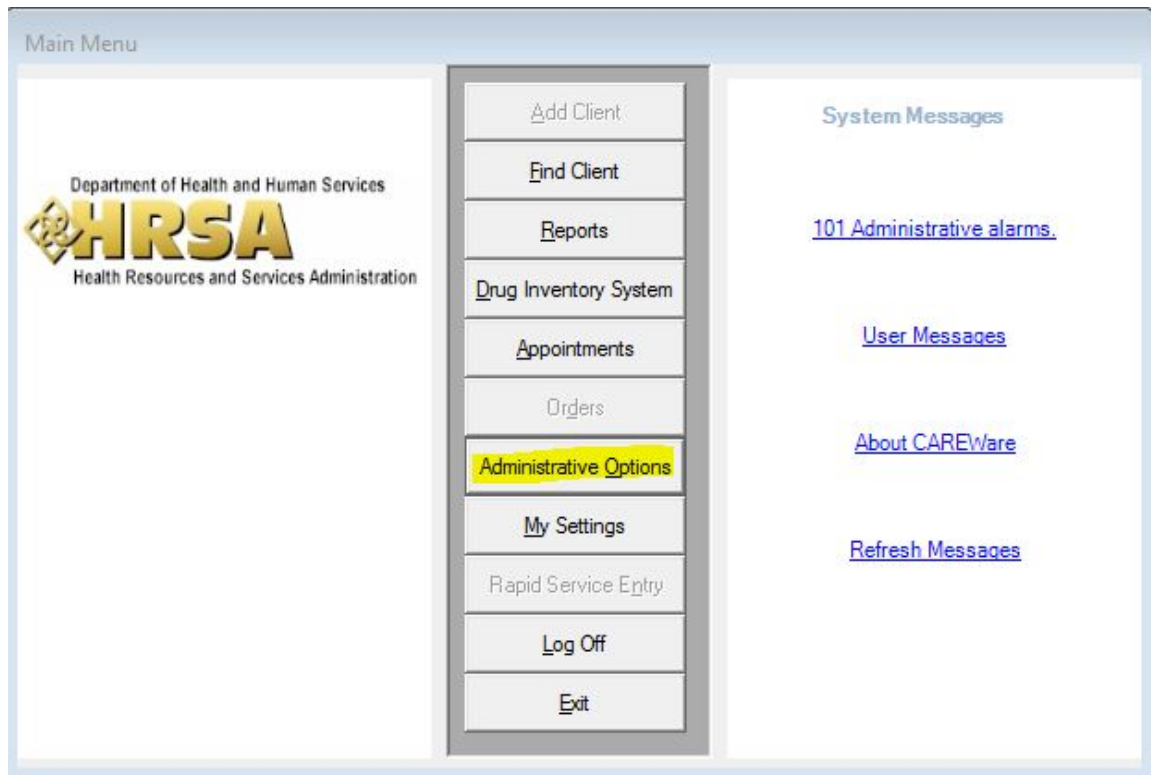


The Central Client Merge feature can merge clients across multiple domains, search and identify clients as duplicates using custom fields, and allows for an automatic daily search based on a client match threshold setting.

Note: the client names shown in this document are fictitious names.

To access the Central Client Merge feature:

