

NC Division of Aging and Adult Services

ARMS - CNDS Interface Training

(Common Named Database Service)

ARMS

Aging Resource Management System

Introduction

- In order to streamline the information sharing between the Aging Resource Management System (ARMS) system and other Department of Health and Human Services (DHHS) division's systems, the ARMS system will interface with the *Common Name Data Service (CNDS)* system and obtain a single unified ID called the "*Person ID*" provided by CNDS to its clients. This unified ID is common to DHHS systems and will bring seamless information sharing and client verification to ARMS.

Assumptions

- Data provided by the client on the DAAS-101 Client Registration Form (CRF) is accurate.
- There are no data entry errors when searching for the client record in CNDS.
- The user has to verify that they have entered the correct search criteria before searching for a person in CNDS.
- The user has to verify that they have transferred information from the CRF to the application accurately before creating a new person in CNDS.

Provider Main Menu Change

The Provider Users main menu item to Add New Client has been changed to Create/Update Client.



Provider Home Menu Change

The screen below will display a running list of changes made to Client records by CNDS. It will be a running list displaying the updated client for 30 days. Clients appearing on this list will display changes/updates to any of the CNDS owned fields:

Last name / First name / Gender / Date of Birth / Race / Ethnicity



Code	Provider	Status	Address	City			
G010	ADULT CENTER FOR ENRICHMENT	A	122 N ELM STREET, SUITE 600	GREENSBORO	Details...	Clients...	Services...

CNDS Updates

The following records have been updated in ARMS. Please update your records and search with the updated values.

1. SMITHE, , MARY, F, DoB: 1/4/1922 updated to SMITH, , MARY, F, DoB: 1/4/1921 on 4/15/2011.
- 

Fields that changed in CNDS

Why I need to Know Client Record Changed in CNDS?

- ARMS clients are now part of CNDS.
- When a record changes in CNDS, ARMS is updated with that change.

Clients displayed

- A list of clients will display by provider. In this example, the record displayed is a client served by provider **G010-Adult Center for Enrichment**.

Code	Provider	Status	Address	City			
G010	ADULT CENTER FOR ENRICHMENT	A	122 N ELM STREET, SUITE 600	GREENSBORO	Details...	Clients...	Services...

CNDS Updates

The following records have been updated in ARMS. Please update your records and search with the updated values.

1. SMITHE, , MARY, F, DoB: 1/4/1922 updated to SMITH, , MARY, F, DoB: 1/4/1921 on 4/15/2011.

Fields that changed in CNDS

Affected by CNDS Change

- Search criteria for Client
- Service Totals
- ZGA-903 Units of Service Report
(*Turnaround Document*)
- DAAS-101
- Providers using third party software programs, such as ServTracker

Create New Client

From the Provider Home screen, the user clicks on “Create/Update” link from the

main menu Home Search Client **Create/Update Client** Export Reports Import ARMS/SIS

Home Search Client **Create/Update Client** Export Reports Import ARMS/SIS

Code	Provider	Status	Address	City			
G055	SENIOR RESOURCES OF GUILFORD	A	301 E. WASHINGTON STREET	GREENSBORO	Details...	Clients...	Services...

Create / Update Client

The user is presented with a “Search CNDS” screen with Last Name, First Name, Sex, and Date of Birth as mandatory fields. All fields with an **asterisk in Red (*)** are mandatory fields.

Home Search Client Create/Update Client Export Reports Import ARMS/SIS

Search CNDS

Last Name* :

First Name* :

Sex* :

Date Of Birth* : / /

Search Criteria

Search CNDS

Last Name* :

First Name* :

Sex* : ▼

Date Of Birth* : / /

→

The user fills in the fields and clicks the “Search” Button as shown below

Search Results

- CNDS returns a maximum of 120 search results in the order of best match. ARMS will display up to 20 records per page as shown below.

