Merging & Deleting Duplicate Contacts

From time to time, users may find duplicate entries in their PlayMaker database. This article discusses how to locate duplicate records and walks through merging two records into one record. There are a few reasons a duplicate record may exist:

- A contact may have been created manually before another record was imported from the Referral Source Database or TargetWatch.
- A new shared owner has been assigned to an account, but the related contacts were not assigned to the new shared owner, causing the new owner to add a contact that already exists.
- A user may have created a new record without searching the database to see if the record already existed.
- If a PlayMaker account uses integration services with an EMR (Electronic Medical Records), duplicates can sometimes be created by that record provider.

When duplicate records exist, an initial reaction may be to delete one of the two records to "clean up" the database. However, deleting an account or contact record can also negatively impact any associated events or referrals. It is normally always best to merge the duplicate records into one record.

> ***Note:*** *The merging of records can't be undone. It is important to verify that the records should be merged before completing this process. Users should check with their PlayMaker account administrator before merging two records is the correct solution. Merging may not be an available option if one of the records is assigned to another shared owner. This is due to role permissions currently set by your account's administrator. To merge these records, partner with your account administrator.*

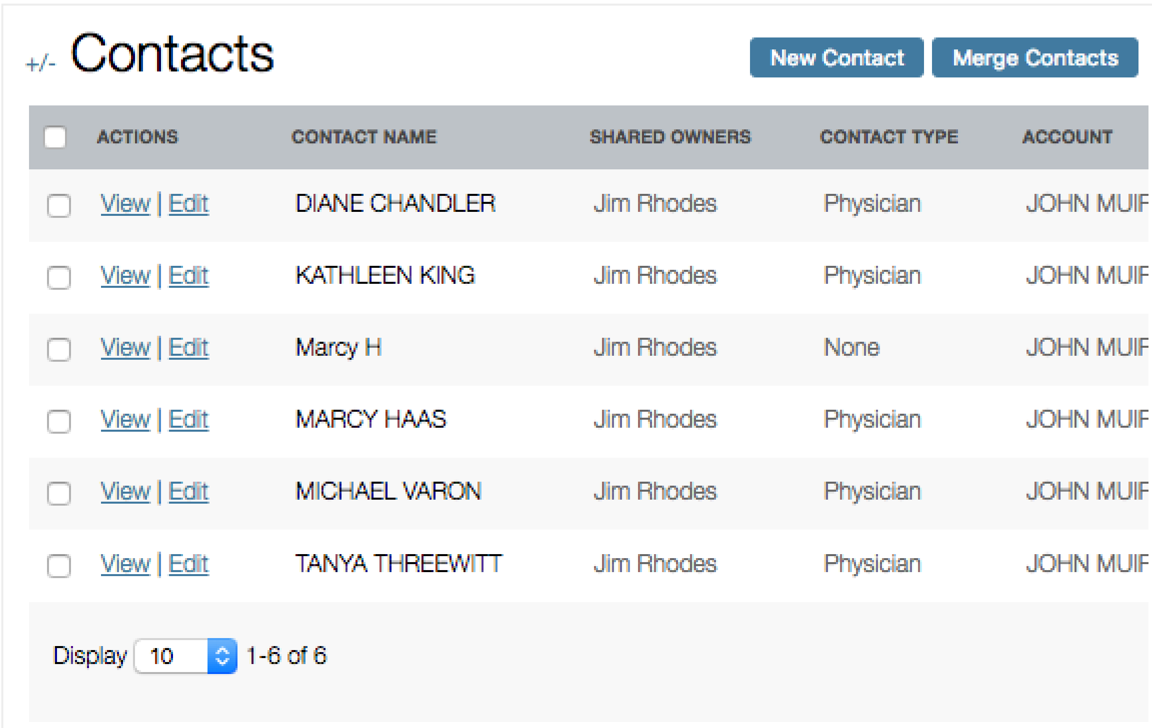
Merging Duplicate Contacts

There are two best practice methods for identifying and merging duplicates in PlayMaker.

