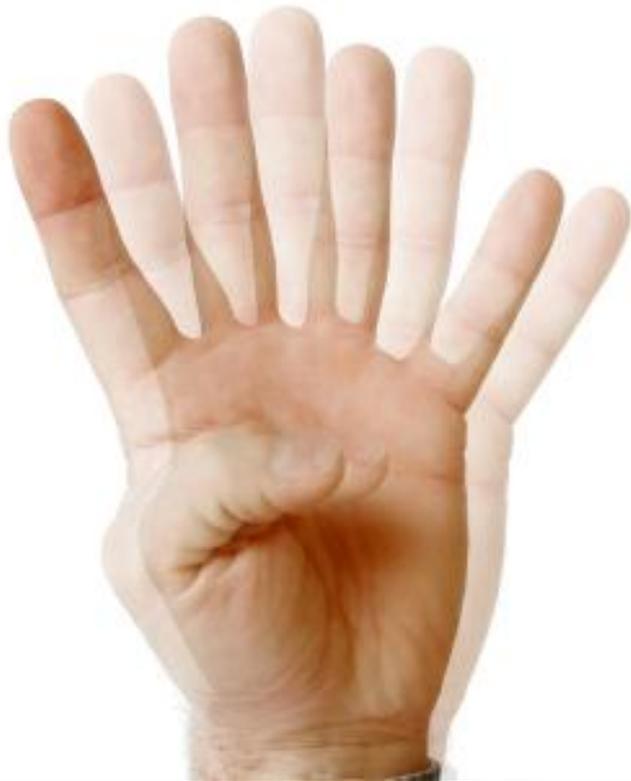


DOUBLE VISION



*A Prescription for
Duplicate ARIES Clients*

On Today's Presentation:

- ◉ Definition of Duplicate Clients
- ◉ Causes of Duplicate Clients
- ◉ Effects of Duplicate Clients
- ◉ Preventing Duplicate Clients
- ◉ Identifying Duplicate Clients
- ◉ Merging Duplicate Clients

