SOS Guidance on GPRA Patient ID Linking in iPortal

June 30, 2025

Overview

The Ohio Department of Mental Health and Addiction Services (OhioMHAS) has modified the way "Patient IDs" are managed in the iPortal SOR/SOS app. This modification applies to the State Opioid and Stimulant Response (SOS) grant in Ohio and service providers who collect and enter the Government Performance and Results Act (GPRA) data. Each client at an organization will now have a single Patient ID, linked across grant periods (e.g., SOR 2, SOS 3, or SOS 4). This modification aligns with SAMHSA guidance, which states:

> "Each client should have their own unique Client ID that is used at all data collection points: GPRA intake/baseline, 6-month follow-up, and discharge. The same unique ID is used each time, even if the client has more than one episode of care. For confidentiality reasons, do not use any portion of the client's date of birth, Social Security number, or names in the Client ID." (GPRA FAQs, July 2024, v.5.0)

Guidance

In the iPortal SOR/SOS app, the Patient ID for a client is now linked to previous entries based on the client's name and date of birth at the organization. When entering a new intake, the portal will check to see if the client has ever had a GPRA entered by the organization. It will check all current and previous interviews for any SOS-funded programs by the organization, including SOR 2, SOS 3, and SOS 4. Below are two implications from this modification:

- Any client who has received services under another grant period at the organization will now have their Patient ID linked to the previous grant period. This modification is to address duplication of clients.

- Any client who has had an intake already entered for the same grant period will see an error message that the client already exists in the system to prevent a duplicate entry.

Below are scenarios with details on the error messages, warnings, and screenshots that will appear with duplicate entries, along with information on changes to the Locator Form.

- Scenario 1 describes when linked Patient IDs will occur and what alert appears in the SOR/SOS app. This scenario applies when a client has previous GPRA interviews under prior grant years and a new intake is being entered in a new grant year.
- Scenario 2 describes what happens when a client in the same grant period has more than one intake attempt to be entered.
- Scenario 3 describes the warning message with the locator form.

Scenario 1 – When will Patient IDs be linked in the SOR/SOS app and how will that be shown?

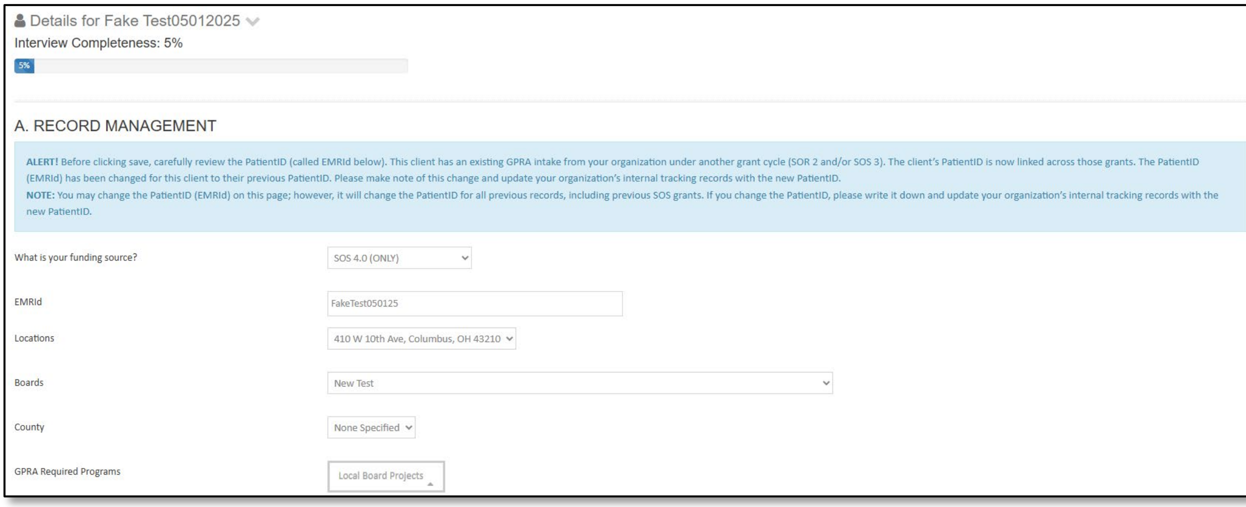
A linked Patient ID occurs when a client in a new grant period already has a GPRA entered under a prior grant period at the same organization. When a service provider enters a new intake for a client, the portal will check the client's name and date of birth for entries in prior grant periods. If there is a match, the portal will link the client to the previous Patient ID. There is a way to change the Patient ID under the new grant period; however, it will change all previous Patient IDs for this client (see below on "How to change a Patient ID").