Search CNDS

Last Name* :

First Name* :

Sex* : Drop down

Date Of Birth* :

Sex* :

Male

Female

List of Clients

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
SMITH	M	JOHNNIE		7628	M	02/27/1918	W	94 . . . 1L	Create
SMITH	B	JOHN		1025	M	03/26/1918	B	94 . . . 2P	Create
SMITH	W	JOHN		1917	M	04/07/1918	B	949	Create
SMITH		JOHN		8983	M	04/09/1918	B	94	Update
SMITH		JOHNNIE		9505	M	04/30/1918	B	94	Create
SMITH	C	JOHN		1079	M	12/26/1918	W	94	Create

CNDS Search Client List

List of Clients

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
SMITH	M	JOHNNIE		7608	M	02/17/1918	W	94.....1L	Create
SMITH	B	JOHN		1025	M	03/05/1918	B	94.....2P	Create
SMITH	W	JOHN		1917	M	04/17/1918	B	94.....3L	Create
SMITH		JOHN		8913	M	04/03/1918	B	94.....	Create
SMITH		JOHNNIE		9515	M	04/03/1918	B	94.....3L	Create
SMITH	C	JOHN		1079	M	12/21/1918	W	94.....P	Create

Create New Person

Review the list of records returned and decide if CNDS has a record for this new applicant already.

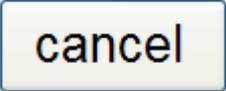
- If a CNDS record is found in the list of search results, the user clicks on the “**Create**” button in the appropriate row.

List of Clients ←

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
SMITH	M	JOHNNIE		7678	M	02/27/1918	W	94.....1L	Create
SMITH		JOHN		8973	M	04/07/1918	B	94.....	Create

Create will allow User to Add this new client to ARMS.

Add New Client to ARMS

- The “Create/Update Client” Screen displays with fields are populated with information from CNDS. All CNDS fields will be disabled for user entry at this stage.
- The user should key information from the DAAS-101-Client Registration Form
- Click the **Create** button to add client in ARMS with a CNDS Id. 
- Click **Cancel** to end task 

Client Record Created

- The user will display a confirmation message. The user must click the **Ok** to complete the task.



Ethnicity Change to match CNDS

Ethnicity : NOT HISPANIC/LATINO

- HISPANIC CUBAN
- HISPANIC OTHER
- HISPANIC MEXICAN AMERICAN
- NOT HISPANIC/LATINO
- HISPANIC PUERTO RICAN
- UNREPORTED

Client created confirmation

- The user clicks “OK” to complete the creation of a client record in **ARMS** and **CNDS**
- On success, ARMS displays a message “Client created successfully”

Index on Last Name: - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U - V - W - X - Y - Z									
Last Name	First Name	MI	Suffix	SSN4	Sex	Date Of Birth	Status	Registration Date	▲
SMITH	JOHN			8 13	M	4/9/1918	R	3/15/2011	Details...

Client not in CNDS or ARMS

- If a CNDS record is not found in the list of search results, click the “Create New Person” button at the bottom of the search results page.

Search CNDS

Last Name* :

First Name* :

Sex* : ▼

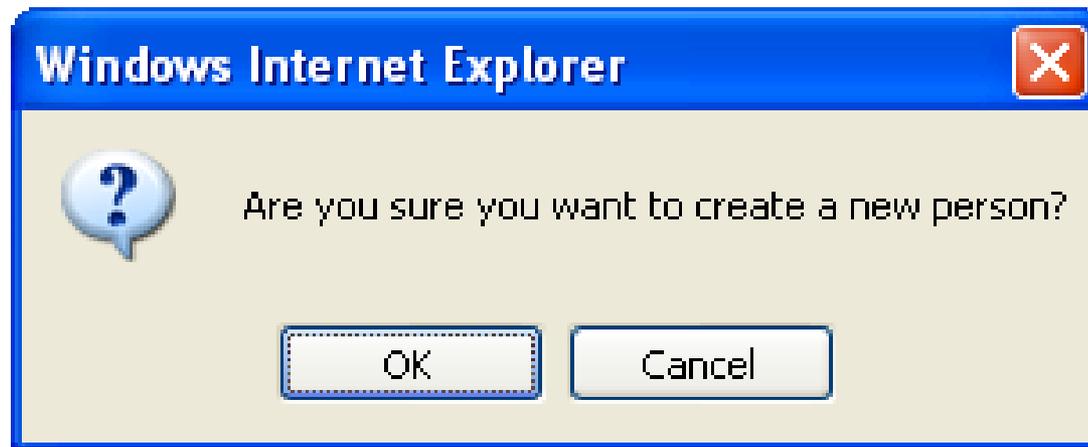
Date Of Birth* : / /

No clients found.

