

CAREWare 4.1:

Client Merge Function

July 2008

Background and need

It is not uncommon for providers to add a client to their database only to find out later that this client has already been entered but with a slightly different Unique Record Number or URN. Of course, duplicate URNs cannot be entered into CAREWare, but if the components of the URN differ by just one character, then CAREWare considers that unique.

For example, say that a client is first entered correctly as John Doe. A month later, the name is written on a form as Jack Doe and entered as though it were an entirely new patient.

Preventing duplicates in the first place:

CAREWare's client matching feature will help prevent your data entry personnel from entering a potential duplicate client. This feature looks for URNs that are similar and will present potential duplicates.

But if a duplicate gets in...

If however, it is after the fact, and you notice down the road that two separate clients in the database are in fact the same person, as in our example above, then the **Client Merge** feature will allow you to join those records without having to re-enter any data.

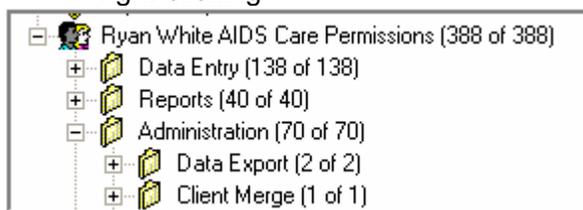
Remember that we are only referring to duplicates that occur with one provider. In multi-provider setups, it is quite likely that the same client appears in more than one provider domain because that individual has received services in multiple locations in the network. That's not a duplicate! However, it is still possible, of course, that the Jack Doe seen in Provider A is really the same person as the John Doe in Provider B.

Again, the client merge feature will allow you to merge clients without having to re-enter any data.

Getting Started:

First grant user rights to run the Client Merge function.

1. Log into Central Administration provider/user manager.
2. Go to Realtime Providers.
3. Select the **Administration** node of the provider of interest. In this example the provider name is "Ryan White AIDS Care." Grant the right to *Client Merge* by right-clicking



4. Repeat this for the user of interest within this provider.

Now let's go through a scenario where you accidentally enter a new client but this individual is really someone else already in your database; maybe you had the incorrect date of birth which resulted in a different URN being generated, or the client used a nickname which also resulted in a different URN.

The main client record that we are going to retain is the **primary** record. The duplicate that needs to be merged into the primary is, amazingly, the secondary record.

In the following example our primary client is Julius Cesar, born on Sept 12, 1985. Now let's say I try and enter a client named Julius **Cedar** born on Sept 12, **1995**. Can you imagine-- two typos! Let's see what happens. CAREWare sees that this URN is remarkably like the primary, and this screen appears.

Please confirm that the data you entered is correct and review the list to make sure that you are not entering a duplicate client.

URN: JLCD0912951U First Name: Julius Last Name: Cedar

Middle Name: Gender: Male Birth Date: 09/12/1995

[F1-Add New Client](#)
[F2-Go To Client Screen](#)
[F3-Go To Client Forms](#)
[ESC-Cancel](#)

Possible Matches:

Score	Name	Gender	Birth Date	URN
77	Cesar, Julius	Male	09/12/1985	JLCS0912851U

Hopefully, in the REAL world, your data entry personnel would have recognized the error here and fixed things. But for demonstration purposes we're going to forge ahead and add this client who is really our friend Julius Cesar born in 1985.

We'll go ahead and add some demographics and services to the secondary record J Cedar.

Now jump ahead a few months and a perspicacious data entry employee notices that these two fellows are really the same individual. To fix this, go into the Primary client, and select the Client Merge button on the top, as shown on this screen:

Cesar, Julius

Appointments	Orders	Forms	Change Log	Client Report	Merge Client	Delete Client	Find List	New Search	Close	
Demographics	Service	Annual Review	Encounters	Referrals	HIV C&T	Relations	Interesting Stuff	Hoi Polloi	Custom Tab 3	Custom Subform

Possible Matches for Client Merge

Primary Client:

URN: Name: Date of Birth:

Phone: Address: Gender:

Possible Matching Clients:

Threshold	Score	Name	Gender	DOB	URN	Address	Phone
70	77	Cedar, Julius	Male	09/12/1995	JLCD0912...		

F1 [Merge Selected Client](#)
 F2 [Search Client](#)
 ESC [Cancel](#)

Highlight the matching client below and select F1. CAREWare compares the data in the two records and produces this screen.

Client Merge

Field Name	Primary Client Count/Value:	Secondary Client Count/Value
First Name	<input checked="" type="checkbox"/> Julius	<input type="checkbox"/> Julius
Gender	<input checked="" type="checkbox"/> Male	<input type="checkbox"/> Male
Date of Birth	<input checked="" type="checkbox"/> 9/12/1985	<input type="checkbox"/> 9/12/1995
Last Name	<input checked="" type="checkbox"/> Cesar	<input type="checkbox"/> Cedar
Case Notes:	1	0
User Log Records:	0	0
PDI Referral Holding Records:	0	0

Client Data Color Reference

Client URN Field: Can not be changed with merge.

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 used.
 ** Cannot remove existing primary record through merging.

Note the color code.

- Fields in **green** can't be changed: the values of the primary client win.
- Fields in **Red** do not match between the 2 clients and you must select from which client you want the value to come from. For example, if we scroll down a bit we'll notice that the HIV status field differs. We'll take the value from the secondary record by selecting it. *Note that if we hadn't selected anything, CAREWare would have defaulted to the primary record's value.*

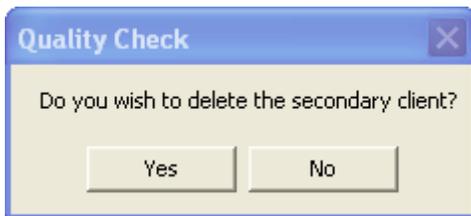
HIV Status

HIV-positive (not AIDS) CDC defined AIDS

- Fields in **Blue** can be unchecked if you do not want to include the value from the secondary client; values that derive from the primary client only *cannot be deleted*.
- Fields in **Black** require no action.

When you're done completing the check list of fields, select Merge Clients. When complete, CAREWare will generate an important client merge report.

And now, this ever-important final warning appears:



Presumably, you will respond YES. Mr. Julius Cedar is now deleted from the database.