CLIENT MERGE & END DATING A DUPLICATE CLIENT

CREATED DATE: May 5, 2006

PART 1: Merging Clients



Pointers to Remember:

- 1. Merging clients is important when one client has two client IDs. It allows you to put information from both clients into one client ID.
- 2. In the event that FACES.NET will not allow you to merge two clients, you will be given the option to mark one of the client IDs as duplicate.

Steps include:

- Step 1: Put a case in focus from workload by clicking on My Assignments.
- Step 2: Hold cursor over Case from the drop down menu, and then click on Merge. (You will see the Client Merge pop up screen)



Figure 1

Step 3: Select Client ID to be retained.

Step 4: Select Client ID to be merged.

o In Focus	* Denotes Required Fields ** Denotes Half	f-Mandatory Fields		
User Name: TRAINER 1	Info Relations Home Remova	al 🔨 Status 🔨 Placement 🔨 Case(s) 🔪 Pemanency Goal 🔪 Court He.	aring	3. Select
Entity Type: Case Entity Name:		v -		Client ID
JACKSON26 Entity ID: 192560	Name			to be
	SSN	DOB		retained*.
	Address	Creation Dt		
		Geoder		
	Client ID to be merged *	~		
3				
Sec.				
	SSN	DOB		4: Select
	Address	Creation Dt		Client ID
FACES.NET		Gender		to be
		Race		meraed*.
				gra
	Merge Swap Cancel			

Figure 2

- Step 5: Review the information in all of the tabs. Ensure that you are merging information into the correct Client ID. Once you have merged the two clients, this process is not reversible.
- Step 6: Use the Swap button if you find you have selected the incorrect Client ID to be retained.
- Step 7: Once you are sure you have chosen the correct Client IDs, Click on Merge.

Organizer Focus History	Client Merge						
😑 In Focus	* Denotes Required Fields ** Denotes Half-Mandatory Fi	ields					
User Name: TRAINER 1	Info Relations Home Removal Status Placement Status Placement Court Hearing						
Entity Type: Castly Name: JACKSN26 Entity ID: 192360	Client ID to be retained * [45202 Name RETSHAWN JACKSON26 SSN	▼ DOB	5: Review information on all tabs.				
	Address	Creation Dt					
7: Click	3700 KING Street NW WASHINGTON, District of Columbia 20001	GL/JG6/206 Gender Male					
Morgo		Black or African American					
	Client ID to be merged * 845987	✓					
	Name RETSHAWN JACKSON SSN	D08 10/31/1993	6: Use Swap if incorrect				
FACESNAT	Address	Creation Dt 05/05/2005 Centrer Male	Client ID was used.				
	Merge Swap Cance	Race Black or African American					

Figure 3

Note:

• FACES will permanently delete the information for the client you wish to merge. After you have entered in the client ID, you must click in the field below in order for the information to populate.

Step 8: Click OK on the user prompt if you want to continue with the merge. Note: Clicking Cancel will cancel the merge.

Referral Client Provider Admin	
Case 🛇 Case Summary Client Herge Collateral Contacts Visits 🖓 Case Plan 🖓 Service 🖓 More 🖓	
Organizen Focus History Client Merge Denotes Required Fields ** Denotes Half-Mandatory Fields #Denotes AFCARS Fields	
User Name: TRAINER I Entity Type: Case	Court Hearing 8: Click OK.
Vack spix2e Name 192569 REFSHAWN JACK SSN Procedure cannot be reversed once the clients on merged. If you are sure you want to merge the two clients, press & domains and the two clients, press & domains and the two clients.	
B700 KING Street Columbia 2000s OK Cancel Black or African American	
Client ID to be merged * 845987	
Name RETISHAWN JACKSON	
Address Creation Dt	
05/05/2006	

Figure 4

You have successfully merged the two clients!

Step 9: Click on OK from user prompt to complete the merge.