Definition of Duplicate Clients



Definition of Duplicate Clients

◎ **Client:** A record in ARIES with a unique set of Client Identifiers

First Name

Gender

Last Name

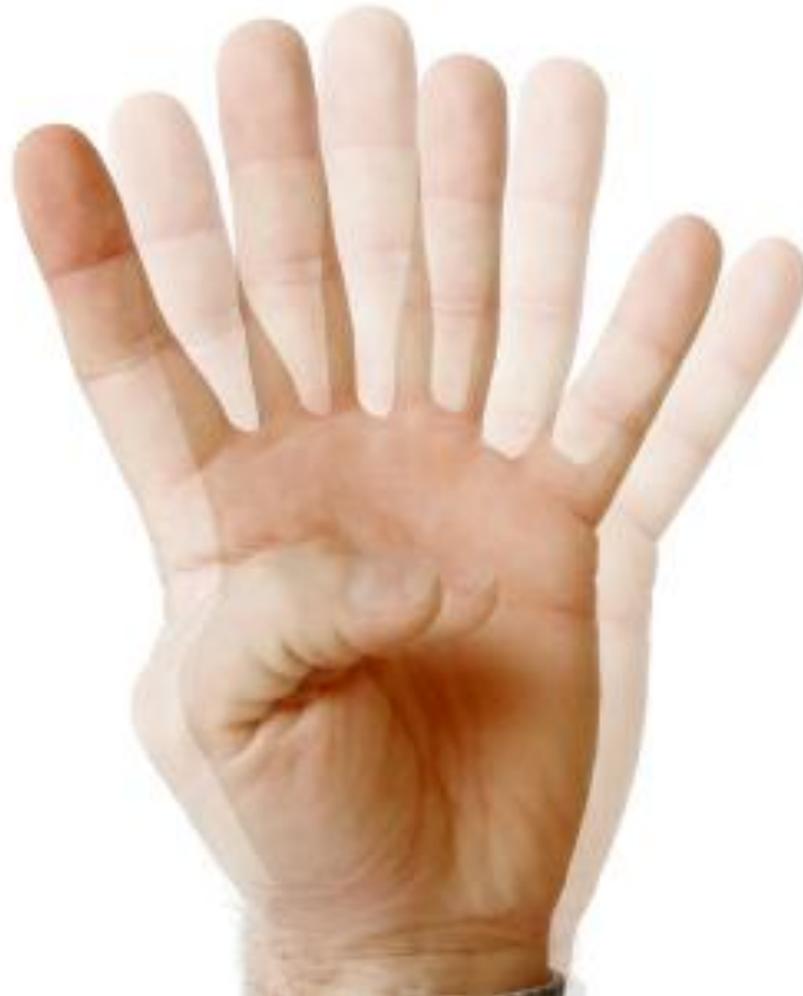
Date of Birth

Middle Initial

Mother's Maiden Name

◎ **Duplicate Client:** A person who is enrolled in ARIES as two different clients (i.e. two different sets of Client Identifiers)

Causes of Duplicate Clients



Causes of Duplicate Clients

◎ Data Conversions

- Some agencies used multiple data systems, and clients were not always consistently enrolled across those systems
- Some clients were enrolled in multiple agencies with different sets of identifiers
- Inactive clients were converted with incomplete identifiers

◎ Imports

- An imported client might already exist in ARIES with different identifiers
- After a “good” import, edits to identifiers in either ARIES or the source system cause the next import to create a duplicate

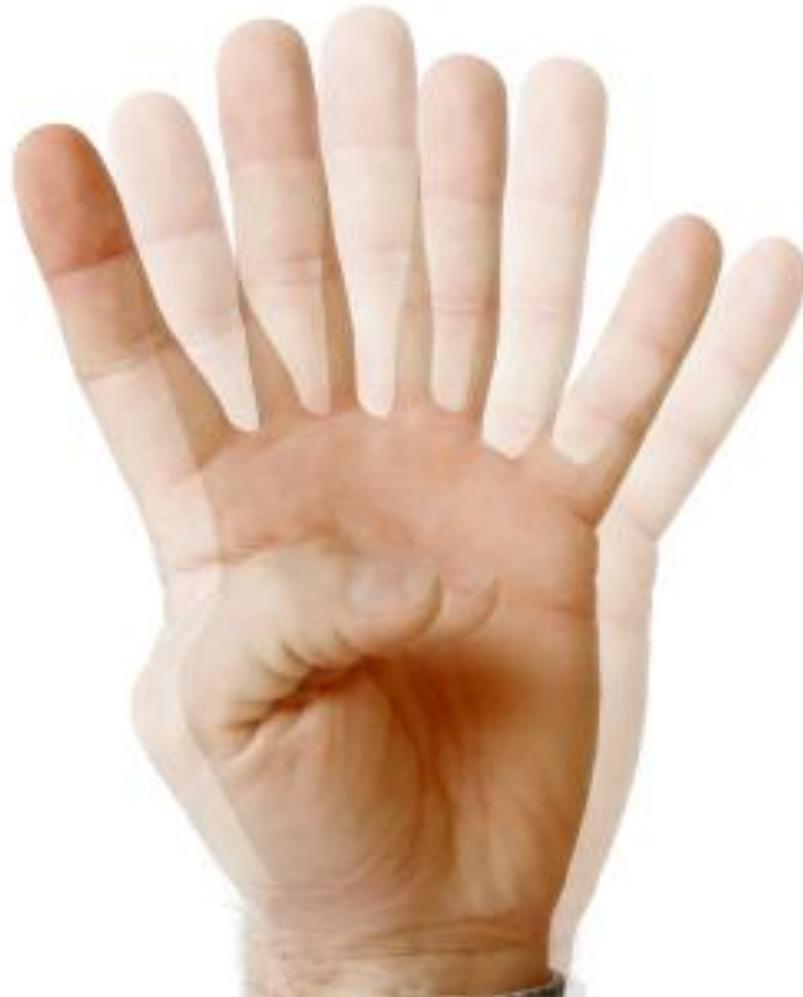
Causes of Duplicate Clients

- ◉ Incorrect Identifiers
 - Clients do not always provide the same set of identifiers
 - Users do not always obtain accurate identifiers

