

Practice Alert



Date: December 8, 2022
Issued by: Safety and Prevention Unit

PA22-IA-05

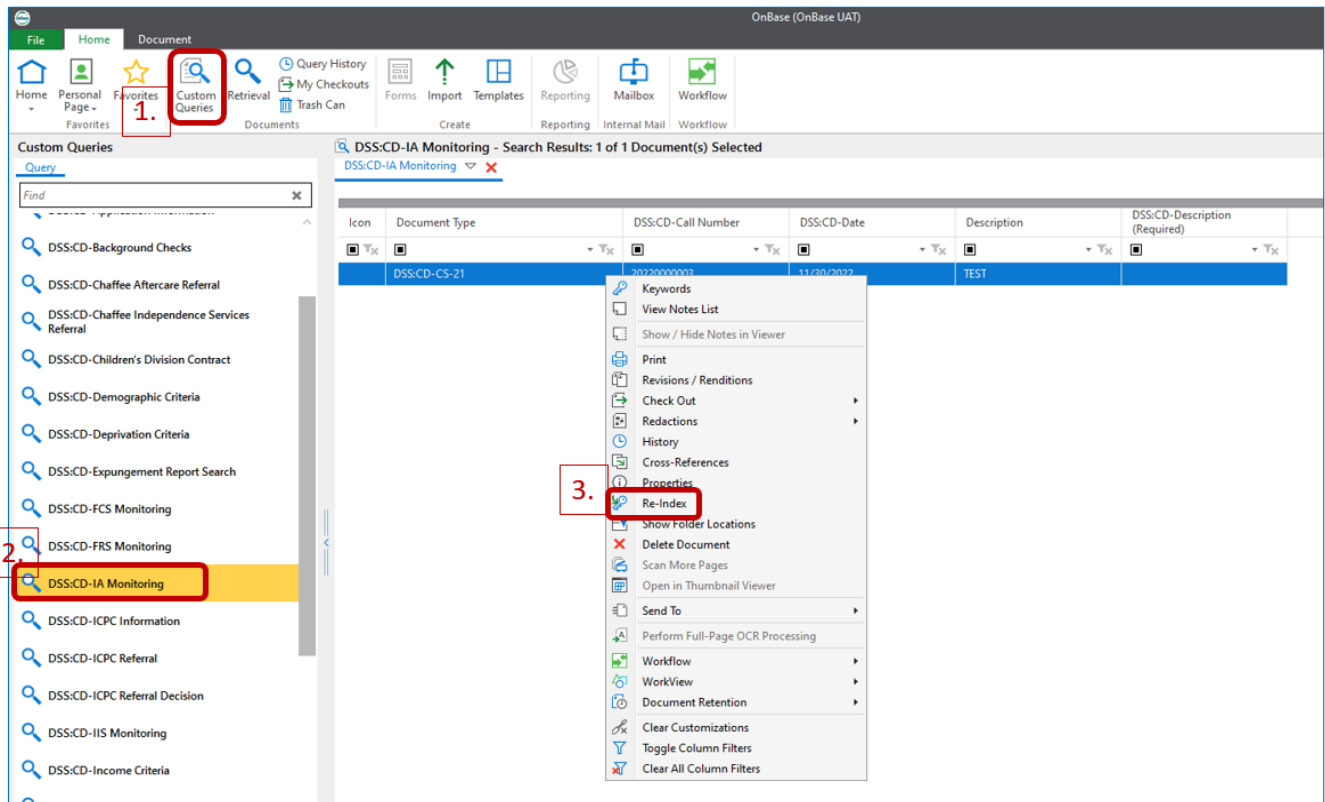
OnBase Documents when Combining or Duplicating Calls

This Practice Alert is being issued to notify staff that when duplicating or combining a secondary call into a primary call, any documents that have been uploaded into the secondary call **WILL NOT** duplicate/combine into the primary call number. It is ideal for staff to identify that they are going to duplicate/combine prior to uploading any documents into OnBase on the secondary call. If documents are uploaded, staff will either have to manually upload the documents into the primary call number or complete the re-indexing process as described below.

Re-indexing in OnBase moves a file from one Primary Keyword to another. For Investigations and Assessments (IA), the Primary Keyword is the call number. When reviewing the family's past involvement with Children's Division it could be beneficial to review OnBase Documents that might be uploaded under a Combined Number or Duplicated Numbers.

Example: You have identified 20220000001 as the primary call number. You would like to combine report 20220000003 into that primary call. To combine any documents that have been uploaded into 0003, you will go to Unity Client (or OnBase link).

Select: **Custom Queries > IA Monitoring > Enter Call Number. On each document, right click and select "Re-index".**



Then change the Primary Keyword and Re-index. This deletes the copy from 0003 and puts it in 0001.

Re-Index

Document Type Group
DSS:CD-IA Documents

Document Type
DSS:CD-CS-21

File Types
Image File Format

Document Date
11/30/2022

Keywords **4.**

DSS:CD-Call Number
2022000001

DSS:CD-Date
11/30/2022

Description
TEST

5. Split

Re-Index Close

OnBase Close

Re-Index Successful

Program Development Specialist Contact:
Cari Pointer
Cari.A.Pointer@dss.mo.gov

Issued: 12/06/22