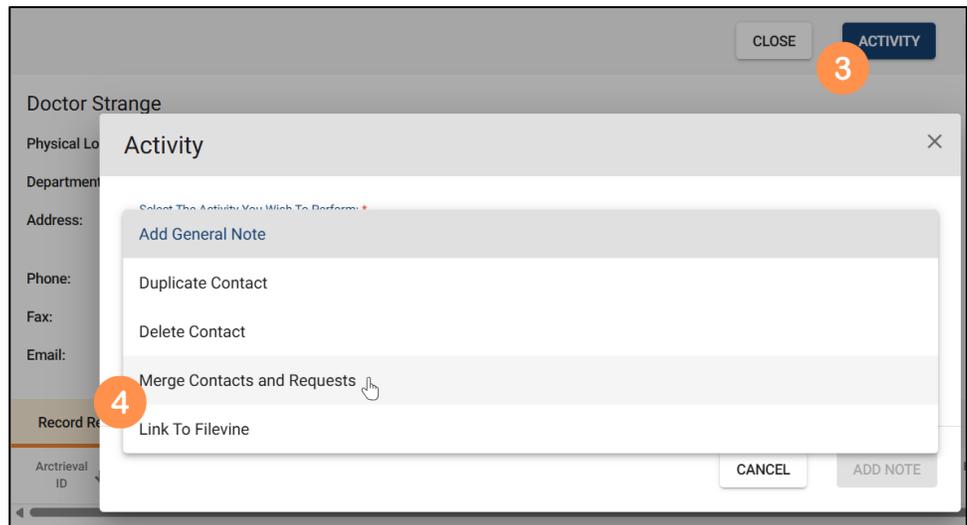


Merging Duplicate Contacts for Facilities and Providers

1. Merging Contacts and Requests—Quick Steps

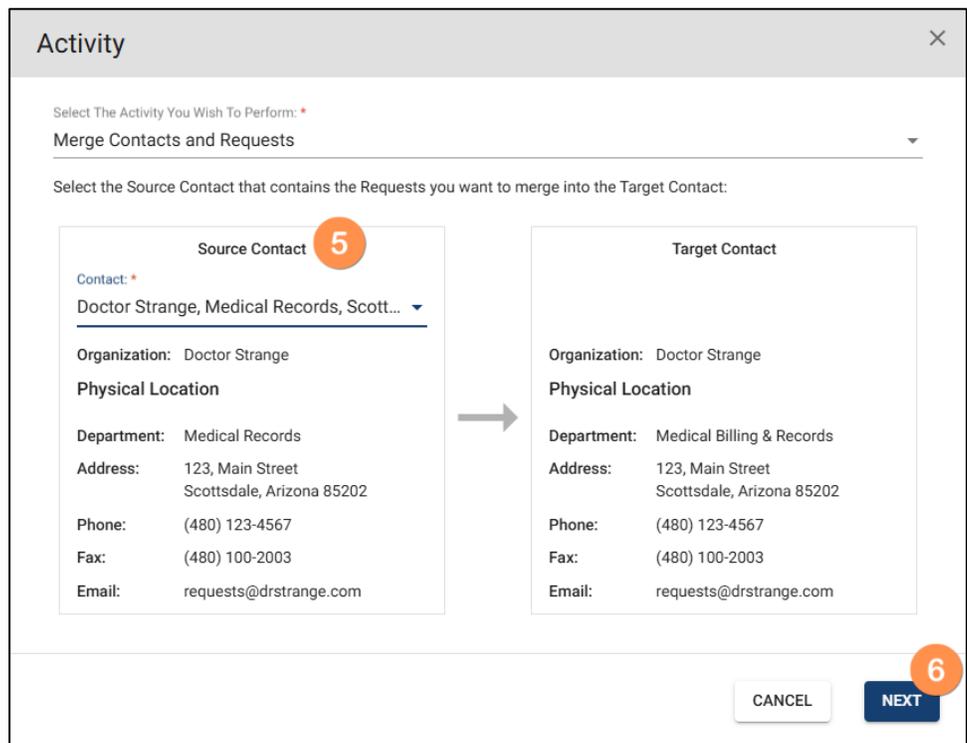
1. Click on Contacts in the left-hand menu.
2. Select the Target Contact. This is the provider record you want to keep in the system.
3. Click the Activity button.
4. Select "Merge Contacts and Requests" from the dropdown menu.



