Person Search

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Person Search Introduction

The purpose of person search is to search the local agency and Statewide Client Index (SWNDX) databases in order to determine if a person is known to a social service agency. Conduct a person search to view basic information about a person, select a person to add to an intake or workgroup, to identify duplicate persons during the County or State Clearing process, and to print details describing a person.

SSIS interfaces with MAXIS, MMIS and PRISM databases to get client data. The local agency's database contains Client and Professional Collateral person records and is limited to the information contained in the local agency's database. SWNDX contains clients only and has over 1.3 million person records.

DHS recommends performing a person search before entering clients into SSIS to avoid duplicate person entries. Search first using SWNDX. If the person record is found, then select a participant from SWNDX or use Copy Client from SWNDX to copy all clients from a selected agency's workgroup. If the client is not found, then search using the local agency's database to narrow the search results to person records contained in the agency's database.

The Person Search function differs depending on where, in the application, workers access the search. If accessed from:

- Intake or a workgroup, use the search to view the client information and select the person record(s) to bring into the workgroup.
- The Main menu, Windows toolbar under Searches/Logs or from the Person Search button on the Application toolbar, use the search to determine if the person is already in the SSIS database or SWNDX.
- County or state clearing, used the search to identify duplicate clients.

When Person Search is accessed from intake or a workgroup, the Main menu, Windows toolbar under Searches/Logs or from the Person Search button on the Application toolbar, the title bar displays accordingly. If the Title bar reads Person Search, this search cannot be used to add the client into the workgroup. To add Clients or Professional Collaterals to a workgroup, Person Search must be accessed through the Participants folder of the workgroup, a quick add button, Action menu, and/or from a Person Search button within a Detail screen.

The different ways to search for a person record are by:

- Name, DOB, Gender which is used most often to search for clients. An age range can also be entered in the Age from and to fields when the exact DOB is unknown. It is not necessary to enter all three fields (e.g., name, DOB, gender), if they are not all known. However, the more information entered the narrower the search results.
- Person Number to search using a specific number attached to a client's record
- Case Number to search using specific numbers associated to workgroups
- Address to search by a client's address. When the Address option button is selected, notice that the Scope field only allows a County search. Address cannot be searched statewide.

The SISS Administration rights needed to perform all person search functions include:

- Access Person Index is required in order to search for a person in SSIS.
- Copy Clients Fm Remote County to access the Copy Client functionality
- Access Offender Index to view any records for a particular client on the Offender tab on the State Detail screen
- View Cnty Detail to view the local agency's detail records for a client
- Create Person to edit a client's record from View Cnty Detail
- View State Detail to view the State Detail screen for a client either from a person search or from the State Details node in the Tree View
- View Statewide CP Reports to view child protection reports in Assessment and Intake workgroups for all clients cleared to SWNDX
- View Statewide TPR to view termination of parental rights information on the State Detail screen for all clients cleared to SWNDX
- View Statewide Workgroups to view all workgroups in which a person was a participant.

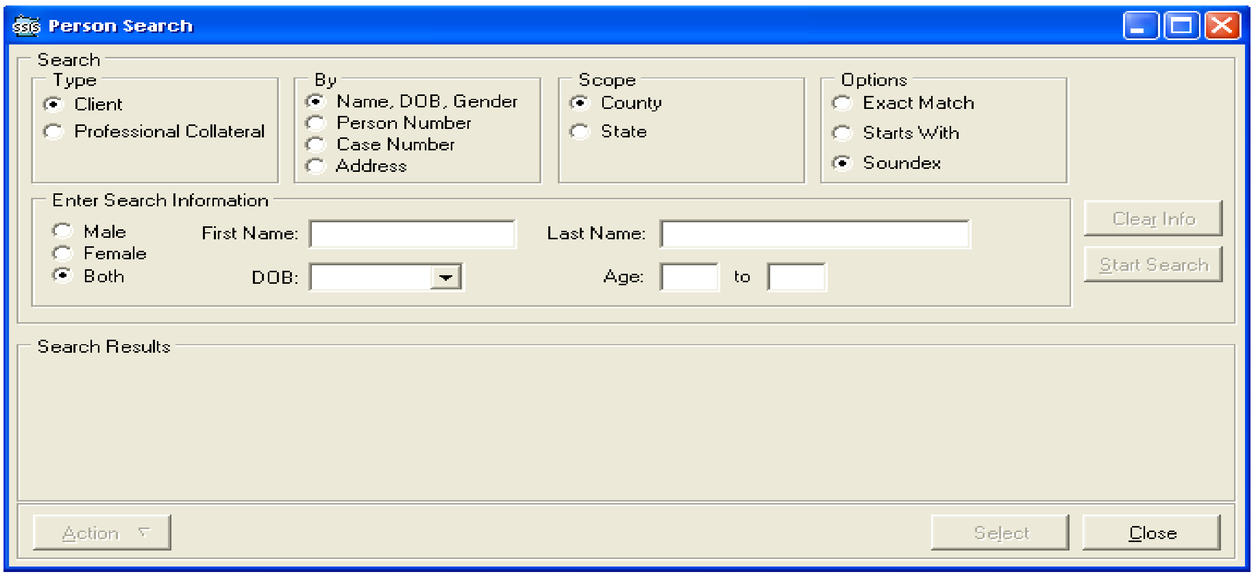
Hint: If the user is unable to perform a person search function, check with the agency's SSIS mentor or coordinator for SSIS Security Administration rights.

