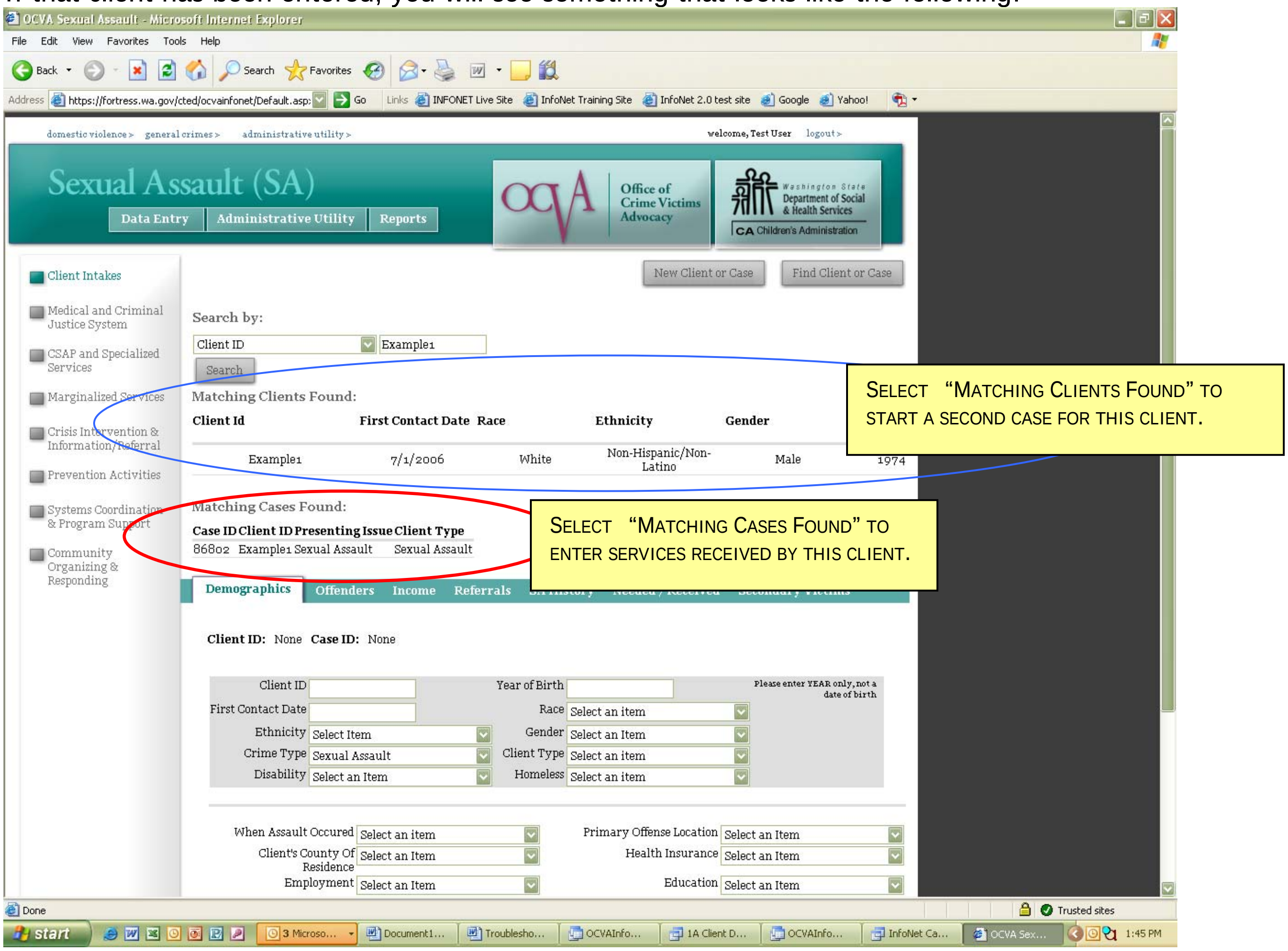
Troubleshooting Searches:
Matching Cases and Matching Clients

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:



