

Eviction Prevention: Copying Client Records

The “Return to NYC Program Page” takes you back to the NYC page on the TBF-Workplace site.

The “Return Westchester Program Page” takes you back to the Westchester page on the TBF-Workplace site.

TBFNYC has many clients given a Borough ID that then get copied in whole to a new ClientID if they are assigned to a special program, such as Retirement Subsidy, Income Growth, Unemployed Subsidy, Disability Subsidy. The end result is that the Main Client table of all client records should have two entries for this client with two different ClientIDs. Each record can be edited separately after the copy is made and will, thus, over time, be different. NOTE that the same client may have a different case worker for the new special program.

The Caspio database helps keep track of these relationships between ClientIDs. Client records are stored in a table we refer to as the **MAIN** table. Each client is a row. The columns are for fields such as Street, Zipcode, Cell Phone all belonging to that client. Two new fields have been added:

- **CrossRefID** (Cross Reference ID): for alternative IDs associated with the same client
- **CrossRefWorker** (Cross Reference Worker): for other case workers who have provided assistance to the same client.

Say ClientID B10100 has caseworker SKC and is to also be assigned to the Rent Subsidy program as R2090 where her caseworker is GRM. When we view B10100’s record, we should see CrossRefID is R2090, CrossRefWorker is GRM. When we view record for R2090, the CrossRefID is B10100 and CrossRefWorker is SKC.

ClientID	Worker	CrossRefID	CrossRefWorker
B10100	SKC	R2090	GRM
R2090	GRM	B10100	SKC

There are cases where a client has been assigned to TWO special programs. Suppose our client is also assigned to the Income Growth project as i307 with case worker TMI. The new information now must show:

ClientID	Worker	CrossRefID	CrossRefWorker
B10100	SKC	R2090, i307	GRM,TMI
R2090	GRM	B10100,i307	SKC,TMI
i307	TMI	B10100, R2090	SKC, GRM

Copying the Client to the MAIN table with a New ID: One way is to create a new ClientID and enter all the same information that belongs in the original record for that client. Compared to ACCESS, the new database has many more columns of information (one for each ethnicity, one for each source of income, one for each amount of income from each source, etc.). This method is labor intensive and prone to data entry errors. The challenge is to make this task easier and more accurate.

WHY ISN’T THERE A COPY BUTTON? You can’t just copy the record in the Main table and then edit the record to give it a new ClientID because the database rules are that you can’t have two clients with the same ClientID. The database won’t let you enter the same record, and you can’t enter a record without a ClientID. So the solution is to copy the record to a **TEMPORARY** table with all the same fields, edit it there, and then copy it back to the **Main** table. In the Temporary table, you **MUST** change the ID, and add the CrossRefID (=the original ClientID) and the CrossRefWorker (=the original Worker if different). Once you have changed the record in the Temporary table, you can copy it back to the Main client table.

Caspio has a set of tools to help you do this. Here are the steps we will explain:

- (1) Find the record in the Main Table you want to copy.
- (2) Copy it to a Temporary Table.
- (3) Find the record in the Temporary Table you want to copy back to the Main table.
- (4) Change the ClientID, add the CrossRefID, and add the CrossRefWorker. UPDATE.
- (5) Copy the changed record to the Main Table.

STEP 1: [Find Client in MAIN to Copy:](#)

Type in the ClientID. Press SEARCH.

If you enter nothing and press SEARCH, you will see ALL clients in the MAIN database.

The results are shown for this client. Check the names, Social Security Numbers, Phone and/or email listings to be sure you have the right client.

Copy a Client Record
 Select ClientID to Copy a Temporary Table.

ClientID

Click on View Details to COPY the record.