5. You will be prompted to select the Source Contact. This duplicate provider record will be merged with the Target Contact.

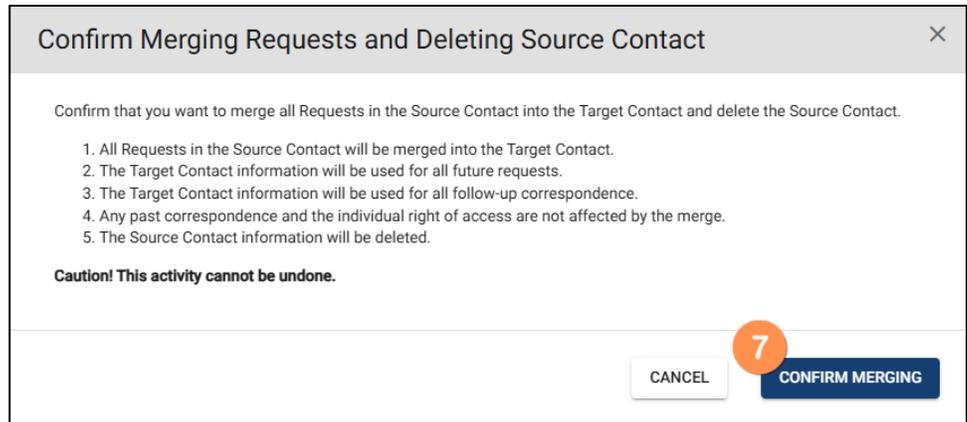
Note: The Source Contact will be deleted after the merge is completed.

6. Once the Source Contact is selected, review the Contact Information, then click Next.

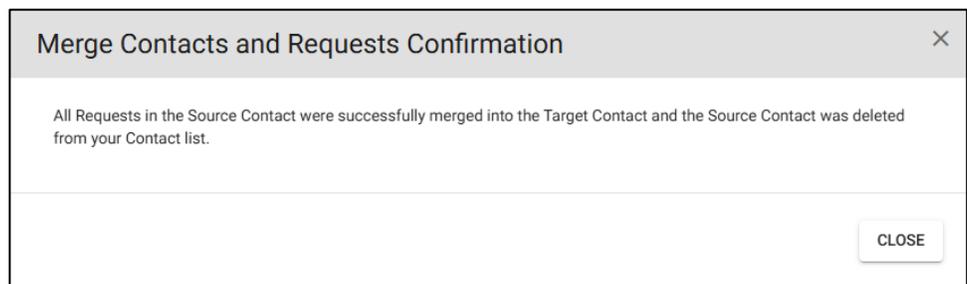


Merging Duplicate Contacts and Consolidating Requests

7. A confirmation message will appear before the merge is completed. Review the message carefully. A merge cannot be undone. After reviewing the message, click the Confirm Merging button.



8. Once the merge is complete, a confirmation message will appear stating that all requests have been successfully moved from the Source Contact to the Target Contact and that the Source Contact has been deleted from your Contact List.



This action cannot be undone. Once you merge Contacts, the Source Contact is deleted permanently, although its requests and documents will be saved in the Target Contact.

Merging Duplicate Contacts and Consolidating Requests



2. Background

In Arctrieval, a “Contact” refers to the provider, facility, record custodian, or covered entity with the protected health information you need, such as—medical records, billing statements, or imaging studies. Over time, especially in busy or collaborative environments, it is common to end up with multiple Contact entries for the same provider. This can happen when team members enter slightly different versions for the same organization, use inconsistent formatting, or misspell a name.

