



Revolutionizing Human Services Software

Merge Clients & Client Deletion September 2022

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Overview

The Merge functionality grants the ability to take two Client records that are identified as being duplicated and join them to create one single consolidated Client record. The data that is transferred through Merge is from the table level, not field level, and thus becomes more complicated due to including data stored on custom tables.

The Merge functionality works at the family level as families are an important concept in CaseWorthy. Both entire families and individual members of a family can be merged.

Throughout this document, Clients and families are referred to as Client A and Family A, and Client B and Family B. Anything referencing B is associated with the surviving record/Client.

Information on Client A's record transfers to Client B unless it is a table with ClientID or EntityID as a Primary Key, meaning Client demographic data, in which case the information is not transferred.

Depending on the purpose of the merge, the old Client records may need to be deleted.

This functionality is intended for administrative purposes.

Pre-Requisite Process

Before starting the merge process, it is vitally important to complete the following preparation work to ensure the resulting record is accurate.

Client Demographics

Client demographics will not be included in the merge process; specifically, information entered on the *Client Demographics* form or information on tables with EntityID or ClientID as a primary key. Therefore, any necessary Client demographics must be added to Client B.

Housekeeping

To preserve the data quality, it is highly recommended to edit the data between the individuals being merged. This involves deleting inaccurate Enrollments, Programs, Services, Case Notes, etc. from Client/Family A and B. This will prevent data from becoming unclear and incorrect.

To remove unwanted or incorrect data, begin by deleting specific information and work backwards so as to not cause data to be orphaned. For example, if an enrollment record needs to be deleted, work backwards through Case Notes, Services, Programs and then Enrollments.



TIP: Pay special attention to warnings and form level help on each form during the process.

Custom Tables

Sync types ensure that the information on each custom table is merged in the correct way. **Sync types are automatically assigned to custom tables during an overnight process which runs daily.** Custom tables are not included in the merge process unless they are assigned a sync type before the merge takes place.



TIP: When creating custom tables that relate to Client data, a best practice is to relate the table to **dbo.Client** during creation. Doing so will ensure merge and delete functionality work correctly.

Create Table

Table Name:

Related To

Search Results

dbo.AssessClientLanguage	
dbo.AssessGrantClientEligibility	
dbo.AssessGrantClientEthnicity	
dbo.AssessGrantClientGender	
dbo.AssessGrantClientRace	
dbo.Client	
dbo.ClientAccessLog	
dbo.ClientAccount	

Custom Table Configuration for Merge

System Administrators have the ability to manually assign sync types if the need arises. This is done on the *Custom Table Configuration for Merge* form.

[Navigation](#) All Features Role – Administration Tab: Client Merge Setup

Click SEARCH to display all existing tables and associated sync types. Filters are also available to limit results.

Click ADD ROW to both initiate the creation of a new table and sync type as well as to display existing tables and associated sync types.

Custom Table Configuration for Merge

Filters

Table Name

Sync Type

Total Rows: 3656

Search

Table Name	PK Column	Sync Type	ColumnName
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BBoardHistory		Client Demographic Info not Sync (Do Not Use)	EntityID
Bereavement		Client Demographic Info not Sync (Do Not Use)	EntityID
Client		Client Demographic Info not Sync (Do Not Use)	EntityID
ClientGender		Client Demographic Info not Sync (Do Not Use)	ClientID
ClientOtherInfo		Client Demographic Info not Sync (Do Not Use)	ClientID
ClientPrintPhoto		Client Demographic Info not Sync (Do Not Use)	ClientID

Save Cancel

Use the **Table Name** lookup to search for a custom table which requires setup for the merge process. Select the desired table.

Custom Tables without Merge Setup Select Lookup

Custom Tables without Merge Setup Select

Filters

This form lists all custom tables that have not yet been set up for the client merge process. Select a table name to begin setting it up for merge.

Table Name

Page Info	Table Name	Primary Key
	XClientResume	XClientResumeID
	Xcres	XcresID
	Xexit	AssessmentID
	XPetShariq	XPetShariqID
	XPetsLisa	XPetsLisaID
	XTargetPopulations	XTargetPopulationsID

Select a **Sync Type** from the dropdown list.

Table Name	PK Column	Sync Type	ColumnName
✓ <input type="text"/>	XTargetPopulationsID	<div> --Nothing-- 1:Replace existing EntityID with new, merged value for Client.EntityID 1a:Replace existing ContextID with new, merged value for Client.EntityID 2:Replace existing data with new, merged values for EntityID and EnrollmentID 2a:Replace existing data with new, merged values for ContextID and EnrollmentID </div>	<input type="text"/>
✓ UserExt			EntityID
✓ EntityContext			merge process, ContextID

Sync Types

Sync Types indicate how the chosen custom table will be merged. All baseline tables have already been assigned sync types for the merge. Sync types are automatically assigned to custom tables during an overnight process which runs daily.

The **Sync Type** description explains how the data from the custom table will be retained and changed during the merge process.

Selecting a **Sync Type** depends primarily on the contents of the custom table. It is important to know how your custom tables capture data. 'Sync type 1' will most likely be used unless other columns listed below are also present on the table.

For example, if the custom table contains an EntityID and an EnrollmentID, select 'Sync Type 2' which will preserve all records from Client A but replace the EntityID and EnrollmentID with those of Client B.



NOTE: The merge will only execute if Client A's ClientID has information in the table, otherwise, the table will be skipped.

For 'Sync Types 1-4a' and 'Table is used in Portal', select the option that contains the column(s) found on the custom table. The row will expand, and an additional 1-3 fields will appear based on the **Sync Type** that was selected. Fill in the fields according to the specific instructions below.



NOTE: Addresses stored on the Baseline Address table appear on the surviving Client's record as a previous address.

1: Replace existing EntityID with new, merged value for Client.EntityID

Indicate the name of the column that stores the EntityID in the 'ClientID Column' field.

✓ XBackupPlan 🔍 XBackupPlanID 1: Replace existing EntityID with new, merged value for Client.EntityID ClientID ✕

📌 Name of the column where ClientID is stored ClientID

1a: Replace existing ContextID with new, merged value for Client.EntityID

Indicate the name of the column that stores the ContextID in the 'ClientID Column' field.

✓ ZipCodeJunction 🔍 ZipCodeJunctionID 1a: Replace existing ContextID with new, merged value for Client.Entity ContextID ✕

📌 Name of the column where ClientID is stored ContextID

2: Replace existing data with new, merged values for EntityID and EnrollmentID

Indicate the name of the column that stores the EntityID in the 'ClientID Column' field and the name of the column that stores the EnrollmentID in the 'EnrollmentID Column' field.

✓ UserClientTime 🔍 UserClientTimeID 2: Replace existing data with new, merged values for EntityID and Enr ClientID ✕

📌 Name of the column where ClientID is stored ClientID

📌 Name of the column where EnrollmentID is stored EnrollmentID

3: Replace existing data with new, merged values for EntityID and FamilyID

Indicate the name of the column that stores the EntityID in the 'ClientID Column' field, and the name of the column that stores the FamilyID in the 'FamilyID Column' field.