- ◉ Changed Identifiers
 - Marriage or other legal name change

- ◉ Inaccurate Searching
 - Misspelled names
 - Too much search criteria

Effects of Duplicate Clients



Effects of Duplicate Clients

⦿ At Your Agency

- Unduplicated client counts exaggerated
- May not see the “big picture” for a client if the client’s data is in multiple records

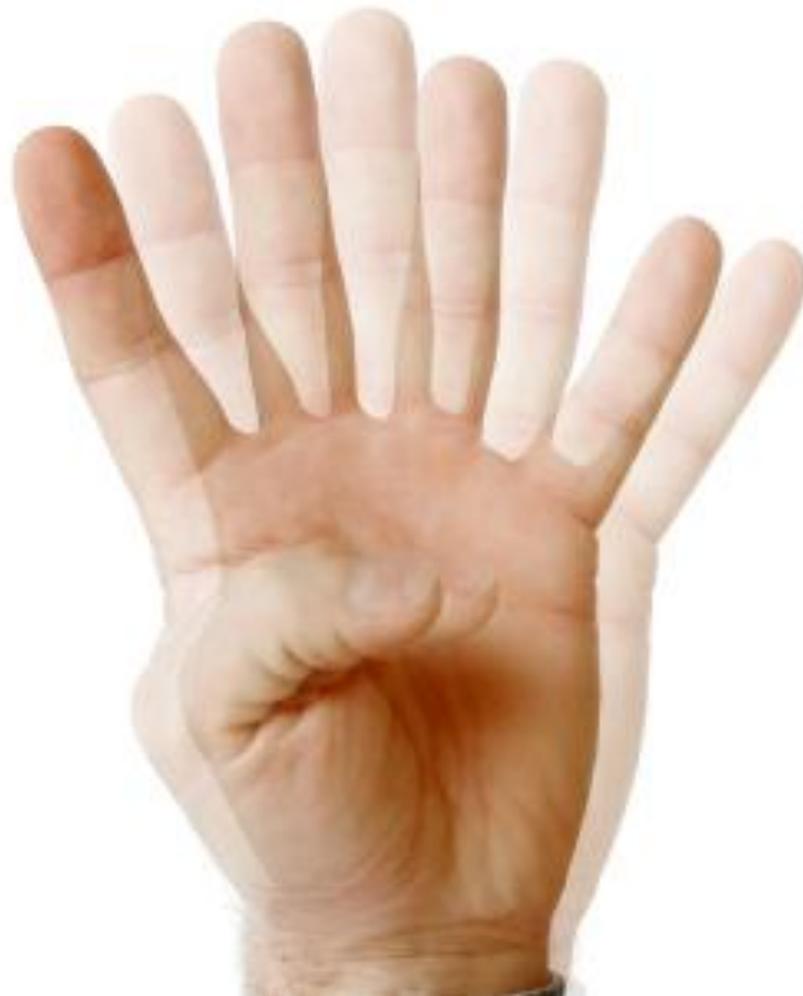
⦿ At the County/State

- Unduplicated client counts exaggerated
- Difficult to monitor contract compliance

⦿ At the Federal Level

- Unduplicated client counts exaggerated
- “RSR Ready” compliance: Ryan White grantees required to minimize duplicates

