

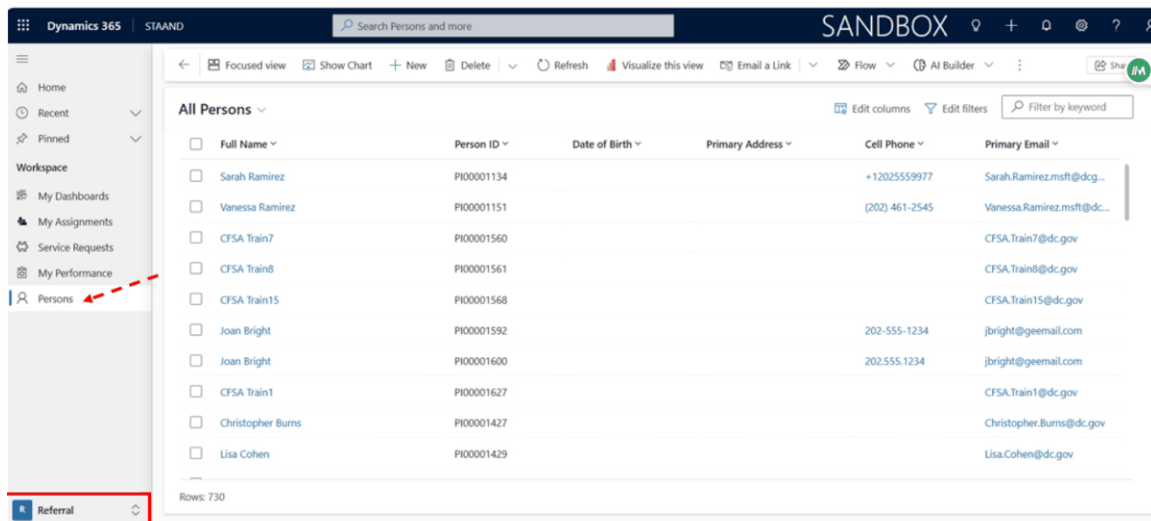
## STAAND: How to Merge Duplicate Person Records

This tip sheet guides you on merging duplicate records in the Referral and Case modules.

Merging client records is crucial when a client has duplicates, as it consolidates their information into a single record. This function can be executed either after a duplicate Person record has been created in error or during the initial entry of the Person information.

### Merging Duplicate Person Records - Referral Module

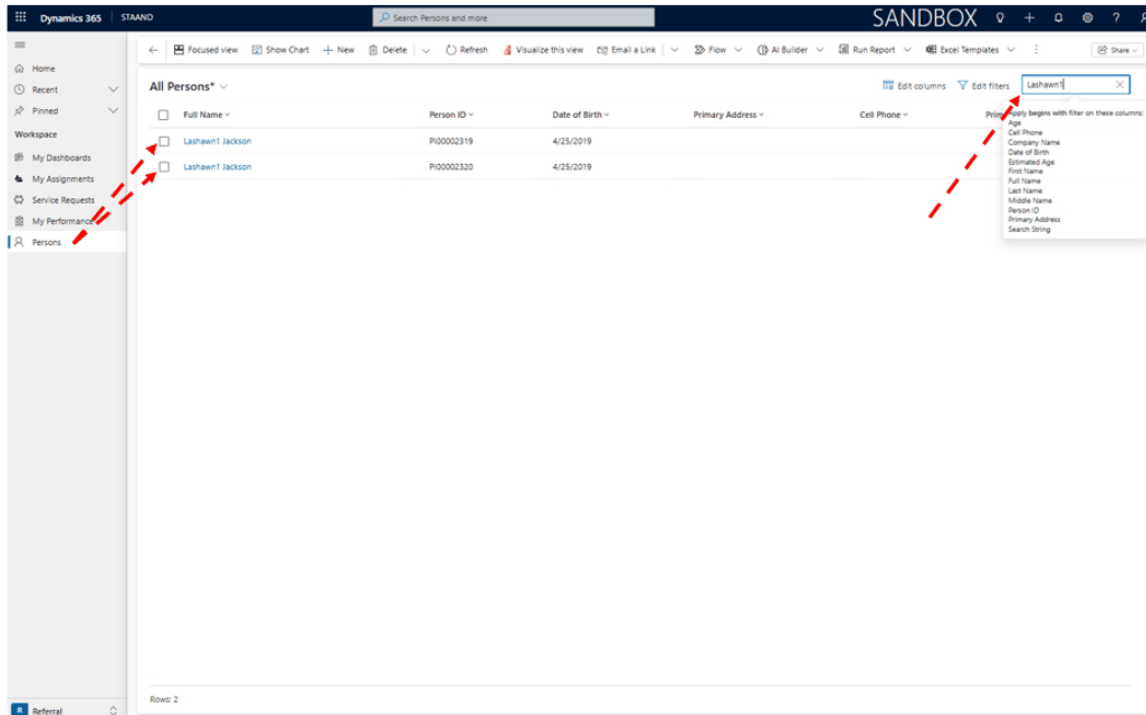
1. Select the **Referral module**, then click on **Persons** in the left navigation area.