Method 1: Visualization

PlayMaker's primary contacts view can be a powerful ally when looking to identify and correct data issues.

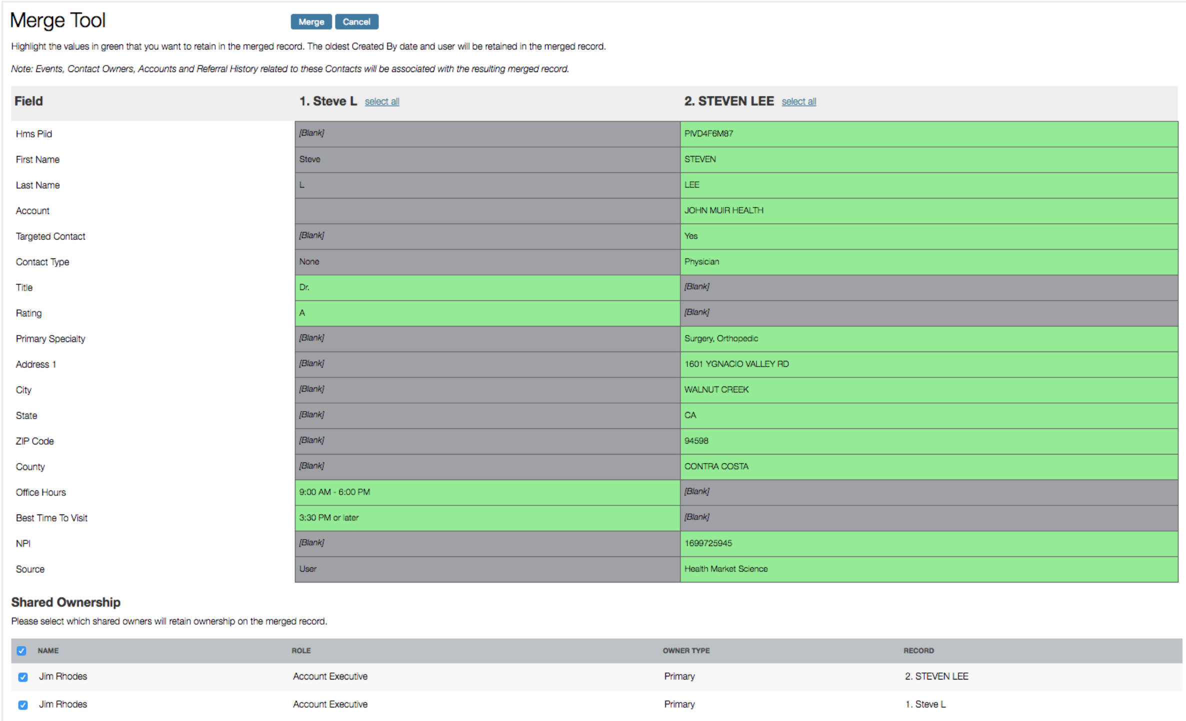
1. Click the Contacts tabs in the main PlayMaker menu bar for the appropriate data you would like to search on.
2. On the page displaying your list of accounts, change the sorting preference by clicking on the dropdown menu for Sort By, which is located under the Search Contacts bar on the left side of the page. Choose Last Name for contacts. Click Go.
3. Scroll through the list of names to look for entries that may be duplicates.