To Access Person Search for Lookup

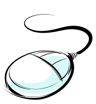
A function of Person Search is to look up information on clients or professional collaterals. This is a view-only search and cannot be used to add clients or collaterals into an existing intake or workgroup. To view information on clients and professional collaterals, Person Search can be accessed in one of two ways:

- From the Windows toolbar under Searches/Logs
- From the Person Search button on the Application toolbar.

Person Search Screen



To Access Person Search for Lookup:



1. From the Windows toolbar, select **Searches/Logs**, and then select **Person Search**.
   Or
   From the **Application** toolbar, select the **Person Search** button.
2. The Person Search screen displays.

To Access Person Search from an Intake or Workgroup

Use this process to search for a participant to add to an intake or workgroup as a client or professional collateral.

To Include the Person in an Intake or Workgroup:

1. From the Intake node or the Participants folder in the Tree View:
   Access the **Action** menu, then select **Add Existing Client** or **Add Existing Collateral;** or click on the **Client** or **Collateral** quick add button on the Application toolbar.

   Or

   From the New Intake workgroup screen, click the **Person Search** button to the right of the **Caller** field. The screen opens in edit mode. Click the **Person Search** button again, then click the **Client** or **Collateral** quick add button.
2. The Select Person for Intake or Select Person for Assessment search screen displays. Enter the appropriate search criteria and click **Start Search**.
3. Highlight the appropriate client or professional collateral in the Search results and click **Select**.
   Or
   Multi-select several clients or professional collaterals at once and click **Select**.
4. The client or professional collateral displays in the Tree View in the Participants folder.

Hints:

- *If no results display: Double-check the search options and changes accordingly. Double-check the spellings and look for typos or use the State scope to search SWNDX.*

- *When family members have the same last name, search by last name only. This allows the user to locate all family members at one time, view the information needed at one time without having to search again, and multi-select clients when pulling them into workgroups.*

  Multi-selecting is used when using Person Search to select multiple people at the same time to add to an intake, Assessment workgroup, or Case Management workgroup.

To multi-select, highlight one client; while pressing down the Ctrl key, continue to select the other clients in the grid. This will highlight each client's name in the grid. Click Select and all clients are pulled into the workgroup.

- *If the person cannot be located, a new client can be added to the system.*

Client SWNDX Search

Use Client SWNDX Search to search for client information that is contained in the SWNDX database and to copy clients from another agency's database.

To search for a client by Name, DOB, Gender:

1. Highlight the Participants folder in the Tree View and access the **Action** menu, or click the **quick add** button on the Application toolbar; select **Add Existing Client**.
2. The **Type** field defaults to **Client**.
3. The **By** field defaults to **Name, DOB, Gender**.
4. In the **Scope** field, select **State**.
5. In the **Options** field, select **Exact Match**, **Starts With** or **Soundex**.
6. Enter the name or partial parts of the name in the **First Name** and/or **Last Name** field.
7. Click **Start Search**.
8. The search results displays.

