

EDI Delete Client Instructions

The MOTS Delete Client functionality allows you the ability to delete a client that was sent from your EHR/EMR into MOTS in error. **CAUTION: There is no “undelete” functionality. Once you delete a client from MOTS, they are deleted and cannot be retrieved.**

NOTE: It has been reported that the Delete Client function is not working in Internet Explorer. You may have to use Firefox to use the Delete Client functionality.

There are several critical steps to be completed in your EHR/EMR before doing the Client Delete in MOTS. If these steps are not followed carefully, you will not be able to delete the client from MOTS.

EDI Delete Client Process:

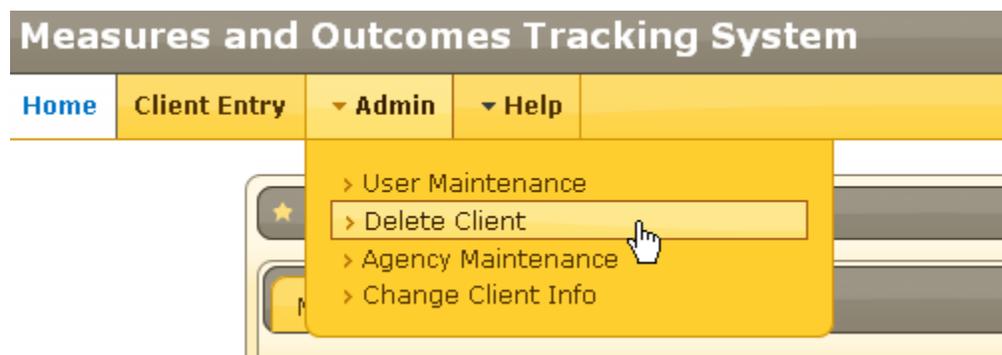
1. Zero out all non-Medicaid Services associated with the client in your EHR system.
2. Send your adjustment record(s) in an EDI Non-Medicaid Service (NMS) File to MOTS through your normal SFTP submission process.
3. Verify the Results File that will be available the following day from your EDI NMS submission, that included the adjustment record(s), to be sure all transactions were successful; should any of them result in unsuccessful transactions, you will need to correct the error(s) and resubmit the file with a new batch number and filename.

IMPORTANT! If you do not complete steps 1-3 before moving on to step 4, you will not be able to delete the client from MOTS.

4. Delete the client from MOTS.
5. Delete the client from your EHR or flag the client so you won't send any records to MOTS.

The following pages contain the step by step instructions for the Delete Client process in MOTS.

You will find the Delete option listed under the Admin Tab. **(NOTE: You will not see this option until AMH Admin grants you access to the Delete Client user role.)**

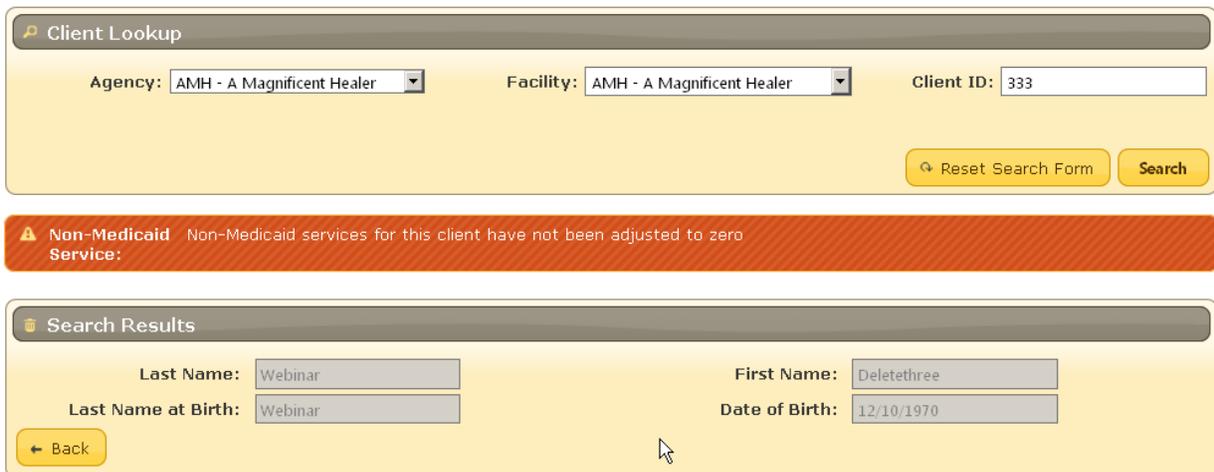


Once you select Delete Client, you will see a Client Lookup screen with three search boxes. All three data fields are required.



The screenshot shows a 'Client Lookup' form with three search fields: 'Agency', 'Facility', and 'Client ID'. All three fields are currently empty. Below the form, there is a message box that reads 'No Deletable Records Found'. The form also includes 'Reset Search Form' and 'Search' buttons.

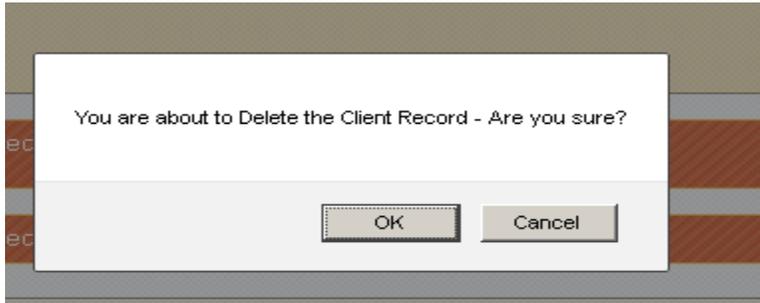
Once you have completed the 3 required fields and clicked on the Search button, the client information will be displayed. There may be a message displayed, depending on the client record.



The screenshot shows the 'Client Lookup' form with the following filled fields: 'Agency' (AMH - A Magnificent Healer), 'Facility' (AMH - A Magnificent Healer), and 'Client ID' (333). Below the form, there is a warning message: 'Non-Medicaid Service: Non-Medicaid services for this client have not been adjusted to zero'. Below the warning, there is a 'Search Results' section displaying the following information: Last Name: Webinar, First Name: Deletethree, Last Name at Birth: Webinar, and Date of Birth: 12/10/1970. A 'Back' button is also visible.

If you did not follow steps 1-3 above, you may get the message above regarding Non-Medicaid services. You will need to go back and complete steps 1-3 before you will be able to delete the client. If you have already deleted the client from your EHR, the client will not be able to be deleted from MOTS.

Once you have completed the steps 1-3 correctly, return to the Delete Client option, select the client again and click on Delete Client. You will get the following message:



If you click cancel, the delete transaction will be cancelled and you will be returned to the previous screen. If you click OK, the client will be deleted from MOTS. You should see the message "Client successfully deleted".

