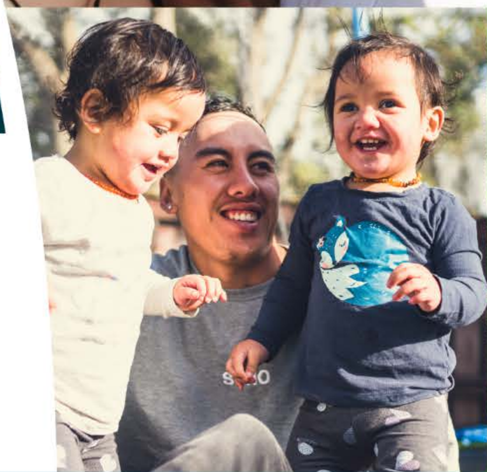



Recordbase:

# Client Merge Data Fix

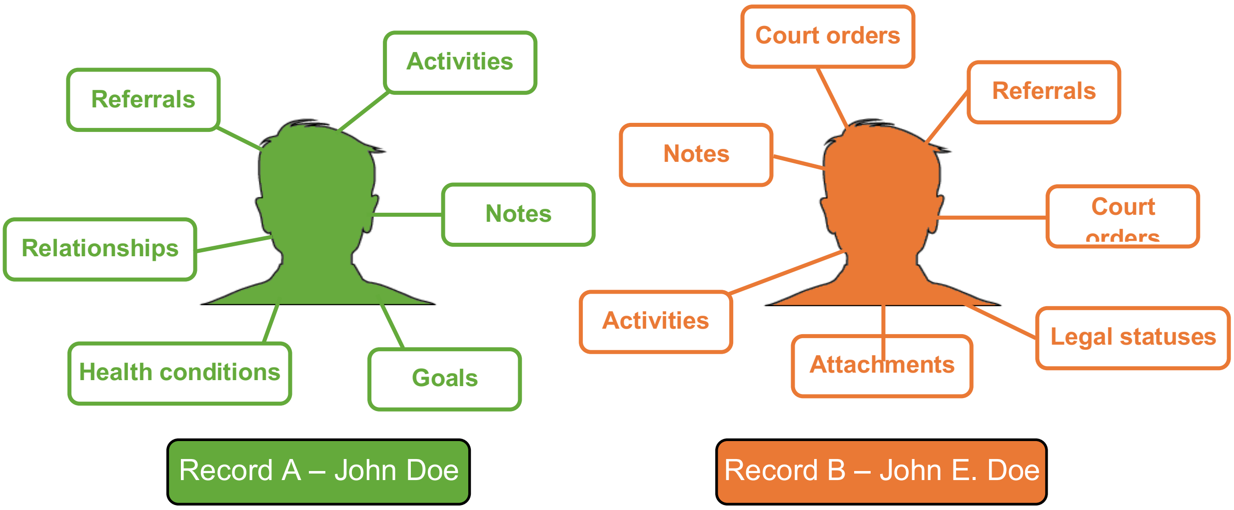



Wild Bamboo 0800 422 648 support@wildbamboo.co.nz

# Client merge data fix

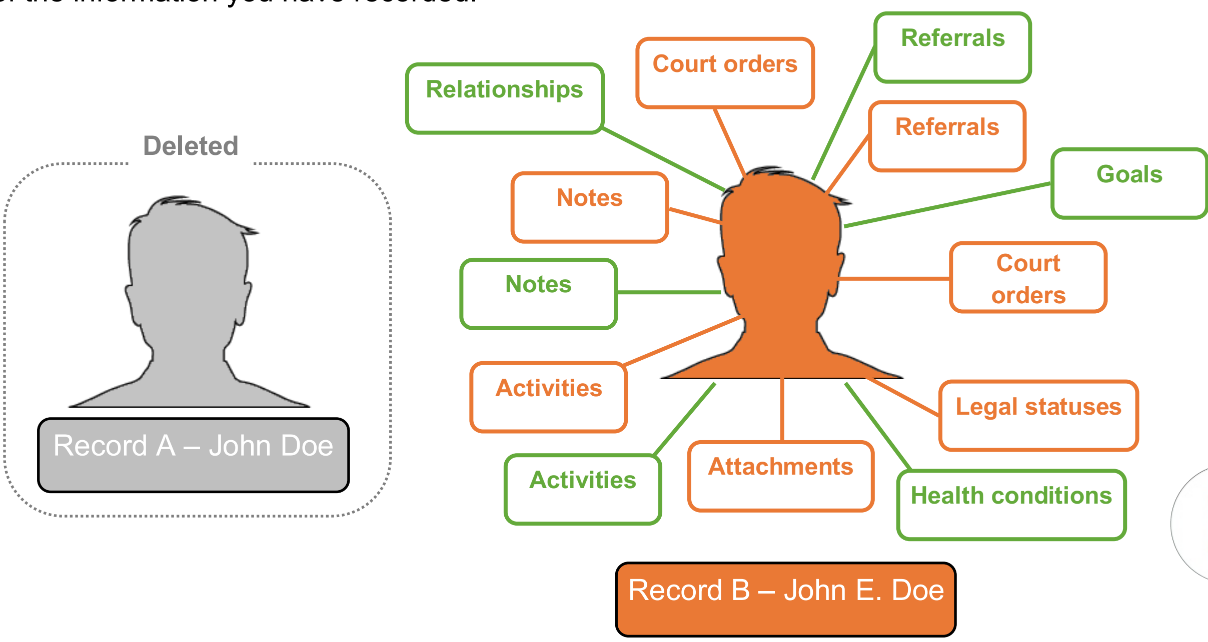
## What is a duplicate record in Recordbase?

When you have two client records, Record A and Record B, that both represent the same person, you have a duplicate record. Often, the two records have different pieces of information recorded against them, so it is important to correctly merge these into a single client record.




## How are duplicate records merged in Recordbase?

To merge two client records, WildBamboo moves the information attached to Record A onto Record B, and then deletes Record A. This leaves you with a single client record containing all of the information you have recorded.



## What sort of information can be merged?

Almost any information can be merged, as long as a client record can reasonably have more than one of that item. For example, a single client record can have multiple referrals, activities, notes, goals, and relationships, so all of these items can be merged. This is a comprehensive list of the items handled in a standard client merge:

Activities
Addresses
Attachments
Auto Tasks
Carers
Contacts
Court Orders
Daily Care Events
Dependants
Educations
Emails
Employment History
Employment Plans

Goals
Health Conditions (current and historical)
Incidents
Languages
Legal Statuses
Medical Tests
Medications
MyRecord Users
Notes
Outcome Tools
Personal Plans
Phone Numbers

Prescriptions
Qualifications
Reference Numbers
Referrals
Relationships (to other individuals and to users)
Risks
Smoking History
Support Needs
Tasks
Vocations

## What sort of information cannot be merged?

Personal details cannot be merged; this is because a client cannot have two birthdates, two genders, two countries of birth, etc. ONLY the personal details from the record you choose to keep are retained, which is why it is important to correctly identify the right client record to keep. This is a comprehensive list of personal details:

Title
First Name
Middle Names
Last Name
Preferred Name
Maiden Name
Date of Birth
Gender
Marital Status
Highest Qualification
Religion
Residency
Nationality

Country of Birth
Primary Daily Activity
Deceased Date
NHI Number (or the primary reference number on the Personal Details)
Treatment Background
Living Situation
Occupation
Ethnicity
Is Private?
UDF1-5 (NB custom fields vary between organisations)

