

State of North Carolina  
Department of Health and Human Services  
**Division of Aging and Adult Services**



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# **ARMS-CNDS**

## Interface Training

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# 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.

The following **assumptions** are made:

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

## Changes to Main Menu for Regions and Provider users

The Regional Users main menu item **Clients** has been changed from Register New Client to Create/Update.

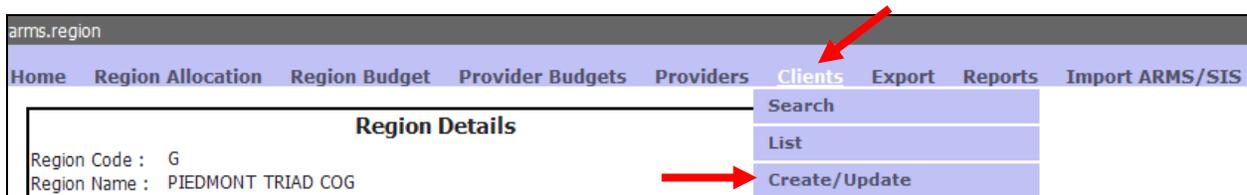


Figure 1 - Regional User Main Menu

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

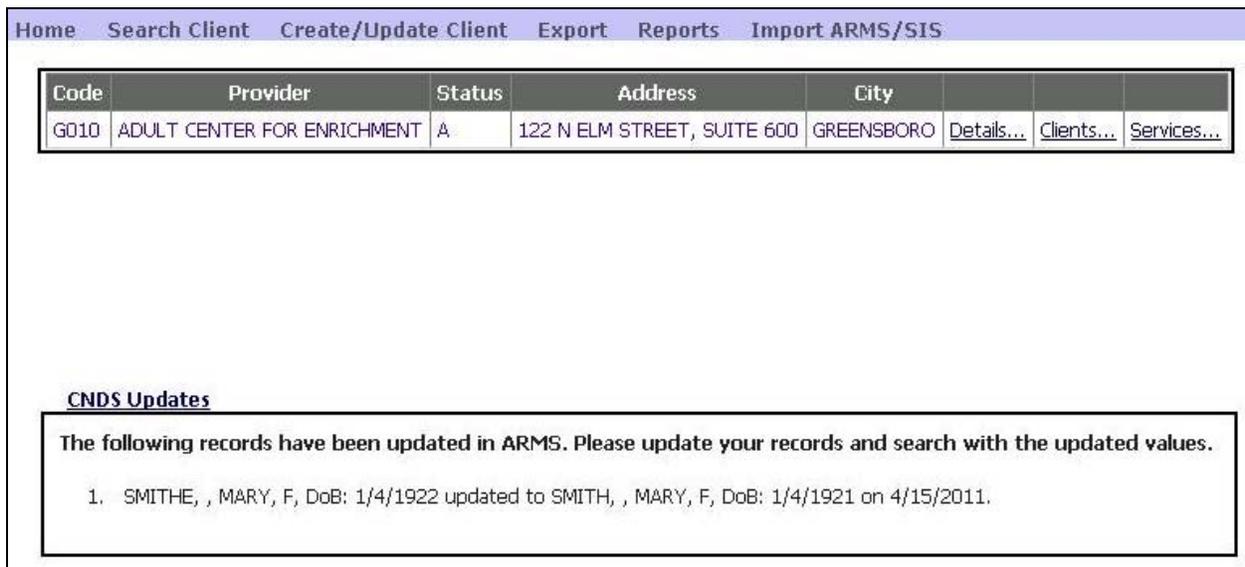


Figure 2 - Provider User Main Menu

## **Provider Home Screen 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:

1. Last name
2. First name
3. Gender
4. Date of Birth
5. Race
6. Ethnicity



The screenshot shows a web application interface with a navigation bar at the top containing links: Home, Search Client, Create/Update Client, Export, Reports, and Import ARMS/SIS. Below the navigation bar is a table with the following data:

Code	Provider	Status	Address	City			
G010	ADULT CENTER FOR ENRICHMENT	A	122 N ELM STREET, SUITE 600	GREENSBORO	<a href="#">Details...</a>	<a href="#">Clients...</a>	<a href="#">Services...</a>

Below the table is a section titled **CNDS Updates** with the following text:

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.