Preventing Duplicate Clients



Preventing Duplicate Clients

◎ Data Conversions

- Comparison of client identifiers and near matches prior to data conversion

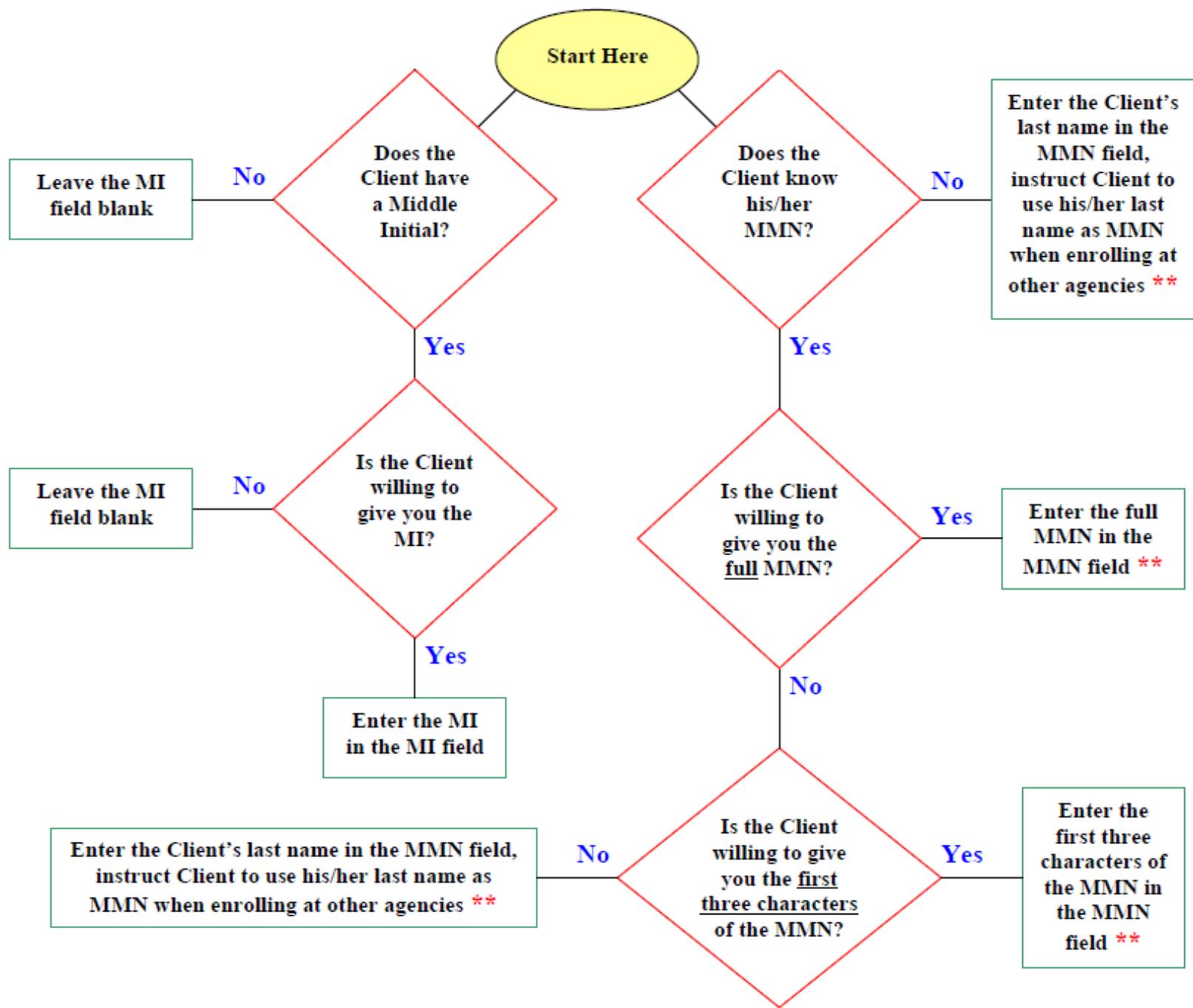
◎ Imports

- Comparison of client identifiers and near matches prior to first import
- Review of potential duplicates after each import (new report available soon), merge and correct before next import
- New ARIES Import enhancement will allow client identifiers to be updated via import (within security limitations)

Preventing Duplicate Clients

⦿ Incorrect Identifiers

- When enrolling a new client, ask if client is already enrolled in ARIES, and if so, ask what identifiers were used
- Do not use nicknames and AKAs
- Where possible, review client's ID to verify identifiers
- Always get all identifiers, follow guidelines of “Decision Tree for Middle Initial and Mother's Maiden Name” from Resources page of www.projectaries.org



Preventing Duplicate Clients

○ Changed Identifiers

- Verify identifiers on a regular basis
- If identifiers have changed
 - Is client already enrolled using the new identifiers?
 - If this error occurs when saving the new identifiers, contact the ARIES Help Desk or your Admin Agency

DEMO DEMO DEMO DEMO

Brother B Boy Client Identifiers

• You cannot have two or more clients with the same URN.