✓ ResourceUsageHold UsageHoldID 3: Replace existing data with new, merged values for EntityID and FamilyID EntityID ✕

Name of the column where ClientID is stored EntityID

Name of the column where FamilyID is stored FamilyID

3a: Replace existing data with new, merged values for ContextID and FamilyID

Indicate the name of the column that stores the ContextID in the 'ClientID Column' field and the name of the column that stores the FamilyID in the 'FamilyID Column' field.

✓ ClientAddress AddressID 3a: Replace existing data with new, merged values for ContextID and FamilyID ClientID ✕

Name of the column where ClientID is stored ClientID

Name of the column where FamilyID is stored FamilyID

4: Replace existing data with new, merged values for EntityID, EnrollmentID, and FamilyID

Indicate the name of the column that stores the ClientID in the 'ClientID Column' field, the name of the column that stores the EnrollmentID in the 'EnrollmentID Column' field, and the name of the column that stores the FamilyID in the 'FamilyID Column' field.

✓ Service ServiceID 4: Replace existing data with new, merged values for EntityID, EnrollmentID, and FamilyID ProvidedToEntityID ✕

Name of the column where ClientID is stored ProvidedToEntityID

Name of the column where EnrollmentID is stored EnrollmentID

Name of the column where FamilyID is stored FamilyID

4a: Replace existing data with new, merged values for ContextID, EnrollmentID, and FamilyID

Indicate the name of the column that stores the ContextID in the 'ClientID Column' field, the name of the column that stores the EnrollmentID in the 'EnrollmentID Column' field, and the name of the column that stores the FamilyID in the 'FamilyID Column' field.

✓ ResourceUsageEnroll 🔍 UsageEnrollmentID 4a: Replace existing data with new, merged values for ContextID, Enr EntityID ✕

📌 Name of the column where ClientID is stored EntityID

📌 Name of the column where EnrollmentID is stored EnrollmentID

📌 Name of the column where FamilyID is stored FamilyID

Table is used in portal and stores Client data

Choose this option if the table is used in the portal. Indicate the name of the column that stores the ClientID in the 'ClientID Column' field.

✓ ProgramAccount 🔍 ProgramAccountID Table is used in portal and stores client data CreatedBy ✕

📌 Name of the column where ClientID is stored CreatedBy

Tables that are assigned one of the following sync types will be skipped in the merge process and therefore may be assigned subjectively.

- **Table does not contain EntityID, FamilyID, or EnrollmentID and will not be included in the merge process:** Data in this table will not be included in the merge process.
- **Table contains entity history or Client accounts, will not be included in the merge process, and will be deleted after the merge:** Data in this table will not be included in the merge process. When the Client/Family A record is deleted, the record's data is deleted as well.
- **Data in this table belongs to Family A's enrollment, not to the Client, and will not be included in the merge process:** Data is tied to enrollment only and must stay with the non-surviving Client's family.



TIP: To avoid the risk of releasing private information, Organizations without data sharing relationships should not merge data.

Refresh Tables

When done modifying custom tables, be sure to use the REFRESH MERGE TABLE SYNC button to update the new configuration before initiating the Merge process.

Custom Table Configuration for Merge

+ Add Row Refresh Merge Table Sync

Filters

Table Name

Sync Type

Total Rows: 3656 Search

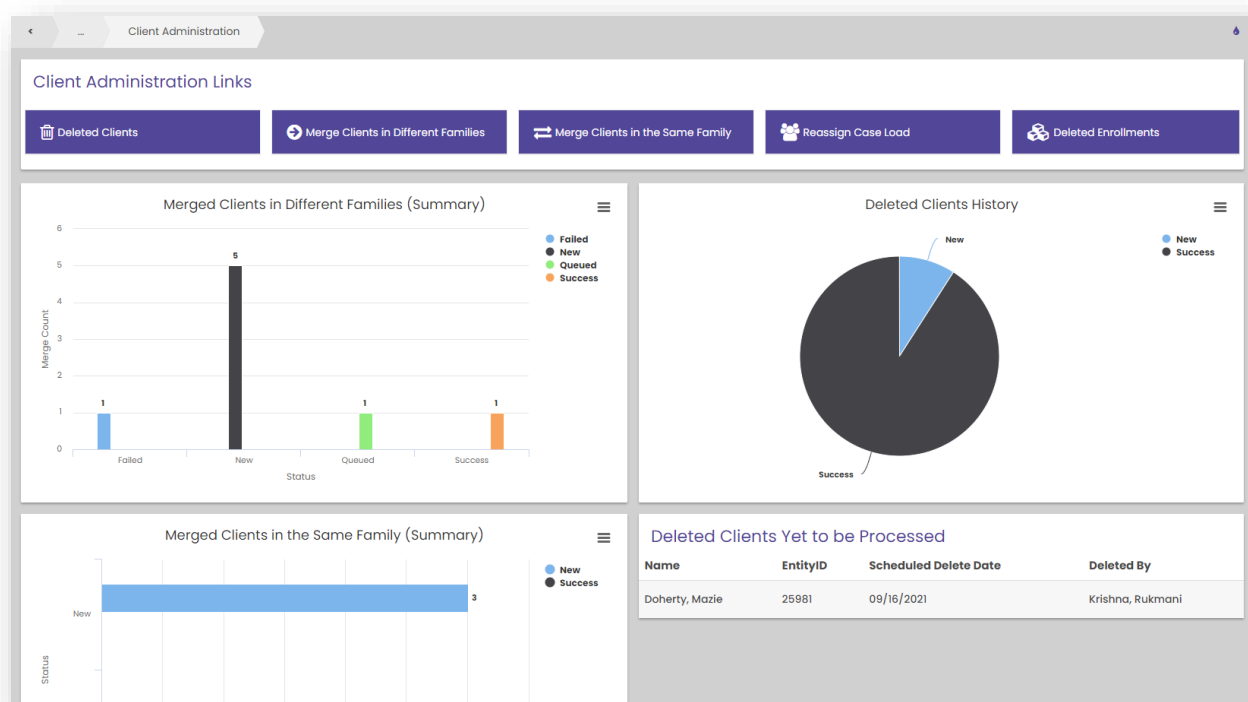
Table Name	PK Column	Sync Type	ColumnName
✓ BBoardHistory		Client Demographic Info not Sync (Do Not Use)	EntityID
✓ Bereavement		Client Demographic Info not Sync (Do Not Use)	EntityID
✓ Client		Client Demographic Info not Sync (Do Not Use)	EntityID
✓ ClientGender		Client Demographic Info not Sync (Do Not Use)	ClientID
✓ ClientOtherInfo		Client Demographic Info not Sync (Do Not Use)	ClientID
✓ ClientPrintPhoto		Client Demographic Info not Sync (Do Not Use)	ClientID
✓ ClientRace		Client Demographic Info not Sync (Do Not Use)	ClientID
✓ ClientSNAPInfo		Client Demographic Info not Sync (Do Not Use)	EntityID
✓ ClientSummaryInfo		Client Demographic Info not Sync (Do Not Use)	ClientID

Save Cancel

Client Administration Dashboard

To ensure the merge is most effective in preserving data quality, be sure to complete all pre-requisite work described in the previous sections. Once all pre-requisite work is complete, the Merge process is initiated from the *Client Administration* dashboard.

