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).

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.

Figure 5 – Button to merge records

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