Last Name * Boy

First Name * Brother

Disable ARIES capitalization, save name as entered

Middle Initial * N

Mother's Maiden Name * Dusty

Date of Birth * 7/11/1960

Gender * Male

All client data is fictitious

Preventing Duplicate Clients

⦿ Inaccurate Searching

- Use the correct spelling of the client's name
- Also search for common variations or misspellings of the client's name
- Do not use more search criteria than necessary to find the client



Preventing Duplicate Clients

Bad Search: **ARIES** will find the client only if ***ALL*** of the data elements match

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name	<input type="text" value="Boy"/>
First Name	<input type="text" value="Brother"/>
Middle Initial	<input type="text" value="N"/>
Client ID	<input type="text" value="100046747"/>
SSN	<input type="text" value="123-45-6789"/>
Date of Birth	<input type="text" value="7/11/1960"/>

Preventing Duplicate Clients

Good Search:
ARIES will find all the clients with the same last name, or all the clients whose first names start with “Bro”

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name	<input type="text" value="Boy"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Client ID	<input type="text"/>
SSN	<input type="text"/>
Date of Birth	<input type="text"/>

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name	<input type="text"/>
First Name	<input type="text" value="Bro*"/>
Middle Initial	<input type="text"/>
Client ID	<input type="text"/>
SSN	<input type="text"/>
Date of Birth	<input type="text"/>

Preventing Duplicate Clients

- Inaccurate Searching (continued)
 - When enrolling a new client, be sure you understand these three screens:
 - Client Search: searches only your agency
 - URN Search: searches all of ARIES
 - URN Search and Confirmation: Confirm Client Identifiers by using the <Tab> key, select Share status, one more final search



Preventing Duplicate Clients

Client Search: **ARIES** searches only your agency, using multiple searches is strongly suggested. Click <Create New Client> button to continue...

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name	<input type="text"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Client ID	<input type="text"/>
SSN	<input type="text"/>
Date of Birth	<input type="text" value="11/7/1960"/>

Preventing Duplicate Clients

URN Search: **ARIES** searches the entire state. All fields are required. If a match is found, you will immediately see the client's data entry screen. If no match is found, you will move on to the next screen...

Client URN

To check if this client may already be registered in ARIES, please accurately enter the following data:

Last Name *	<input type="text" value="Boy"/>
First Name *	<input type="text" value="Brother"/>
Middle Initial *	<input type="text" value="N"/>
Mother's Maiden Name *	<input type="text" value="Dusty"/>
Date of Birth *	<input type="text" value="11/7/1960"/> 
Gender *	<input type="text" value="Male"/> ▼



Preventing Duplicate Clients

URN Search and Confirmation: **ARIES** searches the state again before creating a new client

Client URN

To check if this client may already be registered in **ARIES**, please accurately enter the following data:

No match was found. Please check your entries and search again. To create a new client record, verify the value in each field by tabbing through it and then click on the Create button.

Last Name *

First Name *

Disable ARIES capitalization, save name as entered

Middle Initial *

Mother's Maiden Name *

Date of Birth *

Gender *

Client agrees to share data

If a client says he or she is already enrolled in ARIES and you reach this screen, do not continue. Try searching again with different criteria, or contact the Help Desk or your Admin Agency for help.



Preventing Duplicate Clients

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name

First Name

Middle Initial

Client ID

SSN

Date of Birth

Stop at this screen if you believe the client is enrolled in your agency

Client URN

To check if this client may already be registered in ARIES, please accurately enter the following data:

Last Name *

First Name *

Middle Initial *

Mother's Maiden Name *

Date of Birth *

Gender *

Stop at this screen if you believe the client is enrolled at another ARIES your agency

Client URN

To check if this client may already be registered in ARIES, please accurately enter the following data:

No match was found. Please check your entries and search again. To create a new client record, verify the value in each field by tabbing through it and then click on the Create button.