Warning message

To indicate that the Patient ID has been linked, a new warning message will appear with two parts (see sample screenshot below). The first part is an alert to let the person who is entering the data know that the Patient ID has been changed from what was entered on the previous page. It will be important for this person to update internal tracking records with this linked Patient ID, and to also let others who are tracking this client know. Here is the language from the first part of the warning message:

> **ALERT!** Before clicking save, carefully review the Patient ID (called EMRId below). This client has an existing GPRA intake from your organization under another grant cycle (SOR 2 and/or SOS 3). The client's Patient ID is now linked across those grants.

> The Patient ID (EMRId) has been changed for this client to their previous Patient ID. Please make note of this change and update your organization's internal tracking records with the new Patient ID.



Details for Fake Test05012025

Interview Completeness: 5%

5%

A. RECORD MANAGEMENT

ALERT! Before clicking save, carefully review the PatientID (called EMRId below). This client has an existing GPRA intake from your organization under another grant cycle (SOR 2 and/or SOS 3). The client's PatientID is now linked across those grants. The PatientID (EMRId) has been changed for this client to their previous PatientID. Please make note of this change and update your organization's internal tracking records with the new PatientID.

NOTE: You may change the PatientID (EMRId) on this page; however, it will change the PatientID for all previous records, including previous SOS grants. If you change the PatientID, please write it down and update your organization's internal tracking records with the new PatientID.

What is your funding source?	SOS 4.0 (ONLY)
EMRId	FakeTest050125
Locations	410 W 10th Ave, Columbus, OH 43210
Boards	New Test
County	None Specified
GPRA Required Programs	Local Board Projects

How to change the Patient ID

The second part of the warning message explains that the Patient ID may be changed on the second page of the record management page of a new intake interview. Here is the language from the second part of the warning message:

> **NOTE:** You may change the Patient ID (EMRId) on this page; however, it will change the Patient ID for all previous records, including previous SOS grants. If you change the Patient ID, please write it down and update your organization's internal tracking records with the new Patient ID.

It is important to note that changing the Patient ID (ERMId) on this screen will change all previous Patient IDs for this client. To change the Patient ID (EMRId) on this screen, the service provider entering the interview will overwrite the Patient ID with the new Patient ID. It will be important to make note of the updated Patient ID and to let everyone who is involved with tracking this client know.

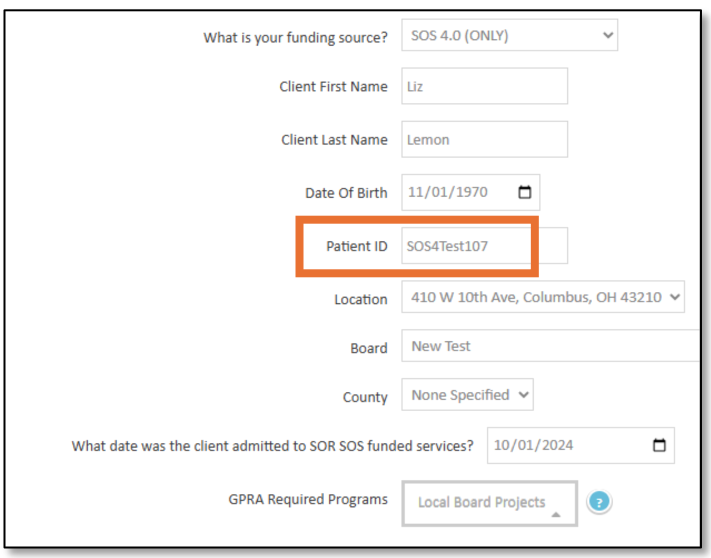
Tips for managing clients Patient IDs

Instead of waiting for the system to alert and change Patient IDs, SOS service providers may want to more actively manage the issuance of Patient IDs. When enrolling a client under a new grant period, check if the client has previously received services under a prior grant period. If so, prior to starting to enter a new intake interview, consider whether to reuse their existing Patient ID or update the previous Patient ID with a new one.