Add new Client

The user is prompted with a question “Are you sure you want to create a new person

To create this client the user should click **Ok** to Create the new person or Cancel to end task.



Create/Update Client Screen

- The user is presented with the “Create/Update Client” Screen, the fields are populated with the user provided information from the previous “**Search CNDS**” screen if the client is not found in ARMS.

Client Screen Details

- The Last 4 Digits SSN is blank. If the 4 digits SSN is known, the user can key it or the user can key “0000”

Create/Update Client

Demographics/Status (blowout, rainy)

Last 4 Digits SSN :	<input type="text"/>			
Last Name :	<input type="text" value="blowout"/>	Suffix : <input type="text" value=""/>		
First Name :	<input type="text" value="rainy"/>			
Middle Initial :	<input type="text"/>			
Registration Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Date Of Birth :	<input type="text" value="02"/>	<input type="text" value="19"/>	<input type="text" value="1914"/>	<input type="checkbox"/> Special Eligibility
Sex :	<input type="radio"/> Male	<input checked="" type="radio"/> Female		

JR
SR
I
II
III
IV

Client Details continued

- The fields from the search criteria populated to the Create/Update Client data entry screen.

Create/Update Client Demographics/Status (blowout, rainy)

Last 4 Digits SSN :	<input type="text"/>	
Last Name :	<input type="text" value="blowout"/>	Suffix : <input type="text" value=""/>
First Name :	<input type="text" value="rainy"/>	
Middle Initial :	<input type="text"/>	
Registration Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Date Of Birth :	<input type="text" value="02"/> / <input type="text" value="19"/> / <input type="text" value="1914"/>	<input type="checkbox"/> Special Eligibility
Sex :	<input type="radio"/> Male <input checked="" type="radio"/> Female	

▼

JR

SR

I

II

III

IV

Last 4 Digits SSN

- The User can key the last 4-digits of SSN or key all zeroes “0000.”
- Users should stop assigning the last 4-digits SSN. If the last 4-digits are not available, please key all zeroes “0000.” If CNDS has the full SSN the last 4-digits will display on the screen.
- This field is a required field to Create a new ARMS Client Record. The record will not save without an entry in this field.

Last 4 Digits SSN :

Client Details – Edit checks

- Edit checks are in place to prevent users from keying spaces or special characters in the last and first name field. A field has been added to key the appropriate Suffix used.

Create/Update Client

Demographics/Status (blowout, rainy)

Last 4 Digits SSN :

Last Name : Suffix :

First Name :

Middle Initial :

Registration Date / /

Date Of Birth : / / Special Eligibility

Sex : Male Female

Dropdown menu options: JR, SR, I, II, III, IV



Client Details continued

- The user fills in the mandatory fields and clicks “**Create**” button at the bottom of the page.
- ARMS prompts the user to confirm the creation.
- The user clicks “OK” to complete the creation of a client record.
- On success, ARMS displays a message “Client created successfully.”

Client not in CNDS but in ARMS

- If a CNDS record is not found in the list of search results, click the “**Create New Person**” button at the bottom of the search results page.



Create New Person

- For example, if the Search CNDS criteria returns list that do include the client you are searching, then the Client is not in ARMS or CNDS.

Search CNDS

Last Name* :

First Name* :

Sex* : ▼

Date Of Birth* : / /

Verify Client

- In the previous slide, the search criteria was for Judy Thomas, dob as 5/17/1946.
- The user should verify the search criteria was keyed correctly and that the client is not in the list of clients returned.