Last Name *

First Name *

Disable ARIES capitalization, save name as entered

Middle Initial *

Mother's Maiden Name *

Date of Birth *

Gender *

Client agrees to share data

Identifying Duplicate Clients



Identifying Duplicate Clients

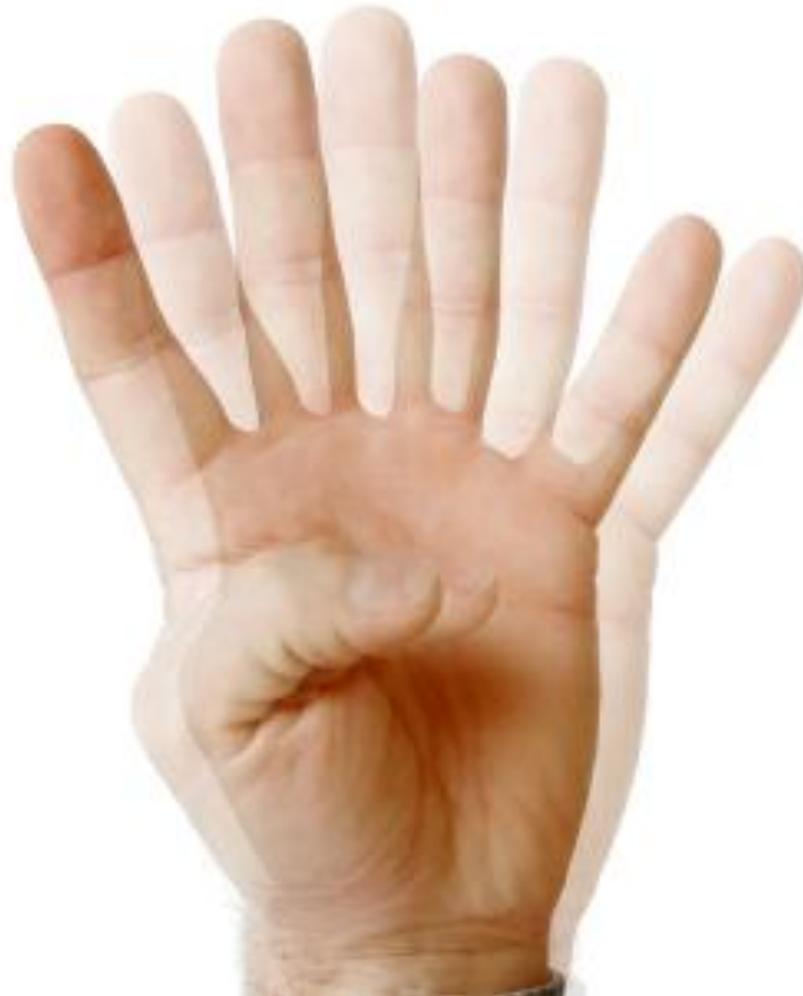
◎ By Coincidence

- Seeing the client more than once in a search result or in a report
- Disappearing Data: services or other data seem to disappear but were actually entered into a duplicate client's record

◎ By Design

- Client Roster in Name, DOB, or URN order
- Post-Import Report (coming soon)
- Potential Duplicate Clients Report (coming soon)

Merging Duplicate Clients



Merging Duplicate Clients

◎ Who can Merge

- Most merges are done by the ARIES Help Desk
- A few Administrative Agencies can merge clients
- Individual provider agencies cannot merge clients, but must report them to their Administrative Agency or to the ARIES Help Desk

◎ What Happens During a Merge

- Longitudinal data (Services, CD4s, Case Notes, etc) remain as discrete records and are consolidated under the new merged client
- Non-Longitudinal data (Contact Info, Demographics, most Medical/Financial data, etc) cannot be merged, one value must be saved, the other discarded

Merging Duplicate Clients

During a merge, all non-longitudinal data must be reconciled, one field at a time, starting with Client Identifiers...