**Figure 3**

This list of client will be provider specific. In the example above, the record displayed is a client served by provider G010-Adult Center for Enrichment.

Users should review these updates prior to keying Service Totals and note changes if necessary on their ZGA-903 Units of Service Report (Turnaround Document). Also, note changes on the file copy of the DAAS-101 of this client. This includes provider using third party software programs, such as ServTracker.

# 1 Create New Client

1. From the Provider Home screen, the user clicks on “Create/Update” link from the main menu bar as shown in Figure 3. (Note: If Region Administrator User the menu item will be found under “Clients.”)



Figure 4 – Provider Home Screen

2. 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.

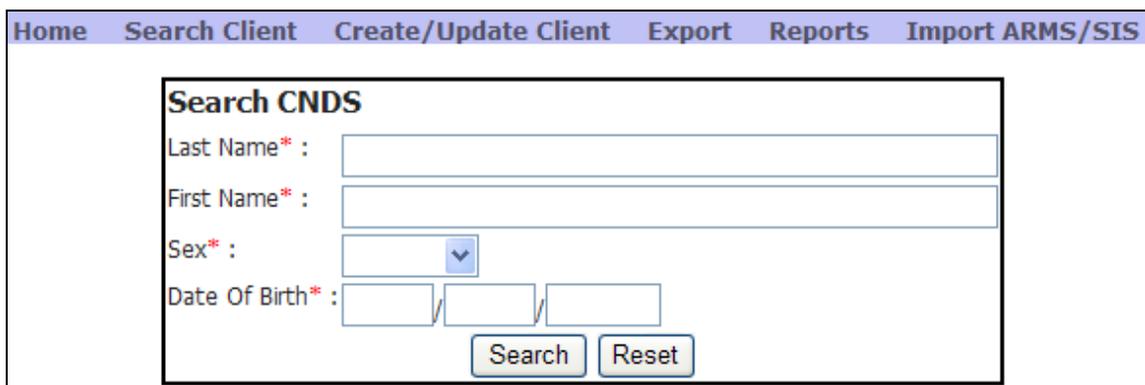


Figure 5 - Search CNDS

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



Figure 6

## Notes

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- 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\* :

Female

### List of Clients

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
SMITH	M	JOHNNIE		7077	M	02/27/1918	W	94... 1L	<a href="#">Create</a>
SMITH	B	JOHN		1025	M	03/26/1918	B	94... 2P	<a href="#">Create</a>
SMITH	W	JOHN		1027	M	04/07/1918	B	949... 9L	<a href="#">Create</a>
SMITH		JOHN		8073	M	04/09/1918	B	94... 30	<a href="#">Update</a>
SMITH		JOHNNIE		9075	M	04/30/1918	B	94... 3L	<a href="#">Create</a>
SMITH	C	JOHN		1079	M	12/26/1918	W	94... P	<a href="#">Create</a>

Figure 7

- The user reviews the list of records returned and decides if CNDS has a record for this applicant already.

### List of Clients

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
SMITH	M	JOHNNIE		7078	M	02/27/1918	W	94... 1L	<a href="#">Create</a>
SMITH	B	JOHN		1025	M	03/26/1918	B	94... 2P	<a href="#">Create</a>
SMITH	W	JOHN		1027	M	04/07/1918	B	94... 9L	<a href="#">Create</a>
SMITH		JOHN		8073	M	04/09/1918	B	94... 30	<a href="#">Create</a>
SMITH		JOHNNIE		9075	M	04/30/1918	B	94... 3L	<a href="#">Create</a>
SMITH	C	JOHN		1079	M	12/26/1918	W	94... P	<a href="#">Create</a>

Figure 8

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



7. The user completes the other required fields and clicks “Create” button.

Grayed out fields cannot be changed by the user, such as: Last 4 Digits SSN, Last name, First Name, Suffix, Date of Birth, and Sex.

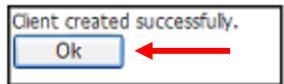
Users should also note that Race cannot be the same as the Other Race. In this example, Race (Client Most Closely Identified) chosen is Black/African American; this same Race under Other Race is disabled. Multiple race codes will not be allowed if *Refused/Unknown* is selected.