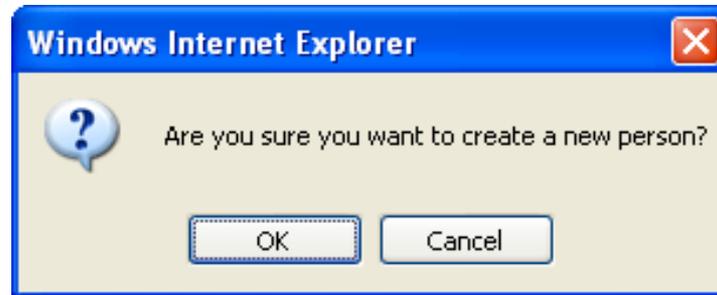
List of Clients

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
THOMAS	E	JUDITH		9***	F	10/08/1946	W	700298881Q	Create

Create New Person

Record Found in ARMS

- If the searched record is found in ARMS with the exact search criteria (Last Name, First Name, Gender, Date of Birth), the user is presented with this message “*Are you sure you want to create a new person?*”



Verify Information

- When Ok is clicked another informational message appears: “***Client found in ARMS. Please verify the available information before creating the CNDS record.***”



Update client record

- The “Create/Update Client” Screen displays with fields populated with the user provided information from the “Search CNDS” screen.
- The User is allowed to update the Client record.
- Clicking the “**Update**” button at the bottom of the page will save and assign a CNDS Id for the Client.



Work on this slide more

Client updated successfully.

Ok

Click Ok to update the Client Record.

The record was successfully created.

Update Existing Clients

- From the Provider Home screen, the user clicks on “Create/Update” link from the main menu bar.
- The user is presented with a “Search CNDS” screen with Last Name, First Name, Sex, and Date of Birth as mandatory fields. All fields with an asterisk in Red (*) are mandatory fields. The user fills in all fields and clicks the “Search” Button.

Search CNDS to Update

- CNDS returns a maximum of 120 search results in the order of best match which ARMS displays as 20 records per page.

Search CNDS

Last Name* :

First Name* :

Sex* :

Date Of Birth* : / /

SSN4	Sex	Date Of Birth	Race	Person ID	Action
7 28	M	02/27/1918	W	944010001L	Create
1 15	M	03/26/1918	B	944010001L	Update
15 7	M	04/07/1918	B	944010001L	Create
SMITH		JOHNNIE		944010001L	Create
SMITH	C	JOHN		944010001L	Create

Update Link

- The user should review the list of records returned and decides if CNDS has a record for this applicant already. If no matching existing client record marked by an “**Update**” link at the end of the row is found, the user can click Reset and search for another client.

SMITH	B	JOHN		1' 15	M	03/26/1918	B	9'P	Update
-------	---	------	--	-------	---	------------	---	------------	------------------------



Updating Clients

- If no CNDS record display on the client list for the given search criteria, the user should click the “Create New Person” button.

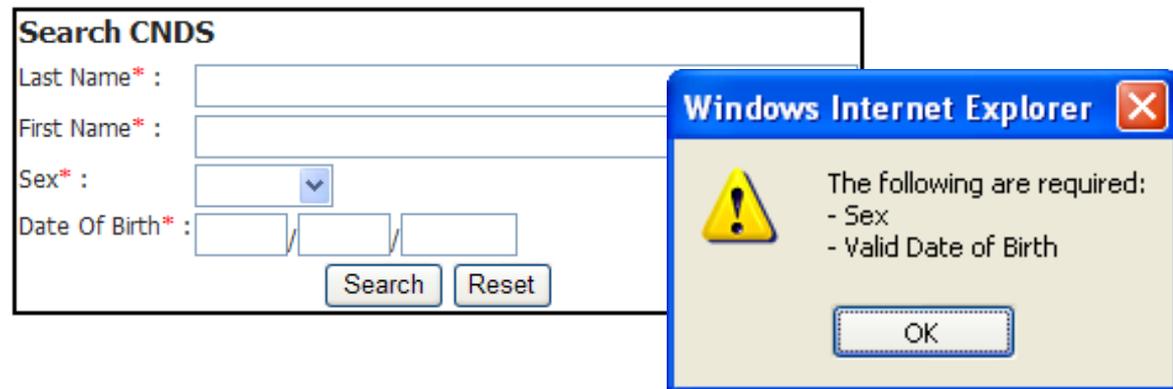


Create New Person

- The User should repeat the steps found under “Client not in CNDS but in ARMS”