	ACTIONS	CONTACT NAME	SHARED OWNERS	CONTACT TYPE	ACCOUNT
	View | Edit	DIANE CHANDLER	Jim Rhodes	Physician	JOHN MUIF
	View | Edit	KATHLEEN KING	Jim Rhodes	Physician	JOHN MUIF
	View | Edit	Marcy H	Jim Rhodes	None	JOHN MUIF
	View | Edit	MARCY HAAS	Jim Rhodes	Physician	JOHN MUIF
	View | Edit	MICHAEL VARON	Jim Rhodes	Physician	JOHN MUIF
	View | Edit	TANYA THREEWITT	Jim Rhodes	Physician	JOHN MUIF

4. Click on the check boxes to the far left of the duplicate contact names. Then scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label select Merge Records.
5. In the Merge Tool display, the selected accounts will appear side by side. Choose which information to keep in each field by clicking on it and highlighting it green. Only

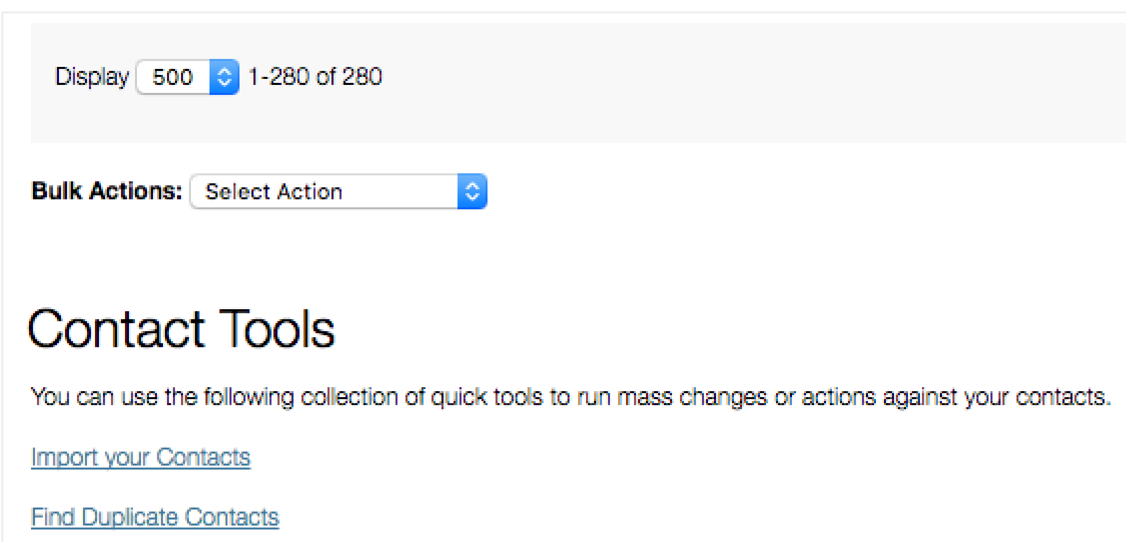
information highlighted in green will appear in the final merged record.



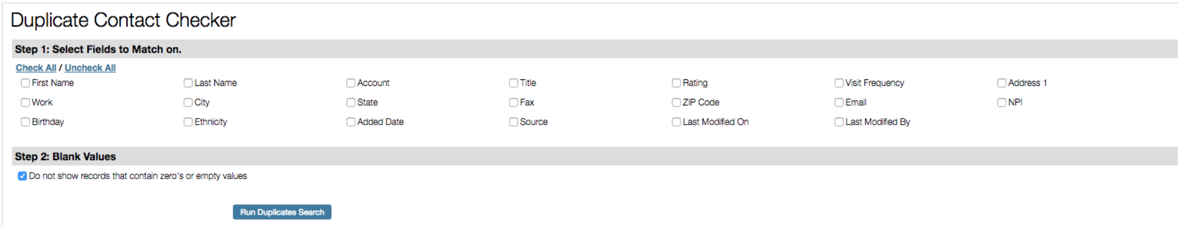
6. Click on the Merge button, located at both the top and bottom of the Merge Tool display.
7. A notification stating Merge successfully completed will appear on your screen. You also have the option here to view the newly merged record or return to the main results display by returning to the previous page.