New Ethnicity codes were changed to match CNDS.

- Ethnicity : Not Hispanic/Latino
- Hispanic Cuban
- Hispanic Other
- Hispanic Mexican American
- Not Hispanic/Latino
- Hispanic Puerto Rican
- Unreported

Figure 10

8. ARMS prompts the user to confirm the creation.



9. The user clicks “OK” to complete the creation of a client record in ARMS and CNDS

10. On success, ARMS displays a message “Client created successfully”.

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

Figure 11



1. The user is presented with the “Create/Update Client” Screen, where the fields are populated either with the user provided information from the previous “Search CNDS” screen if the client is not found in ARMS or with the ARMS information if the client is already present in ARMS while not in CNDS.

The screenshot shows the 'Create/Update Client' form with the following fields populated: Last 4 Digits SSN (empty), Last Name (TACK), First Name (HELEN), Middle Initial (empty), Registration Date (empty), Date of Birth (02/20/1920), Address (empty), County (dropdown), Phone (empty), Sex (Male/Female), At/below poverty level (Yes/No), Marital Status (Single/Married/Divorced/Widowed/Refused), Household Size (Lives Alone/2 in home/3 or more in home/Group/Shared Home/Refused), Race (Black/African American/Asian/American Indian/Alaska Native/White/Native Hawaiian/Other Pacific Islands/Refused), Other Race (checkboxes for Black/African American/Asian/American Indian/Alaska Native/White/Native Hawaiian/Other Pacific Islands), Ethnicity (dropdown), Primary Language Spoken (English), and Emergency Contact Person (Name, Day Time Phone, Evening Phone). A red arrow points from the 'Suffix' dropdown menu to the 'Last 4 Digits SSN' field. A callout box shows the 'Suffix' dropdown menu with options: JR, SR, I, II, III, IV.

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 populate.

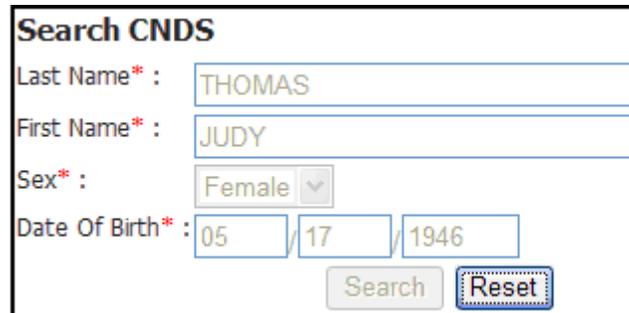
This is a required field to Create a new ARMS Client Record. The record will not save without an entry in this field.

Figure 14

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

## 1.2 Client not found in CNDS but found in ARMS

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



**Search CNDS**

Last Name\* : THOMAS

First Name\* : JUDY

Sex\* : Female

Date Of Birth\* : 05 / 17 / 1946

Search Reset

Figure 15



**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	<a href="#">Create</a>

Create New Person

Figure 16

2. 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?”

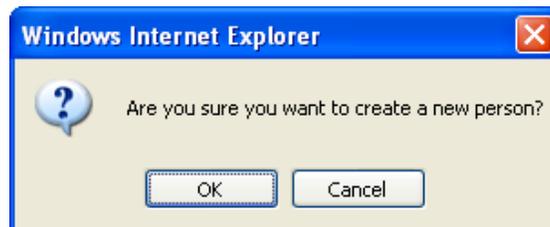


Figure 17

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



Figure 18

The User should click Ok to continue.

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

This particular client is an ARMS client and not found in CNDS; therefore, the User can Update the fields.

If a client is found in both ARMS and CNDS, the users cannot Update mandatory fields if the client is receiving services from a federal program. Provider Users should contact the Regions, which in turn will contact the local county DSS. **(Memorandum of Understanding with DSS is pending)**

Figure 19

- The User is allowed to update the Client record and clicks “Update” button at the bottom of the page.
- ARMS prompts the user to confirm the update.
- The user clicks “OK” to complete the update of the client record.
- On success, ARMS displays a message “Client updated 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	
THOMAS	JUDY			0000	F	05/17/1946	R	09/18/2008	<a href="#">Details...</a>

Figure 20

## 2 Updating Existing Client

1. From the Provider Home screen, the user clicks on “Create/Update” link from the main menu bar. (Note: Region Administrator User the menu item will be found under “Clients” on the main menu bar.)