Mandatory Fields

- If the CNDS mandatory fields like Last Name, First Name, Gender, Date of Birth, Race, Ethnicity and Language are left blank or if there are special characters in these fields, ARMS will display an error asking the user to correct these fields. For example, all fields on the Search CNDS are mandatory and if any are left blank, ARMS will prompt the user of what fields are missing



The image shows a screenshot of a web application interface for searching the CNDS. The form is titled "Search CNDS" and contains several input fields: "Last Name*", "First Name*", "Sex*" (a dropdown menu), and "Date Of Birth*" (a date picker). Below the fields are "Search" and "Reset" buttons. An error message dialog box is overlaid on the form, titled "Windows Internet Explorer". The dialog box contains a yellow warning icon and the text: "The following are required: - Sex - Valid Date of Birth". An "OK" button is at the bottom of the dialog box.

Fields on Client Screen

- All fields on the Client Screen are mandatory except for Emergency Contact and phone numbers.

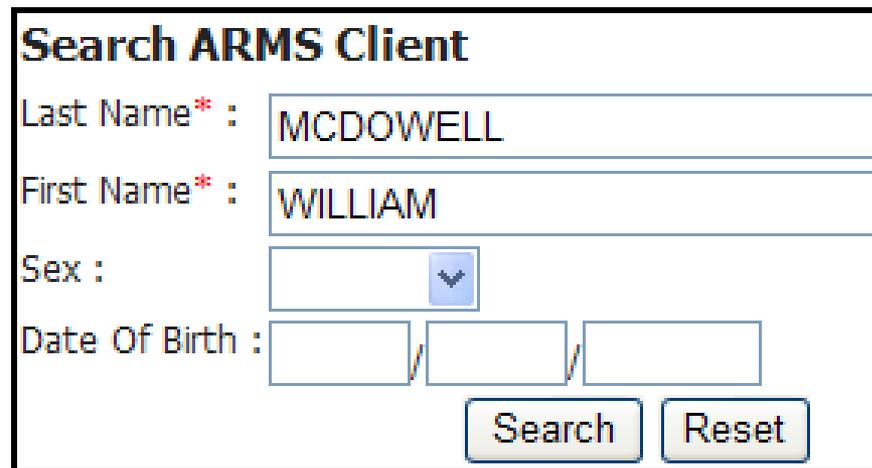
View Existing Client

- The **Search Client** feature allows Users to View **ARMS** Clients. From the main menu, the user clicks on “Search Client



Search ARMS Client

- “Search ARMS Client” screen with Last Name and First Name as **mandatory** fields and Date of Birth and Gender as optional fields. Mandatory fields are marked with asterisk in red (*).



The screenshot shows a web form titled "Search ARMS Client". It contains four input fields: "Last Name*" with the value "MCDOWELL", "First Name*" with the value "WILLIAM", "Sex" with a dropdown arrow, and "Date Of Birth" with three empty input boxes separated by slashes. At the bottom right are "Search" and "Reset" buttons.

Search ARMS Client			
Last Name*	:	<input type="text" value="MCDOWELL"/>	
First Name*	:	<input type="text" value="WILLIAM"/>	
Sex :		<input type="text" value="v"/>	
Date Of Birth :		<input type="text"/>	<input type="text"/>
		<input type="text"/>	
		<input type="button" value="Search"/>	<input type="button" value="Reset"/>

Search Results

- If the ARMS Client is found, the Users can click the **Details** link to view the Client Record. Changes can be made to the client record. When User click Update, a CNDS Id will be assigned to this Client.

List of Clients

<u>Last Name</u>	<u>First Name</u>	<u>MI</u>	<u>SSN4</u>	<u>Sex</u>	<u>Date Of Birth</u>	<u>Status</u>	<u>Registration Date</u>	▲
MCDOWELL	WILLIAM	E	2543	M	11/25/1931	A	8/30/2010	Details...
MCDOWELL	WILLIAM		0860	M	2/8/1918	A	7/9/2004	Details...

