

Chapter 5 – Person Search

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Person Search Overview

Introduction

The Person Search function is the basis for ensuring data integrity within KAMIS. Customers should not be duplicated within the system. Therefore, before a person can be created in KAMIS, a Person Search must be done first to determine whether he/she already exists in KAMIS. Person Search is where all person-related functions in KAMIS begin.

How it Works

If the person record being searched for is not found, a new record is entered using the Person Administration application, which is integrated into KAMIS for this purpose. Adding a person to KAMIS is explained in Chapter 6 - Person Administration.

Search Options

To protect customer information, the Person Search function displays only certain information, depending on the search parameters used. Below are the different search criteria options and what will be displayed.

Search using the following information allows for specific groups of users to find the person:

Statewide: All KAMIS users, regardless of organization membership, will find the customer, regardless of what organization the customer is associated with.

1. Search by KAMIS ID only
2. SSN only
3. Medicaid ID # only
4. Date of Birth only

The following data will display only if included in your search parameters. Otherwise, the information will be masked with x's if the search results have information in any of these fields, and the customer is not associated with the logged in user's organization.

- DOB
- SSN
- CURRENT MEDICAID #
- Also, the Update Person button will not be displayed.

ORG only: Only KAMIS users that belong to the same organization as the customer is associated with will find the customer.

1. Name only (First & Last or Partial)

A person that is not associated with any organization (i.e. is not a customer) will not display in Person Search Results regardless of the criteria used.

- For Associates see Chapter 6 - Person Administration.
- For Assessors/Case Managers/Options Counselors, etc. see Chapter 23 – Organization Member.

The following pages will review the different search options and what search results will display.

Person Search – Customers Only

How To

Follow the steps in the table below to complete a person search.

Step	Action	Result				
1.	On either the KAMIS Home Page or on the Person Search Page, enter the Search Criteria					
2.	Click on the Search button	When complete, a list of the names found and/or a 'No Data found' message displays.				
<table border="1"> <thead> <tr> <th>If Person Search Result...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Is returned</td> <td> <p>Proceed with a new or existing form.</p> <p>See Form Selection Chapter for detailed instructions.</p> <p>NOTE: A limit of 25 records will be returned. A statement will indicate that additional records may exist. The criteria will need to be adjusted to narrow the search.</p> </td> </tr> </tbody> </table>			If Person Search Result...	Then...	Is returned	<p>Proceed with a new or existing form.</p> <p>See Form Selection Chapter for detailed instructions.</p> <p>NOTE: A limit of 25 records will be returned. A statement will indicate that additional records may exist. The criteria will need to be adjusted to narrow the search.</p>
If Person Search Result...	Then...					
Is returned	<p>Proceed with a new or existing form.</p> <p>See Form Selection Chapter for detailed instructions.</p> <p>NOTE: A limit of 25 records will be returned. A statement will indicate that additional records may exist. The criteria will need to be adjusted to narrow the search.</p>					

The screenshot displays the KAMIS Person Search interface. At the top, there are input fields for KAMIS ID, FIRST NAME (opt.), LAST NAME (2 char.), SSN, and DATE OF BIRTH. The first name field contains 'a', the last name field contains 'merr', and the date of birth field contains '07/04/1928'. A 'SEARCH' button and a 'RESET' button are visible. Below the search criteria, the search results are displayed in a table, sorted by Last, First, Middle. The results table has columns for ORIGINAL EFF DT, EFF DT, KAMIS ID, FIRST, MIDDLE, LAST, DOB, SSN, PSA, CUSTOMER STATUS, Update Person, and View Forms. The first three rows of results are shown, with the first name and last name fields highlighted in red to indicate the search criteria used.

ORIGINAL EFF DT	EFF DT	KAMIS ID	FIRST	MIDDLE	LAST	DOB	SSN	PSA	CUSTOMER STATUS	Update Person	View Forms
01/01/2007	01/01/2007	20000519	ANNE		MERMAID	07/04/1928	222-22-2222	20000082	ACTIVE		
07/01/2008	07/01/2008	20000509	ARIEL		MERMAID	07/04/1928	xxx-xx-xxxx	4	ACTIVE		
04/01/2000	04/01/2000	20000518	ALLEN		MERMAN	07/04/1928	555-55-5555				

row(s) 1 - 3

Note

The search results will display the specific criteria you used in your search, in red. In the above example, the A in the first name and MERM in the last name are red because those were the criteria used in the search.