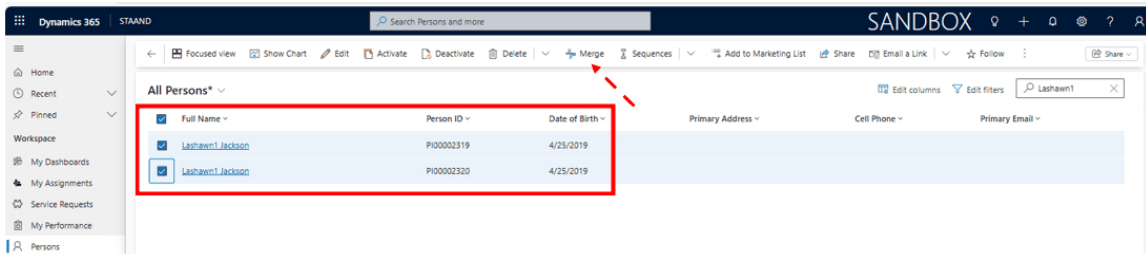
Full Name	Person ID	Date of Birth	Primary Address	Cell Phone	Primary Email
Sarah Ramirez	PI00001134			+12025559977	Sarah.Ramirez.msft@dcg...
Vanessa Ramirez	PI00001151			(202) 461-2545	Vanessa.Ramirez.msft@dc...
CFSA Train7	PI00001560				CFSA.Train7@dc.gov
CFSA Train8	PI00001561				CFSA.Train8@dc.gov
CFSA Train15	PI00001568				CFSA.Train15@dc.gov
Joan Bright	PI00001592			202-555-1234	jbright@geemail.com
Joan Bright	PI00001600			202.555.1234	jbright@geemail.com
CFSA Train1	PI00001627				CFSA.Train1@dc.gov
Christopher Burns	PI00001427				Christopher.Burns@dc.gov
Lisa Cohen	PI00001429				Lisa.Cohen@dc.gov

2. On the **All Persons** screen, locate the **Search** field on the right side of the screen and enter the first and last name, or birthdate of the individual and identify matching

records. Click on the names of each record to compare the information in the Current record to the existing Person record.



3. Select the duplicate records and click **Merge**.



4. Choose the appropriate data from the fields to combine the records into a single primary record, then click **OK**.

### Merge Persons ✕

Choose data from the fields to combine the records into a single primary record. Selecting a section header value will also select any fields in that section. Please review before merging. ⓘ