View Client Screen

View Client

Demographics/Status (SMITH, JOHN)

To update this client, click "Update" at the bottom of the page.

Last 4 Digits SSN :	<input type="text" value="2155"/>	
Last Name :	<input type="text" value="SMITH"/>	Suffix : <input type="text" value=""/>
First Name :	<input type="text" value="JOHN"/>	
Middle Initial :	<input type="text" value="W"/>	
Status:	<input type="text" value="NEW REGISTRATION"/>	
Registration Date	<input type="text" value="03"/> / <input type="text" value="22"/> / <input type="text" value="2011"/>	
Date Of Birth :	<input type="text" value="12"/> / <input type="text" value="09"/> / <input type="text" value="1937"/>	<input type="checkbox"/> Special Eligibility
Address :	<input type="text" value="120 BONNER AVE"/>	
	<input type="text" value=""/>	
	<input type="text" value="MOREHEAD CI, NC"/> <input type="text" value="28557"/>	
County :	<input type="text" value="Carteret"/>	
Phone :	<input type="text" value="(252)"/> <input type="text" value="726"/> <input type="text" value="8585"/>	<input type="checkbox"/> No Phone
Sex :	<input checked="" type="radio"/> Male <input type="radio"/> Female	

View Client Screen

- The fields are disabled until the User clicks **Update** at bottom of screen
- Updates are **NOT** allowed on the mandatory fields on the Client Record **IF the client is owned by a Federal System, such as Medicaid or Food Stamps.** The local DSS can assist Regions with changes to mandatory fields.

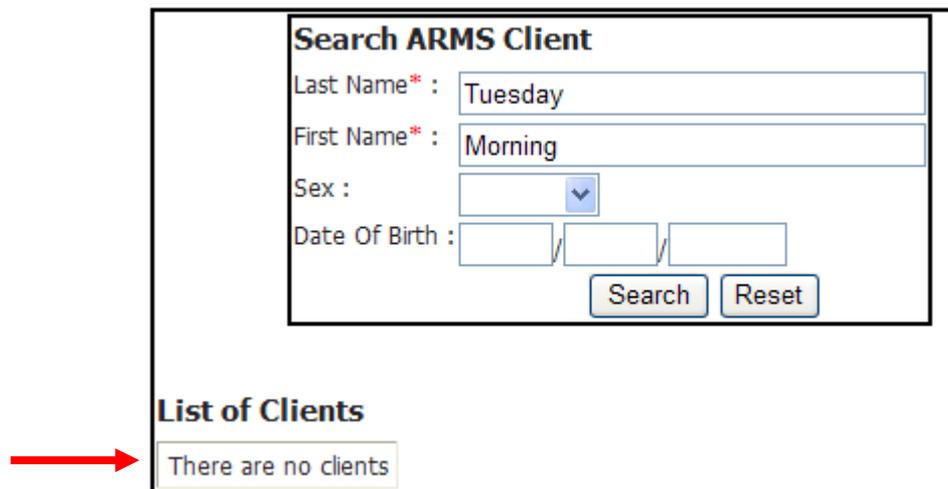
- Updates are **ALLOWED** to mandatory fields if Client receives only ARMS services. **IF** a client later becomes part of a federal program, Users will **NOT** be allowed to update the mandatory fields.

Update Client from the View Screen

- If the User chooses to Update the selected client's information and clicks on the "Update" button at the bottom of the page and the client has a CNDS ID, the user is taken directly to the "Create/Update Client" screen with all the information pre-populated.
- If the client does not have a CNDS ID, the user is taken to the "Search CNDS" screen, where the search results of the ARMS client's record being searched against CNDS are displayed.

Client not found in ARMS

- If Search ARMS Client return “there are not clients” over and over for the search criteria, use should Create/Update Client



The screenshot displays the 'Search ARMS Client' form. The search criteria are: Last Name* : Tuesday, First Name* : Morning, Sex : (dropdown menu), and Date Of Birth : (three empty input boxes). Below the form are 'Search' and 'Reset' buttons. Below the search form is a 'List of Clients' section with a message box that says 'There are no clients'. A red arrow points to this message box.

