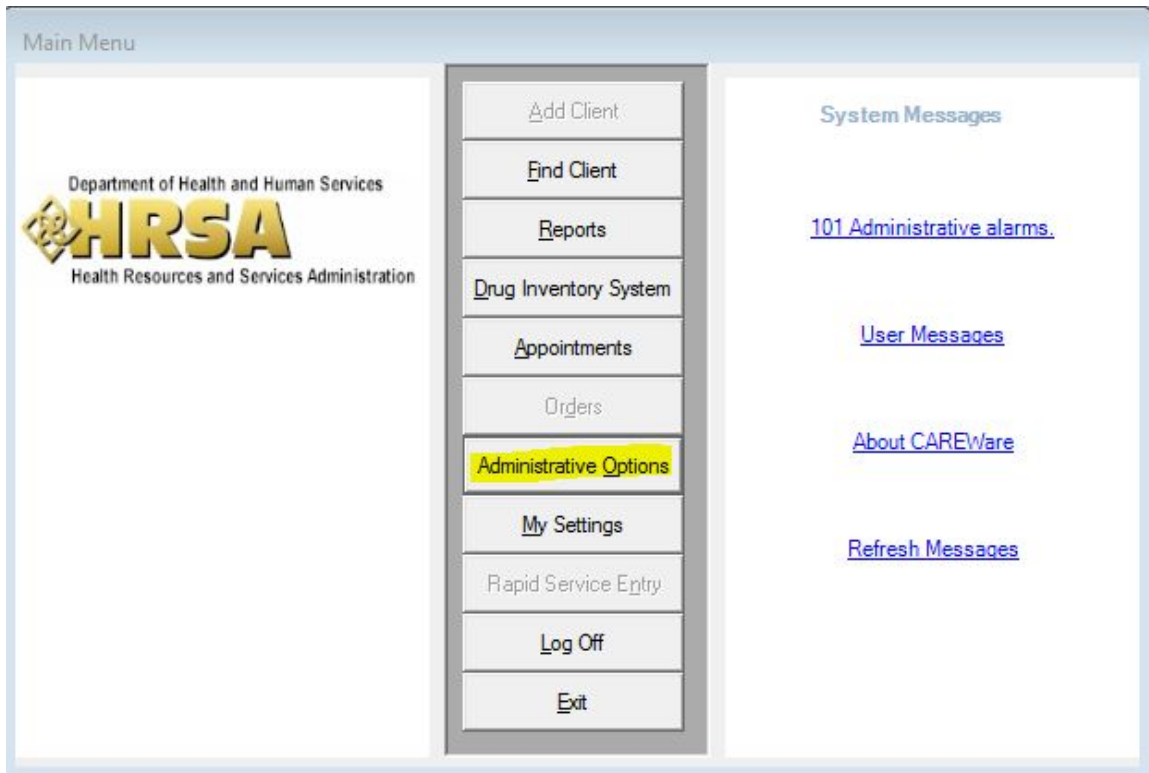


The Central Client Merge feature can merge clients across multiple domains, search and identify clients as duplicates using custom fields, and allows for an automatic daily search based on a client match threshold setting.

To access the Central Client Merge feature:

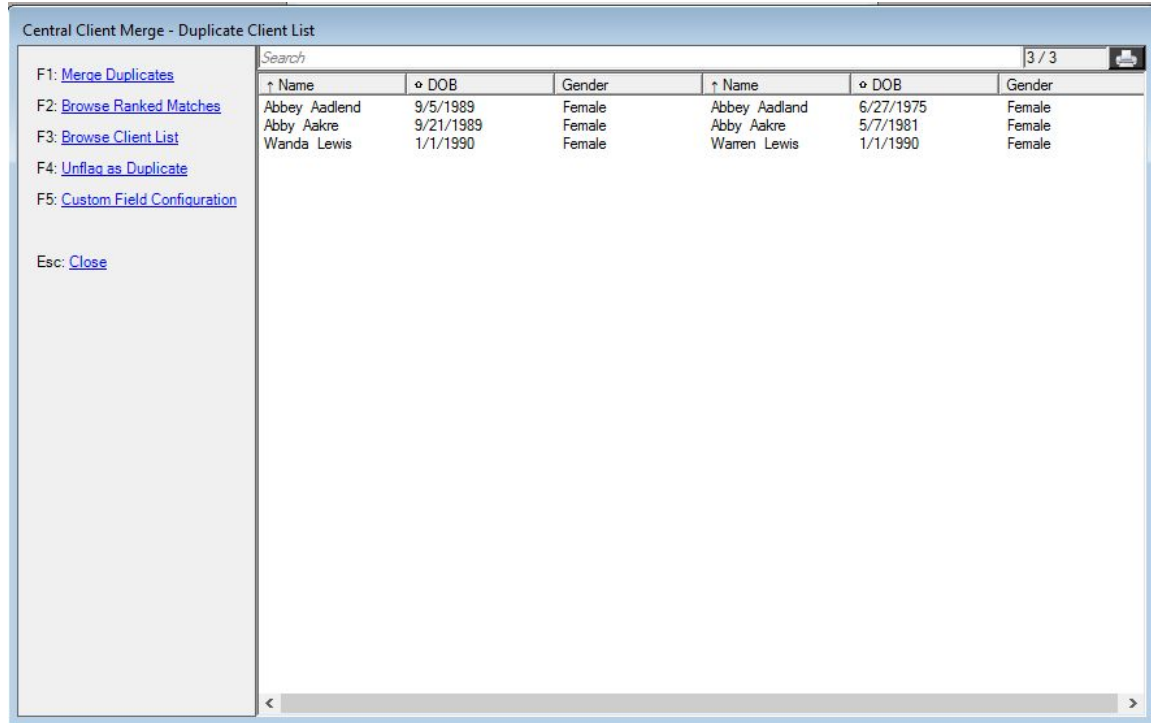
1. Log into the *Central Administration Domain*.
2. Click *Administrative Options*.
3. Click *Client Merge*.



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"/> Aadlend		<input type="checkbox"/> Aadland	
Gender	<input checked="" type="checkbox"/> Female		<input type="checkbox"/> Female	
Date of Birth	<input checked="" type="checkbox"/> 9/5/1989		<input type="checkbox"/> 6/27/1975	
First Name	<input checked="" type="checkbox"/> Abbey		<input type="checkbox"/> Abbey	
ADAP Enrollment Records:	0		0	
ADAP Import Holding Tank:	0		0	
Appointments:	1		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:	1		1	
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:
Race White	<input checked="" type="checkbox"/> True		<input type="checkbox"/> True	
Risk 1 Homosexual	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
Risk 2 Drug Injection	<input checked="" type="checkbox"/> True		<input type="checkbox"/> True	
Risk 3 Heterosexual	<input checked="" type="checkbox"/> True		<input type="checkbox"/> True	
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 8 STI	<input checked="" type="checkbox"/> False		<input type="checkbox"/> False	
State	<input type="checkbox"/> Louisiana		<input type="checkbox"/> Louisiana	
STI	<input type="checkbox"/> 8/1/2014		<input type="checkbox"/> 8/1/2014	
STI	<input type="checkbox"/> Active		<input type="checkbox"/> Active	
STI	<input checked="" type="checkbox"/> 103 logans way		<input checked="" type="checkbox"/> 103 logans way	
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"/> 74034		<input type="checkbox"/> 74043	

Please wait...

Complete...

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.

Score	Name	DOB	Gender	Name	DOB	Gender
95	Rachel Springer	1/1/1990	Male	Ryan Springer	1/1/1990	Female
95	Lillian Poole	1/1/1990	Male	Lillian Powell	1/1/1990	Male
95	Liam Rampling	2/12/1971	Male	Lisa Rampling	2/12/1971	Male
95	Kimberly Parsons	12/16/1961	Male	Kylie Parsons	12/16/1961	Male
95	Kimberly Parr	1/1/1978	Male	Kylie Parr	1/1/1978	Male
95	Katherine Simpson	1/1/1990	Male	Katherine Skinner	1/1/1990	Male
95	Karen Slater	1/1/1990	Male	Karen Smith	1/1/1990	Male
95	Julia Springer	1/1/1990	Male	Julia Stewart	1/1/1990	Male
95	Jessica Poole	1/1/1990	Male	Justin Poole	1/1/1990	Female
95	Jennifer Powell	1/1/1990	Male	Joseph Powell	1/1/1990	Male
95	Jennifer McLean	1/1/1990	Female	Jennifer Metcalfe	1/1/1990	Female
95	Jane Test	1/1/1980	Female	Jonhy Test	1/1/1980	Male
95	Fiona Mathis	1/1/1990	Female	Fiona May	1/1/1990	Female
95	Emily Mitchell	1/1/1990	Female	Emily Morgan	1/1/1990	Female
95	Ella Greene	1/1/1990	Male	Eric Greene	1/1/1990	Female
95	Elizabeth Gray	1/1/1990	Female	Evan Gray	1/1/1990	Female
95	Diane Slater	1/1/1990	Male	Dylan Slater	1/1/1990	Male
95	Diana Smith	1/1/1990	Male	Dominic Smith	1/1/1990	Male
95	Diana Hardacre	1/1/1990	Female	Dylan Hardacre	1/1/1990	Female
95	Diana Hamilton	1/1/1990	Female	Diana Hardacre	1/1/1990	Female
95	Deirdre Payne	1/1/1990	Female	Deirdre Peake	1/1/1990	Female
95	Deirdre Gray	1/1/1990	Female	Deirdre Greene	1/1/1990	Female
95	Deirdre Glover	1/1/1990	Female	Deirdre Gray	1/1/1990	Female
95	Deirdre Glover	1/1/1990	Female	Deirdre Greene	1/1/1990	Female
95	David Springer	1/1/1990	Male	Deirdre Springer	1/1/1990	Male