Organization	Department	City	State	Phone	Fax	Email	Type	Open Requests	Updated Date
1st Choice Accident & Injury, LLC	Billing Department	Houston	TX	(713) 337-3105		testing@m-c-unlimited.com	Hospital	1	04/29/2025
Abington Memorial Hospital - Lansdale	Medical Records	Lansdale	PA	(215) 368-1122	(215) 368-3669		Hospital	3	08/19/2024
Abington Memorial Hospital - Lansdale	Billing Department	Lansdale	PA	(215) 368-1122	(215) 368-3569		Hospital	1	01/23/2024
Abington Memorial Hospital - Lansdale	Radiology Department	Lansdale	PA	(215) 368-1478	(215) 368-5987		Hospital	0	04/03/2024
Abington Memorial Hospital - Medical Drive	Radiology	Abington	PA	(215) 481-2500	(215) 481-2525		Hospital	0	02/10/2023
Abington Memorial Hospital - Medical Drive	Billing or Financial Services	Abington	PA	(215) 481-2500	(215) 481-2525		Hospital	0	10/26/2023
Abington Memorial Hospital - Old York Rd.	Radiology	Abington	PA	(215) 481-2000			Hospital	0	12/08/2023
Abington Memorial Hospital - Old York Rd.	Medical Records	Abington	PA	(215) 481-2000			Hospital	2	12/08/2023
Abington Memorial Hospital - Old York Rd.	Billing Department	Abington	PA	(215) 481-2000			Hospital	1	10/25/2022
Abrazo Health	Health Information Management Services	Phoenix	AZ	(602) 923-5609	(602) 246-5835	roi@abrazohealth.com	Hospital	0	04/24/2024
Abrazo Health	Billing Records	Phoenix	AZ	(602) 923-5609	(602) 246-5835	roi@abrazohealth.com	Hospital	0	03/05/2024
Accident Care & Treatment Center	Medical Records	Oklahoma City	OK	(405) 767-0534	(405) 767-0539		Hospital	0	12/15/2022
Accident Care & Treatment Center	Billing Department	Oklahoma City	OK	(405) 767-0534	(405) 767-0539		Hospital	0	12/15/2022
Action Urgent Care Inc.	Billing Department	San Jose	CA	(626) 791-9004	(626) 791-9005	g-l@medrec.com	Hospital	0	01/31/2023
Action Urgent Care Inc.	Medical Records (A-F)	San Jose	CA	(626) 791-9004	(626) 791-9005	a-f@medrec.com	Hospital	0	11/02/2022

Duplicate Contacts create complications in how your team manages and tracks provider interactions. In Arctrieval, each request is assigned to a single Contact when created. If multiple Contacts exist for the same provider, different requests may be attached to different versions of that provider's information. Over time, this results in fragmented request histories. One Contact may show only rejections, while another shows fulfillment, creating an incomplete picture of the provider's behavior. This confusion can delay escalations, mislead users about whether follow-ups have occurred, and complicate enforcement efforts when compiling a complete record of correspondence.

In more serious cases, duplicate Contacts can weaken legal compliance. During audits or investigations, it is critical to have a complete and consistent history for each provider. If documents and actions are divided across separate entries, this history becomes unclear and harder to defend. For these reasons, Arctrieval includes a tool that allows users to merge duplicate Contacts into a single, complete record. This guide explains when to use that tool and how to do it properly.

Merging Duplicate Contacts and Consolidating Requests

3. Discovering Duplicate Contacts

When working with Contacts, you may find Contacts with similar names but slightly different information. For example, below are two entries for Magic Kingdom Medical Center with slightly different information, but they are both related to the medical records department.

Organization ↓	Department	City	State	Phone	Fax	Email	Type	Open Requests	Updated Date
Magic Kingdom Medical Center	Billing Department	Disneyland	CA	(480) 550-9611	(909) 786-0131	Billing@m-c-unlimited.com	Hospital	8	05/27/2025
Magic Kingdom Medical Center	Medical Records	Disneyland	CA	(480) 550-9600	(909) 786-0131	MK_ROI@m-c-unlimited.com	Hospital	20	05/27/2025
Magic Kingdom Medical Center	Medical Release of Information	Disneyland	CA	(480) 550-9600	(909) 786-0131		Hospital	0	05/27/2025

Contact 1 and Contact 2 have many similarities and only a few minor differences, as follows:

1. The Organization is the same for Contact 1 and Contact 2.
2. The Department is Medical Records for Contact 1 and Medical Release of Information for Contact 2.
3. The City and State are the same for Contact 1 and Contact 2.
4. The Phone and Fax are the same for Contact 1 and Contact 2.
5. The Email for Contact 1 is listed, but there is no Email for Contact 2.
6. The information for Contact 1 is much more complete, as you will see in the images below.

Merging Duplicate Contacts and Consolidating Requests

If you look at the Requests for Contact 1, you will see many requests that have been issued, complete mailing information, additional notes, and an email address.

1
CLOSE
ACTIVITY
EDIT CONTACT
SEND NEW REQUEST

Magic Kingdom Medical Center

Physical Location Information:

Department: Medical Records

Address: 345.5 Main Street, Suite 115
Disneyland, CA 90203

Phone: (480) 550-9600

Fax: (909) 786-0131

Email: MK_ROI@m-c-unlimited.com

Mailing Location Information:

Department: Health Information Management - ROI

Address: PO Box 456
Disneyland, CA 90000

Fax: (909) 786-0131

Note:

Additional information about the contact. They handle primary treatment for all cast members real or imaginary.

