

Category: Health Information	Subject: Client identity information-Unable to Verify Process County of San Luis Obispo: Behavioral Health Department
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Purpose: To identify a process for creating a medical record for a client who is unable or unwilling to provide.

Procedure:

When client is unable or unwilling to provide the basic information and there are not medical records to verify the following will occur:

Staff will:

1. Query/seek out information from client or medical records to assist in identifying the client.
2. Ask your site Health Information Technician (HIT) to query archival electronic health records (Anasazi) for any further information being available.
3. If unable to get name or date of birth (DOB) you will:
 - a. Review the electronic health record (SC-SmartCare and Anasazi) by viewing/searching all Doe, John or Jane, all DOB with 1/1/1900 and investigating to see if there are any other identifiers you can utilize to verify the identity of the client (such as address, mother’s maiden name, etc.)
 - i. If you can identify using other identifiers the client record will be updated.
 - ii. If unable to identify using other identifiers, take note of the next proceeding middle name (number) since you will need this when registering.
 - b. Register the client in the following manner:
 - i. From the Name Search screen, complete the three searches by, Name, DOB and Social Security Number.
 - ii. If not found select “Create New Potential Client”
 - iii. In the Client Information screen, add the address on the general tab, including a city, state and zip code.
 - iv. On the Aliases tab Enter Doe, John or Jane, using the succeeding next number in both the first name and Middle Name Field. For example:

Client Alias

First Name	<input type="text" value="John 1"/>	Middle Name	<input type="text" value="1"/>	Last Name	<input type="text" value="Doe"/>
Type	<input type="text" value="Alias"/> ▼	<input checked="" type="checkbox"/> Allow Search	<input checked="" type="checkbox"/> Chosen Name		

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- c. Ensure Chosen name is selected and select insert.
 - d. Save.
 - e. If the client is an infant be sure to add any other names being used under Aliases tab in Client Information.
4. If provided with the client’s name but not the DOB do the following:
- a. After verification in Meds Lite and reviewing the electronic health record and searching the name, register using the name and **DOB of 1/1/1900**.
5. If provided with the DOB but not the client’s name; complete the following:
- a. Review the electronic health record (SC-SmartCare and Anasazi) to see if you can identify client by searching the DOB, register using the Doe, John or Jane with the succeeding number in first and middle name on the Aliases tab of the Client Information screen.
 - b. If the client is an infant be sure to add any other names being used under Aliases tab in Client Information.
6. If the client is an infant and if the name is listed on MEDS as Baby Boy or Baby Girl Doe, you will register with this name using the correct DOB. Please note you should only be seeing this with newborn clients that enter without a name.
- a. Be sure to add any other names to be used for the client under Aliases tab in Client Information.

Reminder: Always check the name and DOB when reviewing and registering clients to ensure we are not duplicating client accounts.

Revision History

Date:	Section Revised:	Details of Revision:
07/08/2024	New	
7/31/2024	Update	Update information on infants, add specifics for how to add number to alias