COVID-19 Community Team Outreach Tool

For Admins Only: Merging Profiles

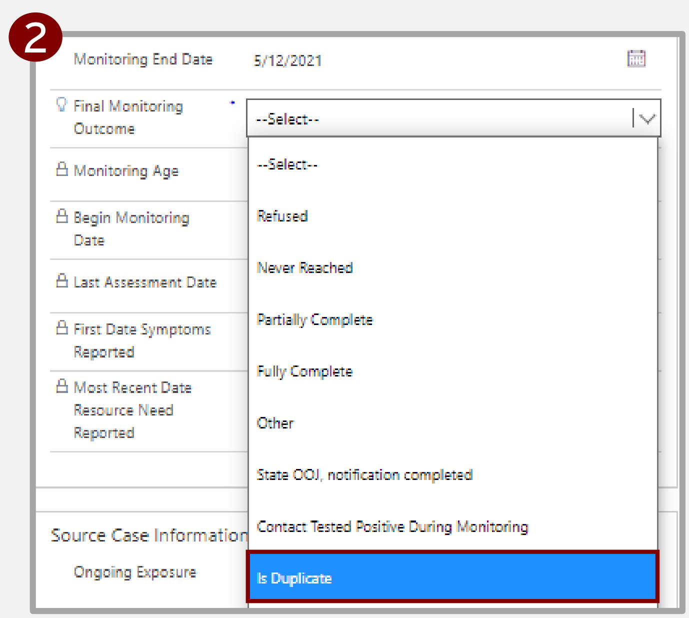
- **Merging is an automated form of [deduplication] for admin users. Merging transfers notes, activities, and selected fields from a duplicate ("subordinate") record onto a master ("primary") record and automatically deactivates the duplicate record**. *You can only use the merging process between two profiles at once; however, merging can occur on the same primary record multiple times.*
- **As a deduplication process, merging should only be used when there is more than one concurrent monitoring event for a contact, which means the contact is currently being monitored in more than one profile for the same monitoring period.**
- For admins, merging supplements the manual deduplication process. Non-admin users may also complete the deduplication process manually by following the instructions in the Handling Duplicates Job Aid.

BEFORE YOU BEGIN:
As an admin, before merging (deduplicating) two records, you must verify the following per the processes in the Cloning, Connecting, Deduplicating Job Aid and the Handling Duplicates Job Aid:
- **These records are active.**
- **These records describe the same individual.**
- **These records describe a concurrent monitoring period.**

Preparing to Merge

To start merging, you must first identify one of the records as the primary and the other as the subordinate record:

1. Determine a primary record, which is the record to be kept. You should choose the record with the most **complete and correct information** to be the primary record. The non-primary record will be marked as duplicate and later deactivated**. All notes and activities associated with this record will be merged into the primary record.** For information on how to correctly identify a duplicate, view the Handling Duplicates job aid.
2. On the subordinate record that will not be kept, select the **"Is Duplicate"** Final Monitoring Outcome and save. ***Do not deactivate the record now.***



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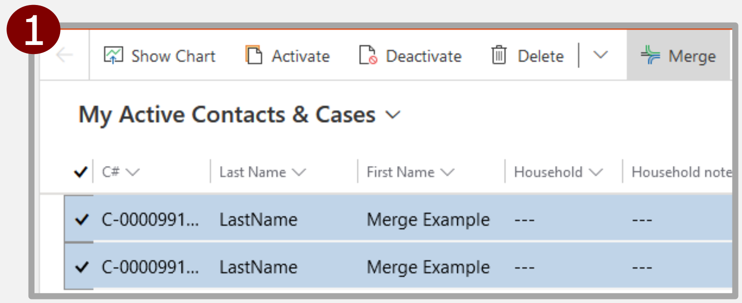
Merging Records