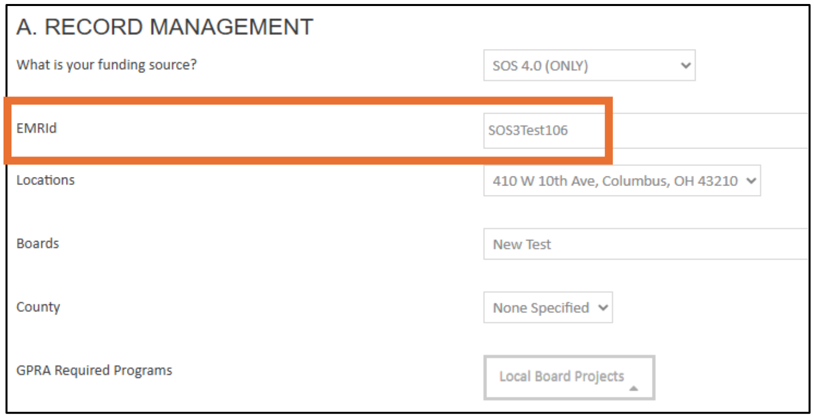
If a client's GPRA from a previous grant was collected by a different collector, please ensure that they are aware of any changes that you may make to the Patient ID. If you decide to change the Patient ID, the Patient ID on all previous GPRA records will change as well. Please ensure that previous collectors are aware of this change so they can still locate any previous records in iPortal. GRC recommends keeping an internal tracking system so that collectors can track this information outside of the SOR/SOS iPortal Application.

Case example

In the screenshot below, a new intake interview with fake data has been entered with a Patient ID for the client of SOS4Test107. This client had received services under a previous grant period (SOS 3) and the person entering the interview assigned a new Patient ID for the client.



After pressing save on page 1 of the record, page 2 shows the Patient ID (EMRId) has changed to a linked Patient ID for this client (now SOS3Test106). The linked Patient ID is the client's previous Patient ID under SOS 3 (see screenshot below).



On this page, the person entering the interview may keep the linked Patient ID. They will need to update internal tracking records with this linked Patient ID and let others who are tracking this client know about the linked Patient ID.

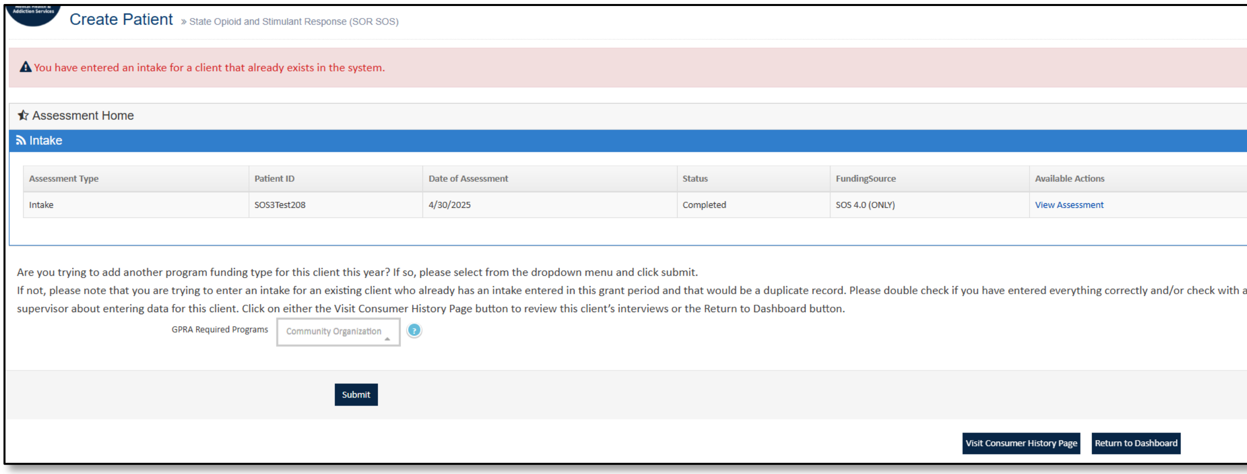
Alternatively, the person may change the Patient ID (EMRId) by overwriting the EMRId cell. However, as mentioned already, **this changes the Patient ID for all interviews for this client for this grant period and all previous SOS grant periods**. Any Patient IDs previously used for this client will now be linked to the Patient ID (EMRId) that is entered on this page. After moving past this page, the only way to change the Patient ID is to submit a request to GRC to send a ticket to OhioMHAS.