Multiple issued requests

Record Requests		History	Contact Details	Automated Follow Up										
Arctrieval ID	Client Name	Client DOB	Requested Information	Request Type	Status	Days Open	Request Expenses	Page Count	Delivery Method	Starting DOS	Ending DOS	Request Date	Due Date	Last Activity Date
AADR-2319	Termaine, Cinderella	01/01/1980	Medical	Patient Directed to 3rd Party	Invoice Received	6		98	-	01/10/2023	05/21/2025	05/21/2025	06/20/2025	05/22/2025
AADH-6347	Avocado, Allie	01/01/1980	Billing	Patient Directed to 3rd Party	Invoice Paid	67	\$0.00	0	-	01/01/2023	03/20/2025	03/21/2025	04/20/2025	04/08/2025
AADH-5000	Bagel, Benjamin	01/01/2022	Billing	Patient Directed to 3rd Party	Saved as Draft				-	01/01/2023	03/20/2025	-/-/-	-/-/-	03/20/2025
AADE-7401	Bell, Tinker	01/01/1980	Medical	Patient Directed to 3rd Party	Invoice Received	90		0	-	01/01/2025	02/26/2025	02/26/2025	03/28/2025	03/04/2025

If you look at the Requests for Contact 2, you will see only one request was issued, the mailing address is missing, the additional notes are missing, and the email address is missing. The record is not as complete as Contact 1. Contact 2 should be merged into Contact 1.

Arctrieval
Smith, Gallagher & Spencer LLP
Samuel Brown
HELP

2
CLOSE
ACTIVITY
EDIT CONTACT
SEND NEW REQUEST

Magic Kingdom Medical Center

Physical Location Information:

Department: Medical Release of Information

Address: 345.5 Main Street, Suite 115
Disneyland, CA 90203

Phone: (480) 550-9600

Fax: (909) 786-0131

Mailing Address is Missing

eMail Address is Missing

Additional Notes are Missing

One issued request

Record Requests		History	Contact Details	Automated Follow Up										
Arctrieval ID	Client Name	Client DOB	Requested Information	Request Type	Status	Days Open	Request Expenses	Page Count	Delivery Method	Starting DOS	Ending DOS	Request Date	Due Date	Last Activity Date
AAADR-7836	Termaine, Cinderella	01/01/1980	Medical	Patient Directed to 3rd Party	Completed	0		0	-	01/01/2023	05/27/2025	05/27/2025	06/26/2025	05/27/2025

Merging Duplicate Contacts and Consolidating Requests

4. Merging Duplicate Contacts—In Detail

The steps below will walk you through merging two Contacts into one entry in your Arctrieval account.



This action cannot be undone. Once you merge Contacts, the Source Contact is deleted permanently, although its requests and documents will be saved in the Target Contact.

Identify the Contact that you want to keep—the Target Contact. The Target Contact should have the most complete and accurate information, such as a full address, fax number, email address, etc....

The Source Contact is the duplicate entry that will be merged into the Target Contact. This Contact will be deleted after the merge is complete. All associated requests with each request history uploaded files, and communications are preserved and transferred to the Target Contact.

Click on Contacts in the left-hand menu to display all the providers, facilities, and covered entities in your Arctrieval account. Use the search function if needed to find the correct target contact record. After locating the Target Contact in the table, click on the Contact’s row to open the detail page.

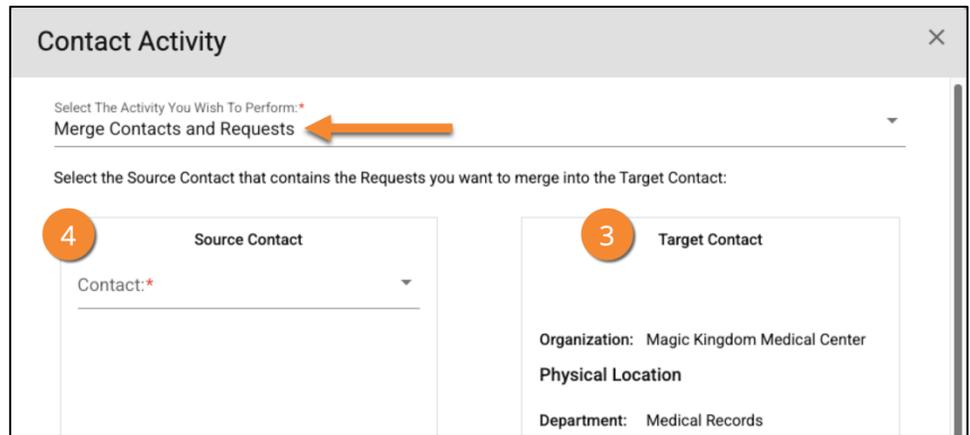
1. Click the Activity button to open the dropdown list of available actions.