Add Client to Provider

- From the “Provider Home” screen, the user clicks on the “**Clients...**” link

Main Menu

Home Search Client Create/Update Client Export Reports Import ARMS/SIS

Code	Provider	Status	Address	City			
G055	SENIOR RESOURCES OF GUILFORD	A	301 E. WASHINGTON STREET	GREENSBORO	Details...	Clients...	Services...

Provider Home Screen – Users can always return to this screen by clicking Home on the main menu.

Provider Client List

- The list of Clients assigned to the Provider will display

Add Client Providers

Client List

Provider Code : G055
Agency Name : SENIOR RESOURCES OF GUILFORD

Index on Last Name: [\[All\]](#) - [A](#) - [B](#) - [C](#) - [D](#) - [E](#) - [F](#) - [G](#) - [H](#) - [I](#) - [J](#) - [K](#) - [L](#) - [M](#) - [N](#) - [O](#) - [P](#) - [Q](#) - [R](#) - [S](#) - [T](#) - [U](#) - [V](#) - [W](#) - [X](#) - [Y](#) - [Z](#)

SSN4	Last Name ▲	First Name	Sex	Date Of Birth	Provider Client Status	Registration Date		
:		ABRAHAM	IDA	F	4/17/1937	Inactive	1/5/2007	Details...
:		ACHILLES	CAROLE	F	9/5/1957	Active	1/25/2008	Details...
:	.	ADAMS	CHINETTA	F	11/15/1941	Active	9/21/2010	Details...
:	.	ADAMS	CLEASY	F	4/23/1927	Inactive	8/23/2006	Details...
:		ADAMS	WILLIE	M	12/15/1916	Active	6/18/2007	Details...
:		ADRONG	HLONG	F	12/31/1942	Active	12/13/2009	Details...
:	!	ADRONG	HNU	F	11/2/1940	Active	9/9/2008	Details...

Add Client to Provider List

- Click the “Add Client” button at the top of the list.



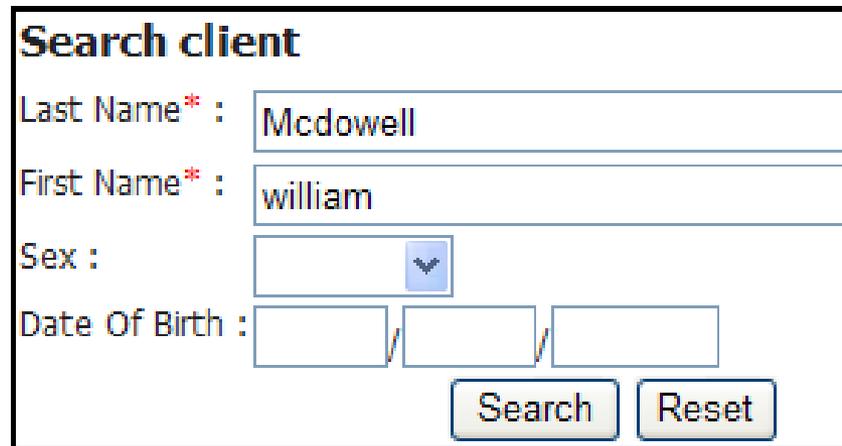
- There are two options “Search for existing client” and “Register New Client”

Search for a client that has already been added to the ARMS system
OR...
Add a brand NEW client that does not exist in the ARMS system at all

Search for existing Client Register New Client

Search for Existing Client

- To Search for existing Client, the User is presented with the “Search ARMS” screen.
- Follow existing steps to add an ARMS client to the Provider Client List



The screenshot shows a web form titled "Search client". It contains the following fields and controls:

- Last Name***: A text input field containing the value "Mcdowell".
- First Name***: A text input field containing the value "william".
- Sex**: A dropdown menu with a downward arrow icon.
- Date Of Birth**: Three separate text input fields for the day, month, and year, separated by slashes.
- Search**: A button with a light blue background and a dark blue border.
- Reset**: A button with a light blue background and a dark blue border.

