

In this job aid, users will learn how to use the new merge feature to handle duplicate client records when initiating a data transfer from VASE+ to WebVISION. This feature can be used when clients with the same first name, last name, and date of birth have multiple appointments in the same event. This functionality is available to users with the VASE+ Web VISION District Admin or Site Admin roles.

Initiate Data Transfer in VASE+

First, navigate to the "Transfer Data to WebVISION" tab. Next, select the "Start" option for that data you wish to transfer. If you would like to view additional details, including the client count, select "See Details" (Figure 1).

Site	Clinic	Clinic Date ↓	WebVision CE ID	Status	
Hanover Community Center	October Mass Vax Event	10/01/2024	70985	Not Started	▶ See Details Start

Figure 1 – Data Transfer See Details and Start actions

Upon selecting "Start", a pop-up will appear with additional event details. To confirm the data transfer, select "Submit" (Figure 2).

Start Data Exchange ✕

Clinic: October Mass Vax Event

Start Date: 10/01/2024

Clients: 4

Vaccinations: HPV (2), TDAP (2)

Status: Not Started

Cancel
Submit

Figure 2 – Data exchange confirmation pop-up

If there are duplicate client records, the Status will update to "Failed". To view error messages with details regarding the data transfer fail, select "See details" next to the event (Figure 3).

Site	Clinic	Clinic Date ↓	WebVision CE ID	Status	
Hanover Community Center	October Mass Vax Event	10/01/2024	70985	Failed	▶ See Details Restart

Figure 3 – Select See Details to view error messages

Edit Duplicate Record

Registrants that have duplicate appointments will appear on the report with the following error message "Same Client under multiple appointments. Please Merge Vaccination Records". In order to rectify this issue, select the edit icon next to one of the line items associated with a client (Figure 4).

Clinic	Client Count	Status	Message	Time Stamp	Log
October Mass Vax Event	4	Failed	Precheck Failed	10/01/2024 14:04:51	

Registrant Name																		
Registrant Name: JANE DOE																		
<table border="1"> <thead> <tr> <th>Edit</th> <th>Error Type</th> <th>Error Message</th> <th>Rectified By</th> <th>Rectified On</th> <th>Rectified</th> </tr> </thead> <tbody> <tr> <td></td> <td>Client: 36407</td> <td>Same Client under multiple appointments. Please Merge Vaccination Records.</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Client: 36408</td> <td>Same Client under multiple appointments. Please Merge Vaccination Records.</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Edit	Error Type	Error Message	Rectified By	Rectified On	Rectified		Client: 36407	Same Client under multiple appointments. Please Merge Vaccination Records.			<input type="checkbox"/>		Client: 36408	Same Client under multiple appointments. Please Merge Vaccination Records.			<input type="checkbox"/>
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	Client: 36405	Same Client under multiple appointments. Please Merge Vaccination Records.			<input type="checkbox"/>													
	Client: 36406	Same Client under multiple appointments. Please Merge Vaccination Records.			<input type="checkbox"/>													

Figure 4 – Edit button to rectify data transfer issues

Upon selecting edit, users will be brought to the Review page for the selected appointment. Under the Vaccination Details section, there is an option to merge the records (Figure 5). Users will receive a pop-up message where they can review the details and confirm the merge. Upon selecting the "Merge" button, the duplicate appointments will be associated with each-other.

Vaccination Details								Merge	Edit Vaccine
Edit	Vaccine Name	Vaccine Administrator	Vaccine Administered Date	Vaccine Administrator	Lot Number	Site Of Injection	Route of Administration	Comments	
	ADACEL,TDAP BY SANOFI PASTEUR, FOR 10-64 YRS.	Yes	10/01/2024	Derek Shepherd	43155	LA	IM		

Figure 5 – Button to merge records

Merge Records ✕

From				
Vase Client ID	WV Client ID	Vaccine Name	Vaccine Administered Date	Vaccine Administrator
36408	New Client	HUMAN PAPILLOMAVIRUS VACCINE, 9-VALENT	10/01/2024	Derek Shepherd

Into				
Vase Client ID	WV Client ID	Vaccine Name	Vaccine Administered Date	Vaccine Administrator
36407	New Client	ADACEL,TDAP BY SANOFI PASTEUR, FOR 10-64 YRS.	10/01/2024	Derek Shepherd

Close
Merge

Figure 6 – View details and confirm merge

Reinitiate Data Transfer

Once all records with error messages have been rectified, the data transfer can be reinitiated (Figure 7).

Site	Clinic	Clinic Date ↓	WebVision CE ID	Status	
Hanover Community Center	October Mass Vax Event	10/01/2024	70985	Failed	See Details Restart

Figure 7 – Restart data transfer