Continued on next page

Person Search – Customers Only, Continued

Note (continued)

Step	Action	Result				
	<table border="1"> <thead> <tr> <th data-bbox="565 499 979 531">If Person...</th> <th data-bbox="984 499 1390 531">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 537 979 678">is not returned</td> <td data-bbox="984 537 1390 678">A new person will need to be created in KAMIS. See Chapter 6 - Person Administration for detailed instructions.</td> </tr> </tbody> </table>	If Person...	Then...	is not returned	A new person will need to be created in KAMIS. See Chapter 6 - Person Administration for detailed instructions.	
If Person...	Then...					
is not returned	A new person will need to be created in KAMIS. See Chapter 6 - Person Administration for detailed instructions.					
		<div data-bbox="440 751 1398 1003" style="border: 1px solid black; padding: 5px;"> <p> <input type="text" value="KAMIS ID"/> <input type="text" value="ar"/> <input type="text" value="mermaid"/> <input type="text" value="SSN"/> <input type="text" value="DATE OF BIRTH"/> <input type="button" value="SEARCH"/> <input type="button" value="RESET"/> </p> <p style="text-align: right; font-size: small;">done: 0:01</p> <hr/> <p> Search Results (Sorted by Last, First, Middle) <input type="button" value="Create New Name Entry"/> </p> <p style="color: red; font-weight: bold; font-size: 1.2em;">No Data found</p> </div>				

Search Results – KAMIS ID Number Only

Introduction

Because search by KAMIS ID only is a Statewide return, this search will return the customer regardless of the associated organization.

However, for the customers whose organization number is NOT the same as the person performing the search, the Social Security Number, Date of Birth and Medicaid ID # will be masked. Additionally, the link to the Person Administration Page (Update Person) is unavailable.

To obtain full access to the customer, you must request a Share or Transfer of the customer from the organization with which they are currently associated. Refer to the Share and Transfers chapter of the KAMIS Manual for instructions.

Logged in user and customer are associated with the same organization:

Search Selections

Person # First Name (optional) Last Name (Two character minimum) SSN Medicaid # Date of Birth done: 0:04

Search Results (Sorted by Last, First, Middle)

Searched by Person Number

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	Organization	Current Medicaid #	Customer Status	Update Person	View Forms
12/01/2014	12/01/2014	30013980	COTTON	A	HILL	12/07/1925	121-77-1925	Primary 4		ACTIVE		

rows) 1 - 1

Logged in user and customer are associated with different organizations:

Search Selections

Person # First Name (optional) Last Name (Two character minimum) SSN Medicaid # Date of Birth done: 0:01

Search Results (Sorted by Last, First, Middle)

Searched by Person Number

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	Organization	Current Medicaid #	Customer Status	Update Person	View Forms
12/01/2014	12/01/2014	30013980	COTTON	A	HILL	xx/xx/xxxx	xxx-xx-xxxx	Primary 4		ACTIVE		

rows) 1 - 1

Search Results – Date of Birth Only

Introduction

This search will return the customer regardless of the associated organization.

To limit the search and to perform a quicker search result, add the customers' last name. The name is not required however, in doing so it will return only the customers whose Name and Date of Birth match.

For the customers whose organization number is NOT the same as the person performing the search, the Social Security Number and Medicaid ID # will be masked. Additionally, the link to the Person Administration Page (Update Person) is unavailable.

To obtain full access to a customer that is not associated with your organization, request a Share or Transfer from the current organization. Refer to the Share and Transfers chapter of the KAMIS User Manual for further instructions.

