Name and Sex are required when performing the Alpha Name Search. Although it is possible to enter a minimum of two characters for the First Name, it is strongly advised to enter the entire first name whenever possible, in order to bring up the correct search list.

Due to the way that the CNDS/Soundex lookup currently works, if a partial first name is entered into the Alpha Search:

- The system may not find the participant.
- The system may display an incomplete list of participant names.
- Duplicate Patient Master records could be created.
- An incorrect CNDS ID could be selected.

The DOB or Date of Birth is optional, and may be used when normal searching does not bring up a particular participant.

Chapter 1: USING THE HEALTH SERVICES INFORMATION SYSTEM (HSIS)  
Section 9: ALPHA SEARCH (SCREEN 00)

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- DOB is entered as MMDDCCYY (2-digit month, 2-digit day, 4-digit year).
- Plus or Minus Years is a 3-digit number entered as 001 through 150 years.

Note: If DOB and Plus or Minus xxx Years are entered, in addition to the Last Name, First Initial and Sex, the search will be confined to those specific parameters.

```
HSA007A          NORTH CAROLINA HSIS - PATIENT MASTER ALPHA SEARCH          06101
NEXT RECORD:  COUNTY 035  SCREEN 00  ID          DATE          ACTION I
MESSAGE: 699 For OPTIMAL search results enter FULL FIRST NAME

ENTER LAST NAME: test_____
          FIRST NAME : mary_____
          SEX: 2

          (MMDDCCYY)
(OPTIONAL) DOB: 07071987  PLUS OR MINUS 005 YEARS

          IF DOB IS NOT ENTERED ALL AGES WILL BE RETURNED.

          IF YOU ENTER DOB AND PLUS OR MINUS XXX YEARS THE SEARCH WILL
          BE CONFINED TO THOSE PARAMETERS.
```

The screen displays, in alphabetical order, all records meeting the entered criteria. Search through the entire list to see if there is more than one record for the same participant.

```
HSA511A          NORTH CAROLINA HSIS SYSTEM
TO SELECT, PLACE CURSOR ON LINE & ENTER, OR VIEW ALL THEN  F3 TO QUIT VIEWING
MESSAGE: 376 F7-PAGE UP;  F8-PAGE DOWN; F10-SCROLL LEFT; F11-SCROLL RIGHT

PAT ID          NAME          DOB          RACE          SEX
123456789H  TEST, MARY          1987/07/07  2             2
123456788H  TEST, MONIQUE      1990/05/12  1             2
321321321H  TOST, MINNIE       1989/03/22  1             2
```

There may be more names than can fit on one page.

- To see the additional names in a long list,
  - ▶ Press the <F8> key to page down, and
  - ▶ Press the <F7> key to page back.
- Press the <F11> key to scroll to the right in order to see more data, including chart number, street, city, state, zip code, county code for the county of residence, Medicaid ID, previous ID (if the ID has been changed), Entry and Change dates (the date when the Patient Master was entered into the system and the date the Patient Master was last changed).
- Press the <F10> key to scroll back to the left.

HSA511A NORTH CAROLINA HSIS SYSTEM					
TO SELECT, PLACE CURSOR ON LINE & ENTER, OR VIEW ALL THEN F3 TO QUIT VIEWING					
MESSAGE: 376 F7-PAGE UP; F8-PAGE DOWN; F10-SCROLL LEFT; F11-SCROLL RIGHT					
PAT ID	CHART NUM	STREET	CITY		CNTY RES
123456789H		1234 MAIN STREET	RALEIGH	NC 27609	085
123456788H		4321 1ST STREET SW	RALEIGH	NC 27609	085
321321321H		2222 MAPLE AVE	RALEIGH	NC 27609	085

HSA511A NORTH CAROLINA HSIS SYSTEM					
TO SELECT, PLACE CURSOR ON LINE & ENTER, OR VIEW ALL THEN F3 TO QUIT VIEWING					
MESSAGE: 376 F7-PAGE UP; F8-PAGE DOWN; F10-SCROLL LEFT; F11-SCROLL RIGHT					
PAT ID	MEDICAID ID	PREV ID	ENTRY DATE	CHANGE DATE	
123456789H			2009/06/04	2009/06/04	
123456788H			2009/06/04	2009/06/04	
321321321H			2009/06/04	2009/06/04	

### Accessing the Patient Master from the Alpha Search

- If the name of the participant displayed on the alphabetical listing matches the name searched for, place the cursor under the Patient ID number of the participant and press the **ENTER** key to access the Patient Master screen (01).
- If the name of the participant is not found on the alphabetical listing of participants
  - ▶ Press the <F8> key to scroll to the end of the list of names
  - ▶ Press the <F3> key to return to the first screen of Screen 00 Alpha Search; then
  - ▶ Proceed to the Patient Master (Screen 01) in order to add a record.
- When adding a Patient Master record from screen 01, the system will bring up the Alpha Search screen 00 record. If the participant is not in the Alpha Search list,
  - ▶ Press the <F8> key to scroll to the end of the list of names, and
  - ▶ Press the <F3> key to return to the Patient Master record to continue adding the new Patient Master for the participant.