Search Again

ClientID	Last Name, Person 1	First Name, Person 1	Last Name, Person 2	First Name, Person 2	Social Security#, Person 1	Social Security#, Person 2	Email, Person 1	Home Phone	Cell Phone	
WZ101	AALastName1	AAFirstName1	WZ101LN2	WZ101FN2	8989	9898	AALastName@nomail.com	9149999999	9148888888	View Details

Records 1-1 of 1

If this is the one to copy to a Temporary table, click on View Details at the end of the row.

Scroll to bottom to click on COPY TO TEMP TABLE.

Search Again

ClientID *

Last Name, Person 1

First Name, Person 1

Last Name, Person 2

First Name, Person 2

Social Security#, Person 1

Social Security#, Person 2

Street & Apt # or PO Box

Other Income Sources

[Copy to Temporary Table](#)

This is the DETAILS page showing all the values in the MAIN table for this Client.

Again, if this is not the one you want to change, click on Search Again: Search Again

Do Not edit any details here. Your changes will NOT be saved.

Only the top part of the form is shown here. Scroll down to see the end of the form.

Here is the end of the form.

Click on [Copy to Temporary Table](#) and wait while a copy is made.

You may see a PROCESSING message at the bottom of the screen. But the screen may also appear to be blank. Just wait. There is a lot of information to copy.

When the copy has been made, the copied form will appear with all the same information.

This is the Client Information that will be copied to a **TEMPORARY** table.

DO NOT CHANGE THE ClientID Here.

Scroll down and click on **SUBMIT** button.

ClientID *	WZ101
Last Name, Person 1	AALastName1
First Name, Person 1	AAFirstName1
Last Name, Person 2	WZ101LN2
First Name, Person 2	WZ101FN2
Social Security#, Person 1	8989
Social Security#, Person 2	9898

STEP 2: Copy information to the TEMPORARY table.

Only the top part of the form is shown here.

As the instructions on the page say, **DO NOT** make changes here.

Scroll to the bottom of the form, and press the **SUBMIT** button.

The record will copy quickly and moves to Step 3.

SUBMIT

If you are not ready to proceed to step 3, close the browser tab when this next screen appears. You can resume by clicking on this link: [Copy from Temporary Table to MAIN table](#)

Choose the ClientID to Copy Back to the Main Table

ClientID

SEARCH

STEP 3: Find the ClientID in the Temporary Table to be changed.

Enter the **original** ClientID (it hasn't been changed yet). If you press **SEARCH**, you will see all records in the Temporary table. You can delete ones you no longer need to copy back to the Main Table. Here, we see just one record in the Temporary Table, the one we just copied.

EDIT ClientID HERE

REQUIRED

1. Edit ClientID to change to NEW ClientID.
2. Add old ClientID to CrossRefID
3. Add old Worker to Cross Ref Worker.
4. **UPDATE**, then **SUBMIT**.

Search Again

ClientID	Worker	CrossReference ID ?	Cross Ref Worker ?	Last Name, Person 1	First Name, Person 1	Cell Phone	Home Phone	
WZ101	SKC	WZ101	SKC	AALastName1	AAFirstName1	9148888888	9149999999	Submit Edit X Delete

Records 1-1 of 1

STEP 4: Here is the critical requirement. You **MUST** change the ClientID or this record cannot be moved back into the MAIN table. The previous ID is WZ101 and case Worker is SKC. Press EDIT to change the ClientID.

ClientID	Worker	CrossReference ID ?	Cross Ref Worker ?	Last Name, Person 1	First Name, Person 1	Cell Phone	Home Phone		
WZ101	SKC	WZ101	SKC	AALastName1	AAFirstName1	9148888888	9149999999	Submit	UPDATE CANCEL

Search Again

ClientID	Worker	CrossReference ID ?	Cross Ref Worker ?	Last Name, Person 1	First Name, Person 1	Cell Phone	Home Phone		
WZX900	GRM	WZ101	SKC	AALastName1	AAFirstName1	9148888888	9149999999	Submit	UPDATE CANCEL

