

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)

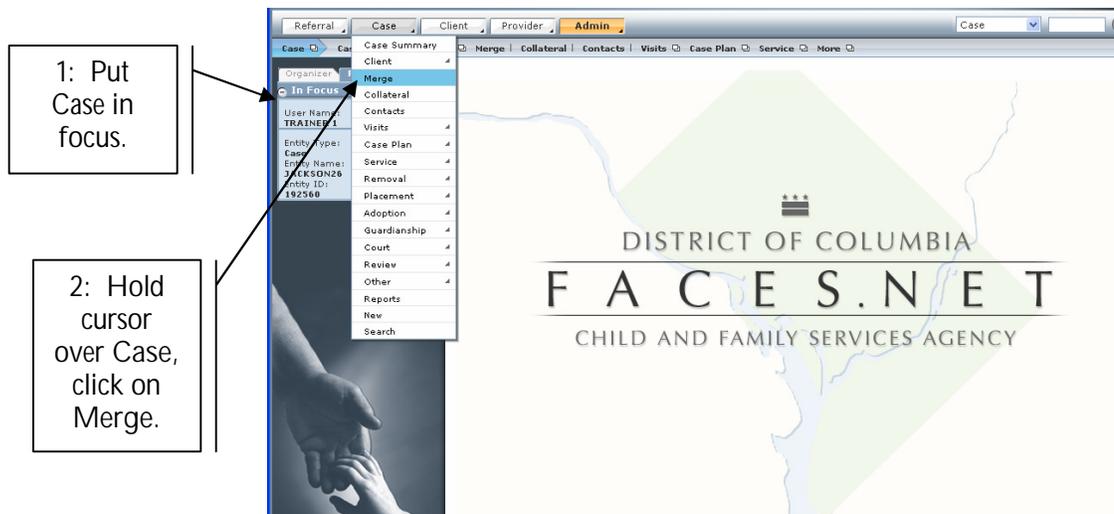


Figure 1

Step 3: Select Client ID to be retained.

Step 4: Select Client ID to be merged.

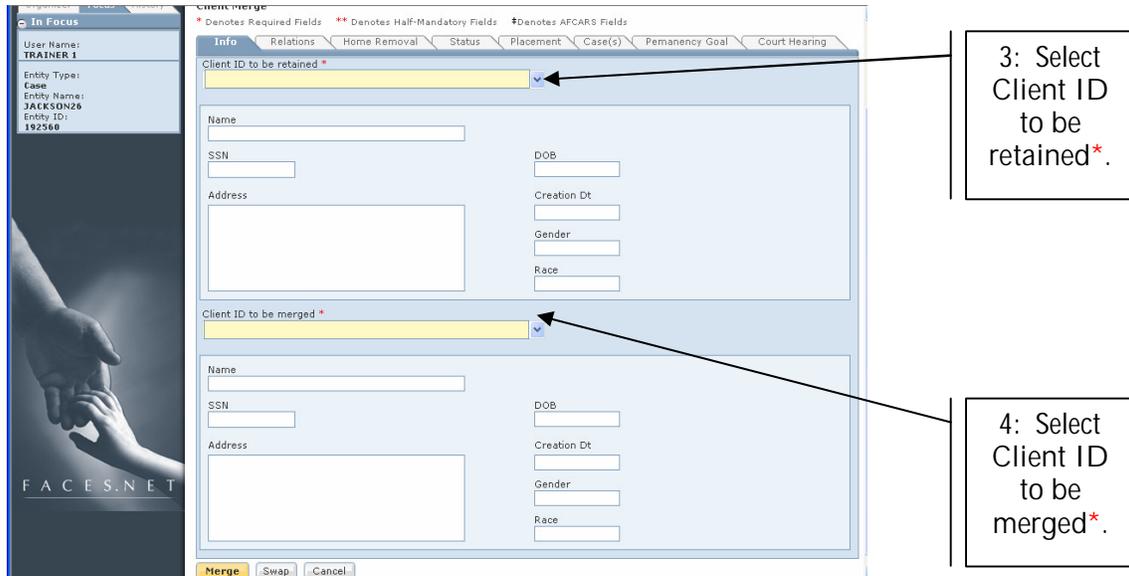


Figure 2

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.