Hints:

- *When exact spelling of a name is known, search by Exact Match to avoid a lengthy list of search results. Exact Match searches for the exact information entered. For example, if a name is typed in with a different spelling than how it is spelled in the databases, no search results display.*
- *Starts With searches for all names that start with the letters entered. A broad search is made by entering only a few letters of the first and/or last name in the Last Name field or First Name field or in both fields. Use this option when the exact spelling of a name is unknown since entering the first few letters of a common name makes an inclusive search. For example, entering "And" into the Last Name field returns results with last names of Anderson, Andersen, Andresen, etc. Many search results may display. To avoid a lengthy search results list, enter as much information as you know.*
- *Soundex search uses a combination of the Start With option and a sounds-like feature. Soundex does not allow a search by first name only because a search could potentially take too much time and return large search results. Soundex results use the following criteria:*

- *Returns names that start with the same first letter and match the sound of the consonant in the search word. For example, searching by the first name of Cathy with a 'C' does not return results of Kathy with a 'K'.*
- *Removes all vowels (except if the first letter in the name is a vowel) and the consonants h, w, and y.*
- *Disregards the same letter when two or more of the same letter are juxtaposed, e.g., nn or mm.*
- *Uses a mathematical formula that assigns numbers to letters to formulate the sound of the name.*
- *Searches for names reduced to the four remaining characters in a similar name. For example, entering a last name or part of a last name of "Johns" may return results such as Johns, Jones, Janes, Jonas, James.*

If Soundex Search Results do not find the correct client name, change the search parameters and search different ways to avoid entering duplicate names. If a name is not found in a search of the SWNDX database, change the Scope to Agency and search again.

To Search for a Client by State Person #'s:

1. Highlight the Participants folder in the Tree View and access the **Action** menu, or click the **quick add** button on the Application toolbar; select **Add Existing Client**.
2. The **Type** field defaults to **Client**.
3. In the **By** field, select the **Person Number**.
4. In the **Scope** field, select **State**.
5. Select the **Number Type** from the drop-down menu.
6. Enter the applicable number in the **Number** field.
7. Click **Start Search**.
8. The search results displays.

To Search for a Client by State Case #'s:

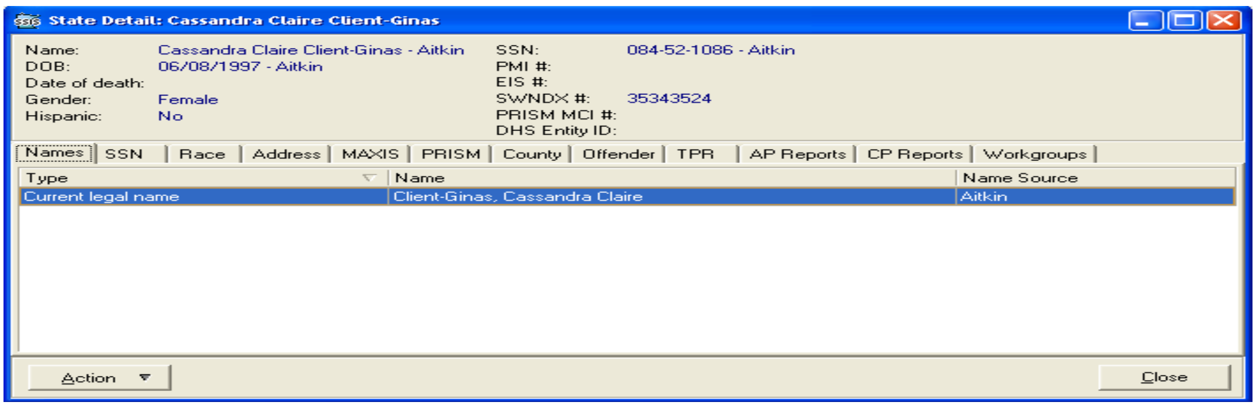
1. Highlight the Participants folder in the Tree View and access the **Action** menu, or click the **quick add** button on the Application toolbar; select **Add Existing Client**.
2. The **Type** field defaults to **Client**.

3. In the **By** field, select the **Case Number**.
4. In the **Scope** field, select **State**.
5. The **Number Type** field defaults to **MAXIS Case** #.
6. Enter the applicable number in the **Number** field.
7. Click **Start Search**.
8. The search results display.

