



FoM OpenSpecimen Participant Matching Guidance Document

The OpenSpecimen (OS) system checks for duplicate participants within across all Collection Protocols (CPs) within the instance in the below 2 cases:

- Case 1: When a new participant is registered (i.e. added)
- Case 2: When a participant registration form is edited

In both cases, users will be prompted to either:

- Ignore the match and proceed. No matching takes place.
- Select the match and Use Selected Match to proceed with the matching procedure. **Note:** Once matched, participants **cannot** be unmatched. Edits made after matching will be updated across all matched CPs.
- Go Back. Takes you back to the Participant Registration page
- Cancel. This cancels and does not save data entered in the Participant Registration page.

Participant matching is contingent on the following fields in the Participant Registration page:

- MRN and site
- eMPI (Master Patient Index)
- SSN (or equivalent country-specific ID like Medicare, NRIC, etc.)
- Last name and birthdate

Once Participant matched/merged with in multiple CPs:

The Participant Registration page may be edited and subsequently updated/deleted by users with access to either CP. CP-specific custom fields will not be viewable.

CPs will automatically sync changes/updates made to participant registration fields. Only participant registration fields are updated; visits and specimen pages are not affected.

Recommendations:

End-users with add/edit privileges on the Participant Registration page must be trained on how to handle potential participant matching within the OS system. For CPs that wish to keep



participants unmatched, the FoM DM Team **strongly recommends** using the “*Ignore the match and proceed*” option on the matching prompt page to avoid any potential linkage errors.