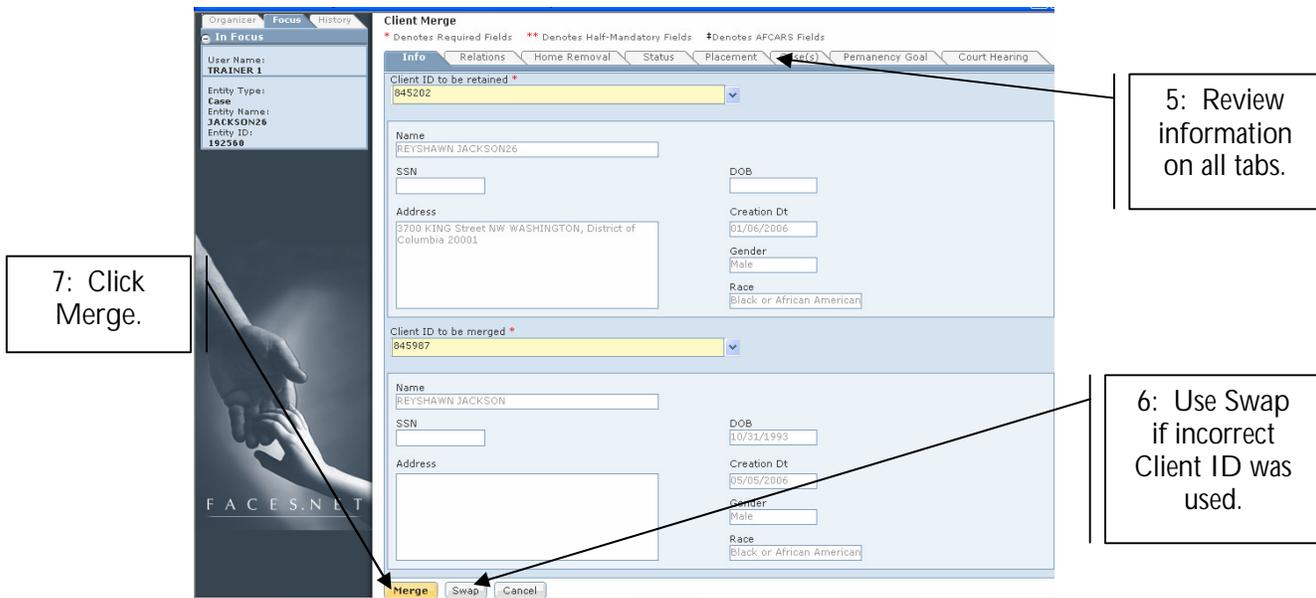


Figure 3

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.

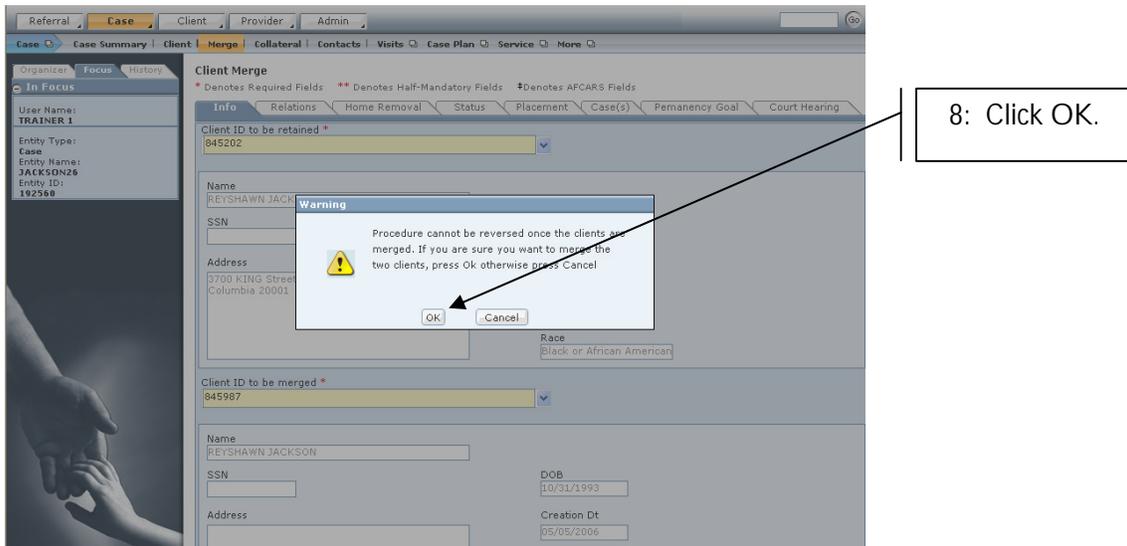


Figure 4

You have successfully merged the two clients!