View State Detail

View State Detail contains client demographic information available in the local agency to determine if this is the correct client name. It also can provide information on prior or current intakes or workgroups that the client has been included in statewide.

State Detail Screen



Names Tab:

The Names tab includes the current legal name and any alias names(s). When multiple persons make a name change to the same person record, these changes display on the Names tab after the client is again cleared to the statewide database. Name types includes Maiden name, Other (non-maiden) previous legal name, Nickname, Alternate spelling of the legal name, Other, and Unknown.

SSN Tab:

The SSN tab includes SSN and Source (county/tribe, MAXIS, MMIS, etc.). This is the client's identified social security number and where the number was retrieved from.

Race Tab:

The Race tab displays the race or races, a Client's Tribes or Ethnicity, and the Tribal Enrollment Status that has been entered into SSIS, MAXIS or MMIS.

Address Tab:
The Address tab displays the most current mailing address stored in Executive Information System (EIS), the state information database. SWNDX does not store an address history like that in View Cnty Detail. If a user selects a person from SWNDX, the SWNDX address becomes a mailing address in SSIS. Source displays whether the address was uploaded from a county/tribe, MAXIS, or MMIS.

MAXIS Tab:
The MAXIS tab contains all MAXIS case numbers associated with the person. The Persons tab lists all the persons who are part of the MAXIS case. The Program tab includes a list of the programs the client has been or is enrolled in. For example, the Program tab displays the programs the client is receiving, received or is a household member of someone who received or is receiving Minnesota Family Investment Program (MFIP), Food Stamps, MinnesotaCare, Medical Assistance, Health Care, Title IV-E Foster Care, General Assistance and Emergency Assistance.

Hint: Double-click on a person on the Persons tab to open the State Detail screen for the selected person without doing a separate State Detail search.

PRISM Tab:
The PRISM tab displays information about a child's PRISM or child support case if the child has been in placement in a Minnesota county, is a IV-E eligible child, or the agency receives IV-D (Child Support) funds. This information is available on SSIS through a monthly upload from PRISM via the DHS Data Warehouse, but it is a good idea to verify the details with the PRISM worker.

County Tab:
The County tab includes a list of counties/tribes that cleared this person at both the county/tribal and state levels in SSIS. It also displays a Last Change Date, which informs the user when the record was last edited in the corresponding agency.

Offender Tab:
The Offender tab displays maltreatment determinations for Child Protection and Adult Protection. The Offender tab displays the agency that made the maltreatment determination for each individual Allegation in an Assessment workgroup, the date of the maltreatment determination, the name and phone

number of the worker making determination, maltreatment type, and appeal information when relevant.

The Offender tab also displays DHS Licensing Maltreatment information. This includes the maltreatment type, allegation, determination date, and phone number.

TPR Tab:

The TPR tab includes information regarding past Termination of Parental Rights for a parent whose rights have been terminated. It displays the agency's name, name and relationship of the terminated parent/child, termination date and reason, and termination type.

Hint: This tab does not display when search results are for a child whose parent's rights have been terminated.

AP Reports Tab:

The AP Reports tab displays Adult Protection data including Intake, Assessment and Case Management workgroups in which the person has had the role of either an alleged victim or alleged perpetrator. The information displayed includes the agency in which the workgroup is held, status (Accepted for emergency protective service, Accepted for county investigation, or Not accepted for investigation), end date, and whether the report was determined. When results display, the plus sign in front of the agency name allows the record to be expanded. Expanding the plus sign displays the allegations and names of the alleged victim and alleged offender.

CP Reports Tab:

The CP Reports tab displays Child Protection data including Intake, Assessment, and Case Management workgroups in which the person has had the role of either an alleged victim or alleged offender. The information displayed includes the agency in which the workgroup is held, the Report Track (Inv – Family investigation, Fac - Facility investigation, FA - Family assessment), Report Date, Status (Assessment complete, Screened in for assessment, Screened out, Unable to conclude), end date, whether the report was determined, whether CPS were needed, Unable to Complete Reason, Facility Responsible, Individual Responsible Determination After Appeal, and License Action. When results display, the plus sign in front of the agency name allows the record to be expanded. Expanding the plus sign displays the allegations and names of the alleged victim and alleged offender, Determined, Offender/Victim Relationship, and Determination After Appeal.

