QRG – Data De-duplication and Merging

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WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as "cheat sheets" quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

WHO THIS GUIDE IS FOR **–** Any HMIS user who enters client records.

WHY UNDUPLICATED DATA IS IMORTANT

Obtaining an unduplicated count of persons receiving homeless services is one the primary goals of the Homeless Management Information System (HMIS). Unduplicated client information supports accurate data informed decision making including:

- Informs national policy
- Informs local planning
- Enhances Coordinated entry and Client Case Management

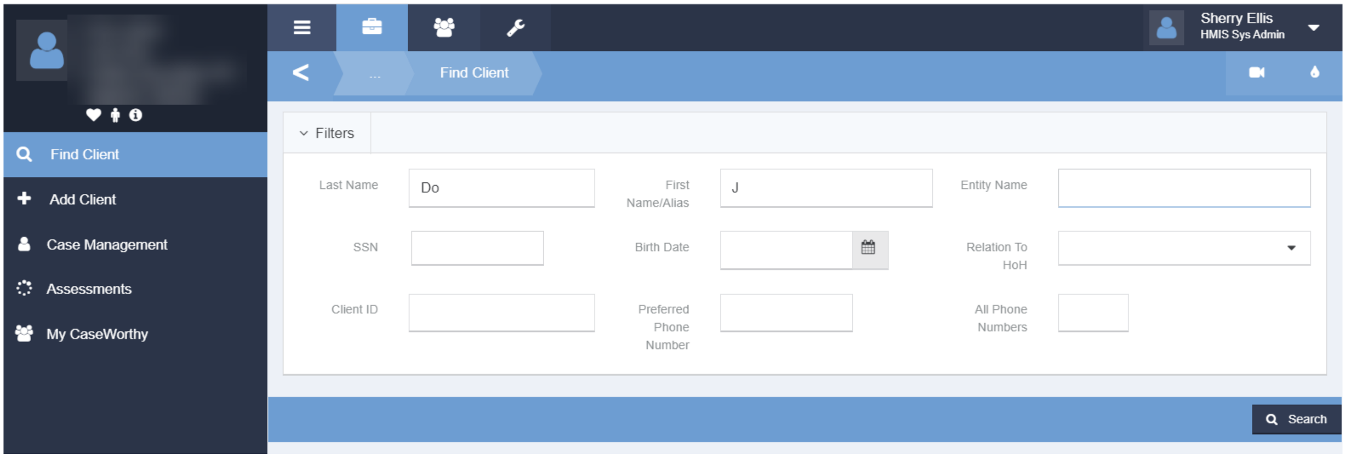
THE BEST WAY OF AVOIDING CLIENT DUPLICATION

The primary way of avoiding duplication of client data is when you initially enter a client record. You should always search to see if the client already exists before creating a new client record.