Merge records by choosing fields with data ⓘ  View fields with conflicting data

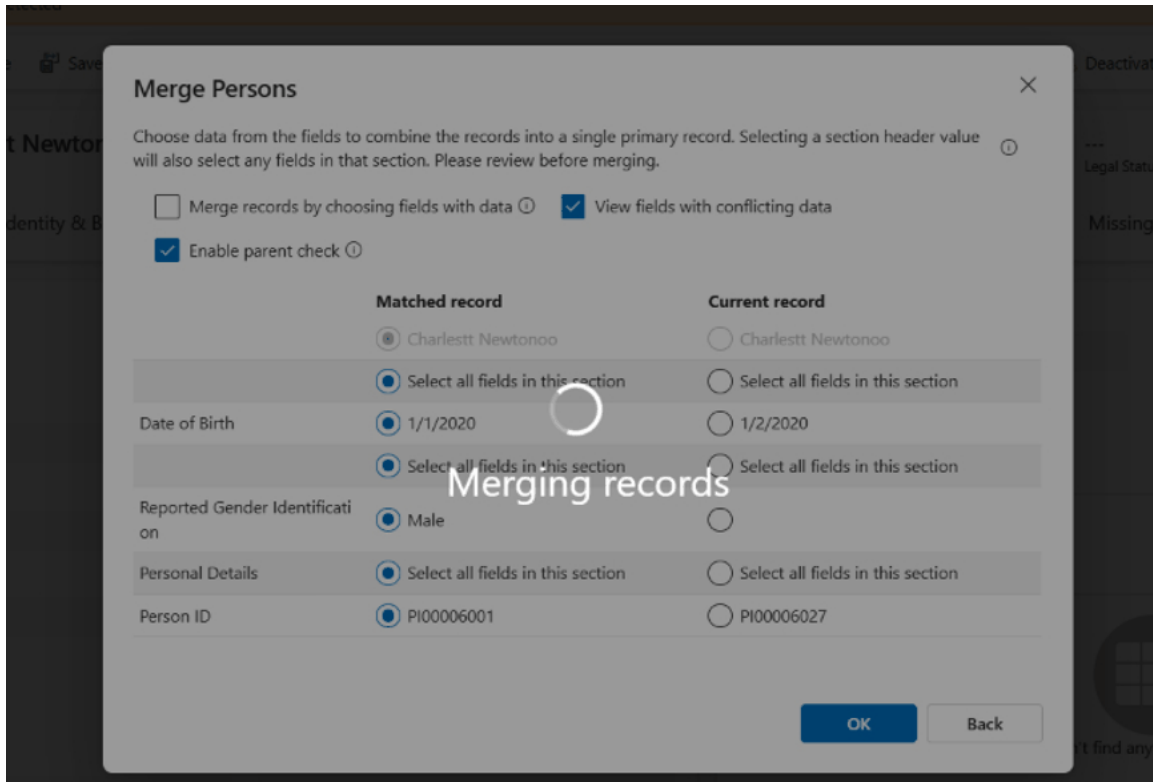
Enable parent check ⓘ

	Matched record	Current record
	<input checked="" type="radio"/> Lashawn1 Jackson	<input type="radio"/>
	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Initials	<input checked="" type="radio"/> L.J.	<input type="radio"/>
Personal Details	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Person ID	<input checked="" type="radio"/> PI00006285	<input type="radio"/>

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Alert! If the Person record exists In-progress Referrals, In-progress Cases, etc., STAAND will not allow the Merge and will reveal a business process error.

5. STAAND will merge the records and deactivate the duplicate record.



**Merge Persons**

Choose data from the fields to combine the records into a single primary record. Selecting a section header value will also select any fields in that section. Please review before merging.