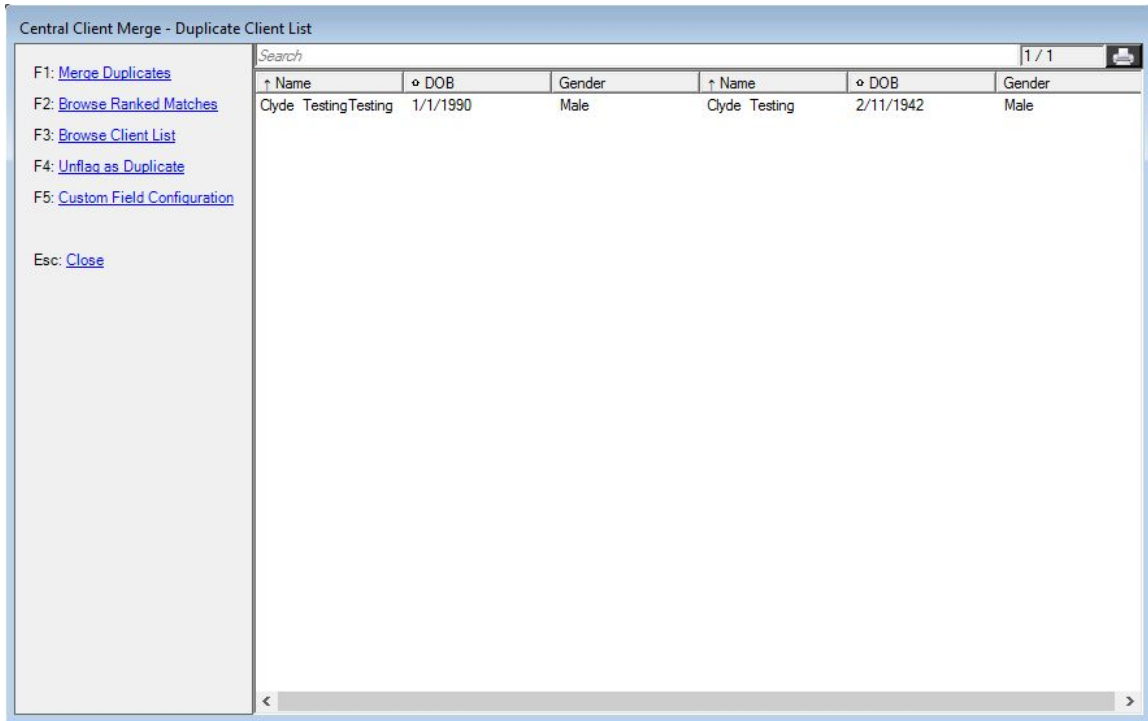
1. Log into the *Central Administration Domain*.
2. Click *Administrative Options*.
3. Click *Client Merge*.



Administrative Options

<u>P</u> rovider/User Manager	<u>L</u> ab Test Mapping Tool
Setup <u>W</u> izard	Advanced Encryption <u>O</u> ptions
<u>C</u> ontracts	Business Tier Diagnostics
<u>G</u> rantee Setup	Change Log Operations
Clinical <u>E</u> ncounter Setup	<u>B</u> ackup
Custom <u>F</u> eatures	System <u>I</u> nformation
International Options	Client Matching Setup
Pharmacy Supplier	Provider Data Import
Performance Measures	Custom Report Field Setup
Field Merge	<u>R</u> SR Export
SF Import Manager	Email Alert Scheduler
HOPWA Setup Wizard	Advanced Security Options
Clear Caches	HL7 Feed Settings
Attachments Settings	Provider Data Export
Provider By Provider Sharing	Client by Client Sharing
<u>O</u> rphaned Record Cleanup	Client Merge

Back to Main Menu



Merge Duplicates – Starts the merge process, which allows a user to choose the correct data for the client’s record using both records being merged.

Browse Ranked Matches – Opens the Ranked Matches menu where a percentage threshold can be used to identify clients with similar records. It has a check box to schedule daily checks for duplicate client records.

Browse Client List – Opens the Browse Client List, which contains a list of all clients. A menu on that screen has an option for filtering the list using specific fields, such as first name, last name, DOB, and gender.

Unflag as Duplicate – This removes client records from the list of duplicate clients.

Custom Field Configuration – Opens the Custom Field Configuration menu, which is used to setup custom fields that identify clients as duplicate records. Client records with the same value for that custom field will show up as a 100% match in the Browse Ranked Matches, even if URN fields such as DOB and gender are different.

Merge Duplicates

Once clients are listed in the Duplicate Client List, clicking Merge Duplicates will open the menu to identify data to keep in the client's record. Once the merge is complete, CAREWare will generate a report will be generated showing the changes to the client record. Users can choose to delete or retain the duplicate record.

Client Merge

Field Name	Primary Client Count/Value:		Secondary Client Count/Value:	Advanced Options:
Last Name	<input checked="" type="checkbox"/> TestingTesting		<input type="checkbox"/> Testing	
Gender	<input checked="" type="checkbox"/> Male		<input type="checkbox"/> Male	
Date of Birth	<input checked="" type="checkbox"/> 1/1/1990		<input type="checkbox"/> 2/11/1942	
First Name	<input checked="" type="checkbox"/> Clyde		<input type="checkbox"/> Clyde	
ADAP Enrollment Records:	3		0	
ADAP Import Holding Tank:	0		0	
Appointments:	0		0	
Case Notes:	0		0	
Client Forms Map:	0		0	
Client Language Map:	0		0	
Counseling and Testing:	0		0	
Custom Subform:	0		0	
Dependent Relations:	0		0	
Diagnosis:	0		0	
Drug Payments:	0		0	

<
>

[Client Data Color Reference](#)

Unique ID

Client Data Mismatch: Choose value to keep. *

Client Data Missing: UnCheck to not add. **

Client Data Match: No merge required.


