TO: Subrecipients of the State Unit on Aging

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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.

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

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 retained client (green) record has data and it is kept. The leaving client (red) information (blue) is removed with the client record.
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 completed fields (blue) on the leaving client (red) are added to the final retained (green) client tab.
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.