Merge records by choosing fields with data ⓘ  View fields with conflicting data

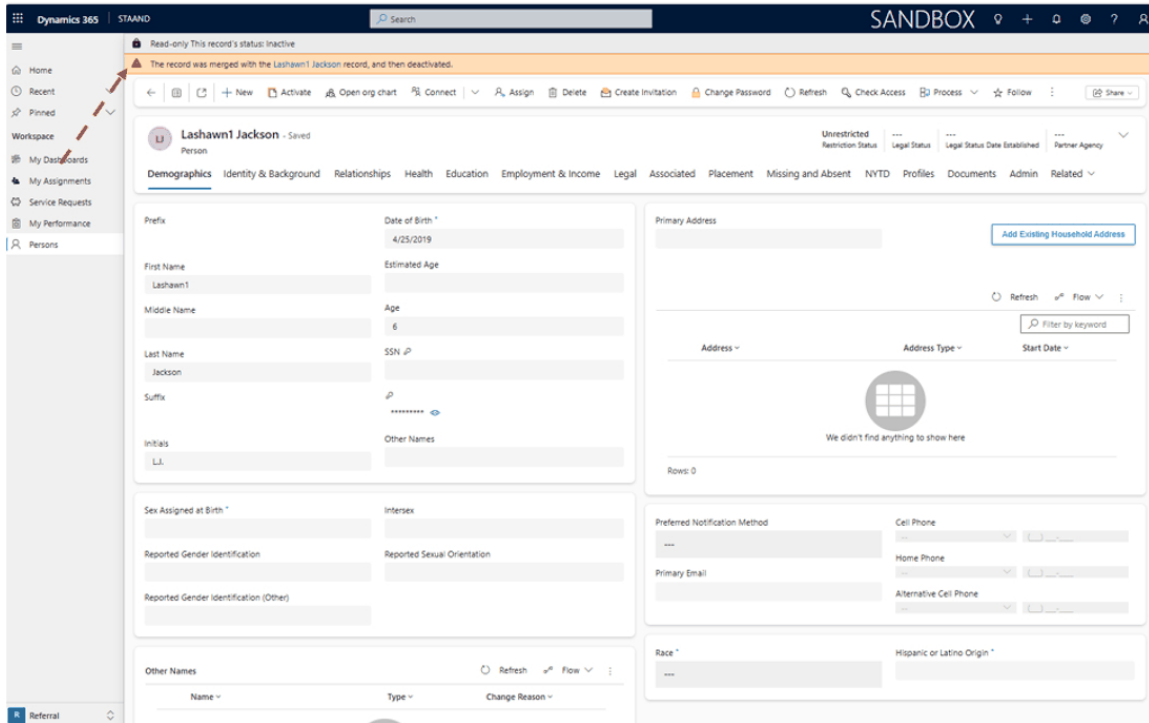
Enable parent check ⓘ

	Matched record	Current record
	<input checked="" type="radio"/> Charlestt Newtonoo	<input type="radio"/> Charlestt Newtonoo
	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Date of Birth	<input checked="" type="radio"/> 1/1/2020	<input type="radio"/> 1/2/2020
	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Reported Gender Identification	<input checked="" type="radio"/> Male	<input type="radio"/>
Personal Details	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Person ID	<input checked="" type="radio"/> PI00006001	<input type="radio"/> PI00006027

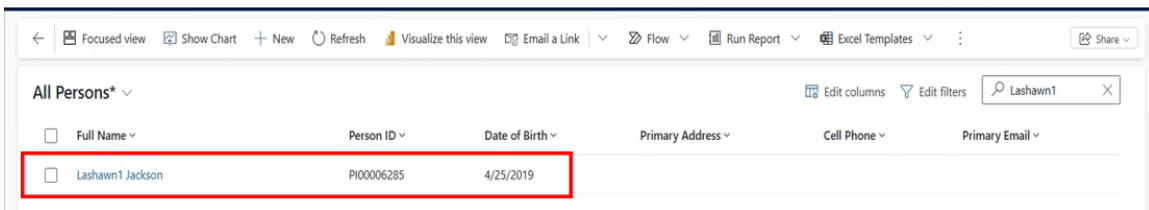
OK Back

Merging records

- An alert banner will appear to confirm the records have been merged and the duplicate record has been deactivated.



- The active **Person** record will remain accessible.

