

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.
- 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.





Notices: Copyright © 2010-2025 Arctrieval, Inc. All Rights Reserved. This publication is protected by copyright, and all rights are reserved. No part of it may be reproduced or transmitted by any means or in any form without prior written consent from Arctrieval, Inc. You may make a copy or reproduce any part of this document for your own personal use. Making copies for any other purpose is a violation of U.S. Copyright law.

- 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.
- Once the merge is complete, a confirmation message will appear stating that all requests have been successfully moved from the

Confirm that you want to merge all Requests in the Source Contact into the Target Contact and delete the Source Contact. 1. All Requests in the Source Contact will be merged into the Target Contact. 2. The Target Contact information will be used for all future requests. 3. The Target Contact information will be used for all follow-up correspondence. 4. Any past correspondence and the individual right of access are not affected by the merge. 5. The Source Contact information will be deleted. Caution! This activity cannot be undone.



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.

Revision Date: 2025-06-03

CANCEL

CONFIRM MERGING

×



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.

| ≡ Arctrieval Smith, 0 | Gallagher & Spencer LLP | | | | | | | | John Na | asam 🗸 ⑦HELP |
|------------------------------------------|--------------------------------------------|----------------------------------------|---------------|-------|----------------|----------------|-------------------------|----------------------|-----------------|------------------------------------------------------|
| A Dashboard | Q Search | | | | | | | EXPO | RT TO EXCEL | ADD NEW CONTACT |
| Clients | Organization 🕈 | Department | City | State | Phone | Fax | Email | Туре | Open Request | s Updated Date |
| Record Requests | 1St Choice Accident & Injury, Llc | Billing Department | Houston | тх | (713) 337-3105 | | testing@m-c-unlimited.c | com Hospital | 1 | 04/29/2025 |
| Reports | Abington Memorial Hospital - Lansdale | Medical Records | Lansdale | PA | (215) 368-1122 | (215) 368-3669 | | Hospital | 3 | 08/19/2024 |
| Forms | 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 | ок | (405) 767-0534 | (405) 767-0539 | | Hospital | 0 | 12/15/2022 |
| | Accident Care & Treatment Center | Billing Department | Oklahoma City | ок | (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 |
| © 2025 Arctrieval All Rights Reserved. | | | | | | | | Rows per page: 100 💌 | l – 100 of 1464 | $ \langle \ \langle \ \rangle \rightarrow \rangle $ |

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.



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.

| = Arctr | ie∨al ° Smith, | Gallagher & Spe | ncer LLP | | | | | | Samu | el Brown 🗸 | ⑦HELP |
|------------------------------------------|---------------------------|---------------------------------|-----------------------------------|------------|-------|-----------------------|-----------------------|-------------------------------|----------|------------------|-----------------|
| DashboClients | ard | Q magic | | | | | | | | | RT TO EXCEL |
| Record | Requests | Organization 🕹 | Department | City | State | Phone | Fax | Email | Туре | Open Requests | Updated Date |
| Reports | :S | Magic Kingdom Medical Center | Billing Department | Disneyland | CA | (480) 550- 9611 | (909) 786- 0131 | Billing@m-c- unlimited.com | Hospital | 8 | 05/27/2025 |
| Forms | 1 | 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 |
| Settings | s 2 | Magic Kingdom Medical Center | Medical Release of Information | Disneyland | CA | (480) 550- 9600 | (909) 786- 0131 | | Hospital | 0 | 05/27/2025 |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| © 2025 Arctriev | al All Rights Reserved. | | | | | | | Rows per page: 50 👻 | 1 – 3 of | 3 < | |

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.



