
HMIS Support Manual - Merging Client Records in HMIS



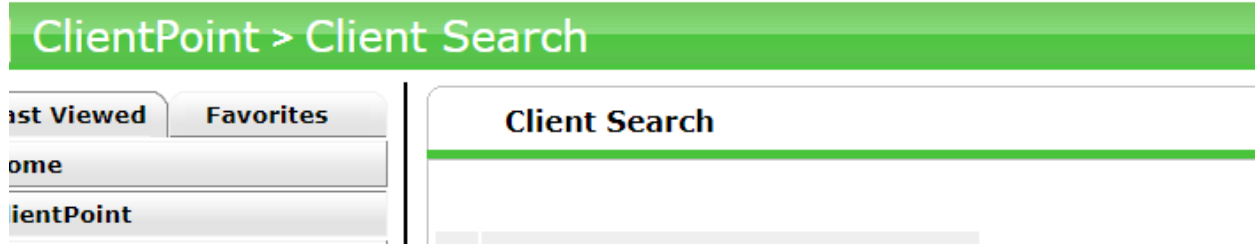
**Summit County, Ohio
Homeless Management Information System**



MERGING CLIENT RECORDS IN HMIS

PLEASE NOTE - NEVER MERGE Haven of Rest records! 😊

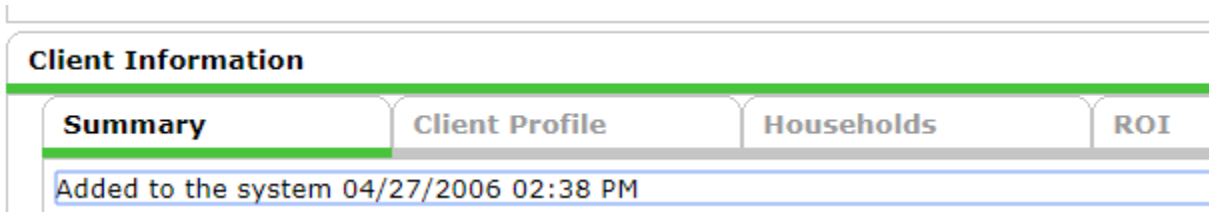
1. Perform a partial name search for the Client to populate all possible spelling variations and to reveal all potential duplicate records:



2. Review search results to check for similar records:

Social Security Number	Date of Birth	Alias	Gender
300 00 0000	10/01/1980		Female

3. Check and review each record result:



4. Check the Client's ROI(s):
 - a. If all listed permissions are "Yes", this record may be merged.
 - b. If any listed permissions are "No", this record may not be merged.

Release of Information				
	Provider	Permission	Start Date	End Date
	Home Again	Yes	06/11/2010	06/11/2011
	Former Foster Care Youth Homeless Prevention (SCCS)	Yes	05/11/2010	05/11/2011

MERGING CLIENT RECORDS IN HMIS

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Add ROI

- If there is no ROI for the Client, go to the **| Client Profile |** tab and scroll down to check for attachments:

Client Information

Summary **Client Profile** Households ROI

Client Record

File Attachments

Date Added	Name	Description	Type	Provider	Added From
No matches.					

Add New File Attachment

Incidents

Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
No matches.						

Add New Incident

Save Save & Exit Exit

- If there are no attachments, check for **Entry/Exit Projects**.
 - If the Entry/Exit project is youth-related and there are no ROIs, **NOT MERGE THIS RECORD.**

Househol

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Entry/Exits

Program	Type	Project Start Date	Exit Date
Transitional Housing Program #1 (SCCS)	HUD	01/06/2004	10/08/2004

Add Entry / Exit

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MERGING CLIENT RECORDS IN HMIS

7. If there are multiple people in the Client's household(s), you must search for each member of the household(s) and then merge all of their records, repeating the process listed above.
8. Check for **Entry/Exit programs** and **timeframes** for **ALL** household members:

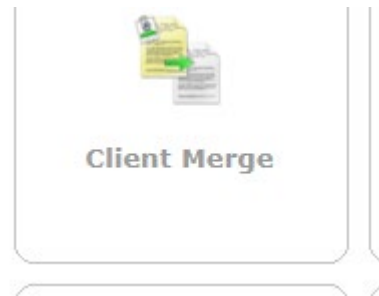
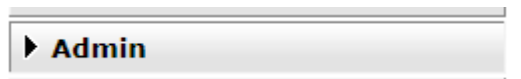
Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Rapid Re-Housing - Home Again (UWSC) (137)	HUD	01/08/2020				6
ACCESS, Inc. (7)	HUD	12/09/2019				4
Central Intake (UWSC) (144)	HUD	10/11/2019	12/08/2019			2

9. Check and confirm the **Client Counts** attached to the entries:
 - a. Client Counts can be examined by clicking on the appropriate **Client Count icon**.

Program	Client Count
Rapid Re-Housing - Home Again (UWSC) (137)	6
ACCESS, Inc. (7)	4
Central Intake (UWSC) (144)	2

10. Once the files needing merged have been positively identified, go to **Admin -> Client Merge**



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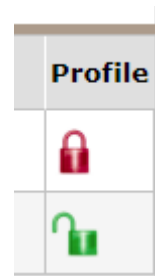
11. Enter the **Client ID numbers** to be merged:

12. Compare and confirm Client information:

Client Comparison						
Selected Clients						
Unique ID	Client ID	Client Name	Social Security Number	Date of Birth	Creating Provider	Profile

13. Check for **locked Client records**.

- a. Locked records may be unlocked on behalf of the agency creating the record.



14. Edit/add the Client's visibility:

Visibility Groups		Deny Groups	
Group ID	Group Name	Group Type	Last Updated
<input type="button" value="Add Visibility Group"/>		No matches.	
<input type="button" value="Provider Applying Change"/>	Home Again (91)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/> <input type="button" value="Clear"/>

MERGING CLIENT RECORDS IN HMIS

Visibility Groups Search

Search for Visibility Groups by using keywords from their Group name or description.

Search

Search
Clear
Create New Group

Visibility Group Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Group ID		Name												Date Created	Last Updated											
		0	Global												02/05/2009	02/05/2009											

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Exit

Visibility Groups			Deny Groups	
	Group ID	Group Name	Group Type	Last Updated
	0	Global	Public	01/29/2020

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Add Visibility Group

Provider Applying Change

Home Again (91)

Search
My Provider
Clear

15. Check for **Deny Groups**

- a. If there is a specific deny group (rather than the list of non-existing providers [non-existing in the HMIS chart]), you must take note of them and add the deny providers after merging.

16. Pick **Source(s)** and **Destination**:

Merge Action

- Source
- Destination
- NOT Included
- Mark as Distinct

Merge Action

- Source
- Destination
- NOT Included
- Mark as Distinct

Submit
Cancel

17. Click **[Submit]**.