[Navigation](#) All Features Role – Administration Tab: Client Administration > Client Administration



The *Client Administration* dashboard includes links to access various functionalities including:

- Accessing deleted Client records
- Merging Clients in different families
- Merging Clients in the same family
- Reassigning Client caseloads between Case Managers
- Accessing deleted program enrollments

The dashboard also includes queries displaying details related to the functionalities which list:

- New deletes which have yet to be processed
- Records in the merge queue
- New merges which have yet to be processed

Merge Clients in Different Families

This process is used to merge Clients for two different purposes.

- One Client record or several Client records from one family are merged with one Client or multiple Client records of another family. After this process, the old Client records are deleted.
- A single Client's record which is used in two families is consolidated and associated with one family. The Client is then removed from the old family but is not deleted.

[Navigation](#) All Features Role – Administration Tab: Client Administration > Client Administration > MERGE CLIENTS IN DIFFERENT FAMILIES

To initiate the merge process for either purpose, click the ADD NEW button on the *Merged Clients in Different Families Summary* form.

← Merge Clients in Different Families Summary + Add New

Filters

[Merged Clients in Different Families](#)

Click the Add New button above to either resolve a duplicate client conflict or move a client's data from one family to another.

⚠ The Process Now options are not available during peak operating hours (8-5 MST). Please use the Queue options to allow these to run overnight or you may run manually outside of this time range.

Status

Total Rows: 75 Refresh

ID	Family Name	Old Family	Status	Comments	Created Date	Created By
72	Bell,Asiya-2009-04-01	Doherty,Asiya-1970-02-07	Reversed Successfully		9/16/2021 1:58 PM	Krishna, Rukmani
70	Heaton,John-2000-10-10	Heaton,Jonathan-2003-10-10	Queued		9/3/2021 2:49 PM	tester, autoqa
68	Alcock,Igor-1970-01-01	Alcock,Iga-1970-01-01	Success		9/2/2021 4:58 PM	Krishna, Rukmani
66	Guy,Kaja-1965-05-05	Gray,Kaja-1971-10-08	Queued		8/27/2021 11:10 AM	Tjoe, Jane
65	Wilde,Sania-2001-10-10	Patterson,Sania-2000-10-10	Failed	Invalid column name 'ProviderServiceID'.	8/17/2021 12:53 PM	tester, autoqa

Done

Merging Clients with Different Client IDs

When merging one Client record or several Client records from one family into one Client or multiple Client records of another family, Family A members are merged into Family B members. The surviving Family B Client's record will include all enrollment related data including services, referrals, assessments, case notes, etc.

Any individual Clients not selected in Family A to merge to Family B will remain with Family A.

If the Head of Household is merged into Family B, a remaining Family A member must be assigned as the new Head of Household.

When merging multiple family members, be sure to perform the merge at the same time to ensure that the enrollment data is transferred correctly.

After the merge is complete, Clients who were merged out of Family A should be deleted.

Selecting Families

Merge Clients in Different Families

Filters

Merge Clients in Different Families

Merges can be performed for individual Client records or for multiple Client records from the same family using one process.

Family A will be merged into Family B. Family B will include the surviving Client records after the merge process which includes ownership of all enrollments and enrollment related data including services, assessments, etc. which were previously owned by Family A. If members of Family A are not included in the merge process, they will remain associated with Family A with their data intact.

Use the lookups to search for each family.

Family A ID ★ 15020

Family B ID ★ 15021

Click inside the field for **Family A ID** to search for either the family or the members of the family with the duplicate record(s). After selecting the required record, the family members will display in the **Client A** Column.

Next, click inside the field for **Family B ID** to search for the family or members of the family with which the Client(s) will be merged.

Including Enrollment Statuses

Enrollments with status of 'Assessments Pending', 'Enrolled', and 'Exited' are included in the merge process by default.

Enrollments which have been deleted will not be included in the merge and will remain with Family A.

To include enrollments with statuses of 'Unknown' and/or 'Ineligible', select them in **Additional Enrollment Status**.

The dialog box is titled "Enrollment Statuses Included in Merge Process". It contains three paragraphs of text: "Enrollments with status of 'Assessments Pending', 'Enrolled', and 'Exited' are included in the merge process by default.", "Enrollments which have been deleted will not be included in the merge and will remain with Family A.", and "To include enrollments with statuses of 'Unknown' and/or 'Ineligible', select them below." Below the text is a section labeled "Additional Enrollment Status" with a dropdown menu currently showing "Choose Options...". The dropdown is open, showing two options: "Unknown" with a grey checkmark and "Ineligible" with a blue checkmark. At the bottom of the dialog are two buttons: "Add Selected" and "Cancel".

Selecting Clients

Family B members will become available for selection in the **Client B** dropdown list upon selecting a member of Family A in the **Client A** column.

The form is titled "Selecting Clients". It contains instructions: "Each of the members of Family A are listed below under Client A. Select each Client which should be included in the merge process by clicking the checkmark. Then select the corresponding Client B into which Client A will merge." and "Repeat the process for each Family A member. Once ALL necessary members are configured, click SAVE." Below the instructions is a red warning triangle icon followed by the text: "DO NOT CLICK THE 'SAVE' BUTTON BEFORE COMPLETING THE ABOVE INSTRUCTIONS." The main part of the form is a table with four columns: "Client A", "Client A ID", "Client B *", and "Client B ID *". There are three rows of data. The first row shows "Guerra, Max" with ID "26308" and "Guerra, Maximus" with ID "26311". The second row shows "Guerra, Marie" with ID "26309" and "Guerra, Maria" with ID "26313". The third row shows "Guerra, Jason" with ID "26310" and "Guerra, John" with ID "26312". The "Client B" dropdown for the second row is open, showing options: "--Nothing--", "Guerra, John", "Guerra, Maria", and "Guerra, Maximus". At the bottom right of the form are "Save" and "Cancel" buttons.

Client A	Client A ID	Client B *	Client B ID *
✓ Guerra, Max	26308	Guerra, Maximus	26311
✓ Guerra, Marie	26309	Guerra, Maria	26313
✓ Guerra, Jason	26310	Guerra, John	26312

For each necessary Client record of Family A, first click the checkbox and then select the corresponding member of Family B from the dropdown in the **Client B** column.

Select all members of the family who will be merged in the same process to guarantee that enrollments with multiple members will be transferred correctly.



NOTE: Beyond the convenience of merging multiple records for a family, the ability to view the members of both families is available here to allow the User to see the impact that this merge will have on both family groups.

Once Clients have been selected, click the SAVE button which will add the record to the *Merge Clients in Different Families Summary* form with a **Status** of 'New'.

Filters

Merged Clients in Different Families

Click the Add New button above to either resolve a duplicate client conflict or move a client's data from one family to another.

Status

Total Rows: 77 Refresh

ID	Family Name	Old Family	Status	Comments	Created Date	Created By
96	Leon, Rayhan-1978-05-16	Schmitt, Fiza-1998-06-01	New		9/23/2022 10:39 AM	Krishna, Rukmani
95	Guaera, Maximus-1970-01-01	Guerra, Max-1970-01-01	New		9/23/2022 10:36 AM	Krishna, Rukmani

See the [Merge Clients in Different Families & Same Family Summary](#) for directions to continue the process.