* If no record is selected, the primary client record will be

All provider-specific data will be transferred to the primary client and the secondary client will be deleted. Click the arrows to swap which client is kept.

Merge Clients

Cancel

Client Merge

Field Name	Primary Client Count/Value:		Secondary Client Count/Value:	Advanced Options:
Risk 1 Homosexual	<input type="checkbox"/> False		<input checked="" type="checkbox"/> True	
Risk 2 Drug Injection	<input checked="" type="checkbox"/> True		<input type="checkbox"/> False	
Risk 3 Heterosexual	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
Risk 4 Hemophilia	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
Risk 5 Prenatal	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
Risk 6 Other	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
Risk 7 Transfusion	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
Risk 9 Unknown	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
State	<input checked="" type="checkbox"/> Louisiana		<input type="checkbox"/> Louisiana	
STD Enrollment Date	<input checked="" type="checkbox"/> 1/1/2013		<input type="checkbox"/> 7/1/2005	
STD Enrollment Status	<input checked="" type="checkbox"/> Active		<input type="checkbox"/> Active	
Street Address	<input checked="" type="checkbox"/> 199 Logan Way		<input type="checkbox"/> 1 Slytherin	
Uses Scheduler	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
Vital Status	<input checked="" type="checkbox"/> Alive		<input type="checkbox"/> Alive	
Zip Code	<input checked="" type="checkbox"/> 74043		<input type="checkbox"/> 48867	

Client Data Color Reference

Unique ID

Client Data Mismatch: Choose value to keep. *

Client Data Missing: UnCheck to not add. **

Client Data Match: No merge required.

* If no record is selected, the primary client record will be

All provider-specific data will be transferred to the primary client and the secondary client will be deleted. Click the arrows to swap which client is kept.

Merge Clients

Cancel

A client's record can be added to the Duplicate Client List by identifying the clients as duplicates, using the Browse Ranked Matches or Browse Client List menus. Clicking Browse Ranked Matches creates a list of clients, which may be duplicates based on a Match Threshold percentage. If the threshold set to 75% match, the list shows record pairs for which 75% of the data (in this case, the URN fields-name, DOB, and gender) match.

Browse Ranked matches

To initiate the search, click *Search Now*.

To change the percentage, click the % box and change the numeric value.

To add clients to the Duplicate Client List:

- Click the client's row.
- Click *Flag as Duplicate*.

Checking the box for Automatically Score Clients (daily) updates the list based on the Match Threshold each day.

Central Client Merge - Ranked Matches

Search now

Match Threshold: % Automatically Score Clients (daily)