Referral Case Cli	ent Provider Admin
Case 🛛 Case Summary 🕴 Client	L_Merge Collateral Contacts Visits Q. Case Plan Q. Service Q. Nore Q.
Organizer Focus History In Focus User Name: TRAINER 1 Entity Type:	Client Merge * Denotes Required Fields ** Denotes Half-Mandatory Fields *Denotes AFCARS Fields Info Relations Home Removal Status Placement Case(s) Pemanency Goal Court Hearing Client Dis be retained * accord
Case Entity Name: JACKSON26 Entity ID: 192560	Name RevsHaWN JACK FACES Warning SSN Merge completed.
	Address 5700 KING Street Columbia 20001 OK Race Black or African American
	Client ID to be merged * 1945997
	Name REYSHAW JACKSON SSN DOB 10/31/1993
	Address Creation Dt

Figure 5

PART 2: End Dating a Duplicate Client:



Pointers to Remember:

- 1. If the client information is unable to merge you will receive the option of marking the Client ID to be merged as a duplicate client.
- 2. The client that was to be merged can be "flagged" as a Duplicate Client.
- 3. Information should not be entered on a record that is "flagged" as duplicate.

Steps Include:

Step 1: Place cursor over Case, Client, and then click on Client List.



Figure 6

- Step 2: Highlight the duplicate client from Client Selection.
- Step 3: Click on Show.

Referral Case C Case C Client C Client List Organizer Focus History C In Focus	Client Provider Admin Case Go List Summary General Info Demographics Relationships CKL Q Child Fatality More Q Client Selection Denotes Required Fields ** Denotes Half-Mandatory Fields *Denotes AFCARS Fields						2: Highlight the duplicate client.		
TRAINER 1		ients					/	-	
Entity Type:		Name	Client ID	Age	Gender	DOB	Duplicate		
Case Entity Name:		FEMALE SCOTT26	845204		Female	00/00/0000		^	
JACKSON26		KEYSHAWN JACKSON26	845206		Male	00/00/0000			
192560		LAKEISHA JACKSON26	845203		Female	00/00/0000			
		LATONYA HOLMES26	845207		Female	00/00/0000			
Client		MALTREATER UNKNOWN26	845210		Male	00/00/0000			
Entity Name: REYSHAWN JACKSON Entity ID:		PAUL WILLIAMS26	845208		Male	00/00/0000			
	▶	REYSHAWN JACKSON	845988	12	Male	10/31/1993			
845988		REYSHAWN JACKSON26	845202	12	Male	10/31/1993			
a subfigure and the second second		RODNEY SCOTT26	845209		Male	00/00/0000		~	
	● ○	Active Clients All Clients *) Show Gearch Cancel							3: Click Show.

Figure 7

- Step 4: Click on the Case, Client, and then General Information screen. Enter end date in End Date field.
- Step 5: Select Duplicate Client as the Reason for End Date.
- Step 6: Click Save.

	TRAINER 1		
	Entity Type: Case	Client Residence Other	
		Client Details	
	JACKSON26	Prefix First** Middle Last** Suffix Maiden Name	
	192560	REYSHAWN JACKSON	
	Entity Type:	Gender* Date Of Birth‡ SSN Medicaid# In Household‡	
	flient	Female V 10/31/1992 V 547-98-7987 SSN Verified Yes V	
4: Enter End	HEYSHAWN JACKSON	Date Of Death Death Certificate# Number of persons in household	
Data for	345988	Deceased 0 \$	
l client.		Dates of Involvement in Case	
		Start Date* End Date Reason For End Date *	E: Entor
		5/5/2006 V Duplicate Client Non-participating Member	D. EIIIR
		Participating as a Child* Reason Description	Reason For
		Head of the Yes V	End Data*
	Transaction American	Household	Enu Date .
		Citizenchin/Alienage* Alien Registration Number Nationality Religion	
	400	US Citizen	
		Role In Case / Language	
	FACES.NET		
		Alleged Victim	
		Child	
4. Click S	0.40		
O: CIICK S	ave.	Select	
		riyule o	

If you have any questions, please call the HelpDesk at (202) 727-3009.