

## Client Merge Guide

The Client Merge will allow users to merge duplicated clients into a single record. This is an important tool to assist organizations in ensuring their clients are as de-duplicated as possible, which provides improved reporting accuracy and easier to maintain data. The Client Merge tool allows for the searching, selecting and merging of multiple duplicated clients at one time and also walks users through a process of checking and merging, if necessary, duplicated household members into a single household record.

*Please note that the Client Merge tool is only available for users that are Assistant Managers or Agency Managers and can be found under the [Home](#) -> [Client Management](#) folder in the system.*

When selecting this option you are taken to the first step in the process, which is an open client search that allows for the searching and locating of duplicate clients in your organization. When a duplicate is identified in your organization you can locate them using this initial step or you can use the **Duplicate Clients Report** on the top of the screen to find clients to locate in the search.

Client ID:

First Name:

Last Name:

Full Name (Last, First):

Birth Date:

Social Security Number:

[Duplicate Clients Report](#)

2 records found.

Client	First	Last	Full Name	Age	Household	Birth Date	Social Security	Gender	Race	Veteran	Disabling	Created
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*We recommend using generic searches to try and locate as many possible duplicates as possible; by using only the first few characters of the first and/or last name will help search and display clients that may be duplicates (i.e. entering "Su" for first name to find persons named Susie and Suzanne).*

After entering your criteria and hitting **Search** the form will return any matching client in your organization. Each client listed will have their profile information displayed to better help identify duplicate clients.

Client ID:

First Name:

Last Name:

Full Name (Last, First):

Birth Date:

Social Security Number:

3 records found.

<input type="checkbox"/>	Merge Type*	Client ID	First Name	Last Name	Full Name (Last, First)	Age	Household	Birth Date	Social Security Number	Gender	Ethnicity	Race	Veteran Status	Disabling Condition	Created Date
<input type="checkbox"/>	-- SELECT --	88791	Ken	Ponder	Ponder, Ken	30	Ponder, Ken Household	3/17/1985	787-99-2345	Male	Non-Hispanic/Latino	White	No	No	6/21/2015
<input type="checkbox"/>	-- SELECT --	88476	Kenneth	Ponder	Ponder, Kenneth	30	Ponder, Kenneth Family	3/17/1985	787-99-2345	Male	Non-Hispanic/Latino	White	No	No	6/15/2015
<input type="checkbox"/>	-- SELECT --	88794	Kendra	Ponders	Ponders, Kendra	38	Ponders, Kendra Household	3/17/1977		Female			No		6/21/2015

Search results are displayed below in which to identify any duplicate clients

Once duplicated clients are identified use the **Merge Type** field to label the 'Merge To' client and the 'Merge From' clients, which are selectable from the a drop-down list. Each client merge requires at least two clients to be identified, one as the *Merge To*, and at least one as the *Merge From*.

3 records found.

<input type="checkbox"/>	Merge Type*	Client ID	First Name	Last Name	Full Name (Last, First)	Age	Household	Birth Date	Social Security Number	Gender	Ethnicity	Race	Veteran Status	Disabling Condition	Created Date
<input checked="" type="checkbox"/>	Merge From	88791	Ken	Ponder	Ponder, Ken	30	Ponder, Ken Household	3/17/1985	787-99-2345	Male	Non-Hispanic/Latino	White	No	No	6/21/2015
<input checked="" type="checkbox"/>	Merge To	88476	Kenneth	Ponder	Ponder, Kenneth	30	Ponder, Kenneth Family	3/17/1985	787-99-2345	Male	Non-Hispanic/Latino	White	No	No	6/15/2015
<input type="checkbox"/>	-- SELECT --	88794	Kendra	Ponders	Ponders, Kendra	38	Ponders, Kendra Household	3/17/1977		Female			No		6/21/2015

The *Merge To* client will be the client record in which all other duplicate clients will be merged into and will contain the client profile information displayed on the screen for that record. The client merge tool allows for the selection of up to 4 *Merge From* clients to be combined to the single and final *Merge To* client, which should allow for handling of any duplication scenario in a single process.