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

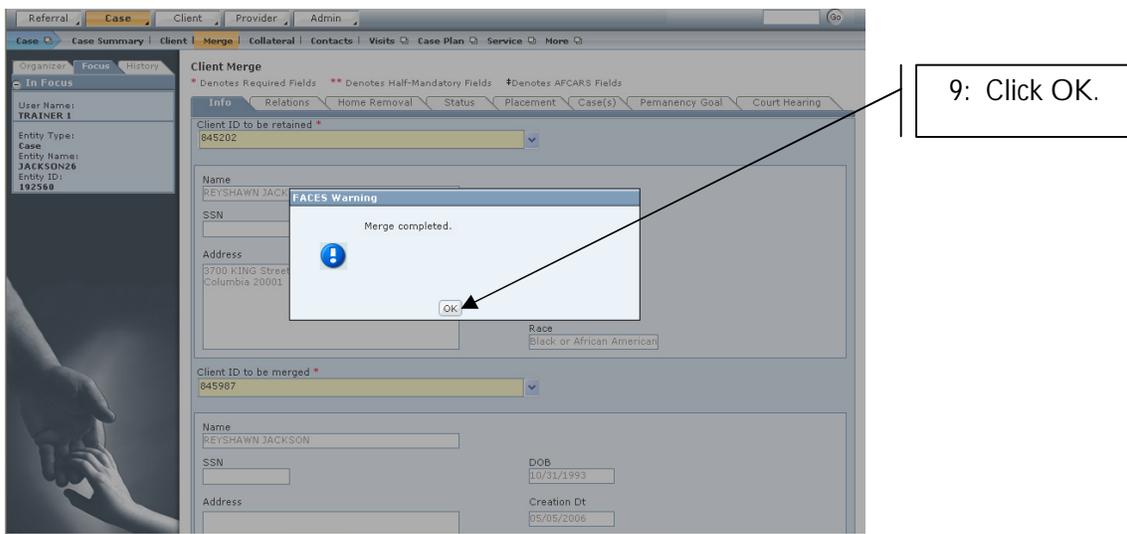


Figure 5

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.

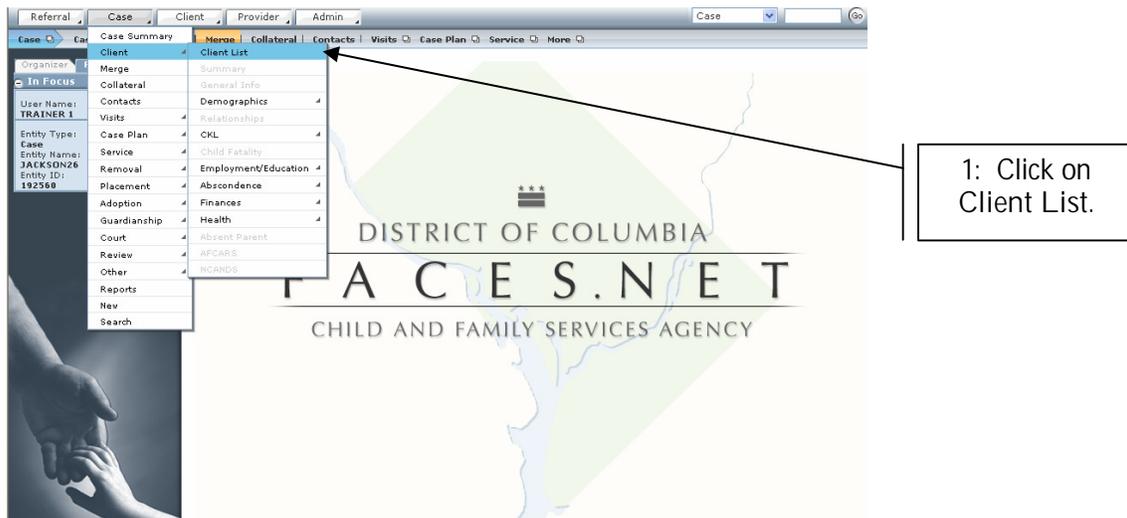


Figure 6

Step 2: Highlight the duplicate client from Client Selection.

Step 3: Click on Show.