### CNDS ID Search

When creating a new participant record on screen 01, the system now requires a CNDS ID search from screen 00 Patient Master Alpha Search (HSA007A).

Before selecting the CNDS ID, pay close attention to the complete name and date of birth.

If the CNDS ID search from the Alpha Search screen attempts to bring up a list that is too large for the system to display, the message 697 Selection Too Large – Please Refine Search Criteria will appear.

```

HSA007A          NORTH CAROLINA HSIS - PATIENT MASTER ALPHA SEARCH          06101
NEXT RECORD: COUNTY 035  SCREEN 00  ID          DATE          ACTION N
MESSAGE: 697 SELECTION TOO LARGE - PLEASE REFINE SEARCH CRITERIA

ENTER LAST NAME: JONES_____
                FIRST NAME : MARY_____
                SEX: 2
    
```

- Type the participant’s date of birth next to DOB and
- Type the 3-digit numbers 005 next to Plus or Minus \_\_\_\_Years to narrow the search.

```

HSA007A          NORTH CAROLINA HSIS - PATIENT MASTER ALPHA SEARCH          06101
NEXT RECORD: COUNTY 035  SCREEN 00  ID          DATE          ACTION N
MESSAGE: 697 SELECTION TOO LARGE - PLEASE REFINE SEARCH CRITERIA

ENTER LAST NAME: JONES_____
                FIRST NAME : MARY_____
                SEX: 2

(OPTIONAL) DOB: 12222006      PLUS OR MINUS 005 YEARS
                (MMDDCCYY)

                IF DOB IS NOT ENTERED ALL AGES WILL BE RETURNED.

                IF YOU ENTER DOB AND PLUS OR MINUS XXX YEARS THE SEARCH WILL
                BE CONFINED TO THOSE PARAMETERS.
    
```

If the 697 message appears again, type the 3-digit number 001 next to Plus or Minus \_\_\_\_Years to narrow the search even more.

The search results will display a list of names and associated CNDS ID numbers along with any associated Patient Master ID numbers.

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HSA511A      NORTH CAROLINA HSIS SYSTEM
TO SELECT, PLACE CURSOR ON LINE & ENTER, OR VIEW ALL THEN F3 TO QUIT VIEWING

MESSAGE: 376 F7-PAGE UP; F8-PAGE DOWN; F10-SCROLL LEFT; F11-SCROLL RIGHT

PAT ID   CNDS ID      NAME                DOB   RACE  SEX
        987654321N JONES, MARIAH R     2006/12/19  2    2
        976543218L JONES, MARIAH D     2006/11/24  2    2
        965432187L JONES, MARIAH       2007/05/12  1    2
        954321876N JONES, MARIAH K     2008/07/07  2    2
        943218765T JONES, MARIE A      2006/12/26  1    2
        932187654Q JONES, MARIYAH B    2005/04/14  2    2
123456789H 921087654K JONES, MARY F       2006/12/22  2    2
        910876543L JONES, MARY G       2003/10/09  1    2
        908765432S JONES, MARY L       2004/02/22  1    2
        987612345P JONES, MARY P       2004/07/27  1    2

```

The system will allow for selection of any CNDS ID in the displayed list on screen HSA511A, making it possible to select an incorrect CNDS ID.

- If a mistake is made and the wrong CNDS ID is selected, note that it can be corrected from the 01 Patient Master screen.
- If the participant is not listed in the CNDS list
  - ▶ Press the <F8> key several times to scroll to the end of the list.
  - ▶ Press the <F3> key to return to the Patient Master screen (HSA010A) to continue the creation of the new Patient Master Record.
- If the participant is in the CNDS list
  - ▶ Verify the name and date of birth before selecting the CNDS ID number.
  - ▶ Place the cursor under the CNDS ID number that is next to the correct name and date of birth.
- Press the **ENTER** key to continue with the creation of the Patient Master Record.
- If the participant is in the CNDS list and there is also a Patient Master Record number
  - ▶ Place the cursor under either the Patient Master Record number or the CNDS ID number that is next to the correct name and date of birth.