Ending DOS	Request Date	Due Date	Last Activity Date
05/21/2025	05/21/2025	06/20/2025	05/22/2025
03/20/2025	03/21/2025	04/20/2025	04/08/2025
01/01/2023	03/20/2025	-/-/---	-/-/---
01/01/2025	02/26/2025	02/26/2025	03/28/2025
01/01/2023	02/25/2025	02/25/2025	03/27/2025
01/01/2024	02/13/2025	02/13/2025	03/15/2025

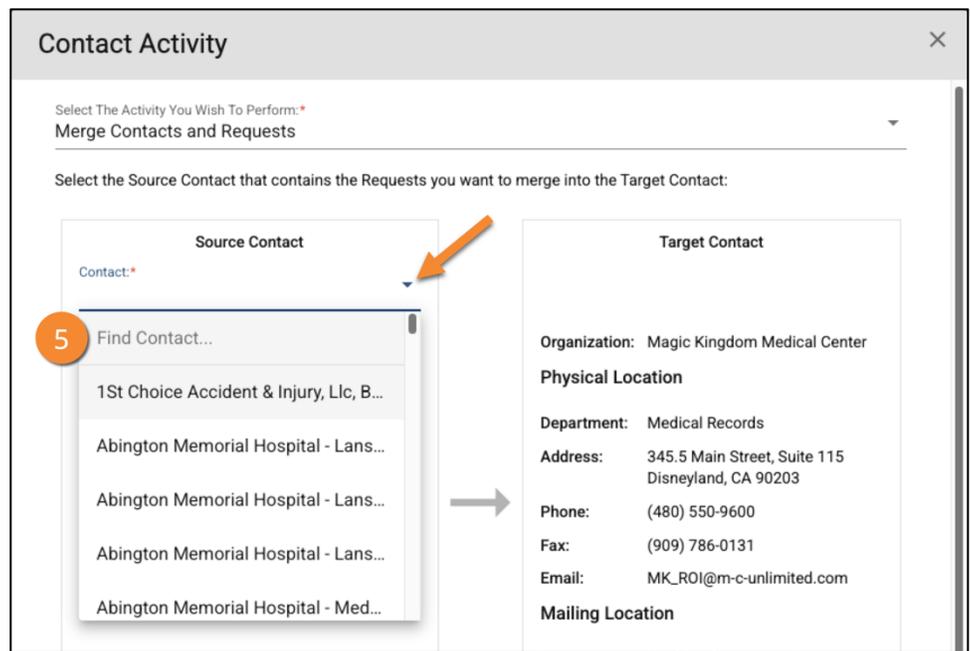
2. Select Merge Contacts and Requests from the options under the “Select The Activity You Wish To Perform” drop-down dialog menu, as shown.