Figure 21

2. 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 as shown below.

The 'Search CNDS' form contains the following fields and controls:

- Last Name\* : SMITH
- First Name\* : JOHN
- Sex\* : Male (dropdown menu)
- Date Of Birth\* : 03 / 26 / 1918
- Buttons: Search (indicated by a red arrow), Reset

Figure 22

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

The 'List of Clients' table displays the following data:

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
SMITH	M	JOHNNIE		7 78	M	02/27/1918	W	944010501L	Create
SMITH	B	JOHN		1 15	M	03/26/1918	B	941011111P	Update
SMITH	W	JOHN		15 7	M	04/07/1918	B	941011111L	Create
SMITH		JOHNNIE		9 15	M	04/30/1918	B	941011111L	Create
SMITH	C	JOHN		1 9	M	12/26/1918	W	941011111P	Create

Below the table is a button labeled 'Create New Person'. A red arrow points to the 'Update' button in the second row.

Figure 23

4. The user should review the list of records returned and decides if CNDS has a record for this applicant already. If no client record matches the search criteria the user can click Reset and search again client.
5. If a CNDS record was found and a matching ARMS client record was found, the corresponding rows in the “Search Results” screen will have an “Update” button at the end and the user clicks on the “Update” button in the appropriate row. (See Figure 22)

6. The user is presented with the “Create/Update Client” Screen, where the fields are populated with current information about the client, both from CNDS and ARMS. (See Figure 17)
7. The user changes the appropriate fields and clicks the “**Update**” button at the bottom of the page.
8. ARMS prompts the user to confirm the update.
9. The user clicks “OK” to complete updating the client record in ARMS.
10. On success, ARMS displays a message “Client updated successfully”.
11. The user clicks “Ok” to end the task.

### 2.1.1 Client to Update not found in CNDS

1. If no CNDS record exists for the given search criteria, the user should click the “Create New Person” button.
2. The User should repeat the steps found under “Client not found in CNDS but found in ARMS”

### 2.1.2 CNDS Rejects the Update Request

1. If the client is a federal aid recipient and if there are updates to any of the CNDS-ID fields like Name, Gender and Date of Birth fields, ARMS displays an error “*Some CNDS fields (Name, Gender, Date of Birth) cannot be updated. Contact your local DSS office. Other fields may have been updated successfully.*”



Figure 24

2. The User must have client information updated with the federal systems first by contacting the local County DSS. (See MOU).
3. The user clicks “Ok” and end the task.

### 2.1.3 CNDS Partially Rejects the Update Request

1. If the client is a federal aid recipient and if there are updates to any of the CNDS-ID fields as well as other non CNDS-ID fields, ARMS updates the changes to the non-CNDS ID fields and displays an error “*Partial Update: ARMS does not have the access to update the Name, Gender and Date of Birth in this client record.*”

2. The User must have client information updated with the federal systems first by contacting the local County DSS. (See MOU).
3. The User clicks “Ok” and end the task.

#### **2.1.4 ARMS GUI Validates the Data**

1. 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.



**Figure 25**

2. The User fixes the client information and verifies the fields and clicks “Update” to complete updating the client record in ARMS.
3. On success, ARMS displays a message “Client updated successfully”.
4. The user clicks “Ok” and the task ends.

#### **2.1.5 CNDS Rejects the New Person Creation**

1. If the CNDS person creation is not successful, an appropriate error message returned by CNDS is displayed to the user.
2. The user verifies the client information and clicks “Update” to complete updating the client record in ARMS.
3. On success, ARMS displays a message “Client updated successfully”.
4. The user clicks “Ok” and the task ends.

### 3 View Existing Client



Figure 26

1. The Search Client feature allows Users to View ARMS Clients. From the main menu, the user clicks on “Search Client. (Note: If Region Administrator User the menu item will be found under “Clients.”)
2. The user is presented with a “Search ARMS” 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 ( \* ).

