

# ADR In Focus: Understanding Client-Level XML Import Rules for Merging Records

## Introduction

**AIDS Drug Assistance Programs (ADAPs) may submit more than one client-level data file for the ADAP Data Report (ADR).** For example, an ADAP may have their enrollment, demographic, and clinical information in one data system and their drug services data in another system, requiring two uploads.

**Key Point:** For ADR submission, when multiple client-level data files for the same ADAP are merged, actual values are never replaced with missing values.

## What are the rules for merging records?

When HAB receives more than one file from an ADAP, the **files are merged based on the encrypted Unique Client Identified (eUCI)**. When an ADAP uploads data, if a given client's eUCI already exists in the ADR Web System, any new data are merged with the existing data. **Some data elements are added on to the existing data in the system, and other data elements overwrite the existing data.** The table on the following page and the [ADR Merge Rules](#) outline how each data element is merged across multiple files.

### Data Appended if New

When files are merged, new data are added for elements which allow multiple responses.

### Overwritten Data

Data are overwritten for elements which only allow one response. There are multiple processes by which the system chooses which values to keep vs. overwrite, outlined below:

- **Hierarchy/Priority:** A few items (HIV/AIDS Status, Ethnicity, Enrollment Status, Sex at Birth) are merged based on a hierarchy of responses. For these elements, the higher-priority response is always kept. The table below outlines elements merged by priority.

Ethnicity:	HIV/AIDS Status:	Enrollment Status at End of Year:
<ol style="list-style-type: none"> <li>Hispanic/Latino</li> <li>Non-Hispanic</li> </ol>	<ol style="list-style-type: none"> <li>CDC-defined AIDS</li> <li>HIV-positive, not AIDS</li> <li>HIV-positive, AIDS status unknown</li> <li>HIV-indeterminate</li> </ol>	<ol style="list-style-type: none"> <li>Disenrolled</li> <li>Enrolled, receiving services</li> <li>Enrolled, on waiting list</li> <li>Enrolled, services not requested</li> </ol>

- **Incongruent:** On Gender and Sex at Birth, records are marked as “Incongruent” if the data do not match across files. To clear incongruent values, all client-level data must be cleared and new XML files must be uploaded with congruent data.
- **Keep “Yes”:** A “Yes” response is always kept, regardless of the order or upload.
- **Date/Value:** For some fields, responses are compared by value or date to keep the highest, lowest, most recent, or oldest value.

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## Merge Rules for All ADR Data Elements

The following table illustrates the Merge Rules for all ADR data elements. Please note that **in all cases, any response will overwrite missing data** on any element in an existing file.

ID	Element	Append Values if New	Overwrite Values By:				
			Priority	Incongruent	Keep "Yes"	Date	Value
4	Ethnicity		✓				
5	Race	✓					
6	Gender			✓			
9	Birth Year					Oldest	
10	HIV/AIDS Status		✓				
11	Poverty Level						Lowest
13	Health Coverage	✓					
14	New Enrollment				✓		
15	Application Received Date					Oldest	
16	Application approval Date					Oldest	
17	Last Eligibility Confirmation Date					Newest	
18	Enrollment Status at End of Year		✓				
19	Disenrollment Reason	✓					
20	Insurance Assistance Received				✓		
21	Insurance Premium Amount						Highest
22	Insurance Premium Month Count						Highest
23	Mediation Copay or Deductible Amount						Highest
25	Medication Dispensed Flag				✓		
26-29	Medication	✓					
32-33	CD4 Test	✓					
34, 35	Viral Load Test	✓					
67	Insurance Assistance Type	✓					
68	Hispanic Subgroup	✓					
69	Asian Subgroup	✓					
70	Native Hawaiian or Pacific Islander Subgroup	✓					
71	Sex at Birth				✓		

### Need help with your ADR data?

Contact the DISQ Team at [data.ta@caiglobal.org](mailto:data.ta@caiglobal.org) for individualized technical assistance to help you address your data quality needs!

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