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 | ΑCTIVI | TY EDI | IT CONTACT | | W REQUEST |
|--------------------|-------------------------|------------------------------------|--------------------------|----------------------------------------|---------------------|-----------------------|---------------------|---------------|--------------------|-----------------|--------------------|------------------|-----------------|--------------------------|
| Magic King | gdom Me | edical Cente | er | | | | | | | | | | | |
| Physical Locat | tion Informat | ion: | | | Mailing Locati | on Information | on: | | | Note: | | | | |
| Department: | Medical F | Records | | | Department: | Health In | formation Ma | anagement - I | ROI | Additiona | I information ab | out the contact. | They handle pri | mary |
| Address: | 345.5 Ma Disneylar | in Street, Suite 1 id, CA 90203 | 15 | | Address: | PO Box 4 Disneylar | 56 1d, CA 90000 | | | treatmen | t for all cast mer | mbers real of im | aginary. | |
| Phone: | (480) 550 | -9600 | | | Fax: | (909) 786 | 5-0131 | | | | | | | |
| Fax: | (909) 786 | -0131 | | | | | | | | | | | | |
| Email: | MK_ROI@ | m-c-unlimited.c | om | Mul | tiple issu | ied req | uests | | | | | | | |
| Record Requ | lests | History | Cont | act Details | Automate | ed 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, Cind cella | 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, Benicinin | 01/01/2022 | Billing | Patient Directed to 3rd Party | Saved as Draft | | | | - | 01/01/2023 | 03/20/2025 | // | // | 03/20/2025 |
| AADE- | Bell, Tinker | 01/01/1980 | Medical | Patient Directed | Invoice | 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 8 | Spence | r LLP | | | | | | | | | | Samu | el Brown ~ | ⑦HELP |
|---|-------------------|--------------------|-------------------------|----------------------------------------|--------------------------|----------------------------------------|-----------|--------------|---------------------|---------------|--------------------|-----------------|----------------|-----------------|------------|--------------------------|
| ń | Dashboard | 2 | | | | | | | | | CLOSE | ACTIV | ITY E | DIT CONTACT | SEND N | EW REQUEST |
| - | Clients | Magic Ki | ngdom N | ledical Cente | r | | | | | | | | | | | |
| Ē | Record Requests | Physical Loc | ation Inform | ation: | | | Maili | ng Add | ress is N | Missing | | A | dditional | l Notes ar | e Missing | 5 |
| | Contacts | Department: | Medica | l Release of Inform | ation | | | | | | | | | | | |
| 8 | Reports | Address: | 345.5 N Disneyl | Main Street, Suite 11 and, CA 90203 | 5 | | | | | | | | | | | |
| | Forms | Phone: | (480) 5 | 50-9600 | | | | | | | | | | | | |
| • | Settings | Fax: | (909) 7 | 86-0131 eM | ail Addr | ess is Mi | issing | | | | | | | | | |
| | | Record Rec | quests | History | Cor | ntact Details | Automa | ted Follow U | p | | | | | | | |
| | | 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- 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 |
| | | | | | One | issued r | equest | | | | | Rows | s per page: 50 | ▼ 1-1 of | n K | |



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.