Scenario 2 – What happens if an additional intake interview is attempted to be entered under the same grant year?

A client should only have one intake interview in a grant period. The one exception is when a client is being readmitted for services. According to SAMHSA, "Occasionally, a client will return for treatment after their episode of care has ended and they have been discharged from the program." (GPRA FAQs, July 2024, v.5.0, Q#23) Aside from a readmission, more than one intake is not allowed and considered duplication.

When a service provider enters a new intake for a client, the portal will check the client's name and date of birth for entries in the current grant period. If there is a match, a warning message will appear saying "You have entered an intake for a client that already exists in the system."

In addition, a two-part notification will appear below the "Assessment Home" screen. The first part applies in select cases where an organization has been funded under more than one program funding type. The second part applies when a duplicate intake is being attempted to be entered.



Updating program type

The first part of the message asks,

> Are you trying to add another program funding type for this client this year? If so, please select from the dropdown menu and click submit.

SOS 3.0 had several program funding types; however, under SOS 4.0 there are only two program types.

- Local Board Projects – This program type is for SOS programs that receive funding from a local ADAMHS board.
- Community Organization – This program type is for SOS programs that receive funding directly from OhioMHAS.

In select instances, an organization may receive both types of funding (from both the local ADAMHS board and direct funding from OhioMHAS). In these select cases, the Patient ID will be linked, and the second page of the administrative record gives the prompt for adding the program type. If you have funding for more than one program type and you are trying to add it for the indicated grant year, then select from the dropdown menu and click submit.

Duplicate intake record

The second part of the message states:

> If not, please note that you are trying to enter an intake for an existing client who already has an intake entered in this grant period and that would be a duplicate record. Please double check if you have entered everything correctly and/or check with a supervisor about entering data for this client. Click on either the Visit Consumer History Page button to review this client's interviews or the Return to Dashboard button.

A client should only have one intake interview in a grant period. Aside from a readmission, more than one intake is not allowed and considered duplication. Sometimes errors occur with data entry, so double check that everything was entered correctly. If this record is a duplicate intake, check with a supervisor or manager about how to improve internal client management.

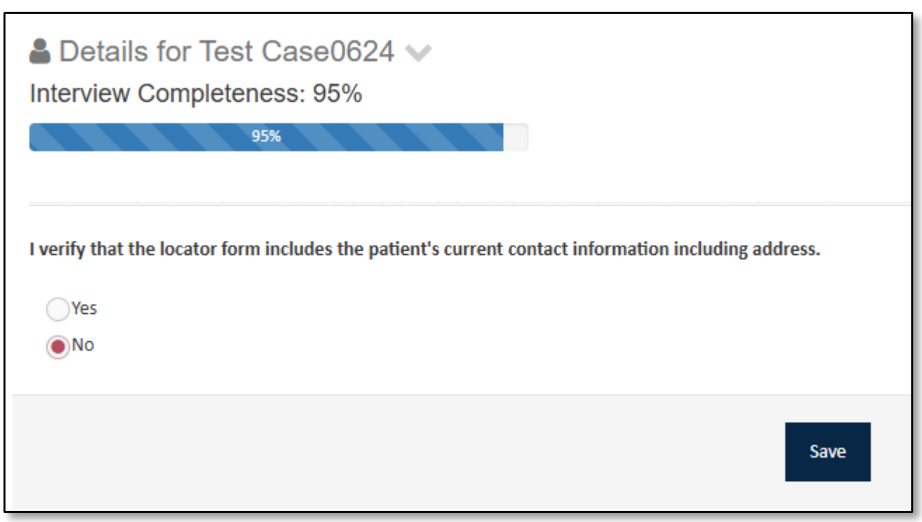
Scenario 3 – What happens with Locator Form data when a client has a linked Patient ID?