Search

Score	Name	DOB	Gender	Name	DOB	
100	Rebecca Tester...	1/1/1990	Male	Rebecca Tester...	1/1/1990	Fe
100	Olivia Endingtest	1/1/1990	Female	Olivia Endingtest	1/1/1990	M
100	Matt Toralasyr Test	1/1/1990	Male	Matt Test	1/1/1990	Fe
100	Jessica Endingtest	1/1/1990	Male	Jessica Endingtest	1/1/1990	Fe
100	Jennifer Endingt...	1/1/1990	Male	Jennifer Endingt...	1/1/1990	Fe
100	Irene Experiment...	1/1/1990	Male	Irene Experiment...	1/1/1990	Fe
100	Faith TesterTester	1/1/1990	Male	Faith TesterTester	1/1/1990	Fe
100	Faith Experiment...	1/1/1990	Female	Faith Experiment...	1/1/1990	M
100	Dorothy Endingt...	1/1/1990	Male	Dorothy Endingt...	1/1/1990	Fe
100	Dorothy Beginn...	1/1/1990	Male	Dorothy Beginn...	1/1/1990	Fe
100	Dominic Experim...	1/1/1990	Male	Dominic Experim...	1/1/1990	Fe
100	Chase Runningt...	1/1/1990	Male	Chase Runningt...	1/1/1990	Fe
95	Wendy Testing	1/1/1990	Male	Weranil Nardiln...	1/1/1990	Fe
95	Wendy Hypothe...	1/1/1990	Female	Whitley Hypothe...	1/1/1990	Fe
95	Warren Running...	1/1/1990	Female	Wendy Running...	1/1/1990	M
95	Warren Hypothe...	1/1/1990	Female	Wendy Hypothe...	1/1/1990	Fe
95	Warren Hypothe...	1/1/1990	Female	Whitley Hypothe...	1/1/1990	Fe
95	Wanda Running...	1/1/1990	Female	Warren Running...	1/1/1990	Fe
95	Wanda Running...	1/1/1990	Female	Wendy Running...	1/1/1990	M
95	Virginia Endingtest	2/10/1958	Female	Virginia Experiment	2/10/1958	Fe
95	Vanlond Shaland...	1/1/1990	Female	Virginia Test Test	1/1/1990	Fe
95	Valene Test	1/1/1990	Male	Violette Test	1/1/1990	M
95	Tracey Beginn...	1/1/1990	Female	Trudie Beginning...	1/1/1990	M
95	Toradragthor Tor...	1/1/1990	Female	Trudie Beginning...	1/1/1990	M
95	Toradragthor Tor...	1/1/1990	Female	Tracey Beginn...	1/1/1990	Fe
95	Tinurina Ondoos ...	1/1/1990	Female	Tracey Experime...	1/1/1990	Fe
95	Tinurina Cromvir ...	1/1/1990	Female	Toradragthor Tor...	1/1/1990	Fe
95	Tinurina Cromvir ...	1/1/1990	Female	Tracey Beginn...	1/1/1990	Fe
95	Tinurina Cromvir ...	1/1/1990	Female	Trudie Beginning...	1/1/1990	M
95	Tim Hypothesish...	1/1/1990	Female	Trevor Hypothes...	1/1/1990	Fe
95	Tiffny Runningtest	1/1/1990	Female	Trevor Runningt...	1/1/1990	Fe
95	Tiffny Hypothe...	1/1/1990	Female	Tim Hypothesish...	1/1/1990	Fe

Browse Client List

Clicking Browse Client List searches the entire database of clients for duplicates. This list can be sorted by clicking the drop down menu labeled “*Show only clients that match on*”. Once clients have been identified, click the check box for two clients that are considered duplicate records and click Flag Matched Pair. This will add those to clients to the Duplicate Client List.

Central Client Merge - Browse Client List

F1: [View Client Details](#)
 F2: [Flag Matched Pair](#)
 Esc: [Close](#)

Show only clients that match on:

Search 100 / 100

<input type="checkbox"/>	First Name	Middle Name	Last Name	DOB	Gender	BaseURN
<input type="checkbox"/>	Abdul		Tester	8/30/1988	Male	ADTS0830881
<input type="checkbox"/>	Abigail		Testing Testing	1/1/1990	Female	AITSO101902L
<input type="checkbox"/>	Abram		Runningtest	6/6/1990	Male	ARRN0606901
<input type="checkbox"/>	Adria		Endingtest	1/1/1990	Female	AREDO101902
<input type="checkbox"/>	Audrey		Testbeginning	2/11/1942	Male	ADTS0211421
<input type="checkbox"/>	Ava		Tests	6/27/1975	Female	AATS0627752I
<input type="checkbox"/>	Bailey		Test	1/1/1980	Male	BITS0101801L
<input type="checkbox"/>	Barton		Testing	2/18/1988	Male	BRTS0218881
<input type="checkbox"/>	Basil		TesterTester	1/1/1980	Female	BSTS0101802I
<input type="checkbox"/>	Beau		Tests	3/28/1987	Male	BATS0328871I
<input type="checkbox"/>	Benedict		Test	9/21/1989	Female	BNTS0921892
<input type="checkbox"/>	Benito		Hypothesishyp...	7/19/1957	Male	BNHP0719571
<input type="checkbox"/>	Benjamin		Experimentexp...	2/11/1942	Male	BNEP0211421
<input type="checkbox"/>	Bill		Endingtest	10/4/1988	Transgender R/M	BLSD1004885I
<input type="checkbox"/>	Blaine		Endingtest	4/2/1980	Female	BAED0402802
<input type="checkbox"/>	Bob		Hypothesishyp...	2/12/1971	Male	BBHP0212711
<input type="checkbox"/>	Bower		Experimentexp...	1/1/1990	Female	BWEP0101902
<input type="checkbox"/>	Brant	M	Tester	12/15/1984	Male	BATS1215841I

Results per page: << Prev Page 1 of 24 Next >>

Custom Field Configuration

The search field can be used to search through custom fields. Check the box for a custom field that will be used to consider clients as a duplicate pair. Any client records that have the same value for that field will be considered a duplicate pair with a 100% match, even if they have different URN field data such as DOB or name.

