



# Greetings from the Help Desk!

## ***Duplicate CAPS ID #s***

The best way to avoid creating the problems associated with duplicate ID#s is to do a thorough search before adding someone to the system:

- Perform a phonetic search when entering a new person in CAPS. Take time to go through the screens to ensure that the person being added is not already there.
- Search under all known names for a person.
- If a person has a first name such as Robert or Rebecca, search for other first name possibilities such as Bob, Rob, Bobby, Becca, or Becky.
- If a person has a last name that is more than one word (for example, Rides Horse), do a search for Rides Horse and Rideshorse. A space is considered alphabetically prior to the letter "A".
- Do multiple searches if the information is known – name, SSN, name/DOB, etc.
- Look at the relationship list (RELL) for each of the ID#s. If the list of relationships is completely different, chances are they are not the same person.
- Be aware of fathers/sons and mothers/daughters that have the same name.

**BOTTOM LINE:** It is worth it to spend a few minutes up front doing a thorough person search rather than waste time entering a bunch of information only to discover the information was already there on another ID.

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## ***What to do when you find duplicate CAPS ID #s...***

When you find duplicate ID numbers in CAPS, please notify Margaret Jennings-Jeffrey at [mjenningsjeffrey@mt.gov](mailto:mjenningsjeffrey@mt.gov). Remember, duplicate ID numbers means the same person is listed multiple times on PERL with **different** CAPS ID numbers. **Please do not alter any information when you find duplicate ID#s. Let Margaret work with the Help Desk to resolve the duplicate problem before you update any information.**

Requests must be made via e-mail ([mjenningsjeffrey@mt.gov](mailto:mjenningsjeffrey@mt.gov)) and if known, please state the following information:

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- √ The **“good”** CAPS ID # you want to **keep**
- √ The **“bad”** CAPS ID # you want to **delete**

### ***Reminders...***

- If there is a worker attached to one of the CAPS ID#s, that is the # we need to keep.
- If both CAPS ID#s show a worker attached, the workers must be the same person if the CAPS ID# being deleted is for an open client.
- If both CAPS ID#s have services/assessments, the bad number must have a CLO review entered and approved on IARD.
- You may not replace a client with a person.
- The “bad” client ID# can not be deleted for a person with a name in CAPS of ‘UNK CAPS’
- The “bad” client ID# can not be deleted if trust account monies exist for the client. You would need to contact Susan Austad to have the monies moved to the “good” ID#.