Search Selections

Person # First Name (optional) Last Name (Two character minimum) SSN Medicaid # Date of Birth

done: 0.03

Search Results (Sorted by Last, First, Middle)

Searched by Birth Date

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	Organization	Current Medicaid #	Customer Status	Update Person	View Forms
03/01/2008	03/01/2008	30000510	BRAINY		SMURF	07/04/1920	xxx-xx-xxxx	Primary 1	xxxxxxxxxxxx	ACTIVE		
03/01/2008	03/01/2008	30000511	COOKIE		SMURF	07/04/1920	xxx-xx-xxxx	Primary 8, Secondary 21		ACTIVE		
03/01/2008	03/01/2008	30000512	DOPEY		SMURF	07/04/1920	xxx-xx-xxxx	Primary 3		ACTIVE		
03/01/2008	03/01/2008	30000515	FRANK		SMURF	07/04/1920	xxx-xx-xxxx	Primary 5		ACTIVE		
03/01/2008	03/01/2008	30000516	GEORGE		SMURF	07/04/1920	666-66-6666	Primary 4	001111111111	ACTIVE		
03/01/2008	03/01/2008	30000517	HANK		SMURF	07/04/1920	xxx-xx-xxxx	Primary 7		ACTIVE		
03/01/2008	03/01/2008	30000518	IAN		SMURF	07/04/1920	xxx-xx-xxxx	Primary 8	xxxxxxxxxxxx	ACTIVE		
03/01/2008	03/01/2008	30000519	JOHN		SMURF	07/04/1920	xxx-xx-xxxx	Primary 9		ACTIVE		
03/01/2008	03/01/2008	30000520	KAY		SMURF	07/04/1920	xxx-xx-xxxx	Primary 10		ACTIVE		

Logged in user and customer are associated with the same organization

Search Results – Social Security Number Only

Introduction

This search will return all customers whose Social Security Number matches the entry, regardless of the associated organization.

For the customers whose organization number is NOT the same as the person performing the search, the Date of Birth and Medicaid ID # will be masked. Additionally, the link to the Person Administration Page (Update Person) is unavailable.

To obtain full access to a customer that is not associated with your organization, request a Share or Transfer from the current organization. Refer to the Share and Transfers chapter of the KAMIS User Manual for further instructions.

The screenshot shows a search interface with the following components:

- Search Selections:** A form with fields for Person #, First Name (optional), Last Name (Two character minimum), SSN (55555555), Medicaid #, and Date of Birth. A Search button and a Reset Selections link are present.
- Search Results (Sorted by Last, First, Middle):** A table with the following data:

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	Organization	Current Medicaid #	Customer Status	Update Person	View Forms
10/24/2011	11/14/2011	30000634	GUMBY	BRIGHT	GREEN	11/11/1950	555-55-5555	Primary 4		ACTIVE		
03/01/2008	03/01/2008	30000515	FRANK		SMURF	xx/xx/xxxx	555-55-5555	Primary 5		ACTIVE		
01/01/2010	01/01/2010	30000584	RALPH		SMURF	xx/xx/xxxx	555-55-5555	Primary 12	xxxxxxxxxxx	ACTIVE		

A callout box in the center of the results table contains the text: "Logged in user and customer are associated with the same organization".

Search Results – Medicaid ID Number Only

Introduction

This search will return all customers whose Medicaid ID Number matches the entry, regardless of the associated organization.

For the customers whose organization number is NOT the same as the person performing the search, the Social Security Number and Date of Birth will be masked. Additionally, the link to the Person Administration Page (Update Person) is unavailable.

To obtain full access to a customer that is not associated with your organization, request a Share or Transfer from the current organization. Refer to the Share and Transfers chapter of the KAMIS User Manual for further instructions.

Search Selections

Person # First Name (optional) Last Name (Two character minimum) SSN Medicaid # Date of Birth

Logged in user and customer are associated with the same organization

Search Results (Sorted by Last, First, Middle)

Searched by Medicaid Number

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	Organization	Current Medicaid #	Customer Status	Update Person	View Forms
04/06/2011	08/19/2013	30000618	FRED	GEORGE	FLINTSTONE	xx/xx/xxxx	xxx-xx-xxxx	Primary 4	00123456789	ACTIVE		
04/06/2011	04/06/2011	30000619	FRED	GEORGE	FLINTSTONE	xx/xx/xxxx	xxx-xx-xxxx	Primary 4	00123456789	ACTIVE		
01/13/2009	06/28/2010	30000529	LOGAN		CUSTOMER	01/13/1945	555-55-5555	Primary 5	00123456789	ACTIVE		
01/01/2013	01/01/2013	30013268	STEVE		SHEEPDOG	xx/xx/xxxx	xxx-xx-xxxx	Primary 4, Secondaries 12, 21	00123456789	ACTIVE		