Merging Clients with the Same Client ID

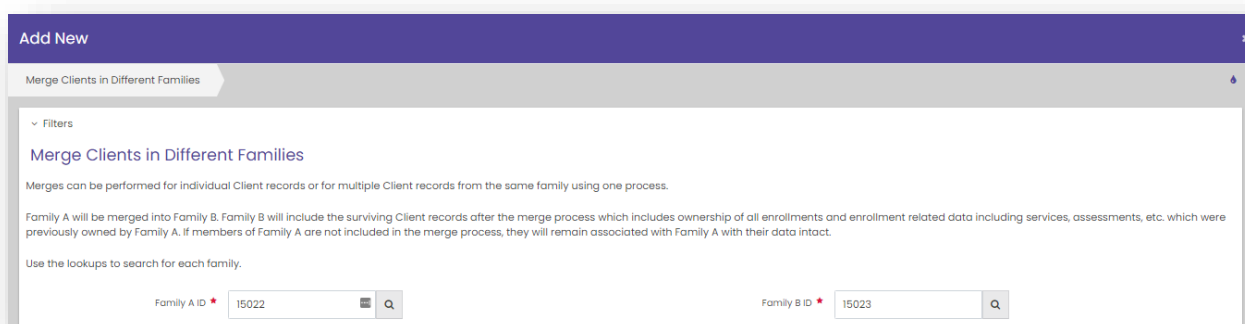
Merging to consolidate a single Client's record which is used in two families, for example Client A is in Family A and in Family B.

All of Client A/Family A enrollment related data including services, referrals, assessments, case notes, etc. is moved and associated with Family B.

If Client A is the Head of Household in Family A, a new Head of Household should be assigned.

Client A should be removed from Family A after the merge is complete.

Selecting Families



The screenshot shows a software interface titled "Add New" with a sub-header "Merge Clients in Different Families". Below this, there is a section labeled "Filters" containing the title "Merge Clients in Different Families". The text explains that merges can be performed for individual Client records or for multiple Client records from the same family using one process. It further states that Family A will be merged into Family B, and Family B will include the surviving Client records after the merge process, which includes ownership of all enrollments and enrollment related data including services, assessments, etc. which were previously owned by Family A. If members of Family A are not included in the merge process, they will remain associated with Family A with their data intact. At the bottom, there are two search fields: "Family A ID" with a red asterisk and a search icon, and "Family B ID" with a red asterisk and a search icon. Both fields contain the value "15022".

Click inside the field for **Family A ID** to search the Client who will be merged out of their family. After selecting the required record, the family members will display in the **Client A** Column.

Next, click inside the field for **Family B ID** to search the family into which the Client will be merged.

Including Enrollment Statuses

Enrollments with status of 'Assessments Pending', 'Enrolled', and 'Exited' are included in the merge process by default.

Enrollments which have been deleted will not be included in the merge and will remain with Family A.

To include enrollments with statuses of 'Unknown' and/or 'Ineligible', select them in **Additional Enrollment Status**.

The dialog box is titled "Enrollment Statuses Included in Merge Process". It contains the following text: "Enrollments with status of 'Assessments Pending', 'Enrolled', and 'Exited' are included in the merge process by default. Enrollments which have been deleted will not be included in the merge and will remain with Family A. To include enrollments with statuses of 'Unknown' and/or 'Ineligible', select them below." Below this text is a section labeled "Additional Enrollment Status" with a dropdown menu labeled "Choose Options...". The dropdown is open, showing two options: "Unknown" with a grey checkmark and "Ineligible" with a blue checkmark. At the bottom of the dialog are two buttons: "Add Selected" and "Cancel".

Selecting Clients

Family B members will become available for selection in the **Client B** dropdown list upon selecting a member of Family A in the **Client A** column.

The dialog box is titled "Selecting Clients". It contains the following text: "Each of the members of Family A are listed below under Client A. Select each Client which should be included in the merge process by clicking the checkmark. Then select the corresponding Client B into which Client A will merge. Repeat the process for each Family A member. Once ALL necessary members are configured, click SAVE." Below this text is a red warning icon and the text: "DO NOT CLICK THE 'SAVE' BUTTON BEFORE COMPLETING THE ABOVE INSTRUCTIONS." Below the warning is a table with four columns: "Client A", "Client A ID", "Client B *", and "Client B ID *". The table has three rows of data. The first row shows "Schmitt, Fiza" with ID "26314". The second row shows "Schmitt, Samina" with ID "26315", and the "Client B *" column has a dropdown menu open showing a list of names: "--Nothing--", "Leon, Rayhan", "Schmitt, Lori", and "Schmitt, Samina". The third row shows "Schmitt, Paul" with ID "26316". At the bottom right of the dialog are two buttons: "Save" and "Cancel".

Client A	Client A ID	Client B *	Client B ID *
✓ Schmitt, Fiza	26314		
✓ Schmitt, Samina	26315	--Nothing-- Leon, Rayhan Schmitt, Lori Schmitt, Samina	
✓ Schmitt, Paul	26316		

Select the duplicate Client and then select the corresponding member of Family B from the dropdown in the **Client B** column. The Client A ID will match the Client B ID.

Client A	Client A ID	Client B *	Client B ID *
✓ Schmitt, Fiza	26314		
✓ Schmitt, Samina	26315	Schmitt, Samina	26315
✓ Schmitt, Paul	26316		

Click the SAVE button which will add the record to the *Merge Clients in Different Families Summary* form with a **Status** of 'New'.

Merge Clients in Different Families Summary
Add New

Filters

Merged Clients in Different Families

Click the Add New button above to either resolve a duplicate client conflict or move a client's data from one family to another.

Status

Total Rows: 77

Refresh

ID	Family Name	Old Family	Status	Comments	Created Date	Created By
96	Leon,Rayhan-1978-05-16	Schmitt,Fiza-1998-06-01	New		9/23/2022 10:39 AM	Krishna, Rukmani
95	Guaera,Maximus-1970-01-01	Guerra,Max-1970-01-01	New		9/23/2022 10:36 AM	Krishna, Rukmani

See the [Merge Clients in Different Families & Same Family Summary](#) for directions to continue the process.

Merge Clients in the Same Family

This functionality is used to merge Client records which are in the same family.

If there are more than 2 records for a single Client in a family, only one record can be merged into the surviving record during each merge process. Multiple merge processes may be necessary to result in one consolidated Client record.

When merging 2 Client records in the same family, Client A's transactional data will be merged into Client B. The surviving Client B's record will include all enrollment related data including services, referrals, assessments, case notes, etc.

If Client A is the assigned Head of Household, ensure that Client B is assigned as the new Head of Household.

After the merge is complete, the old Client record that was merged into the surviving Client record should be deleted.

[Navigation](#) All Features Role – Administration Tab: Client Administration > Client Administration > Merge Clients in the Same Family

On the *Merged Clients in the Same Family Summary* form, click the ADD NEW button to initiate the merge process.

Selecting Family

As this process is merging Client records that belong to the same family, only the one family is entered. Upon selection, all family members will display.