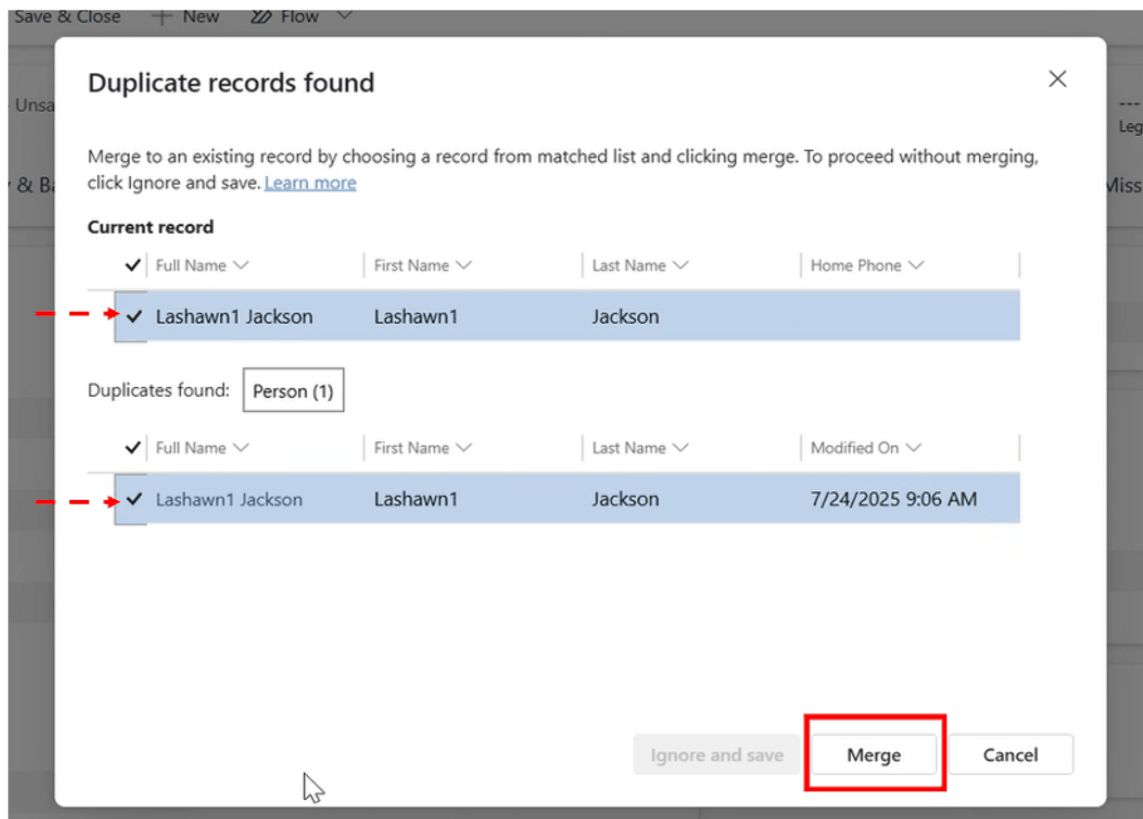


Full Name	Person ID	Date of Birth	Primary Address	Cell Phone	Primary Email
<input type="checkbox"/> Lashawn1 Jackson	PI00006285	4/25/2019			

## Merging Duplicate Person Records Referral Module - Initial Entry

8. When entering new information into STAAND, a window will display any found duplicate records.
9. Click the area to the left of each record to display the checkmark.
10. Click **Merge** to consolidate the records.

Note: This is also applicable to Case when a Case person and Person record are added.



11. Select data from the fields to combine the records into a single primary record. Select OK.

### Merge Persons ✕

Choose data from the fields to combine the records into a single primary record. Selecting a section header value will also select any fields in that section. Please review before merging. ⓘ

Merge records by choosing fields with data ⓘ   
  View fields with conflicting data

Enable parent check ⓘ

Select Primary record   
  Lashawn1 Jackson ✕   
  Lashawn1 Jackson ✕

Personal Details	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Person ID	<input checked="" type="radio"/> PI00002319	<input type="radio"/> PI00002320
Status Reason	<input checked="" type="radio"/> Active	<input type="radio"/> Inactive

12. The active **Person record** will remain accessible.

Full Name	Person ID	Date of Birth	Primary Address	Cell Phone	Primary Email
<input type="checkbox"/> Lashawn1 Jackson	PI00006285	4/25/2019			