The Locator Form data for a client with a linked Patient ID (a client who received services under another grant period) will be prepopulated with the latest update to the Locator Form. The Locator Form data will even prepopulate for a new intake if it is a client with a linked Patient ID. Below are instructions for how to update the Locator Form data on clients with linked Patient IDs for each type of interview.

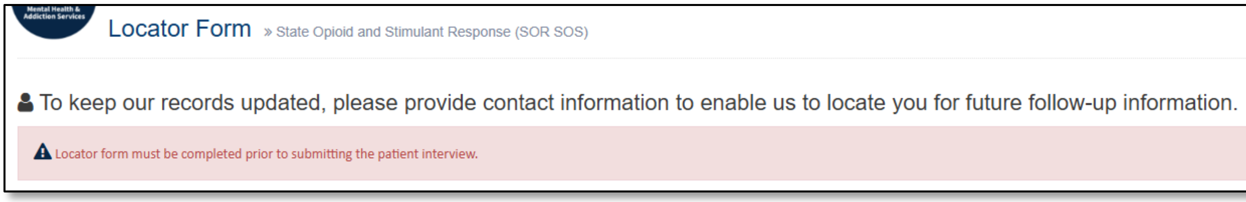
Intake Interview – How to update Locator Form data for a client with linked Patient ID

At the end of entering the GPRA intake interview on a linked Patient ID, the person entering it will need be prompted to answer the following question **before** updating the Locator Form: "I verify that the locator form includes the patient's current contact information including address."

- Enter a **"No"** response because updates to the locator form have not been reviewed or made yet (see screenshot below).



A warning message will appear that says, "Locator form must be completed prior to submitting the patient interview." (See the screenshot below.)



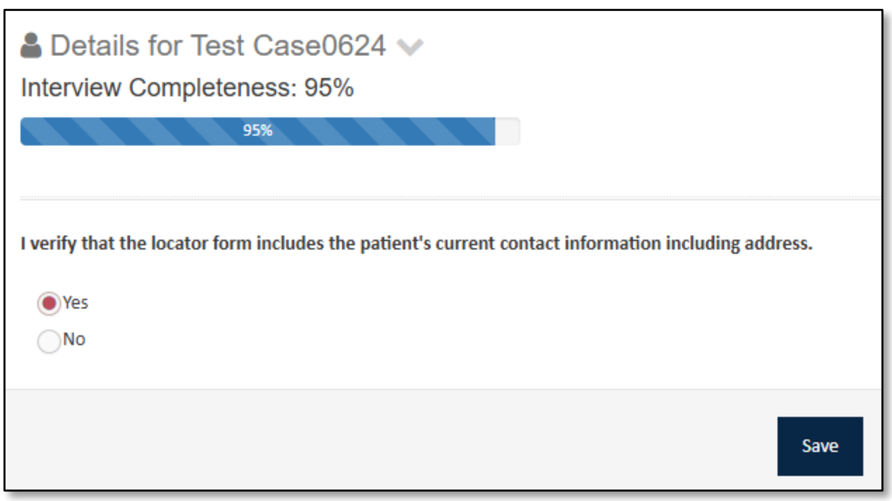
All details in the Locator Form need to be reviewed and updated. There could be multiple updates that need to be captured, including the client's contact information, gift card information, and other contacts.