Central Client Merge - Custom Field Configuration

Esc: [Close](#)

Select custom fields to be used in client matching

(Client records with matching values for any of these fields will be considered a 100% match)

Search 1 / 1

Use for ...	Field Name	Control Type
<input type="checkbox"/>	Social Security	TextBox

Results per page: << Prev Page 1 of 1 Next >>

In a provider domain, the button to merge clients is called Duplicate Client. This can be found on the Client Info screen.

The screenshot shows a web-based client information form for Aaron Morin. The form is titled "Test, Aaron Morin" and has a navigation bar with buttons for "Appointments", "Orders", "Forms", "ChangeLog", "Client Report", "Duplicate Client" (highlighted in yellow), "Delete Client", "Find List", "New Search", and "Close". Below the navigation bar are tabs for "Demographics", "Drug Services", "Service", "Annual Review", "Encounters", "Referrals", "HIV C&T", "Relations", "Custom Tab 1", "Custom Tab 2", "Custom Tab 3", and "Subform".

The form fields are organized into several sections:

- Personal Information:** First Name (Aaron), Middle Name (Morin), Last Name (Test), Gender (Male), Date of Birth (4/5/1989), Est? (checkbox), Unique ID (ARTS0405891U), Encrypted URN (V8zd8WE9n).
- Enrollment:** Enrollment Status (Active), Enrollment Date (1/1/2014), Eligibility Status (Not Eligible for Ryan White), Vital Status (Alive), Case Closed Date (checkbox), Eligibility History (link).
- HIV Information:** HIV Status (HIV-positive (not AIDS)), HIV+ Date (12/2/2013), Est? (checkbox), AIDS Date (1/1/2014), Est? (checkbox), HIV Risk Factors (Male who has sex with male(s)).
- Identification:** Sex at Birth (Male), Encrypted UCI (85DF5C79F166A8393895F7E9790192455F948118U), Client ID (999999).
- Address:** Street Address (102 logans way), City (Yeppers), State (Louisiana), Zip Code (74043), County (Natchitoches), Phone Number (555-555-5556). There is a checkbox "Include on label report".
- Race and Ethnicity:** Race(s) (White, Native Hawaiian or Other Pac), Pacific Subgroup (Guamanian or Chamoro), Ethnicity (Hispanic), Hispanic Subgroup (Puerto Rican, Another Hispanic, Lat).

At the bottom of the form, there are tabs for "Common Notes", "Provider Notes", "User Messages", and "Case Notes".

Users can check the box to flag this record as a duplicate, and they can select a matching client record from the list and to link it to the primary client.

Possible Matches for Client Merge

Primary Client:

Flag as Duplicate Client

Unique ID: ARTS0405891U Name: Test, Aaron Date of Birth: 04/05/1989

Phone: 555-555-5556 Address: 102 logans way Gender: Male

Possible Matching Clients:

	Threshold	Score	Name	Gender	DOB	Unique ID	Address	Phone
F1	70	90	Testending...	Male	04/05/1989	ANTS0405...	102 logans...	555-555-55...
	70	90	Testing, An...	Male	04/05/1989	AGTS0405...	102 logans...	555-555-55...
F2	70	75	Test, Adam	Male	09/05/1990	AATS0905...	301 logans...	555-555-56...
	70	72	Test Test, ...	Female	01/05/1989	AETS0105...		
F3	70	70	Hypothesis...	Male	04/05/1989	ANHPO405...	102 logans...	555-555-55...
	70	70	Tester, Amy	Male	09/05/1990	AYTS0905...	301 logans...	555-555-56...
	70	70	Testing, Je...	Male	04/05/1989	JNTS0405...	102 logans...	555-555-55...
	70	70	TestingTes...	Male	04/05/1989	CETS0405...	102 logans...	555-555-55...
	70	70	Testrunnin...	Male	09/05/1990	ANTS0905...	301 logans...	555-555-56...
	70	70	Testrunnin...	Male	04/05/1989	BRTS0405...	102 logans...	555-555-55...
	70	70	Tests, Cha...	Male	04/05/1989	CATS0405...	102 logans...	555-555-55...
	70	70	TestsTests...	Transgend...	07/05/1990	AETS0705...	171 logans...	555-555-54...
	70	70	Test Test, L...	Male	04/05/1989	LATS0405...	102 logans...	555-555-55...

ESC [Cancel](#)