When performing a client merge you want to select as the *Merge To* client the client record with the most complete and accurate client profile information as displayed in the search results grid. During the client merge process no client profile information is combined and the *Merge To* client will become the client profile information of record; any profile information contained within the *Merge From* client(s) will be discarded.

*Please note that the client merge process will automatically combine all transactions from all selected clients, which includes all Enrollments, Services, Assessments, Case Notes, Case Load Assignments, Data Sharing Agreement and any other data collected outside of the general client profile, into the final client record.*

Once the duplicate clients have been identified and the *Merge To* client and *Merge From* client(s) have been set, select the **Continue** option on the bottom of the screen to begin the actual client merge. The client merge process will then prompt you to select which household for which to place your merged client.

Client Merge Household Selection

The following list provides all of the households the selected duplicate clients are associated with, please select the household in which to place any of the 'From' or 'To' clients previously indicated. Any household not selected will be retired to allow the client to reside in a single household.

*Please note that when process includes additional household members, all merged or non-merged (skipped) household members will also be placed into the household selected to ensure all clients are residing in the same family in the system.*

Household:\* -- SELECT --  
Ponder, Ken Household  
Ponder, Kenneth Family

Select the Household in which to place your merged client

The household selection form will display the households from all the client records selected to be merged in the first step (all *Merge To* and *Merge From* clients), which provides the user with the flexibility to place the merged client in a specific household after the merge has been completed.

The Household selection also allows users to choose the 'Merge To' client based solely on the client record that has the best client profile information and have the system place the client into the proper household denoted by the user in this step.

Once the household is selected, hit the **Save and Continue** option on the bottom of the screen. Once the save button is selected the client will be permanently merged in the system. At this point, if the client that was merged is a single person the process is complete.

### Household Merge:

If the client is identified as being associated to additional household members in the system, the process is not complete and will automatically launch into a household merge. The household merge process will loop through each additional household member and allows you to perform the same search, locate and merge process for duplicates as well.

The household member screen will display a grid that contains all of the household members associated with the initially merged clients, along with their current household and whether they have been merged during this process. The system will attempt to identify duplicates between the selected households and they will be listed in the grid (examples are Alex and Susie/Suzanne below) which can help users during the subsequent household member searches.

Current Household Member: Ponder, Alex

Name	Age	Household	Status
Ponder, Kenneth	30	Ponder, Kenneth Family	Merged
Ponder, Alex	9	Ponder, Kenneth Family	
Ponder, Alex	7	Ponder, Ken Household	
Ponder, Billy	15	Ponder, Kenneth Family	
Ponder, Susie	25	Ponder, Ken Household	
Ponder, Suzanne	25	Ponder, Kenneth Family	

The current household member will be listed and highlighted within the grid

The current household member will be listed and highlighted within the above grid and will also be automatically populated into the search form. Hit the **Search** button to identify duplicated clients.

Name	Age	Household	Status
Ponder, Kenneth	30	Ponder, Kenneth Family	Merged
Ponder, Alex	9	Ponder, Kenneth Family	
Ponder, Alex	7	Ponder, Ken Household	
Ponder, Billy	15	Ponder, Kenneth Family	
Ponder, Susie	25	Ponder, Ken Household	
Ponder, Suzanne	25	Ponder, Kenneth Family	

Client ID:

First Name:

Last Name:

Full Name (Last, First):

Birth Date:

Social Security Number:

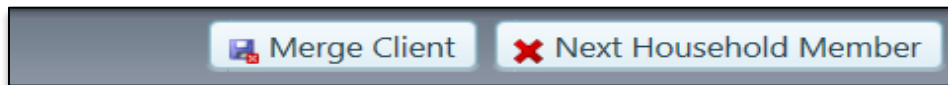
And their First and Last Name will be pre-populated in the search area

The search results will be displayed below and you will use the same process to identify duplicate clients for household members as with the initial client. You can select a single *Merge To* client and up to 4 *Merge From* clients in which to merge into a single client record.