As a reminder, the person entering the data will need to click

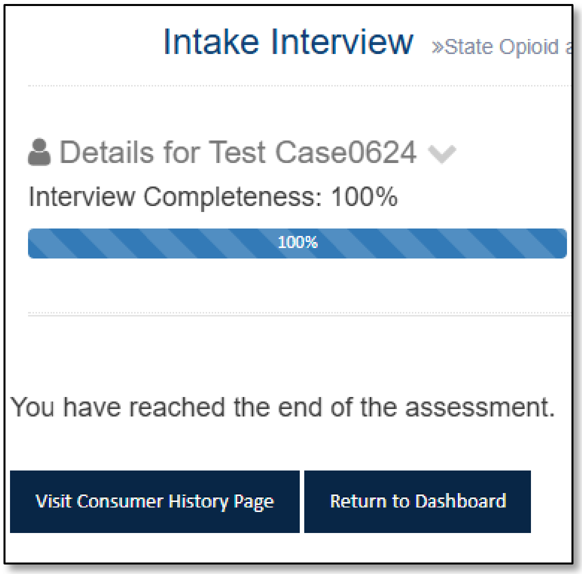
- **Submit** after updating the client contact and gift card details,
- **Save** after updating the alternate contacts
- **Continue interview** to move forward

The next prompt of the verification question appears again **after** updating the Locator Form: "I verify that the locator form includes the patient's current contact information including address."

- Enter a **"Yes"** response after updates are made (see screenshot below).



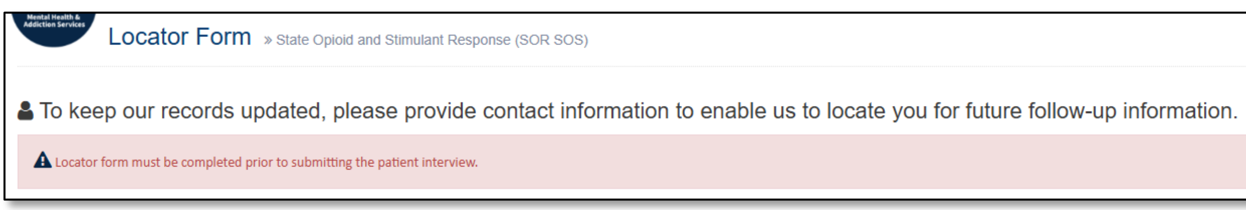
- Look for message saying, "You have reached the end of the assessment."



Follow-up and Discharge Interviews – How to update Locator Form data for a client with linked Patient ID

After answering the last GPRA question for the follow-up or discharge interview, the iPortal SOR/SOS app will bring up the most recent Locator Form for the client. Review all details and update any contact information that may have changed for the client or their other contacts.

At the end of entering the GPRA intake interview on a linked PatientID, the system will automatically open the Locator Form. A warning message will appear that says, "Locator form must be completed prior to submitting the patient interview." (See the screenshot below.)



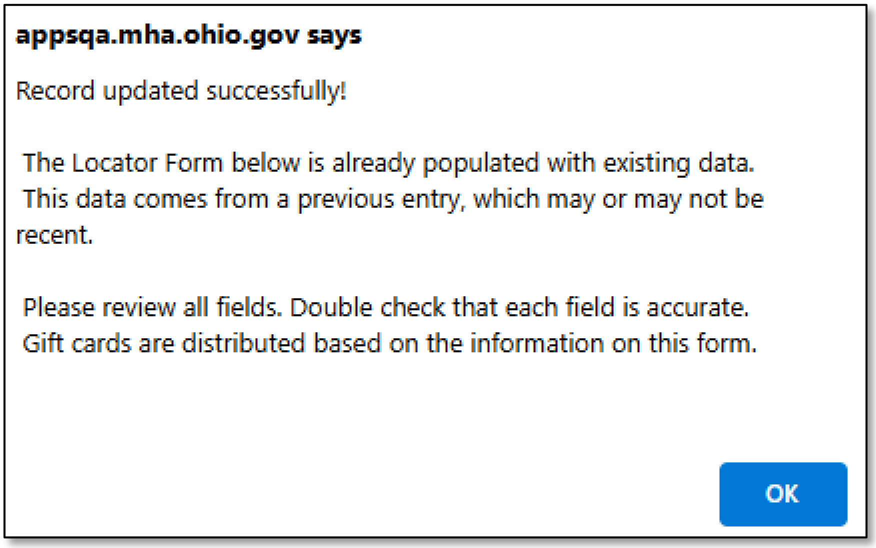
All details in the Locator Form need to be reviewed and updated. There could be multiple updates that need to be captured, including the client's contact information, gift card information, and other contacts.