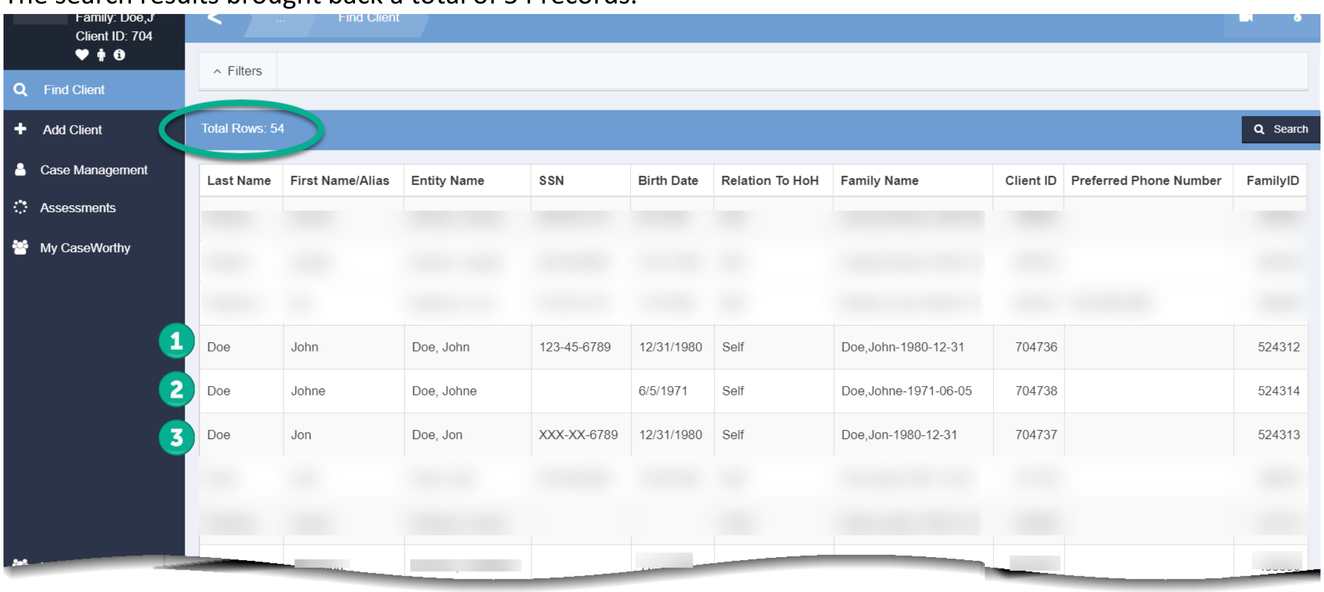
Find Client > Partial name search for First Name and Last Name > Search

Let's look at an example:

In this instance I entered the first couple of letters for Last Name and one character for the First Name.



The search results brought back a total of 54 records.



As identified in above picture, there are 3 entries that could possibly be the client I want to create an enrollment for. Next, I'll go thru and evaluate the sameness/difference between these records.

- I see that spelling of last name for all 3 match what I am looking for: *Doe*.
- I also see that the spelling of the first name for all 3 clients are different versions of the same name.
- The SSN for 1 and 3 have the same last 4 digits, and both match the last 4 digits provided by my client.
- Also, the DOB for 1 and 3 are both the same and match the birth date provided by my client.
- I see that 2 is a totally different DOB -based on that and no SSN listed, I know this is not the client I am looking for.

- Next, I'll look at the Gender, Race and Ethnicity for both 1 and 3. I'll also look at their enrollments.
- My client provided the spelling of *Jon* so client 3 is the client record I will add my enrollment to. It also appears that client 1 is a duplicate record, because of this I will open a helpdesk ticket asking client record 1 be merged into client 3.

To recap: Every effort should be made to avoid duplicate client records. When you find duplicate client records, reach out to the Helpdesk and provide client IDs of those records to be merged. HMIS Administrative team will review the records and determine if merge can be completed. All impacted agencies will be notified.

BEST PRACTICES

1. Always start client data entry with searching to see if they already exist in the system.
2. Always make note of the HMIS Client ID on your paper copies of client info.
3. If you are unsure of similar client records due to different or missing data element, then go ask the client for more information and continue to evaluate possible matches.

PREPARING FOR CLIENT RECORD MERGE

The Merge functionality is the ability of HMIS Administration to take two (or more) client records that are identified as being duplicated and join them to create one single consolidated client record. Both entire families and individual members of a family can be merged.

When requesting a client record merge through HMIS Helpdesk:

1. Completed "housekeeping" on the client's enrollments and assessments if any are inaccurate or missing before requesting they be merged.
2. If the records to be merged have differing demographic information, take notes on what demographics should be in the final merged record. You will be responsible for updating this information once the merge is completed. (demographic data includes items such as: DOB, SSN, Veteran Status…)
3. If the client records you want merged has several enrollments or services from different organizations, HMIS Administration reserves the right to identify which client ID will be the "surviving" client.

HOW TO REQUEST A CLIENT MERGE

1. Follow the guidance from PREPARING FOR CLIENT RECORD MERGE (above)
2. Open a Help Desk ticket from: http://www.kcmetrohmis.org/helpdesk.htm
3. Provide the client ID(s) to be merged (do NOT provide the client names or other PII).

POST MERGE

1. HMIS Administration will email all impacted organization (leads) and you with the final merged result.
2. The user requesting the merge should now go in and complete any updates to client demographics.