Workgroup Tab

The Workgroup tab displays all program area Assessment and Case Management workgroups in which the person has been a client. The plus sign in front of the agency name allows the record to be expanded. Expanding the plus sign displays the remainder of the clients included in the workgroup.

Hints:

- *The columns for Statewide Case Access (i.e., Access Request Dt, Access Response Dt, and Access Approved), only display data when the worker who has requested access is logged on.*
- *The Workgroups tab has a special feature available from its Action menu. A function exists that enables workers to select all clients from a previous workgroup. The function is called Copy Clients and is only enabled when using Person Search to select Person for Intake, Assessment or Case Management workgroups. Copy Clients is beneficial when adding existing clients to workgroups to avoid having to search for and select multiple people needed for a workgroup. When Copy Clients is selected, all clients in the workgroup highlighted are pulled into the workgroup. Therefore, there may be unwanted clients in the workgroup. If this is the situation, remove any clients not needed in the new workgroup that were copied from the previous workgroup.*

To View State Detail:

1. From the Person Search screen, access the **Action** menu.
2. Select **View State Detail**.
3. State Detail screen displays.

Hint: Basic demographic information displays at the top of the screen and there are a number of tabs in State Detail available to review client history and determine if the correct client was located. Depending on the security access given, the user may not be able to view all of these tabs.

To Copy Client from SWNDX:

1. From the Person Search screen, select **State** as the **Scope** and enter additional search criteria.
2. Click **Start Search**.
3. Highlight the client in the search results.
4. Access the **Action** menu.
5. Select **Copy Clients**.
6. The copied clients display as participants in the intake or workgroup.

Hint: The Copy Clients feature allows workers to search and add an existing client from another agency's workgroup. If there are multiple clients in the workgroup, all the other associated clients in that workgroup copy to your agency's workgroup. It copies all clients (and their participant information) or nothing. Once copied, remove any clients not needed in the new workgroup that were copied from the remote agency workgroup.

To Print State Detail Information:

1. From the Person Search screen, access the **Action** menu.
2. Select **Print.** The Print Preview displays.
3. Click the **Print** button on the Print Preview toolbar.

Client County Search

Use Client County Search to search for client information that is contained in the Local Agency's database.

To Search for a Client by Name, DOB, Gender:

1. Highlight the Participants folder in the Tree View and access the **Action** menu, or click the **quick add** button on the Application toolbar; select **Add Existing Client**.
2. The **Type** field defaults to **Client**.
3. The **By** defaults to **Name, DOB, Gender**.
4. In the **Scope** field, select **County**.
5. In the **Options** field, select **Exact Match**, **Starts With** or **Soundex**.

6. Enter the name or partial name in the **First Name** and/or **Last Name** fields.
7. Click **Start Search**.
8. The search results displays.

To Search for a Client by County Person #:

1. Highlight the Participants folder in the Tree View and access the **Action** menu, or click the **quick add** button on the Application toolbar; select **Add Existing Client**.
2. The **Type** field defaults to **Client**.
3. In the **By** field, select the **Person Number**.
4. In the **Scope** field, select **County**.
5. Select the **Number Type** from the drop-down menu.
6. Enter the applicable number in the **Number** field.
7. Click **Start Search**.
8. The search results displays.

To Search for a Client by County Case #:

1. Highlight the Participants folder in the Tree View and access the **Action** menu, or use the **quick add** button on the Application toolbar; select **Add Existing Client**.
2. The **Type** field defaults to **Client**.
3. In the **By** field, select the **Case Number**.
4. In the **Scope** field, select **County**.
5. In the **Number Type** field, select the type of number to use for the search from the drop-down menu.
6. Enter the applicable number in the **Number** field.
7. Click **Start Search**.
8. The search results displays.

To Search for a Client by Address:

1. Highlight the Participants folder in the Tree View and access the **Action** menu or click the **quick add** button on the Application toolbar; select **Add Existing Client**.
2. The **Type** field defaults to **Client**.

3. In the **By** field, select the **Address**.
4. In the **Scope** field, select **County**.
5. In the **Search the contents of street address line 1, 2 and 3**, enter the address.
6. In the **City** field, enter the city.
7. Click **Start Search**.
8. The search results displays.

