Panorama Bulletin

Bulletin #0042: Client Merge Additional IDs

eHealth Saskatchewan   **July 27, 2015**   **Version 1**

To: All Regional Panorama DIAs and Superusers

Issue

During the Client Merge process, users must ensure <u>all</u> Additional IDs are transferred from the Merged Client to the Destination Client's record.

Inclusion of both the Merged Client's and Destination Client's Additional IDs on the final Client's record will allow the Panorama Support Team to troubleshoot any reported data issues and to provide accurate Client counts during analysis.

Management

Follow the steps below to ensure all Additional IDs are retained on the Destination Client's record. Note, these steps assume the Client Merge process has already begun and the user is on Section 5.0 Merge Records of the Guidelines.

1. From the Merge Client Attributes screen, scroll down to the Additional IDs row. If different Additional IDs exist on both the Destination Client (left column) and Merged Client record (right column), all must be kept.

Birth City, Province	-		-	
Multiple Birth	No		No	
Alternate Names	-		-	
Additional IDs	Include ☐	SIMS Internal ID / 868848	Include ☐	SIMS Internal ID / 878445
Phone Numbers	Pref. ○ ○	Include ☐ (000) 000-0000 (Primary Home) ✓ **Effective:** 2015 Jan 29 **to** - **Created On:** 2015 Jan 29 ☐ (000) 000-0000 (Primary Home) **Effective:** 2015 Jan 29 **to** - **Created On:** 2015 Jan 29	Pref. ○	Include ☐ (000) 000-0000 (Primary Home) ✓ **Effective:** 2015 Jan 29 **to** - **Created On:** 2015 Jan 29

2. Select the checkbox next to each Additional ID. This will tell Panorama to keep all Additional IDs during the merge process.

3. Continue through the Merge Process as per the guidelines.

The Panorama Duplicate Client Management Guidelines have been updated to better reflect the steps to retain Additional IDs during the Client Merge process.

Contact

If you have any questions or concerns, please contact the eHealth Service Desk at 1-888-316-7446 or by email at servicedesk@ehealthsask.ca.