| ≡ Arctrieval Smith, | Gallagher & | Spencer | LLP | | | | | | | | | Samue | l Brown 🗸 | ⑦HELP |
|------------------------------------------|------------------|-------------------------|-----------------------------------------|--------------------------|----------------------------------------|---------------------|------------------------------|---------------------|-------|------------|-------------------|--------------------|-----------------|------------------|
| A Dashboard | | | | | | | | | CLOSE | ACTIVIT | TY EDI | T CONTACT | SEND NEV | W REQUEST |
| Clients | Magic Kin | igdom M | edical Cente | er | | | | | | | | | | |
| Record Requests | Physical Loca | tion Informa | ition: | | | Mailing Locatio | on Information: | | | Note: | | | | |
| Contacts | Department: | Medical | Records | | | Department: | Health Informa | tion Management - R | וס | Additiona | l information ab | out the contact. | They handle pri | mary |
| Reports | Address: | 345.5 M Disnevla | ain Street, Suite 1 nd. CA 90203 | 15 | | Address: | PO Box 456 Disnevland, CA | 90000 | | ueaunent | Tor all cast file | nders rear of init | aginary. | |
| Forms | Phone: | (4) | Contact Act | tivitv | | | | | | × | | | | |
| Settings | Fax: | (90 | iontaot Ao | uvity | | | | | | | | | | |
| E Crowdsourced Updates | Email: | Mł | Select The Activity A Add General No | /ou Wish To Perfo ote | rm:* | | | | | - | | | | |
| | Record Req | uests | Add General | Note | | | | | | ~ | | | | |
| | Arctrieval ID | Clien Nam | Duplicate Co | intact | | | | | | | Ending DOS | Request Date | Due Date | Last Activity |
| | AADR- | Term | Delete Conta | ict | | | | | | | | | | bute |
| | 2319 | Cinde 2 | Merge Conta | icts and Requ | iests ₩ | | | | | | 05/21/2025 | 05/21/2025 | 06/20/2025 | 05/22/2025 |
| | AADH- | Avoca | Update From | Filevine | | | | | | | 03/20/2025 | 03/21/2025 | 04/20/2025 | 04/08/2025 |
| | 0347 | Ame | Unlink From | Filevine | Dationt | | | | | _ | | | | |
| | AADH- 5000 | Bagel, Benjamin | 01/01/2022 | Billing | 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 |
| | AADE- 5420 | Termaine, Cinderella | 01/01/1980 | Medical | Patient Directed to 3rd Party | Invoice Received | 91 | 63 | | 01/01/2023 | 02/25/2025 | 02/25/2025 | 03/27/2025 | 02/27/2025 |
| © 2025 Arctrieval All Rights Reserved. | AADD- | Starks, | 01/01/1980 | Medical | Patient Directed | Rejected | 103 | | | 01/01/2024 | 02/13/2025 | 02/13/2025 | 03/15/2025 | 03/14/2025 |

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

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

- 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.
- 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.



Arctrieva





Arctrieval

- 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.

| ect the Source | Contact that contains the Requests | you want to m | erge into the Ta | rget Contact: |
|--------------------------|------------------------------------------------------|---------------|------------------|------------------------------------------------------|
| | Source Contact | | | Target Contact |
| Contact:* Magic Kingd | om Medical Center, Medi 🍷 | | | |
| Organization: | Magic Kingdom Medical Center | | Organization: | Magic Kingdom Medical Center |
| Physical Loc | ation | | Physical Loo | cation |
| Department: | Medical Release of Information | | Department: | Medical Records |
| Address: | 345.5 Main Street, Suite 115 Disneyland, CA 90203 | | Address: | 345.5 Main Street, Suite 115 Disneyland, CA 90203 |
| Phone: | (480) 550-9600 | \rightarrow | Phone: | (480) 550-9600 |
| Fax: | (909) 786-0131 | | Fax: | (909) 786-0131 |
| | | | Email: | MK_ROI@m-c-unlimited.com |
| | | | Mailing Loca | ation |
| | | | Department: | Health Information Management - ROI |
| | | | Address: | PO Box 456 Disneyland, CA 90000 |
| | | | Fax: | (909) 786-0131 |

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

| Confirm Merging Requests and Deleting Source Cor | |
|---------------------------------------------------------------------------------------|----------------------------|
| Confirm that you want to merge all Requests in the Source Contact into the Target Con | delete the Source Contact. |
| 1. All Requests in the Source Contact will be merged into the Target Contact. | |
| 2. The Target Contact information will be used for all future requests. | |
| 3. The Target Contact information will be used for all follow-up correspondence. | |
| 4. Any past correspondence and the individual right of access are not affected by | je. |
| 5. The Source Contact information will be deleted. | |
| Caution! This activity cannot be undone. | |
| , | |
| | 11 |
| | |
| | CONFIRM MERGING |

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.



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

> If the merge cannot be completed or there is an issue,

Merge Contacts and Requests Confirmation ×
All Requests in the Source Contact were successfully merged into the Target Contact and the Source Contact was deleted from your Contact list.

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.