

ADVISORY to Katrina Aid Today

Case Managers:

CAN Duplicate Records

CAN's enhancement to identify duplicate records has raised some concerns about the potential for mistakenly removing cases from CAN. Information contained here is intended to create an understanding of the Duplicate Recognition Tool and how to use it.

How the Duplicate Recognition Tool works

Every night, CAN's Duplicate Recognition Tool searches the entire CAN database to identify potentially duplicate records on the following set of criteria. All three fields must have identical information recorded in these fields in order to be flagged as a duplicate:

- Client First and Last Name
- Client Pre-disaster Street Address
- Client age

When the Tool identifies a potential duplicate that has identical information in the criteria fields, it flags the identified records, with a heading as depicted (at right) with this gray-shaded box.



What to do when your client record is marked with the duplicate box

When your record is identified as a potential duplicate, you should take the following course of action:

1. Link (go) to the other client records identified as potential duplicates by clicking on the client record id #s that are listed in the duplicate gray-shaded box.
2. Search these records for other identifying information such as FEMA number, post-disaster address, date of birth, Social Security #
3. Verify information in the "Case Management" section to ensure that only the record your search started with has case management information such as "KAT case managed" checked and an assigned case manager.
 - If your review finds that the identified cases are NOT duplicates, proceed as normal with entering information into the original record you opened in CAN.
 - If your review finds that the identified case has duplicate records in CAN, refer to the next section of this Advisory.

What to do if a duplicate record is identified

If a duplicate is identified through your review of identified records, you should review the information in each one of the records marked as a duplicate.

- Review all history sections for the case including the client, contact and case history (links to histories are found at the top of each section in CAN).
- Identify one primary record that holds the majority of the information. Write down the CAN ID to ensure you track the correct file. (This is the record that will stay in CAN_
- Transfer all information through copy and paste or direct reentry of the information from the other records into the Primary Record.

Once you review and consolidate information into the primary record that will remain in CAN, you now have the authority to permanently archive the other records in CAN. To do this link (go) into the records you want to archive. Once in the record, (you'll know by seeing the CAN ID in parenthesis at the top of the CAN screen), you can check the "Confirm Permanent Deletion of Duplicate" check box.

- Records checked for duplication are moved to the archives once a week.
- *Note:* Due to accidental deletions, CAN does not delete the duplications any longer, they are now all moved to the CAN Archives which can be brought back into CAN at a later date if deemed necessary.
- The system for duplications includes a protection that all duplicate records cannot be marked for duplication (archiving) so that at least one case will remain in CAN.
- If you wish to remove the check from the check-box you have that ability until the case is archived.

What is the CAN Duplication Tool does not appear for a duplicate record?

At times, CAN does not pick up that a record is a duplicate. This is caused by the three criteria fields not being completely identical to each other (i.e. the client's age changed since the first record was entered, one record spelled out the street address while the second record used an abbreviation, etc.).

If a case manager identified a duplicate record, use the following steps to move the record to CAN Archives:

- Review all history sections for the case including the client, contact and case history (links to histories are found at the top of each section in CAN).
- Identify one primary record that holds the majority of the information. Write down the CAN ID to ensure you track the correct file. (This is the record that will stay in CAN)
- Transfer all information through copy and paste or direct reentry of the information from the other records into the Primary Record.
- Go into the CAN records that are not your primary records and change the case status to "Duplicate"