Figure 27

3. The user fills in the fields and click the “Search” Button
4. If client is not found, the Users can click Reset to search on a different name and click Search. *Always do an exhaustive search before adding a new client to ARMS.*

Last Name	First Name	MI	SSN4	Sex	Date Of Birth	Status	Registration Date	▲
MCDOWELL	WILLIAM		00 0	M	2/8/1918	A	7/9/2004	<a href="#">Details...</a>
MCDOWELL	WILLIAM	E	20 3	M	11/25/1931	R	8/30/2010	<a href="#">Details...</a>

Figure 28

5. If ARMS continues to return “There are no clients,” the User can click Create/Update Client from the Provider Main Menu to add the client to ARMS. **Create/Update Client**
6. If clients matching the search criteria are found, ARMS displays the search results up to 20 records per page.

- The user reviews the list of records returned and decides if ARMS has a record for this applicant already. If a matching client record is found in the list of search results, the user clicks on the “details...” link in the appropriate row.

MCDOWELL	WILLIAM	E	2..*3	M	11/25/1931	R	8/30/2010	<a href="#">Details...</a>
----------	---------	---	-------	---	------------	---	-----------	----------------------------

- The user is presented with a “View Client” Screen, where the fields are populated with current information about the client.

**View Client**  
Demographics/Status (MCDOWELL, WILLIAM)

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

Last 4 Digits SSN : 2542

Last Name : MCDOWELL Suffix :

First Name : WILLIAM

Middle Initial : W

Status : NEW REGISTRATION

Registration Date : 08 30 2010

Date Of Birth : 11 25 1931

Address : 425 NORTON ST

County : CAK ISLAND NC 25465

Phone : 252 278 2747

Sex :  Male  Female

At/below poverty level :  Yes  No

**Martial Status**

Single (never married)  
 Married  
 Single (divorced/widowed)  
 Refused To Answer

**Household Size**

Lives Alone  
 2 in home  
 3 or more in home  
 Group/Shared Home  
 Refused to answer

**Race (Client Most Closely Identifies)**

Black(African American)  
 Asian  
 American Indian/Alaska Native  
 White  
 Native Hawaiian/Other Pacific Islander  
 Refused/Unknown

**Other Race (Check all that apply)**

Black(African American)  
 Asian  
 American Indian/Alaska Native  
 White  
 Native Hawaiian/Other Pacific Islander

Ethnicity : Unreported

Primary Language Spoken : English

**Emergency Contact Info (MCDOWELL, WILLIAM)**

Emergency Contact Person

Name : MARY MCDOWELL

Day Time Phone : 252 278 2747

Evening Phone :

Created User : DESSA.M.GORE  
 Created Time : 9/13/2010 10:52:48 AM  
 Last Updated User : SETHIDA\_STROOPS  
 Last Updated Time : 11/12/2010 12:56:45 PM

**Associated Provider Info: (MCDOWELL, WILLIAM)**

Providers		
Provider Code	Status	Agency Name
004L	A	BRUNSWICK SENIOR RESOURCES

**Providers where Client is Care Recipient**

There are no associated providers where the client is a Care Recipient

**Providers where Client is Caregiver**

[ Update ] [ OK ]

The fields are disabled until the User clicks Update.

Updates are **NOT** allowed 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.**

This Client is an ARMS Client only; therefore, the User can update any field on this Client Record.

When the User clicks Update, ARMS will display a message that the Client updated successfully. The User is only allowed to click Ok on this screen. The Client is displayed.

Figure 29

### 3.1 Update Client from the View Client Screen

1. 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.

#### Search CNDS

Last Name\* :

First Name\* :

Sex\* :

Date Of Birth\* :  /  /

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#### List of Clients

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
MCDOWELL	L	WILLIAM		1334	M	12/29/1931	W	9C.....JM	<a href="#">Create</a>

Figure 30

2. If the client has a CNDS ID in ARMS or if a CNDS record was found for the ARMS client in the "Search CNDS" screen, the flow follows the steps under Update Existing Client.

