

San Francisco Department of Early Childhood

Contract Management System

Participant De-duplication Workflow

Steps:

1. Cityspan will merge duplicates via automation
 - a. Cityspan will schedule a merge date and notify agencies on the system login page
 - b. Child/Youth records with matching first name, last name, and DOB will be considered duplicates and merged.
 - c. Parents / Caregivers / Adults records with matching first name, last name, and DOB will be considered duplicates and merged.
 - d. The retained registration record will combine data from the merged records.
 1. If a given field is empty in one record but populated in another, the system will keep the populated value.
 2. If a given field is populated for multiple records, the system will keep the value that has been most recently saved.
2. Agencies will merge the remaining duplicates that do not have a matching first name, last name, and DOB
 - a. Agencies will
 1. Run the “Duplicate Persons” report from the site reports menu. The report has parameters to separate Youth / Youth records from Parent / Caregiver / Adult records
 2. Review the report for potential duplicates and enter the Cityspan ID of the record to be retained into the Keep ID column of the record to be removed. Any record with a Keep ID number will be removed and merged into the record with the Cityspan ID.
 3. Upload Duplicate Persons files (with entered Keep IDs) to your private FTP folder on the Cityspan server

- b. Cityspan will merge the records and provide confirmation to the agency of merge completion.

The retained Child/Youth record will combine data from the merged records.

1. If a given field is empty in one record but populated in another, the system will keep the populated value.
2. If a given field is populated for multiple records, the system will keep the value that has been most recently saved.
3. The retained Child/Youth record will combine group/individual activity and attendance data from the merged records so that no service history is lost.

Protocols for preventing additional duplicates:

1. File uploads

- a. Uploaded records must include first name, last name, DOB, and client ID
- b. If an uploaded record matches an existing client ID, but the uploaded first name, last name, and DOB does not match, the system will reject the record and require the user to correct the first name, last name, and DOB in the system before re-uploading
- c. If an uploaded record matches an existing first name, last name, and DOB, but the client ID does not match, the system will reject the record and require the user to correct the client ID in the system before re-uploading

4. Manual data entry

- a. Require new records to include first name, last name, DOB, and client ID
- b. If a matching first name, last name, and DOB is found, the system will prevent the user from creating a new record with a different client ID
- c. If a matching client ID is detected, the system will prevent the user from creating a new record with a different name and date of birth