



INFORMATION MEMORANDUM

SUA-20-IM-04
Rescinds: SUA-18-IM-07

07/01/2019

TO: Subrecipients of the State Unit on Aging

FROM: Cynthia Brammeier ^{CBM} Administrator, State Unit on Aging

BY: Amy Hochstetler, Information Technology Business Analyst, State Unit on Aging

SUBJECT: Merging Clients in NAMIS

CONTENT: This guidance is for all Area Agencies on Aging. **The State Unit on Aging does not recommend merging NAMIS client accounts.** Area Agencies on Aging can still merge client accounts at their discretion, however, merging clients may result in a loss of data.

The two areas impacted by merging: service information and client information.

Services are combined when client records are merged. This ensures that all services are kept except when duplication occurs. In the example below, there are two rows for February 2013 and two rows for April 2013. The service, provider, sub provider, and date range are the same. Duplicated rows are not allowed.

Services	SubServices	Provider	SubProvider	Start Date	End Date	Qty.	UOM	
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	04/01/2013	04/30/2013	22.00	Meals	/
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	03/01/2013	03/31/2013	16.00	Meals	/
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	02/01/2013	02/28/2013	13.00	Meals	/

Services	SubServices	Provider	SubProvider	Start Date	End Date	Qty.	UOM	
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	04/01/2013	04/30/2013	0.00	Meals	Dec
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	02/01/2013	02/28/2013	0.00	Meals	Acti

This guidance document is advisory in nature but is binding on an agency until amended by such agency. A guidance document does not include internal procedural documents that only affect the internal operations of the agency and does not impose additional requirements or penalties on regulated parties or include confidential information or rules and regulations made in accordance with the Administrative Procedure Act. If you believe that this guidance document imposes additional requirements or penalties on regulated parties, you may request a review of the document.

The duplicate rows are merged. The leaving client (red) has 0 service units. When merged, the leaving client (red) service units overwrites the retained client's (green) service units (22 and 13). Thirty five Congregate Meals are lost in any future reports.

Services	SubServices	Provider	SubProvider	Start Date	End Date	Qty.	UOM
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	04/01/2013	04/30/2013	0.00	Meals
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	02/01/2013	02/28/2013	15.00	Meals
Congregate Meals		Blue Rivers AAA - Admin. O	Fairbury Senior C	02/01/2013	02/28/2013	0.00	Meals

When **client information** is merged, NAMIS must reconcile the OAA Services Screen and the Care Management screen. Reconciliation is done tab by tab. Each tab is considered separately. Three scenarios are possible.

Scenario One

The retained client (green) has information on a tab. The leaving client (red) also has information on a tab.

The image shows two screenshots of the 'Care Management - Support' tab. The left screenshot is for a green client, and the right is for a red client. Both show a list of assistance services with checkboxes and 'Updated By' information.

Assistance	Updated By
<input type="checkbox"/> Help from case manager	
<input type="checkbox"/> Home Maintenance	
<input type="checkbox"/> Home-Delivered Meals	
<input checked="" type="checkbox"/> Laundry	Amy Hochstetler
<input checked="" type="checkbox"/> Meal Preparation	Amy Hochstetler
<input checked="" type="checkbox"/> Medical Treatments	Amy Hochstetler

Client receives help from a care manager

The retained client (green) record has data and it is kept. The leaving client (red) information (blue) is removed with the client record.

This screenshot shows the 'Care Management - Support' tab for the retained client (green). The assistance services list is identical to the previous screenshot, with 'Laundry', 'Meal Preparation', and 'Medical Treatments' checked and updated by Amy Hochstetler.

Assistance	Updated By
<input type="checkbox"/> Help from case manager	
<input type="checkbox"/> Home Maintenance	
<input type="checkbox"/> Home-Delivered Meals	
<input checked="" type="checkbox"/> Laundry	Amy Hochstetler
<input checked="" type="checkbox"/> Meal Preparation	Amy Hochstetler
<input checked="" type="checkbox"/> Medical Treatments	Amy Hochstetler

Client receives help from a care manager

Scenario Two

The retained client (green) does not have any information on a tab. The leaving client (red) has some information on a tab. There are no completed fields (purple) on the retained (green) client tab.

