MERGING CLIENT PROFILES

QUICK FACT OVERVIEW

HMIS
San Antonio/Bexar County
Homeless Management Information System

Application Support Specialist
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WHAT

Combines two or more client profiles into one with a single client ID.

WHY

Combining client profiles prevents duplicate profiles from existing, allowing client data to remain in one profile.

WHO

For the batch merge script to identify a match, the following information must match exactly, partial responses for any will not result in a merge: –First and Last Name –Date of Birth –Social Security Number For clients that do not meet the criteria above, the HMIS user must confirm the two profiles are for the same client.

WHEN

The batch merge script occurs overnight every Wednesday and Friday. To request duplicate profiles to be merged, please submit a ticket, which includes the client IDs and initials to HMIS.Support@havenforhope.org.

HOW

There are two ways in which profiles merge. When the minimum level of information matches, HMIS uses an automatic batch merge script to merge duplicate profiles within the database. In cases where the profiles do not meet the minimum level of matching data elements, the profiles may be requested to be merged manually by a ticket submission to the HMIS team.

All information will be combined on the 'surviving profile' (profile that exists after merge is complete) except the 'Veteran Background' and 'Demographics' page (both found in the 'Client Details' tab), only the information on the surviving profile will remain.

PURPOSE

The purpose is to have the HMIS reflect unduplicated clients and to increase the amount of information on one single profile that more accurately depicts the client's history.