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.**

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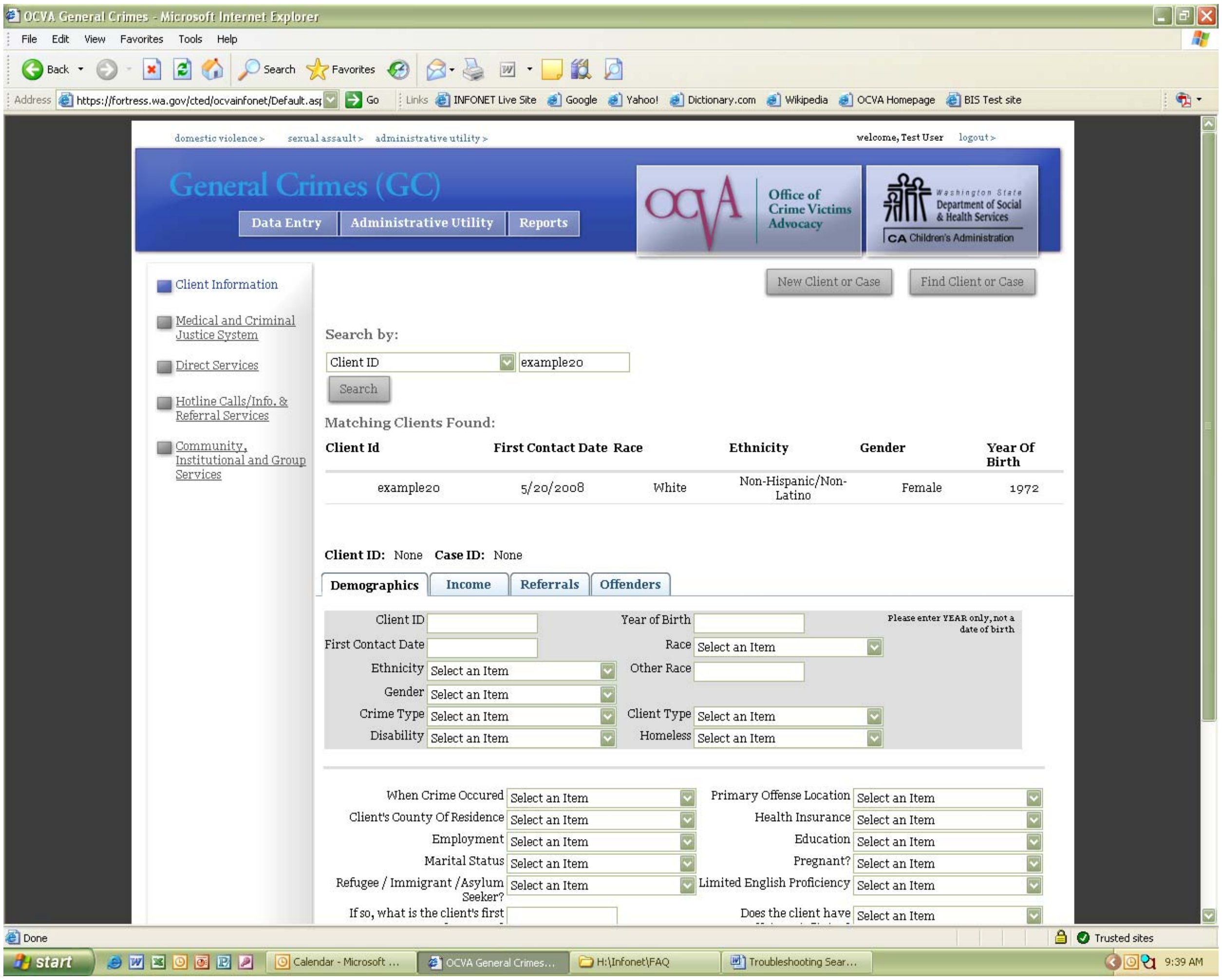
Selecting **Matching Clients Found** indicates you want to start a NEW case for an existing client. Agencies typically enter a new case for an existing client only when a client is a victim of another, separate incident of crime, such as Sexual Assault **and** Domestic Violence.

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:



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.)