Register New Client

- If “Register New client” is selected, the User is redirected to the “Search CNDS” screen. Follow the same steps to Create New Client.

Search CNDS
Last Name* :
First Name* :
Sex* :
Date Of Birth* : / /

Add Existing Client to Provider

- If User selects a client with a CNDS ID, the User follows the existing steps to Add Client to the Provider Client List.

List of Clients

Legend:  currently a client of this provider (use update services instead).

	Last Name	First Name	MI	SSN4	Sex	Date Of Birth	Status
<input checked="" type="checkbox"/>	SMITH	JOHN	W	8' 1	M	6/18/1930	R
 <input type="checkbox"/>	SMITH	JOHN	A	9252	M	9/6/1925	D

Note that the Client highlighted in **Red** has a Status of **D** (Death) can not be added to the Provider Client List

Client without CNDS ID

- When a user selects a client without a CNDS ID to be added, the user is presented with a message “**Client does not have a CNDS ID. Please Create/ Update the client in CNDS to add this client.**” The user is prevented from proceeding further.
- The user must go to the Create/Update Client to search and update the client. After the client has been assigned a CNDS ID, the user should repeat the steps. [Create/Update Client](#)

ARMS Client with no CNDS

Provider Client Assessment

Provider Code : G010 Agency Name : ADULT CENTER FOR ENRICHMENT
Last 4Digits of SSN : 0000 Date Of Birth : 2/20/1922
First Name : HELEN Last Name : TACK

Search for a client that has already been added to the ARMS system OR...

Add a brand NEW client that does not exist in the ARMS system at all

Search for existing Client Register New Client

Search client

Last Name* : tack
First Name* : helen
Sex :
Date Of Birth : / /

Windows Internet Explorer



Client does not have a CNDS ID. Please create/update the client in CNDS to add this client.

OK

List of Clients

Legend: = is currently a client of this provider (use update services instead).

	Last Name	First Name	MI	SSN4	Sex	Date Of Birth	Status
<input checked="" type="checkbox"/>	TACK	HELEN		0000	F	2/20/1922	R

Next

Cancel

Regional Contacts

- Providers should call the ARMS Coordinators in Region to get CNDS owned fields changed. Proof will be required.
- The MOU will give Regional ARMS Coordinators the authority to call DSS Agencies to have CNDS owned fields changed.

- If ARMS Coordinators fail to get CNDS owned fields changed in a timely manner, they should then call me the ARMS Administrator.
- If I have problems getting the CNDS owned fields changed, I will then call the CNDS Staff.

How to contact us

- Linda M. Owens (919) 733-8390
ARMS Support
E-mail – linda.owens@dhhs.nc.gov
- ARMS Support Web site
www.ncdhhs.gov/aging/arms/armspage.htm
- Annette Bagwell (919) 733-8390
ARMS Budget/Reimbursement
E-mail – annette.bagwell@dhhs.nc.gov

ARMS Support Website

NC Division of Aging
and Adult Services

Access ARMS System
Authorized Users Only

Frequently Asked
Questions

Hot Topics

Manuals

Forms

Reports

Monitoring

Schedule

Contact Us

CAAR Committee

Other Links
Resources

Disclaimer



ARMS

Welcome to the Aging Resources Management System

[Click here for ARMS home page](#)

Welcome to the ARMS Support Website

This website will be used to keep ARMS Users informed on any updates, notices and/or announcements.



In preparation for ARMS-CNDS Implementaton on May 23, 2011

Starting at 12 noon on Friday, May 20, 2011 ARMS will be down for
maintenance and unavailable to all users.

The ARMS Training site for CNDS is no longer available

[ARMS-CNDS Training
Document](#)

[CNDS Pre-implementation FAQ](#)

[What is CNDS](#)

Last updated
May 17, 2011
10:11 a.m.

[HCCBG County
Budget Forms](#)

[Password Reset](#)

DAAS
[Administrative
Letters](#)

[Service Code Chart
FY 2011](#)

[Adding Client](#)