Professional Collateral Search

Use Professional Collateral Search to search for professional collaterals contained in the Local Agency's database.

To Search for a Professional Collateral:

1. Highlight the Participants folder in the Tree View and access the **Action** menu or click the **quick add** button on the Application toolbar; select **Add Existing Collateral**.
2. The **Type** field defaults to **Professional Collateral**.
3. In the **Options** field, select **Exact Match**, **Starts With** or **Soundex**.
4. In the **Enter Search Information** section, enter or select the appropriate search criteria.
5. Click **Start Search**.
6. The search results displays.

Hint: The By and Scope fields are greyed out and unavailable since professional collaterals are only searchable within the local agency's database.

Reference: For additional information on searching for a professional collateral by field of practice or Business Organization, see the Business Organization module.

View County Detail

Use View County Detail to search the local agency's database for client demographic information. It also can provide information on prior or current intakes or workgroups that the client has been included in at the local level.

To Access View County Detail:

1. From the Person Search screen, select **County** as the **Scope** and enter all search criteria.
2. Click **Start Search**.
3. Highlight the person in the search results and access the **Action** menu.
4. Select **View County Detail** and review the client detail in the Tree View to ensure the correct client.

Relationship Option

Viewing the Relationships screen helps to identify any familial relationships that the person may have with other clients in SSIS. This helps confirm that the selected client is the correct client. When using Person Search for: Select Person for Intake, Assessment or Case Management, relationships can be multi-select to add all clients into an intake or a workgroup at the same time without having to search again.

The Relationship screen displays not only the type of relationship, the name of the second person; it also displays the status of the relationship, whether it is active or inactive. If the relationship is inactive, the reason and inactive date display.

To Add Participants from Relationships:

1. From the Person Search results screen, highlight the person in the grid and access the **Action** menu.
2. Select **Relationships**.
3. The Relationships screen displays. Highlight the relationship to add to the workgroup or intake.
   Or

Multi-select clients by highlighting the relationship to add to the workgroup or intake and press the **Ctrl** key on the keyboard while selecting each additional relationship in the grid to add to the workgroup or intake.

4. Click **Select**.
5. The intake or workgroup displays and defaults to the Participants folder on the Tree View.

Hint: The SSIS Person numbers are included to assist workers in selecting the correct person's name in case of: duplicate client names or clients entered with minimal identifying information and with a clearing status of Client Do Not Clear.

Print Person Detail

Use Print Person Detail to print a detail report of the person data entered in SSIS for the person highlighted in the grid. This report includes all information available under the Participants node in the Tree View.

Person Detail Report

PERSON DETAIL
Cassandra Claire Client-Ginas

Person Information	
Birth date: 06/08/1997	SSIS Person #: 185528193
Age: 13 years	County Person #: [redacted]
Date of Death:	SSN: [redacted]
Gender: Female	PMI #:
Marital status: Single, never married	SWNDX #: [redacted]
Hispanic heritage?	Child out of home: No
Primary language: English	Interpreter needed?
Qualifies under ICWA: N	

Estimated date of birth or age prints with an asterisk.
No Phone Information...
No Address Information...

Name Type	Name
Current legal name	Cassandra Claire Client-Ginas

Race

Race	Tribe/Ethnicity	Tribal Enrollment Status
Caucasian		

Professionally Determined Disabilities
No known disability

No Diagnosis Information...
No Health Information...

Relationships to Cassandra Claire Client-Ginas's - SSIS Person #: 185528193
Cassandra Claire Client-Ginas's Birth mother is Constance Courtney Client-Ginas
Cassandra Claire Client-Ginas's Birth father is Unknown Male

No Employment Information...
No Education Information...
No Insurance Policies Information...
No Health Care Providers Information...

To Print a Person Detail Report:

1. From the Person Search results screen, highlight the person in the grid and access the **Action** menu.
2. Click **Print Person Detail** to print a person detail report for the person highlighted in the grid.
3. The person detail report displays on the Print Preview screen.
4. Click the **Printer** button on the Print Preview toolbar.
5. Click **Close** to cancel or exit the print preview.

Resources

Clearing Module
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_144008.pdf.

Enhanced Grids Module
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_146991.pdf.

Participant Entry
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008068.

Professional Collateral
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008032.

SSIS Admin: General Security
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008044.