Method 2: Using the Find Duplicate Contacts Tool

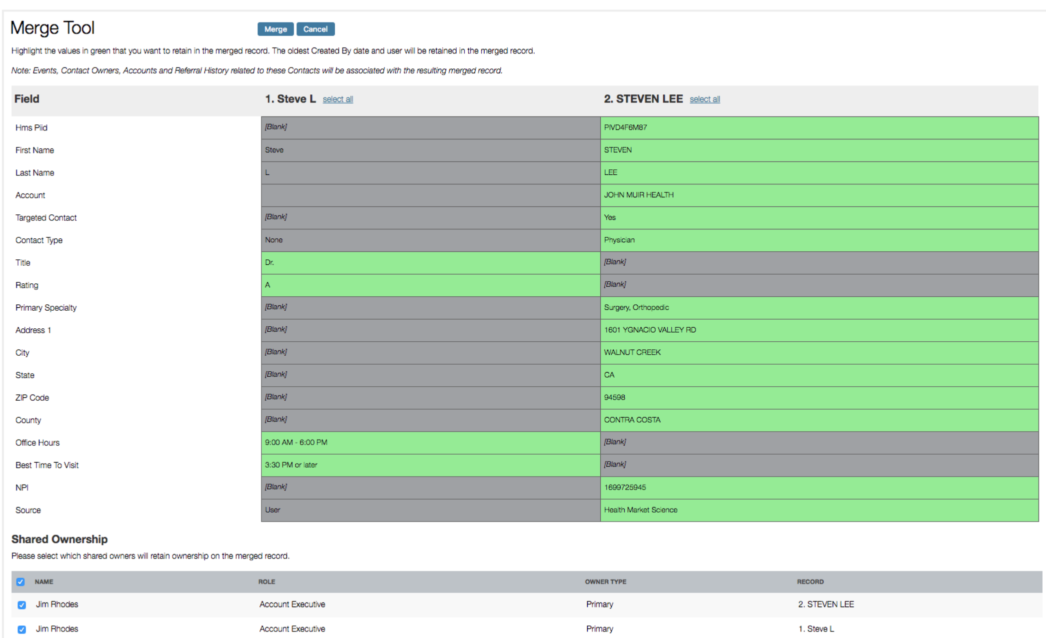
1. Click on the Contacts tabs in the main PlayMaker menu bar for the appropriate data you would like to search on.
2. On the page displaying your list of accounts, scroll to the bottom of the display. In the area labeled Account Tools, click on the "Find Duplicate Contacts".



3. In the Duplicate Contacts Checker window that appears, select the fields you would like searched for matches. Click Run Duplicates Search, located at the bottom of the window.
    - Helpful fields for refining your search include First Name, Last Name, NPI, Address 1, Phone 1, and ZIP code.



4. Click on the check boxes to the far left of the duplicate contact names. Then either select "Merge Selected" at the top of the screen, or scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label select "Merge".
5. In the Merge Tool display, the selected accounts will appear side by side. Choose which information to keep in each field by clicking on it and highlighting it green.
    - Only information highlighted in green will appear in the final merged record
    - **Tip:** If different shared owners are present on the records, any of them may be selected in the Shared Ownership section to maintain ownership after the merge. Simply deselect any shared owners that should not be assigned to the final merged record. If a SyncID field is present, either value can be selected, as it will be overwritten by a new SyncID for the new merged record.



6. Click on the Merge button, located at both the top and bottom of the Merge Tool display.
7. A notification stating Merge successfully completed will appear on your screen.
    - You also have the option here to view the newly merged record.

- Any remaining duplicates that resulted from your previous search still will be displayed in this area.

REMEMBER: Always merge accounts (facilities) before you merge contacts (individuals).

Deleting Contacts

1. Click the Contacts tabs in the main PlayMaker menu bar for the appropriate data you would like to search on.
2. Scroll through the list of names to look for entries that you would like to delete.
3. Click on the check boxes to the far left of the contact name. Then scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label select Delete Records.

NOTE: Contacts assigned to an event or referral cannot be deleted.