Merging Duplicate Contacts and Consolidating Requests

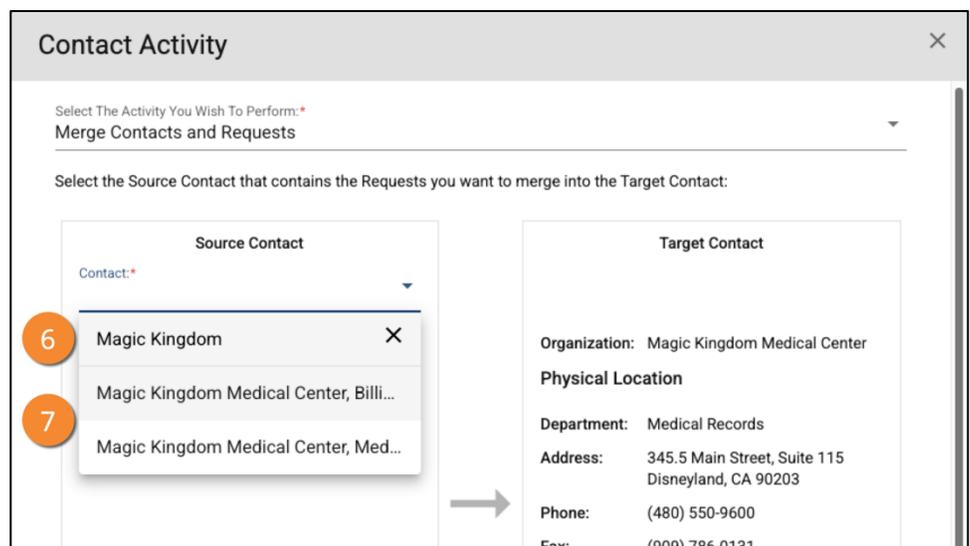
3. The Merge Contacts and Requests dialog box is shown and the Target Contact is pre-selected and is displayed in the right-hand column.
4. Click the Contact drop-down dialog field in the Source Contact to display the Contact list, as shown.



5. In the Find Contact field, enter the Source Contact name for the merge.



6. We will use Magic Kingdom Medical Center to filter the results in this example.
7. The list of choices is now filtered only to include Contacts with Magic Kingdom in the name. Clicking on Magic Kingdom Medical Center, Medical Release of Information will display the Contact's information.



Merging Duplicate Contacts and Consolidating Requests

- 8. The left-hand column displays all the Source Contact information that needs to be compared to the Target Contact information.
- 9. Confirm the Target Contact information in the right-hand column is correct.
- 10. Only after you review the Contacts information and are certain that both entries represent the exact same location and are interchangeable, click the Next button.



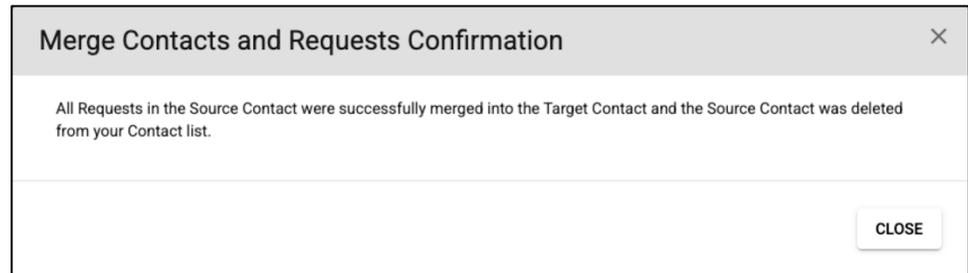
This action cannot be undone. If unsure, it is best to stop and consult your supervisor or Arctrieval Support. If Contacts serve different purposes for requests, or belong to different departments, do not merge them.

- 11. After pressing the Next button, Arctrieval displays a warning message that outlines the merge's consequences.

This is the final confirmation step. If you continue, the action cannot be reversed. If you have any doubts or questions, cancel the process and confirm with your team before proceeding. Once you are ready, click the Confirm Merging button to finalize the action.

Merging Duplicate Contacts and Consolidating Requests

12. If the merge is successful, the following dialog box is displayed.



If the merge cannot be completed or there is an issue, the system will display an error message with additional information.

5. What Happens After the Merge

When the merge is completed, Arctrieval automatically updates the information in your account. The Source Contact is removed from your Contact List, as well as all dropdown menus and search results. However, the information is not lost. All the Requests to the Source Contact are moved into the Target Contact. This includes:

- Request records and their statuses
- PDF documents and uploaded files
- Notes and correspondence history
- Activity logs and timestamps

The system also records the merge as an Activity History event. Any pending escalations or follow-up communications continue normally but are now tracked through the Target Contact.

6. Contact Data Best Practices

To maintain a clean Contact list and good data integrity, always search the Contact List before creating a new Contact for a provider or facility. Even small differences in spelling or formatting can lead to duplicate entries. For example, "Children's Hospital – LA" and "Childrens Hospital Los Angeles" are different Contact entries but refer to the same facility.

Use consistent naming when entering new Contacts. If your team always agrees to spell out "Medical Center" or to use full state names in addresses, this can reduce errors. Also, avoid using temporary or informal Contact names that a more accurate version might later replace.

As a preventative measure, you should audit your Contact List regularly. In high-volume environments, duplicates are sometimes unintentionally introduced. Cleaning these up periodically helps keep your request system organized and reliable.