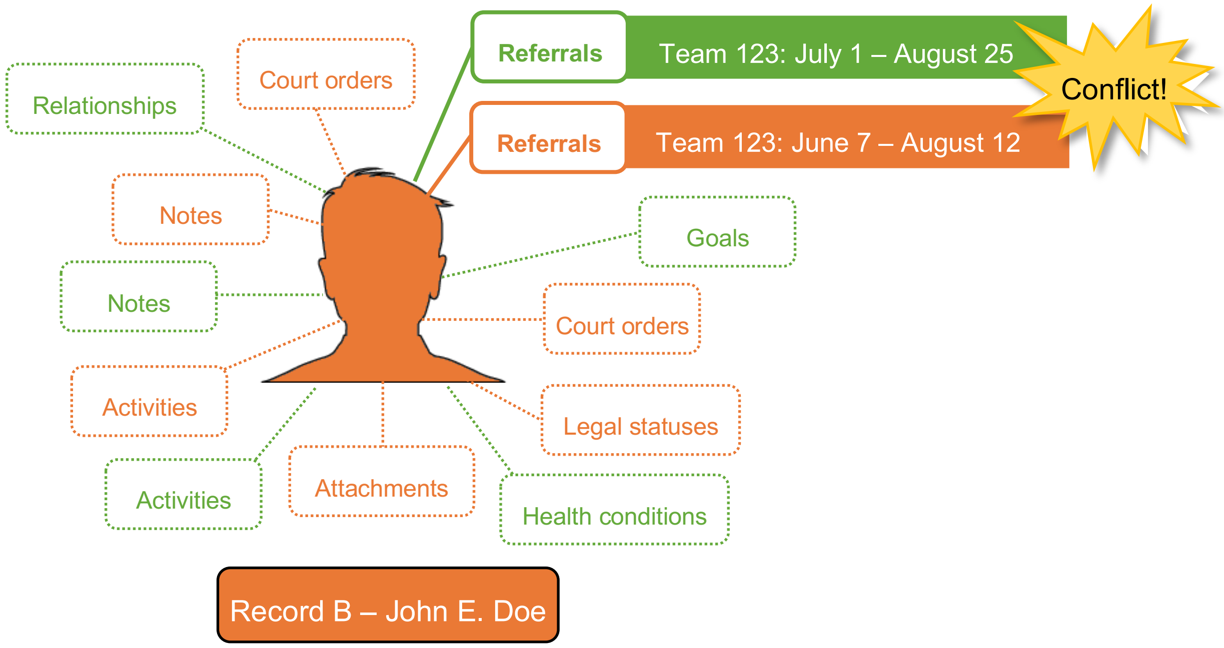
All items in these widgets on the Personal Details page:

- Transportation
- Physical description
- Cultural, Spiritual & Social
- Family
- Employment
- Educatio

## What sort of information causes a merge conflict?

In Recordbase, rules surround certain pieces of information in order to help maintain data quality. For example, a client cannot have two open referrals into the same team at the same point in time, so the user interface will not let you create such a referral. Because a client merge shifts information from one client record to another, however, you can break this rule. Therefore, it's very important to check your client records before requesting a merge, to ensure that there are no duplicated or overlapping referrals.

Remember that a single client cannot have two open referrals into accomodation-based teams at the same time either – this is another potential source of conflict.




## What should I do if my client records have duplicate or overlapping referrals?

In order to prevent referral conflicts, we must delete one of the referrals causing a conflict. When a referral is deleted, remember that ALL of the activities recorded against it are also deleted. Therefore, you must find those activities a new home before we can delete the referral. Either edit the activities and move them to a different referral, or recreate them against the correct referral and then delete from the to-be-deleted referral.

**Only once there are no activities recorded against a referral will we be able to delete the referral – and only once there are no conflicting referrals will we be able to merge client records**

## How do I request a client merge?

1) Check the personal details on the two client records to decide which record you want to keep and which you want to delete.
2) Remember that personal details cannot be merged, so if there are personal details on the DELETE record that you wish to keep, copy that information to your chosen KEEP record.
3) For ease of checking, we recommend that you change the middle name of the keep file to “KEEP” and change the middle name of the delete file to “DELETE” – for example, John DELETE Doe and John E. KEEP Doe.
4) Check both files for the presence of any referrals that are duplicates, overlaps, or which are open in different accomodation-based teams at the same time.
5) If you find such referrals, you must choose which referral to keep and which to delete (if referrals have different information, choose the one that is correct; if the two referrals have identical information, we recommend keeping the one with the most activities).
6) If there are any activities recorded against a referral you want to delete, you must move all of those activities onto another referral and ensure they are removed from the referral to be deleted.
7) Email support@wildbamboo.co.nz with the following information:
    a. Client name on KEEP record
    b. Client name on DELETE record
    c. (If necessary) identifying details of any referral to be deleted:
        i. Team name
        ii. Received date
        iii. Current status
        iv. Client name against which the referral is recorded

## Client merge checklist

☐ I have identified which client record I want to KEEP and which record I want to DELETE

☐ I have changed middle names to identify KEEP and DELETE

☐ I have checked both records for any referrals that could conflict

☐ (If necessary) I have identified which referral(s) to KEEP and which to DELETE

☐ (If necessary) I have moved all activities off of any DELETE referrals and onto an appropriate KEEP referral