3 records found.

<input type="checkbox"/>	Merge Type*	Client ID	First Name	Last Name	Full Name (Last, First)	Age	Household	Birth Date	Social Security Number	Gender	Ethnicity	Race	Veteran Status	Disabling Condition	Created Date
<input checked="" type="checkbox"/>	Merge To	88575	Alex	Ponder	Ponder, Alex	9	Ponder, Kenneth Family	7/28/2005		Female	Non-Hispanic/Latino	White	No	No	6/16/2015
<input checked="" type="checkbox"/>	Merge From	88793	Alex	Ponder	Ponder, Alex	7	Ponder, Ken Household	7/28/2007		Female	Non-Hispanic/Latino	White			6/21/2015
<input type="checkbox"/>	-- SELECT --	88795	Alexia	Ponders	Ponders, Alexia		Ponders, Kendra Household			Female					6/21/2015

At the bottom of each household member screen will be two options, the **Merge Client** button and the **Next Household Member** option. One of these options will need to be selected to move to the next step of the process.



When duplicate clients are located and identified select the **Merge Client** option, this will merge all of the duplicate clients into a single record as in the initial step. In many cases, the household member will not have a duplicated client and does not need to be merged, in this situation select the **Next Household Member** option and this client will be untouched and you will move to the next client in the grid.

As you move through the household members, after each step, the grid will be refreshed and its new status will be displayed along with listing any client that was previously merged.

<input type="checkbox"/>	Name	Age	Household	Status
	Ponder, Kenneth	30	Ponder, Kenneth Family	Merged
	Ponder, Alex	9	Ponder, Kenneth Family	Merged
	Ponder, Billy	15	Ponder, Kenneth Family	
	Ponder, Susie	25	Ponder, Ken Household	
	Ponder, Suzanne	25	Ponder, Kenneth Family	

*Even if a client is not displayed with duplicate record in the above household member grid that does not mean a duplicate client does not exist. It is recommended to perform at least one search on each household member before moving to the next step to ensure that no duplicate client records exist.*


All persons and household members included in the client merge process, whether actually merged or only skipped using the next household member option, will be placed into the same household. Which is the household that was selected during the initial client merge steps and ensures all clients included are together in the same household in the system going forward automatically.

Once you have selected the “merge” or “next” option on the last household member, the system will load a confirmation screen in which you will be presented with the completed version of your merged household and will list each household member. You can quickly review the Join Date and Relationship of each household member to ensure the household is properly setup going forward.

4 records found.			
<input type="checkbox"/>	Member Name ▲	Household Join Date* ▲	Relationship* ▲
	Ponder, Kenneth T.	03/01/2014	Self ▼
	Ponder, Suzanne	04/01/2014	Spouse ▼
	Ponder, Billy Jr.	05/01/2014	Dependent Child ▼
	Ponders, Alex	05/01/2014	Daughter ▼



Once you are finished with your review, and any changes needed have been entered, hit the **Save and Continue** option on the bottom of the screen.

Once you have completed the first step for a single person merge or completed the household review step in a household merge the process is 100% done and you will be prompted with the below notice and question, which includes the ability to **Start a New Client Merge** or **End the Client Merge Process**.



### Client Merge Completed

The Client Merge Process has been completed. Would you like to:

-  Start a New Client Merge?
-  End Client Merge Process?

As previously mentioned, the Client Merge contains a **Duplicate Clients Report** that can provide a list of ‘possible’ duplicate clients in your organization. To run the report, select your organization(s) and press the report button on the bottom of the report screen.

*The Duplicate Client Report can also be found under the Home -> Management Reports -> Client Management Reports folder.*