The screenshot shows a web interface titled "Merge Clients in the Same Family". It includes a "Filters" section with the same title. Below the title, there is explanatory text: "Here you can identify multiple Client records that exist, for a single person, in the same family so as to merge into one consolidated Client record." and "Client A will be merged into Client B. Client B will include the surviving Client records after the merge process which includes ownership of all enrollments and enrollment related data including services, assessments, etc. which were previously owned by Client A. Unmerged members of the Family will remain intact." It also states: "If there are more than 2 records for a single Client in a family, only one record can be merged into the surviving record during each merge process. Multiple merge processes may be necessary to result in one consolidated Client record." and "Use the lookup to search for the family which includes the multiple records representing the single individual Client." At the bottom, there is a "Family ID" field with a red star icon, containing the value "15024", and a search button with a magnifying glass icon.

Including Enrollment Statuses

Enrollments with status of 'Assessments Pending', 'Enrolled', and 'Exited' are included in the merge process by default.

Enrollments which have been deleted will not be included in the merge and will remain with Family A.

To include enrollments with statuses of 'Unknown' and/or 'Ineligible', select them in **Additional Enrollment Status**.

The screenshot shows a web interface titled "Enrollment Statuses Included in Merge Process". It includes explanatory text: "Enrollments with status of 'Assessments Pending', 'Enrolled', and 'Exited' are included in the merge process by default." and "Enrollments which have been deleted will not be included in the merge and will remain with Family A." It also states: "To include enrollments with statuses of 'Unknown' and/or 'Ineligible', select them below." Below this text, there is a section labeled "Additional Enrollment Status" with a dropdown menu labeled "Choose Options...". The dropdown menu is open, showing two options: "Unknown" with a checkmark icon and "Ineligible" with a checkmark icon. At the bottom of the dropdown menu, there are two buttons: "Add Selected" and "Cancel".

Selecting Clients

Selecting Clients

Each of the members of Family A are listed below under Client A. Select each Client which should be included in the merge process by clicking the checkmark. Then select the corresponding Client B into which Client A will merge.

Repeat the process for each Family A member. Once ALL necessary members are configured, click SAVE.

Client A	Client A ID	Client B *	Client B ID *
✓ Rocha, Dawson	26319		
✓ Rocha, Kelly	26320		
✓ Rocha, Ezra	26321	Rocha, Eliza	26323
✓ Rocha, Brodie	26322	Rocha, Bodhi	26324
✓ Rocha, Eliza	26323		
✓ Rocha, Bodhi	26324		

Save Cancel

In the column **Client A**, select the record which will be merged into surviving Client B.

In the column **Client B**, select the Client's name to whose record all enrollment related data will be consolidated.

Upon clicking SAVE, a merge record will appear on the *Merged Clients in the Same Family Summary* form for each individual with a **Status** of 'New'.

Merged Clients in the Same Family Summary

Filters

Merged Clients in the Same Family

Click the Add New button above to resolve a duplicate client conflict within the same Family.

Status

Refresh

ID	Family Name	New Client	Old Family	Old Client	Status	Comments	Created Date	Created By
97	Rocha,Dawson-1995-01-15	Rocha, Eliza	Rocha,Dawson-1995-01-15	Rocha, Ezra	New		9/23/2022 10:42 AM	Krishna, Rukmani
97	Rocha,Dawson-1995-01-15	Rocha, Bodhi	Rocha,Dawson-1995-01-15	Rocha, Brodie	New		9/23/2022 10:42 AM	Krishna, Rukmani

See the [Merge Clients in Different Families & Same Family Summary](#) for directions to continue the process.

Merge Clients in Different Families & Same Family Summary

The merge process is continued on the *Merge Clients in Different Families Summary* and *Merged Clients in the Same Family Summary* forms.

ID	Family Name	Old Family	Status	Comments	Created Date	Created By
96	Leon,Rayhan-1978-05-16	Schmitt,Fiza-1998-06-01	New		9/23/2022 10:39 AM	Krishna, Rukmani
95	Guaera,Maximus-1970-01-01	Guerra,Max-1970-01-01	New		9/23/2022 10:36 AM	Krishna, Rukmani

Each merge record starts in the 'New' status which is the only status that allows for editing. Each record with a 'New' status includes two items to continue the merge process.

← ... Merge Clients in Different Families Summary + Add New

Filters

Merged Clients in Different Families

Click the Add New button above to either resolve a duplicate client conflict or move a client's data from one family to another.

Status

Total Rows: 77 Refresh

ID	Family Name	Old Family	Status	Comments	Created Date	Created By
96	Leon,Rayhan-1978-05-16	Schmitt,Fiza-1998-06-01	New		9/23/2022 10:39 AM	Krishna, Rukmani
95	Guaera,Maximus-1970-01-01	Guerra,Max-1970-01-01	New		9/23/2022 10:36 AM	Krishna, Rukmani
	Test,Jane401-1990-01-01		New		7/18/2022 8:56 AM	One, Jane

Queue

Selecting **Queue** will update the record to the 'Queued' status which means the merge process will occur in an automated process overnight.

Process

Selecting **Process** will cause the merge process to occur immediately. This item is not available during peak business hours of 8:00 AM – 5:00 PM Mountain Time daily as it may cause slowness across the entire system.

Merge Statuses

The following statuses apply to records on the *Merge Clients in Different Families Summary* and *Merged Clients in the Same Family Summary* forms.

Each **Status** determines the functionality available from the record's action gear.

New

The initial status a record receives which allows for editing of the merge details.

- **View/Edit** – The merge record can be both viewed and edited.
- **Family Member Summary** – Shows details for the Clients that will be included in the merge process.
- **Queue** – Updates the status from 'New' to 'Queued' to be included in the next overnight batch process.
- **Process** – Initiates the merge process immediately rather than queuing it in the overnight batch process queue. This item is not available during peak business hours of 8:00 AM – 5:00 PM Mountain Time daily.
- **Delete** – Allows for the removal of the process when entered in error.

Queued

The merge is scheduled to occur in the next overnight batch process.

- **View/Edit** – The merge record can only be viewed.
- **Family Member Summary** – Shows details for the Clients and families that are included in the merge process.
- **Dequeue** – Moves the status from 'Queued' back to 'New' where edits can be made.

In Process

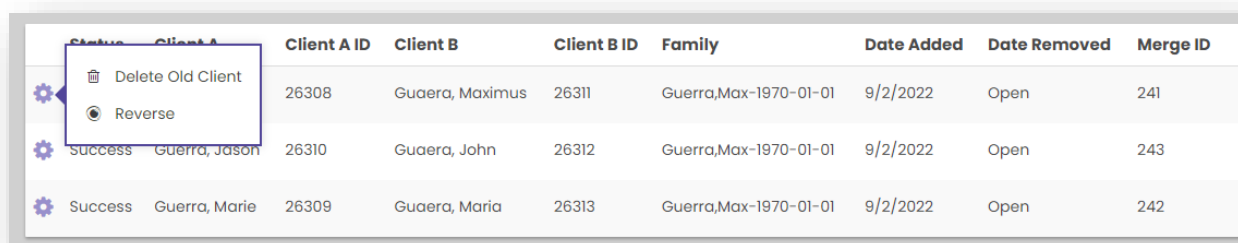
The record is currently in the merge process.

