

## Troubleshooting Searches: Matching Cases and Matching Clients

To find an existing client or case, click the Find Client or Case button. When searching by Client ID, enter the desired Client ID number in the search box, then click the Search button. (You may also search using the Case number by selecting "Case ID" from the Search By pull down menu.)

If that client has been entered, you will see something that looks like the following:

The screenshot shows the OCVA Sexual Assault web application interface. The search bar contains "Example1" and the "Search" button is highlighted with a blue circle. Below the search bar, there are two sections: "Matching Clients Found" and "Matching Cases Found".

**Matching Clients Found:**

Client ID	First Contact Date	Race	Ethnicity	Gender	Year of Birth
Example1	7/1/2006	White	Non-Hispanic/Non-Latino	Male	1974

**Matching Cases Found:**

Case ID	Client ID	Presenting Issue	Client Type
86802	Example1	Sexual Assault	Sexual Assault

Annotations include a blue circle around the "Search" button and the "Matching Clients Found" table, and a red circle around the "Matching Cases Found" table. Two yellow callout boxes provide instructions: "SELECT 'MATCHING CLIENTS FOUND' TO START A SECOND CASE FOR THIS CLIENT." and "SELECT 'MATCHING CASES FOUND' TO ENTER SERVICES RECEIVED BY THIS CLIENT."

There are two items that the search returned: Matching Clients Found, at the top (circled in blue) and Matching Cases Found (circled in red.) You must select the Matching Case (red) to view all of the information on that client, or to enter services.

## Troubleshooting Searches: Matching Cases and Matching Clients

Selecting **Matching Clients Found** indicates you want to start a **NEW** case for an existing client. Agencies typically enter a new case for an existing client only when a client is a victim of another, separate incident of crime, such as Sexual Assault **and** Domestic Violence.

When starting a new case for an existing client, the system presents an intake form that is only partially completed. Information on Homelessness and Disability, for example, are blank for the new case, because this information may change over time. Services must be related to a specific case – services entered for one case will not be shown in the Services section of a new case.

To assign a new case to an existing client, first search for the client's ID number as usual. You will see something like the screen below:

The screenshot shows the OCVA General Crimes web application interface. At the top, there are navigation tabs for "Data Entry", "Administrative Utility", and "Reports". The main content area is titled "General Crimes (GC)" and includes a search section. The search criteria are set to "Client ID" with the value "example20". The search results show one "Matching Clients Found" with the following details:

Client ID	First Contact Date	Race	Ethnicity	Gender	Year Of Birth
example20	5/20/2008	White	Non-Hispanic/Non-Latino	Female	1972

Below the search results, there are tabs for "Demographics", "Income", "Referrals", and "Offenders". The "Demographics" tab is active, showing a form with various dropdown menus for client information, including Client ID, Year of Birth, First Contact Date, Race, Ethnicity, Gender, Crime Type, Disability, Homeless, When Crime Occurred, Client's County Of Residence, Employment, Marital Status, Refugee / Immigrant / Asylum Seeker?, Primary Offense Location, Health Insurance, Education, Pregnant?, and Limited English Proficiency.

In the example above, we are planning on entering a General crimes case for a client that was entered under Sexual Assault. Notice that the only option to select is "Matching Clients Found" because there is not a General Crimes Case yet for this client. (If a different case existed under General Crimes, we would also see the client's previous case.)

## Troubleshooting Searches: Matching Cases and Matching Clients

Selecting Matching Clients Found will present us with a partially completed intake form:

The screenshot shows the 'General Crimes (GC)' intake form. At the top, there are navigation tabs for 'Data Entry', 'Administrative Utility', and 'Reports'. The form is divided into sections: 'Client Information', 'Medical and Criminal Justice System', 'Direct Services', 'Hotline Calls/Info. & Referral Services', and 'Community, Institutional and Group Services'. The 'Client Information' section is highlighted, and the 'Demographics' tab is selected. The form fields are as follows:

Client ID	example20	Year of Birth	1972
First Contact Date	5/20/2008	Race	White
Ethnicity	Non-Hispanic/Non-Latino	Other Race	
Gender	Female	Client Type	Select an Item
Crime Type	Select an Item	Homeless	Select an Item
Disability	Select an Item		

At the top of the form, 'Client ID: example20' and 'Case ID: None' are displayed. A red circle highlights this information, with an arrow pointing to a yellow callout box that says: "NOTICE THAT AT THIS STEP, THE CLIENT ID IS COMPLETED, BUT CASE ID STILL SAYS 'NONE.'" Another yellow callout box on the left explains that some fields (Year of Birth, Race, Gender) are completed, while others (Crime Type, Disability) are blank.

Once the Matching Client has been selected, fill in the blank fields on the partially completed intake as they pertain to the new case. Once the intake is completed, click the Submit button at the bottom of the screen.

The screenshot shows the 'General Crimes (GC)' intake form after submission. The 'Client ID: example20' and 'Case ID: 133202' are now both completed and highlighted with a red circle. The form fields are as follows:

Client ID	example20	Year of Birth	1972
First Contact Date	5/20/2008	Race	White
Ethnicity	Non-Hispanic/Non-Latino	Other Race	
Gender	Female	Client Type	Adult
Crime Type	Assault	Homeless	No
Disability	None		

A yellow callout box on the right explains that once the new case has been submitted, both the Client ID and Case ID are completed, and services can now be attached to this case.

Sometimes new users will enter a second case accidentally, when a second incident of crime hasn't occurred. This can be confusing when entering services. If you find you have entered a second case by mistake, e-mail Nicky Gleason at [nickyg@cted.wa.gov](mailto:nickyg@cted.wa.gov) and indicate the duplicate case you do not want, and she can delete the duplicate for you.