Here we have changed WZ101 to WZX900, the new ClientID. The Worker is entered as GRM. Be sure that the CrossReference ID includes the original ClientID WZ101 and the Cross Ref Worker includes SKC, the Worker for WZ101. Remember that there can be more than one CrossReference ID and Cross Ref Workers. Two ClientIDs can be entered into the CrossReferenceID field separated by commas, such as WZ101,U950 if the client has more than one Cross Reference. Two Cross Ref Workers can be entered as SKC,GRM if needed. Now press **UPDATE**

Or **CANCEL** to undo your changes and try again. Verify your changes:

Search Again

ClientID	Worker	CrossReference ID ?	Cross Ref Worker ?	Last Name, Person 1	First Name, Person 1	Cell Phone	Home Phone		
WZX900	GRM	WZ101	SKC	AALastName1	AAFirstName1	9148888888	9149999999	Submit	Edit Delete

Records 1-1 of 1

Submit

And proceed to **Step 5** by pressing on

Step 5:

When the form is ready to view and submit, you will see the Submission Form (with yellow fields). Check to be sure all is correct. If the Client has a **Document Package**, scroll down and select it to add to this submission. The Document Package consists of documents previously uploaded from your computer (any legal or other document pertaining to the client that you have first scanned and stored on your computer). All documents must be in one file. The Document Package can be the same as the package for the original ClientID or a different one. Choose the file name from the folder at CASPIO where you uploaded the package.

Document Package	/Demo/Resume.docx
Date Application Rejected	
Date Application Withdrawn	
CrossReference ID	
Cross Ref Worker	
Employment Amount	
Part Time Amount	
Supplemental Security Amount	

/Demo/Resume.docx

/Common/TBF_Logo_500.png

/Common/TBF-LOGO_4in.png

/Common/TBFW_Logo_BlackWhite.jpg

/Common/TBFW_Logo_BlackWhite_NYC.png

/Demo/Resume.docx

/NYC/Morales Resume (1).docx

/NYC/Resume.docx

/NYC/Sample Cover Letter.docx

/NYC/SampleRESUME.docx

/NYC/Yeon Huh's Resume.docx

/Westchester/TBFW_Logo_BlackWhite.jpg

/Notes_SKC.txt

/P Factor and Mental Illness.pdf

/P Factor and Mental Illness_1.pdf

This data will be copied to the MAIN CLIENT table. Just press SUBMIT.

ClientID *	WZX900
Last Name, Person 1	AALastName1
First Name, Person 1	AAFirstName1
Last Name, Person 2	WZ101LN2
First Name, Person 2	WZ101FN2
Social Security#, Person 1	8989
Social Security#, Person 2	9898
Street & Apt # or PO Box	123 Oak Street

Shown here is just the TOP part of the form.

Scroll down to press SUBMIT:

SUBMIT

You will be taken back to STEP 1, or just close the

browser tab to quit.

IMPORTANT: One more step. Go to the [Client Command Center](#) and edit the original Client record (WZ101 in this example) to add this new ClientID and Worker to the Cross Reference ID and Cross Reference Worker fields of the original ClientID record.

Search Again Download Data Grid Edit

Bridge Fund Worker	ClientID	Close-Out Date	Name	Status	Home Phone	Email	Rejection Date	Withdrawn Date	Document Package	Agency Referral	Update Client	Add Loan/Grant	Add Agency Contribution	Add Service/Outcome
SKC	WZ101	3/15/2021	AALastName1,AAFirstName1	Pending	9149999999	AALastName@nomail.com			P Factor and Mental Illness.pdf	Westchester Residential Opportunities,	Update Client Details	Add Loan/Grant	Add Agency Contribution	Add Service & Outcome

For this example, Search for WZ101. View Details and Click on UPDATE CLIENT DETAILS. Enter:

CrossReference ID	CrossReference Worker
WZX900	GRM

Maintaining the Cross References is a task that must be done with data entry efforts on your part.