

Duplicates – Eliminating or Merging Families or Members

Sometimes, despite all safeguards, there are two records for the same family and/or member. Once the county identifies the duplicates, records **MUST** be consolidated into one-member profile and/or one family profile. **Archiving is NOT the answer.** Archived records will still show as “Duplicates.”

Sometimes, two families consolidate into one household.

Results to achieve with a Family Merge or Family Consolidation

1. One household record, with the most current information (address, email, individual profiles, etc.).

All records transferred out of the family profile which will be deleted are transferred into the profile with the most current information. See Help Sheet [Moving a Member Profile to a Different Family](#). A Family profile **CANNOT** be deleted when it houses ANY member enrollment.

Identifying Empty Family Profiles and Duplicate Families

Empty Family Profile: Go to Search/Reports/Quick Reports and run “Family – Without Members.” Login to Family Profile and click the “Delete Family” button if the family will never return.

Duplicate Families - Identify duplicate families using the Families tab and selectively sorting.

1. Start with sorting alpha by LAST name. Look for the same last name and street address. OR
2. Sort alpha by ADDRESS (click on the word “Address” at the top of the column), then select “ALL” from the alpha click-list at the top. This will reveal possible duplicate families with different family names, but the same address. **There should only be one record per household address.**
3. This sort process also reveals incomplete family records. Each family record is required to have a street address, city, state, zip and phone number before members can be added.
4. Once a family profile is empty or duplicate family records are identified, information must be consolidated, merged or deleted.



Merging Families

To Merge FAMILY records, the following conditions must be true:

1. Two family records exist (not two records for the same youth within the same family).
2. One of the family records has to have been created in the current year (after Sept. 1), and one must have been created in a previous year (before Sept. 1).
3. The family members in the new family must be equal to or less than the original family and individual profiles must be compatible (see merging members instructions).
4. The OLD member record must be inactive or archived.
5. Identify the family (household) name(s), street address(es), email, phone, etc. **to KEEP** by renaming “Smith KEEP.”

Steps to be taken:



1. If the family profile contains no adults/youth, click the Edit Family link and delete the record.
2. Determine which is the CORRECT address, phone and email.
Confirm which record the family wants to use. To be able to differentiate, temporarily rename the families/family (example: Smith NEW/KEEP or Smith DELETE). After the merge, go back and edit/correct the family name.
3. Move all member records into the family profile which will be kept.
4. Once a family profile is empty, it can be deleted. There is a button at the bottom of the Family Information page. The button will not be visible if there are any members in the family profile.

Merging Members

Result to be achieved with a Member Merge

1. One member record, with the original Member ID number, history of the member, with the MOST CURRENT information (that's why it's so important to label/distinguish which record is to be KEEP).

Identifying Potential Duplicates - Go to Search/Reports/Quick Reports and run "Member – Potential Duplicates."

To Merge MEMBER records, the following conditions must be true:

1. The two records must exist in the same family profile. D-110 [Moving a Member Profile to a Different Family](#).
2. The two records **can never have been active in the same year** (one must be inactive and the other may be pending/incomplete/active).

Steps to be taken:

1. You must be able to differentiate between the newer (*usually pending with no Member ID number*) and older record (*Member ID number assigned*). To make the distinction, temporarily rename the member (example – Johnny NEW/KEEP). After the merge, go back remove the "NEW" or "KEEP" added to the name.
2. If both records are pending review both records CAREFULLY to determine which should be kept. (Caution - If one is not inactive, it must be deactivated which will remove any changes which were made when it was reactivated.) If the records are too similar to make a determination, contact the family and ask them to review both records and tell you which to remove. Be sure the records have been labeled (step #1) before making contact with the family. This will reduce mistakes.

During the conversation, remind the family to read the directions in the future to avoid a similar mistake. The instructions explained steps for re-newing enrollment. What the family did was create a new enrollment for the child which loses all of the history.

3. Once all of the above conditions have been determined and completed, contact the state office to merge the two records.