- **View/Edit** – The merge record can only be viewed.
- **Family Member Summary** – Shows details for the Clients and families that were included in the merge process.

Success

The merge process for the record has occurred and was successful.

- **View/Edit** – The merge record can be viewed.
- **Family Member Summary** – Shows details for the Clients and families that were included in the merge process AND provides the ability to:
 - Delete Client A from the action gear which is used for merging different Client IDs. See [Deleting Client Records](#) for details.
 - Reverse the merge which was performed. See [Reversing Client Merges](#) for details.



The screenshot shows a table with columns: Status, Client A, Client A ID, Client B, Client B ID, Family, Date Added, Date Removed, and Merge ID. A dropdown menu is open for the first row, showing 'Delete Old Client' and 'Reverse' options. The table contains three rows of merge records, all with a status of 'Success' and a date added of 9/2/2022.

Status	Client A	Client A ID	Client B	Client B ID	Family	Date Added	Date Removed	Merge ID
		26308	Guaera, Maximus	26311	Guerra,Max-1970-01-01	9/2/2022	Open	241
Success	Guerra, Jason	26310	Guaera, John	26312	Guerra,Max-1970-01-01	9/2/2022	Open	243
Success	Guerra, Marie	26309	Guaera, Maria	26313	Guerra,Max-1970-01-01	9/2/2022	Open	242

- **Merged Tables** – Details the Sync Type applied to each table during the merge.

Failed

The merge process was not completed. Details for why the process failed are included in the **Comments** column.

- **View/Edit** – The merge record can be viewed.
- **Family Member Summary** – Shows details for the Clients who were to be included in the merge process.



NOTE: 'Legacy Merge' appears in the **Comments** column to denote merges that were completed before the new process was implemented.

Reversed Successfully

- **View/Edit** – The merge record can be viewed.
- **Family Member Summary** – Shows details for the Clients who were included in the merge process.

Reverse Failed

- **View/Edit** – The merge record can be viewed.
- **Family Member Summary** – Shows details for the Clients who were included in the merge process.

Next Step

Delete Client Record

The old Client record should be deleted if the merge was for the purposes of:

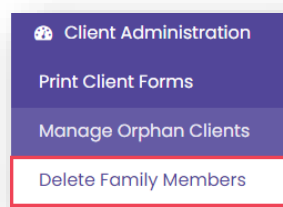
1. Merging one Client record or several Client records from one family into one Client or multiple Client records of another family.
2. Merging two Client records into one Client record in one family.

See [Deleting Client Records](#) for further instructions.

Delete Family Relationship

If the merge was completed to merge the same Client record in different families, the next necessary process is to remove the Client from Family A.

[Navigation](#) Administration Tab: Client Administration > Delete Family Members



Search for the Client A family record.

Manage Family Members

Filters

💡 Delete records from the FamilyMember table. This does not delete the client record.

Family Member Client ID

Entity Name

Family Family ID

Search

Date Added	Date Removed	Family Member ID	Family Member Client ID	Entity Name	Family	Family ID
9/2/2022	Open	18152	26314	Schmitt, Fiza	Schmitt,Fiza-1998-06-01	15022
9/2/2022	Open	18153	26315	Schmitt, Samina	Schmitt,Fiza-1998-06-01	15022
9/2/2022	Open	18154	26316	Schmitt, Paul	Schmitt,Fiza-1998-06-01	15022

Results Per Page: 10

From the action gear of the Client whose complete enrollment history was moved to Family B, select **Delete**.

Date Added	Date Removed	Family Member ID	Family Member Client ID	Entity Name	Family	Family ID
9/2/2022	Open	18152	26314	Schmitt, Fiza	Schmitt,Fiza-1998-06-01	15022
9/2/2022	Open	18153	26315	Schmitt, Samina	Schmitt,Fiza-1998-06-01	15022
9/2/2022	Open	18154	26316	Schmitt, Paul	Schmitt,Fiza-1998-06-01	15022

Results Per Page: 10

The family member relationship has been deleted, but the Client's record remains intact.

Deleting Client Records

Client records may need to be deleted after completing a merge process or when duplicate Client records are created and the error is discovered before data is recorded.

Before moving forward with the deleting of Client records or family memberships, ensure that all enrollment related data has merged with the surviving Client's record.



IMPORTANT: Data saved on the Client table will not be included in the process, so also ensure any necessary history is added to the surviving record. Review [Client Demographics](#) in the Pre-Requisites for more details.

Once the merge process is completed for:

- Merging Clients in different families with different Client IDs
- Merging Clients in the same family

with all transactional data merged to the surviving Client's record, the Client A record should be deleted.

Client deletes are soft deletes, meaning the Client and their respective data's deletion can be reversed. See [Reverse Deletes](#) for details.



NOTE: If the merge was completed to merge the same Client record in different families, see [Delete Family Relationship](#) for details on how to remove the Client from the old family.

Initiating Client Deletes after Merges

The Client delete process can be initiated from the action gear of a merge record in the 'Success' status on either the *Merged Clients in Different Families Summary* or *Merged Clients in the Same Family Summary* forms. Select **Family Member Summary**.

ID	Family Name	Old Family	Status	Comments	Created Date	Created By
96	Leon,Rayhan-1978-05-16	Schmitt,Fiza-1998-06-01	In Process		9/23/2022 10:39 AM	Krishna, Rukmani
	View/Edit					
	Family Member Summary	Guerra,Max-1970-01-01	Success		9/23/2022 10:36 AM	Krishna, Rukmani
	Merged Tables					

Each Client record which was merged into a surviving Client's record will include the action gear item **Delete Old Client**.

Status		Client A	Client A ID	Client B	Client B ID	Family	Date Added	Date Removed	Merge ID
<div> <div>⚙️</div> <div> <div>Delete Old Client</div> <div>Reverse</div> </div> </div>			26308	Guaera, Maximus	26311	Guerra,Max-1970-01-01	9/2/2022	Open	241
	Success	Guerra, Jason	26310	Guaera, John	26312	Guerra,Max-1970-01-01	9/2/2022	Open	243
	Success	Guerra, Marie	26309	Guaera, Maria	26313	Guerra,Max-1970-01-01	9/2/2022	Open	242

Upon clicking **Delete Old Client**, the record will be moved to the [Deleted Clients form](#) in a 'Queued' status.

Deleted Clients

+ Add New

Filters

Delete Clients

Click the Add New button to schedule for a client and their respective data to be soft deleted. This can be reversed using this form.

EntityID

Refresh

ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type	
	36	26308			Guerra, Max	1/1/1970 12:00:00 AM	Queued	Delete Merged Old Client

The record on the *Merge Family Summary* form will no longer include the option to delete.

Status	Client A	Client A ID	Client B	Client B ID	Family	Date Added	Date Removed	Merge ID
Reverse		26308	Guaera, Maximus	26311	Guerra,Max-1970-01-01	9/2/2022	Open	241
Success	Guerra, Jason	26310	Guaera, John	26312	Guerra,Max-1970-01-01	9/2/2022	Open	243
Success	Guerra, Marie	26309	Guaera, Maria	26313	Guerra,Max-1970-01-01	9/2/2022	Open	242

Reverse is used to reverse the merge process which is detailed in [Reversing Client Merges](#).