As a reminder, the person entering the data will need to click

- **Submit** after updating the client contact and gift card details
    - It is critical that the gift card delivery choice is updated to ensure accurate delivery.

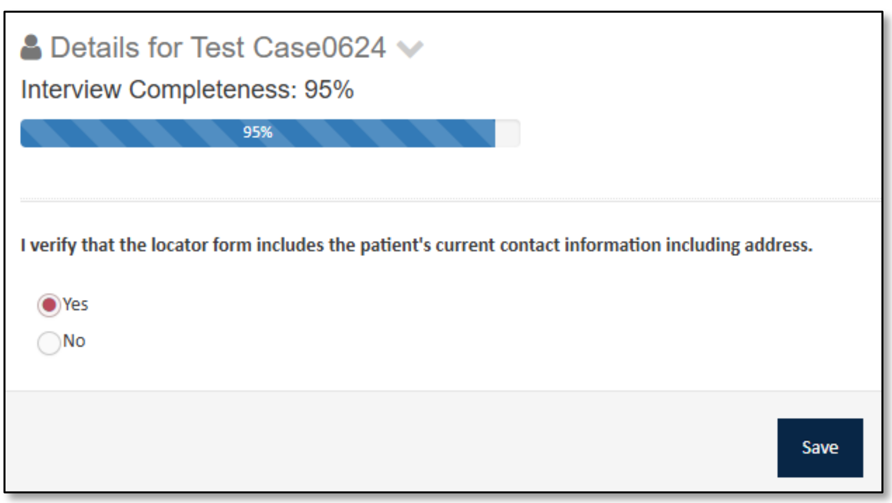
- **Save** after updating the alternate contacts
- **Continue interview** to move forward

A message will appear saying that the record has updated and a reminder to update prepopulated data.

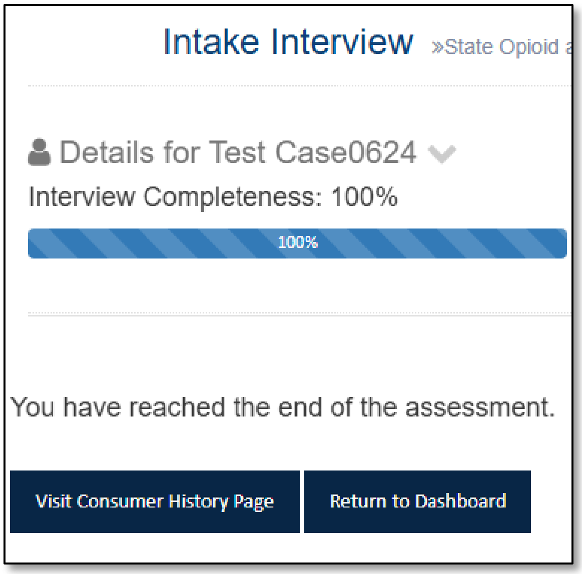


The next prompt of the verification question appears again **after** updating the Locator Form: "I verify that the locator form includes the patient's current contact information including address."

- Enter a **"Yes"** response after updates are made (see screenshot below).



- Look for message saying, "You have reached the end of the assessment."


Intake Interview
»State Opioid
Details for Test Case0624
Interview Completeness: 100%
100%
You have reached the end of the assessment.
Visit Consumer History Page
Return to Dashboard