The image displays two screenshots of a 'Care Management' software interface. The top screenshot shows a green header bar and a pink box around empty form fields. The bottom screenshot shows a red header bar and a blue box around filled form fields.

Field	Retained Client (Green)	Leaving Client (Red)
Educational Level (Yrs)		12
Veteran	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Physician Name		
CM Rate		0
Date Of Update	//	12/07/2017
Date Of Assessment	//	12/07/2017
Updated By		Amy Hochstetler
Last Updated		12/15/2017 8:08:42

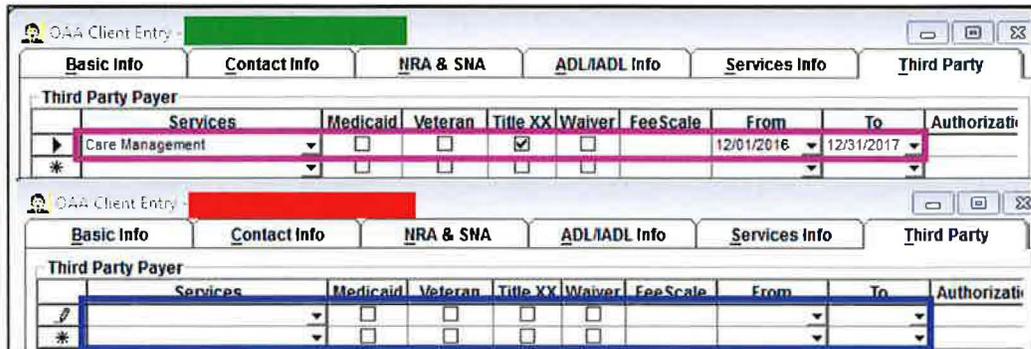
The completed fields (blue) on the leaving client (red) are added to the final retained (green) client tab.

The image displays a screenshot of the 'Care Management' software interface showing the final state where the leaving client's data (blue box) is now present on the retained client's tab (green header).

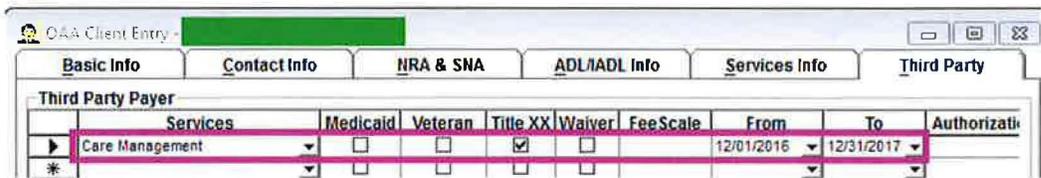
Field	Final Retained Client (Green)
Educational Level (Yrs)	12
Veteran	<input checked="" type="checkbox"/>
Physician Name	
CM Rate	0
Date Of Update	12/07/2017
Date Of Assessment	12/07/2017
Updated By	Amy Hochstetler
Last Updated	12/15/2017 8:08:42

Scenario Three

The retained client (green) has information (purple) on a tab. The leaving client (red) does not have information (blue) on a tab.



Since the retained client (green) has information (purple), it is the only information kept.



Other Merging Notes

In the event that both client record tabs are empty, the retained client information is kept, and the tab remains empty.

NAMIS updates the Basic Info tabs between the OAA and Care Management programs. If a field is updated on the Basic Info tab on the OAA screen, it updates on the Care Management Basic Info tab. This two way updating also occurs between the OAA NRA &SNA tab and the Care Management Nutrition tab. It is unlikely that either of these screens gets overwritten by a client record that is being removed when merged.

If you have questions, please contact Amy Hochstetler at dhhs.aging@nebraska.gov.