Deleted Clients Form

Client record deletions are initiated and managed on the *Deleted Clients* form.

[Navigation](#) All Features Role – Administration Tab: Client Administration > Client Administration > Deleted Clients

The *Deleted Clients* form displays both Clients which were deleted from the *Family Member Summary* form as well as Clients whose deletes are not due to a merge and the process is initiated here.

Deleted Clients
Add New

Filters
Delete Clients
Click the Add New button to schedule for a client and their respective data to be soft deleted. This can be reversed using this form.
EntityID

Refresh

ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type
36	26308	Guerra, Max			1/1/1970 12:00:00 AM	Queued	Delete Merged Old Client
35	26346	Smithy, Pauline		258-52-5852		New	Delete Client

Initiating New Deletions

If a Client record needs to be deleted but a merge process does not need to precede the deletion, use ADD NEW to initiate the process.

Use the Client lookup to search and select the Client record which needs to be deleted. When done, SAVE.

The record will appear with a status of 'New' and a Deleted Type of 'Delete Client'.

ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type
35	26346	Smithy, Pauline		258-52-5852		New	Delete Client



NOTE: All records on the *Deleted Clients* form with a status of 'New' will appear on the *Client Administration* dashboard in the 'Deleted Client Yet to be Processed' query.

From the record's action gear, select **Queue to Delete** to move the record from a 'New' status to 'Queued' to be included in the automated delete process overnight.


ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type
		Guerra, Max			1/1/1970 12:00:00 AM	Queued	Delete Merged Old Client
		Smithy, Pauline		258-52-5852		New	Delete Client
		Test, Jane756		--- -- --	3/7/2010 12:00:00 AM	Reversed Successfully	Delete Client

Process Delete is not available during peak business hours of 8:00 AM – 5:00 PM Mountain Time daily.

Deletions Initiated After Merges

If the delete process was initiated from the *Family Member Summary* form after a successful merge, the record will have a **Status** of 'Queued' and a **Deleted Type** of 'Delete Merged Old Client'. The Client record will be included in the automated delete process overnight.

ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type
36	26308	Guerra, Max			1/1/1970 12:00:00 AM	Queued	Delete Merged Old Client

 **NOTE:** If a Client record's deletion is initiated from a merge process and initiated manually, duplicate deletion records will not appear on the *Deleted Clients* form.

Delete Statuses

The following statuses apply to records on the *Deleted Clients* form. Each **Status** determines the functionality available from the record's action gear, including the ability to reverse a delete.

New

The initial status of a Client delete record if initiated on the *Deleted Clients* form.

- **Edit** shows the details of the Client record.
- **Delete Entity History** displays the records of the delete statuses for the Client record.
- **Queue to Delete** queues the record to be included in the overnight delete process.
- **Process Delete** initiates the delete process to occur immediately. This item is not available during peak business hours of 8:00 AM – 5:00 PM Mountain Time daily.
- **Remove From Delete List** will remove this record from appearing on the *Deleted Clients* form.

Queued

Records with this status are scheduled to be deleted during the automated process which will run that night.

- **Delete Entity History** displays the records of the delete statuses for the Client record.
- **Dequeue Delete** moves the status back to 'New'.
- **Remove From Delete List** will remove this record from appearing on the *Deleted Clients* form.

Success

The soft delete of the Client record has been completed.

- **Delete Entity History** displays the records of the delete statuses for the Client record.
- **Queue to Reverse Delete** queues the record to be included in the overnight process which will remove the end date on the Client record which reverses the delete.
- **Process Reverse Delete** initiates the process to remove the end date on the Client record to occur immediately to reverse the delete. This item is

not available during peak business hours of 8:00 AM – 5:00 PM Mountain Time daily.

- **Remove From Delete List** will remove this record from appearing on the *Deleted Clients* form.
- **Deleted Client Tables** displays each of the tables which were deleted during the process.

Failed

The delete wasn't completed.

- **Queue to Delete** queues the record to be included in the overnight delete process.
- **Process Delete** initiates the delete process to occur immediately. This item is not available during peak business hours of 8:00 AM – 5:00 PM Mountain Time daily.

Queued for Reversal

The reverse delete is scheduled to be completed in an overnight batch process.

- **Delete Entity History** displays the records of the delete statuses for the Client record.
- **Reverse Dequeue** removes the record from being queued for reversal.
- **Remove From Delete List** will remove this record from appearing on the *Deleted Clients* form.

Reversed Successfully

The record's delete was successfully reversed.

- **Delete Entity History** displays the records of the delete statuses for the Client record.
- **Process Delete** initiates the delete process to occur immediately.
- **Remove From Delete List** will remove this record from appearing on the *Deleted Clients* form.

- **Deleted Client Tables** displays each of the tables which were deleted during the process.

Reversed Failed

The record's delete was not successfully reversed.

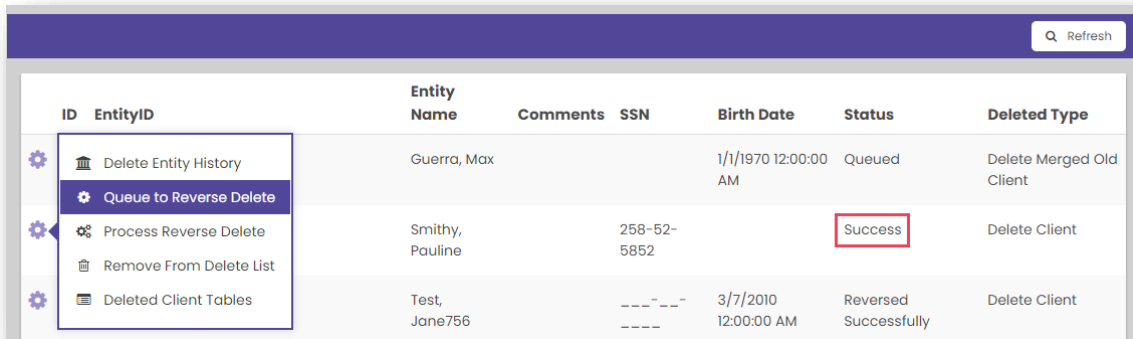
- **Queue to Reverse Delete** queues the record to be included in the overnight process which will remove the end date on the Client record which reverses the delete.
- **Process Reverse Delete** initiates the process to remove the end date on the Client record immediately to reverse the delete.

Reverse Deletes

As Client deletes are only soft deletes, they are reversible, meaning the Client record can be made available again.

Technically speaking, the Client delete process enters an end date on the Client record. Reversing the delete will update end date to 'Open'.

Initiating reverse deletes can be performed from records which have a status of 'Success' using the **Queue to Reverse Delete** action gear item on the *Deleted Clients* form.



ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type
		Guerra, Max			1/1/1970 12:00:00 AM	Queued	Delete Merged Old Client
		Smithy, Pauline		258-52-5852		Success	Delete Client
		Test, Jane756		---	3/7/2010 12:00:00 AM	Reversed Successfully	Delete Client

Process Reverse Delete is not available during peak business hours of 8:00 AM – 5:00 PM Mountain Time daily.