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:
[Dropdown Menu]

Search [100 / 100] [Print Icon]

<input type="checkbox"/>	↑ First Name	◊ Middle Name	Last Name	DOB	Gender
<input type="checkbox"/>	Aadland		Abby	1/2/1990	Female
<input type="checkbox"/>	Aaron	Monn	Aaberg	4/5/1989	Male
<input type="checkbox"/>	Abbey		Aadland	2/27/1989	Female
<input type="checkbox"/>	Abbey		Aadland	6/27/1975	Female
<input type="checkbox"/>	Abbey		Aadlend	9/5/1989	Female
<input type="checkbox"/>	Abbie		Aagaard	11/16/1988	Female
<input type="checkbox"/>	Abbie		Aagaerd	6/12/1990	Transgender MtF
<input type="checkbox"/>	Abby		Aakre	5/7/1981	Female
<input type="checkbox"/>	Abby		Aakre	9/21/1989	Female
<input type="checkbox"/>	Abby	Alexandra	Aakre	1/11/1989	Male
<input type="checkbox"/>	Abdul		Aaland	10/11/1989	Male
<input type="checkbox"/>	Abdul		Aaland	8/30/1988	Male
<input type="checkbox"/>	Abdul		Aaland	8/8/1989	Male
<input type="checkbox"/>	Abe		Aalbers	8/29/1988	Male
<input type="checkbox"/>	Abel		Aalderink	1/5/1989	Female
<input type="checkbox"/>	Abel		Aalderink	5/12/1976	Female
<input type="checkbox"/>	Abigail		Aalund	5/8/1990	Transgender MtF
<input type="checkbox"/>	Abigail		Aalund	7/11/1989	Female

Results per page: 100 << Prev Page 1 of 15 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 the 'Client Info' screen for Aaron Morin. The 'Duplicate Client' button is highlighted in yellow. The form contains the following information:

Appointments		Orders		Forms		ChangeLog		Client Report		Duplicate Client		Delete Client		Find List		New Search		Close					
Demographics		Drug Services		Service		Annual Review		Encounters		Referrals		HIV C&T		Relations		Custom Tab 1		Custom Tab 2		Custom Tab 3		Subform	
First Name: Aaron		Middle Name: Morin		Unique ID: ARAB0405891U		Enrollment Status: Active		Enrollment Date: 10/1/2014		Eligibility Status: Ryan White Eligible		Vital Status: Alive		Case Closed Date:		Eligibility History							
Last Name: Aaberg		Encrypted URN: KaemuB1mL		HIV Status: HIV-positive (not AIDS)		HIV+ Date: 12/2/2013		Est?:		AIDS Date: 1/1/2014		Est?:											
Gender: Male		Date of Birth: 4/5/1989		Est?:		HIV Risk Factors: Male who has sex with male(s)																	
Sex at Birth: Male		Encrypted UCI: 488B07B2A51F60DCACD29B4BB663902C450F30EDU																					
Client ID: 999999		Social Security:																					
Street Address: 102 logans way		City: Yeppers		State: Louisiana		Zip Code: 74043																	
County: Natchitoches		Phone Number: 555-555-5556																					
Race(s): White, Native Hawaiian or Other Pac		Pacific Subgroup: Guamanian or Chamorro																					
Ethnicity: Hispanic		Hispanic Subgroup: Puerto Rican, Another Hispanic, Lat																					

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.