#### Search CNDS

Last Name\* :

First Name\* :

Sex\* :

Date Of Birth\* :  /  /

---

#### List of Clients

Last Name	MI	First Name	Suffix	SSN4	Sex	Date Of Birth	Race	Person ID	Action
ADAMS	W	JOHN		3..	M	02/09/1924	W	94.....JS	<a href="#">Update</a>

Figure 31



## 4 Add Client to Provider

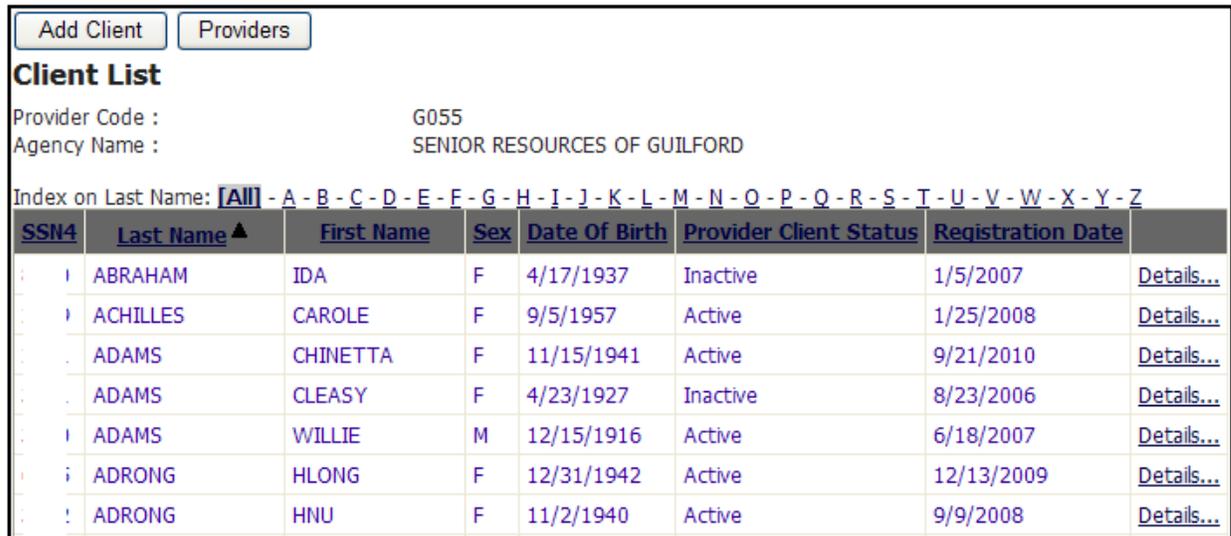
1. From the “Home” screen, the user clicks on the “Clients...” link from the “Home” screen. If the login is at a higher level than “Provider”, the menu item will be found under “Clients” menu.



Home	Search Client	Create/Update Client	Export	Reports	Import ARMS/SIS		
Code	Provider	Status	Address	City	Details...	Clients...	Services...
G055	SENIOR RESOURCES OF GUILFORD	A	301 E. WASHINGTON STREET	GREENSBORO	Details...	Clients...	Services...

Figure 33

2. The user is presented with a list of all clients under the provider.



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	Details...
:	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...

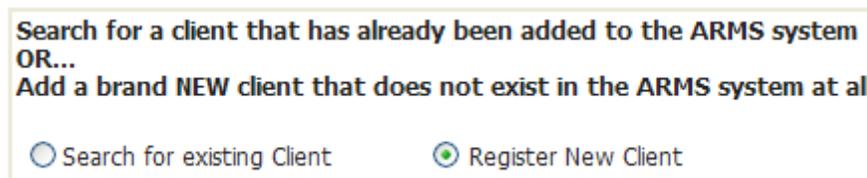
Figure 34

3. The user clicks on the “Add New Client” button at the top of the list.



Figure 35

4. The user is taken to the next screen with two option buttons “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

Figure 36

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

Figure 37

- If Search for existing Client is selected, the User is presented with the "Search ARMS" screen.

The User enters the search criteria in the fields provided and click Search

Figure 38

#### 4.1 Add Existing Client to Provider Client List

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

	Last Name	First Name	MI	SSN4	Sex	Date Of Birth	Status
<input type="checkbox"/>	MCDOWELL	WILLIAM	E	2...	M	11/25/1931	R
<input type="checkbox"/>	MCDOWELL	WILLIAM		0...	M	2/8/1918	A

Figure 39