The record's status will be updated to 'Queued for Reversal' and the reversal process will run overnight. In this status, the action gear includes the option to cancel the reversal using **Reverse Dequeue**.

ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type
		Guerra, Max			1/1/1970 12:00:00 AM	Queued	Delete Merged Old Client
		Smithy, Pauline		258-52-5852		Queued for Reversal	Delete Client
		Test, Jane756		--- -- --	3/7/2010 12:00:00 AM	Reversed Successfully	Delete Client

When the process is completed overnight, the record will have a status of 'Reversed Successfully'.

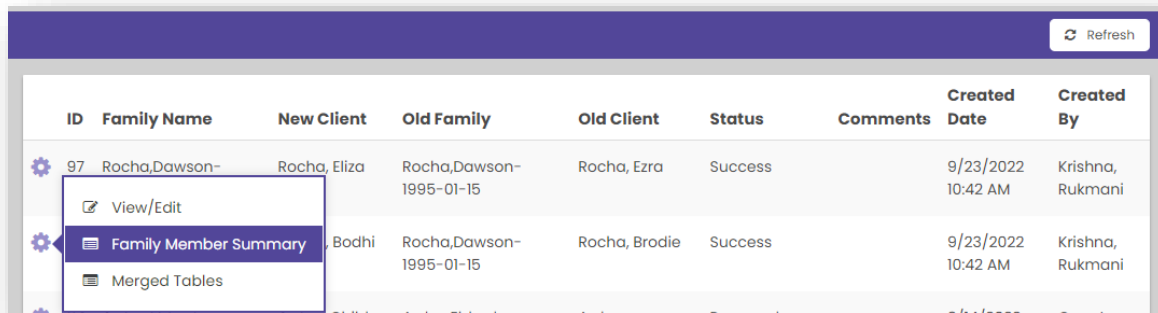
ID	EntityID	Entity Name	Comments	SSN	Birth Date	Status	Deleted Type
35	26346	Smithy, Pauline		258-52-5852		Reversed Successfully	Delete Client

Reversing Client Merges

Merge processes which are successfully completed can be reversed which results in the two distinct Client records as they were originally before the merge process.

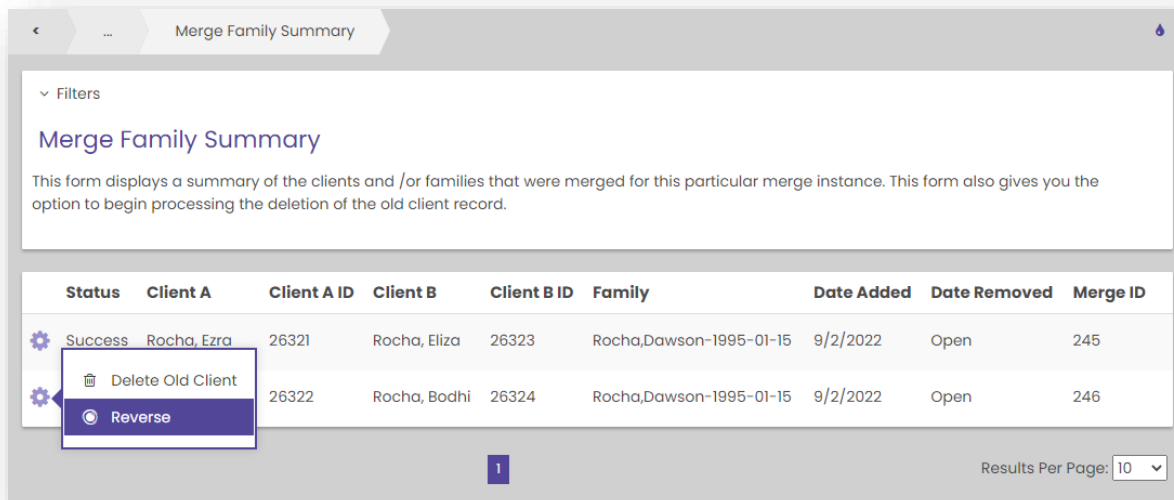
The reverse Client merge process can be initiated from the action gear of a merge record in the 'Success' status, on either the *Merged Clients in Different Families Summary* or *Merged Clients in the Same Family Summary* forms.

Select **Family Member Summary**.



ID	Family Name	New Client	Old Family	Old Client	Status	Comments	Created Date	Created By
97	Rocha,Dawson-	Rocha, Eliza	Rocha,Dawson-1995-01-15	Rocha, Ezra	Success		9/23/2022 10:42 AM	Krishna, Rukmani
		Bodhi	Rocha,Dawson-1995-01-15	Rocha, Brodie	Success		9/23/2022 10:42 AM	Krishna, Rukmani

Each Client record which was merged into a surviving Client's record will include the action gear item **Reverse**. Click Reverse to undo the previously performed merge process.



Filters

Merge Family Summary

This form displays a summary of the clients and /or families that were merged for this particular merge instance. This form also gives you the option to begin processing the deletion of the old client record.

Status	Client A	Client A ID	Client B	Client B ID	Family	Date Added	Date Removed	Merge ID
Success	Rocha, Ezra	26321	Rocha, Eliza	26323	Rocha,Dawson-1995-01-15	9/2/2022	Open	245
		26322	Rocha, Bodhi	26324	Rocha,Dawson-1995-01-15	9/2/2022	Open	246

Results Per Page: 10

When the process is complete, the record's **Status** will be updated to 'Reversed Successfully' and result in two distinct Client records. If the reverse process is unsuccessful, the status will be 'Reverse Failed'.

Merge Family Summary

This form displays a summary of the clients and /or families that were merged for this particular merge instance. This form also gives you the option to begin processing the deletion of the old client record.

Status	Client A	Client A ID	Client B	Client B ID	Family	Date Added	Date Removed	Merge ID
Success	Rocha, Ezra	26321	Rocha, Eliza	26323	Rocha,Dawson-1995-01-15	9/2/2022	Open	245
Reversed Successfully	Rocha, Brodie	26322	Rocha, Bodhi	26324	Rocha,Dawson-1995-01-15	9/2/2022	Open	246

Results Per Page: 10



NOTE: If multiple enrollment members were initially merged resulting in multiple surviving Client records, the merge record, as it appears on the *Merged Clients in Different Families Summary* or *Merged Clients in the Same Family Summary* forms, will have a status of 'Success' until every Client record in the enrollment group has been reverse merged.

Merged Clients in the Same Family Summary

Click the Add New button above to resolve a duplicate client conflict within the same Family.

Status:

Refresh

ID	Family Name	New Client	Old Family	Old Client	Status	Comments	Created Date	Created By
97	Rocha,Dawson-1995-01-15	Rocha, Eliza	Rocha,Dawson-1995-01-15	Rocha, Ezra	Success		9/23/2022 10:42 AM	Krishna, Rukmani
97	Rocha,Dawson-1995-01-15	Rocha, Bodhi	Rocha,Dawson-1995-01-15	Rocha, Brodie	Success		9/23/2022 10:42 AM	Krishna, Rukmani