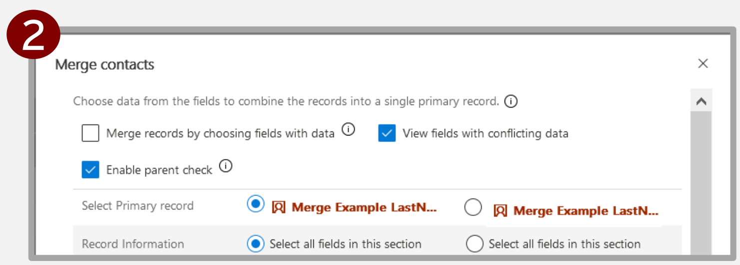
After you have confirmed the conditions in the section on the previous page titled ***Before You Begin*** & ***Preparing to Merge***:

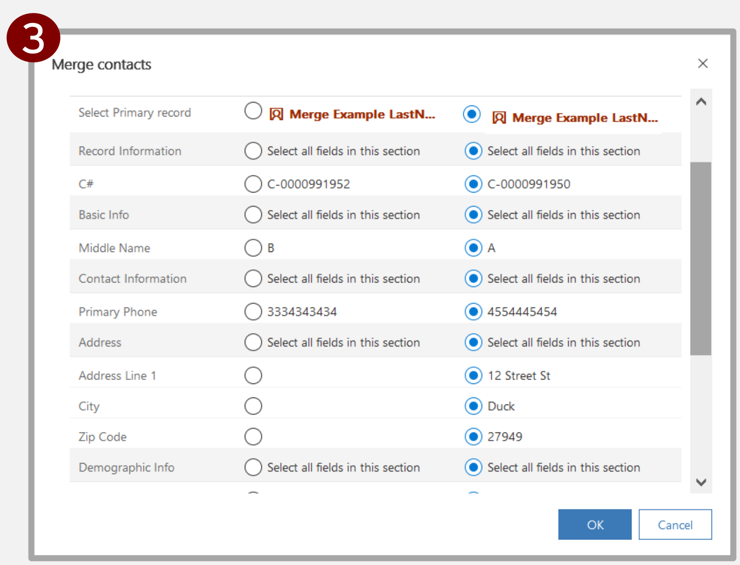
1. There are several ways to begin merging records:
   - In the Contacts Tab, select the two profiles you wish to merge with the checkmarks and click "Merge."
   - In the Contacts Tab, select one profile you wish to merge with a checkmark and click "Merge." In the box that appears, search for the other profile.
   - If you have received a suggested duplicate warning, click "Merge."

2. In the box that appears, you will see both records you have selected. Review the options available to you:
   - **Merge records by choosing fields with data:** Turning this on tells CCTO to default to choosing data from a secondary record field if the primary record is blank in that field. Keep this turned off if you will be reviewing each field manually.
   - **View fields with conflicting data:** Keeping this turned on hides fields that match between the records to help you work more efficiently.
   - **Enable parent check:** Turn this off if your subordinate profile is a member of a household.

3. First, indicate your primary record, or record to be kept. Information from the other ("subordinate") record will be transferred onto this profile, and that record will then be deactivated.







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4. Then, review the fields displayed and select which data should be kept.
   - If the *Local Health Department Information* section must be updated, please note that you will have to **manually change the contact profile's county** after the merge process.
   - **Household** and **Household Relationship** fields will not merge and will need to be manually updated.
5. When you are finished selecting all the information you want to keep, click "OK." If successful, you will receive a message with a green checkmark.
6. If you receive one of the errors shown at the right, **confirm that:**
   a. Both records are active.
   b. The subordinate record has been marked with the FMO "Is Duplicate."
   c. You have unchecked "Enable parent check" if your subordinate member belongs to a household.
7. Any selected data (as well as all notes and activities) is now transferred onto the primary record, and the subordinate record is deactivated. The subordinate record will display a red message noting that it was merged.
8. If you are a member of the deduplication team, follow the existing process to delete the now inactive subordinate profile.