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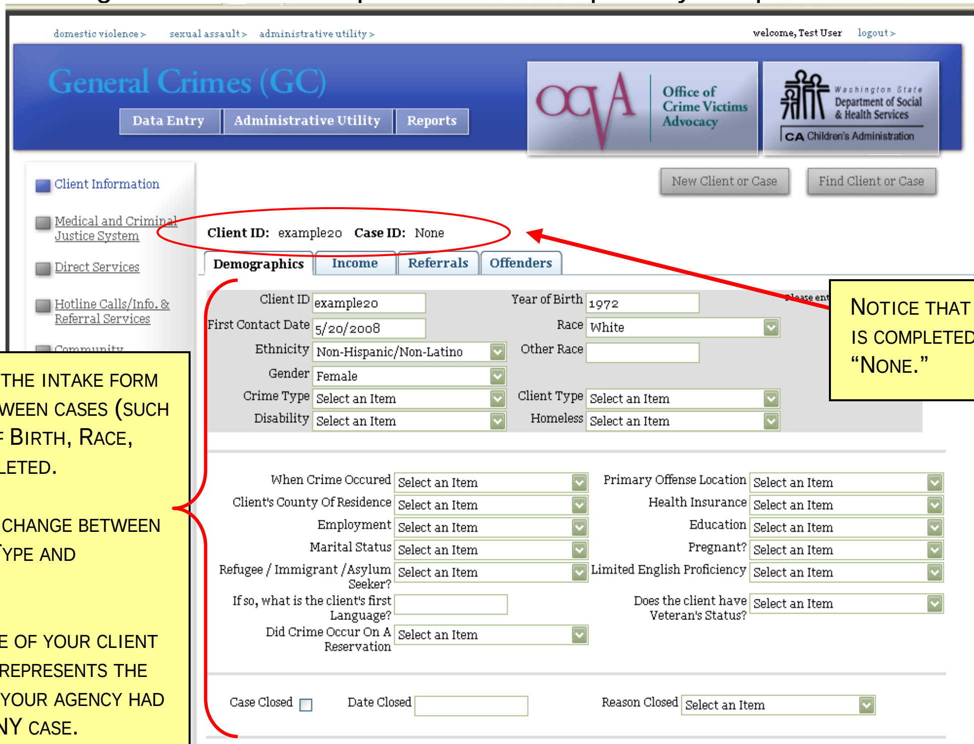
Selecting Matching Clients Found will present us with a partially completed intake form:



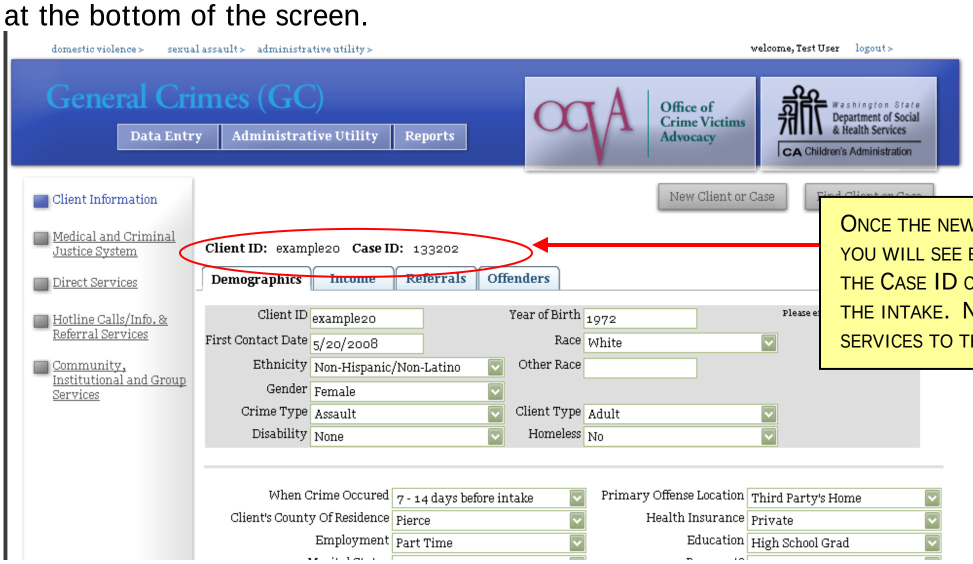
Some of the fields on the intake form that don't change between cases (such as the client's Year of Birth, Race, and Gender) are completed.

Other fields that may change between cases, such as Crime Type and Disability, are blank.

The First Contact Date of your client does not change, and represents the first date of contact your agency had with the client for ANY case.

Notice that at this step, the Client ID is completed, but Case ID still says "None."

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.



Once the new case has been submitted, you will see both the Client ID and the Case ID completed at the top of the intake. Now you may attach services 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 and indicate the duplicate case you do not want, and she can delete the duplicate for you.