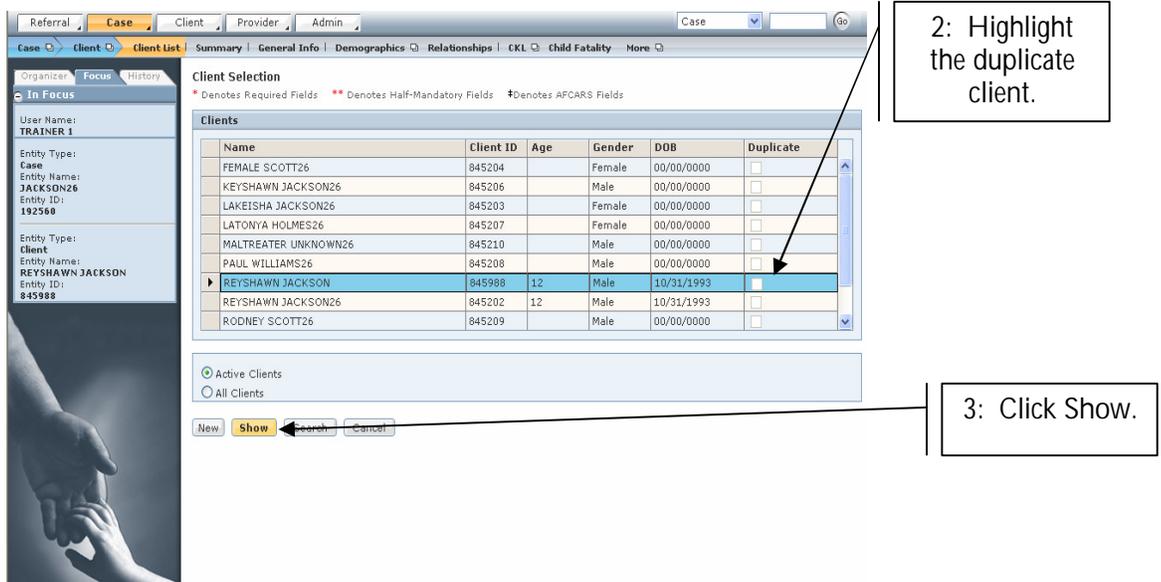


Figure 7

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.

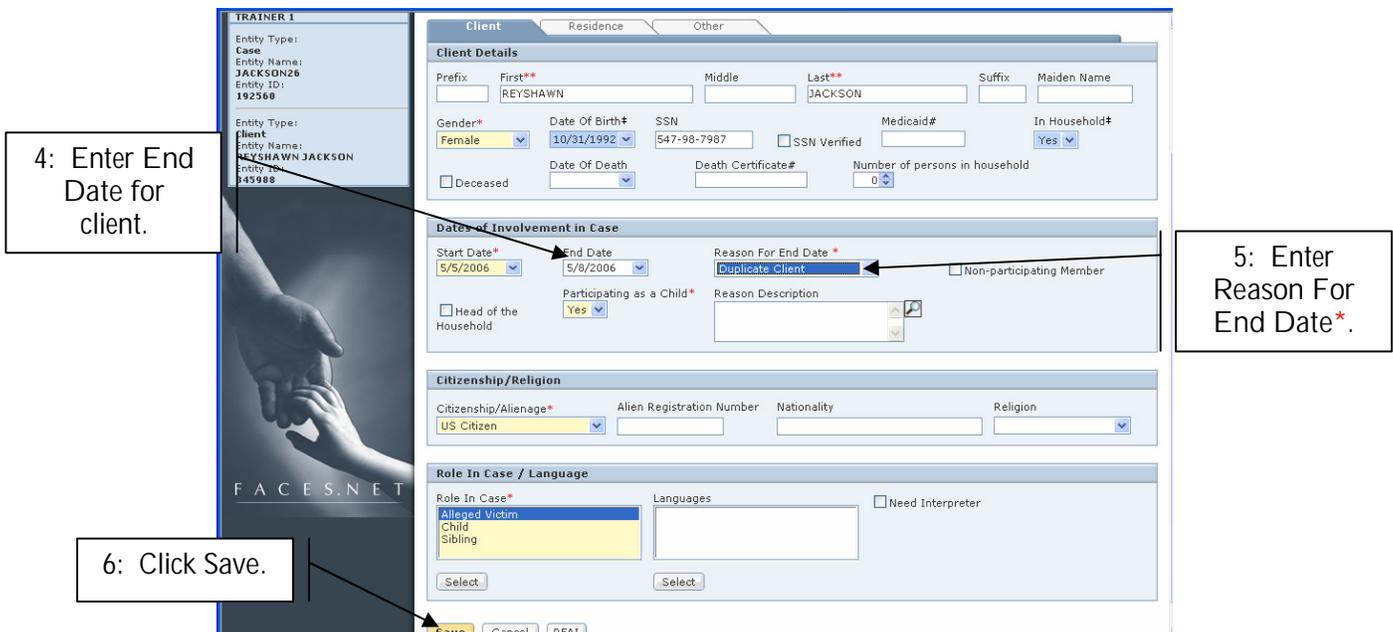


Figure 8