DEMO					
Merge Records for ARIES Partner					
Task	Table	Agency	Has Client 1 Record	Has Client 2 Record	Completed
Merge	Client	Shared Record	True	True	False
Copy	ContactInfo	Shared Record	True	False	False
Merge	Demographic	Shared Record	True	True	False
Copy	LivingSituation	Shared Record	True	False	False
Copy	Medication	Shared Record	True	False	False
Copy	RiskFactor	Shared Record	True	False	False
Copy	SubstanceAbuse	Shared Record	True	False	False
Copy	MentalHealth	Shared Record	True	False	False
Merge	AgencySpecifics	Data Design & Development	True	True	False
Copy	StaffAssignment	Data Design & Development	True	False	False
Field Name		Record 1	Select All	Record 2	Select All
clientID		1500002764		1500011011	
firstName		<input type="checkbox"/> Brother		<input checked="" type="radio"/> Brother	
lastName		<input type="radio"/> Boy		<input checked="" type="radio"/> Boy	
middleInitial		<input type="radio"/> N		<input checked="" type="radio"/> B	
mothersMaidenName13		<input type="radio"/> DS		<input checked="" type="radio"/> DS	
dateOfBirth		<input type="radio"/> 7/11/1960 12:00:00 AM		<input checked="" type="radio"/> 7/7/1960 12:00:00 AM	
gender		<input type="radio"/> Male		<input checked="" type="radio"/> Male	



Merging Duplicate Clients

*Sometimes there are significant differences in the data.
Merging is more complex for multi-agency Non-Share clients.*

DEMO	DEMO	DEMO	DEMO	DEMO	DEMO
Field Name	Record 1	Select All	Record 2	Select All	
clientID	1500002764		1500011011		
agencyID	0		0		
primaryCareSource	<input type="checkbox"/> Federally qualified health center/hospital		<input checked="" type="radio"/> Community-based clinics, public		
primaryCareProviderName	<input type="radio"/>		<input checked="" type="radio"/>		
primaryCareProviderPhone	<input type="radio"/>		<input checked="" type="radio"/>		
primaryCareProviderLastVisitDate	<input type="radio"/>		<input checked="" type="radio"/>		
primaryHIVCareSource	<input type="radio"/> Alternative/complementary care		<input checked="" type="radio"/> VA hospital, CHAMPUS		
primaryHIVProviderName	<input type="radio"/>		<input checked="" type="radio"/>		
primaryHIVProviderPhone	<input type="radio"/>		<input checked="" type="radio"/>		
primaryHIVProviderLastVisitDate	<input type="radio"/>		<input checked="" type="radio"/>		
cdcDiseaseStage	<input type="radio"/> HIV positive, asymptomatic		<input checked="" type="radio"/> CDC-Defined AIDS		
cdcDiseaseStageSource	<input type="radio"/> Letter of Diagnosis		<input checked="" type="radio"/>		
yearFirstHIVPos	<input type="radio"/> 2008		<input checked="" type="radio"/> 2001		
dateFirstHIVPos	<input type="radio"/> 3/31/2008 12:00:00 AM		<input checked="" type="radio"/> 1/1/2001 12:00:00 AM		
numPartnersNotifiedByClient	<input type="radio"/>		<input checked="" type="radio"/>		
numPartnersNotifiedByHealthDept	<input type="radio"/>		<input checked="" type="radio"/>		
healthDeptNotifiedDate	<input type="radio"/>		<input checked="" type="radio"/>		
partnerNotificationOffered	<input type="radio"/> Yes		<input checked="" type="radio"/>		
partnerNotificationOfferedDate	<input type="radio"/>		<input checked="" type="radio"/>		
aidsDiagnosisDate	<input type="radio"/> 3/31/2008 12:00:00 AM		<input checked="" type="radio"/> 8/8/2008 12:00:00 AM		



Merging Duplicate Clients

⦿ How to Request a Merge

- Request merges one at a time or in batches
- Identify clients ONLY by ARIES ID (the URN contains identifying data about a client)
- Indicate which is the “good” client and which is the “bad” client

⦿ Reasons a Merge is Denied

- Share status does not match
- Clients enrolled outside your agency or your Administrative Agency
- Data that clearly does not match

Let's Review:

- ◉ Definition of Duplicate Clients
- ◉ Causes of Duplicate Clients
- ◉ Effects of Duplicate Clients
- ◉ Preventing Duplicate Clients
- ◉ Identifying Duplicate Clients
- ◉ Merging Duplicate Clients

If your client roster looks like this, contact the ARIES Help Desk - the prescription for double vision!

ARIES Help Desk

866-411-ARIES (2743)

helpdesk@projectaries.org

