

Merge Clients in SCRAM 24/7



Purpose

Use this quick sheet to merge clients who have been flagged in SCRAM 24/7. Rules related to merging clients are:

- Multiple active clients CANNOT be merged. You must first deactivate all but one of the active clients to proceed.
- When merged, all cases, activities, financials, sanctions, notes, etc. are merged by date/time.

Procedure

1. Log in to SCRAM 24/7.
2. Click the **Clients** top-navigation option.
3. Click the **Merge Clients Queue** tab.

The *Merge Client Queue* page appears with the clients flagged for merging shown.

The screenshot shows the SCRAM 24/7 interface with the 'Merge Client Queue' tab selected. A notification banner at the top states: "All Potential Duplicate Clients flagged across all test sites are represented in the list below. To start the Merge Client process you must select at least two Potential Duplicate Clients to be merged. Only one of the Potential Duplicate Clients selected can be Active." Below this is a table with the following columns: Select, Potential Duplicate Client, Date of Birth, Identification, Enrolling Site, Status, and Actions.

Select	Potential Duplicate Client	Date of Birth	Identification	Enrolling Site	Status	Actions
<input type="checkbox"/>	Smith, John	10/29/1957	Driver's License: CO 12345	Training & Documentation	Inactive	Remove from Queue
<input type="checkbox"/>	Smith, John	10/29/1957	Driver's License: CO 12345	Training & Documentation	Inactive	Remove from Queue
<input type="checkbox"/>	Smith, John	10/29/1957	Driver's License: CO#12345	Training & Documentation	Active	Remove from Queue

A red box highlights the 'Select' checkboxes for the first two rows. A 'Continue' button is located at the bottom right of the table.

4. Select the check box for each client being merged.
5. Click the **Continue** button.

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The *Merge Clients* page appears.

The system generated ID number for the active client designated as the master client is highlighted in **green**. The master client must be selected if all clients are inactive.


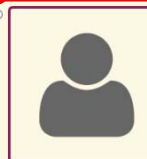

All items that do NOT match are highlighted in **yellow**.

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Client List Search All Clients Add Client Merge Clients Queue

Merge Clients

By default, any client that is **Active** will be the **Designated Master**. If all clients are **Inactive**, you may select any client as the **Designated Master**. You must select a value for any fields that are different between the clients you are merging. The **Designated Master** will be updated with the selected value. All related records (Cases, Activities, Financial Transactions, Test Results, Notes, etc.) will be associated with the **Designated Master** client.

Status	Active	Inactive	Inactive
Designate Master	NDHFYB55	RQY4F655	BW4L35N7
Photo			
First Name	John	John	John
Middle Name	No Value	No Value	No Value
Last Name	Smith	Smith	Smith
Date of Birth	10/29/1957	10/29/1957	10/29/1957
Gender	No Value	No Value	No Value
Ethnicity	No Value	No Value	No Value
Time Zone	US Mountain Standard Time	US Mountain Standard Time	US Mountain Standard Time
Driver's License	<input checked="" type="radio"/> Driver's License: CO#12345 (Exp. Date: 12/31/2018)	<input type="radio"/> Driver's License: CO 12345 (Exp. Date: 12/31/2018)	<input type="radio"/> Driver's License: CO 12345 (Exp. Date: 12/31/2018)
Work Permit	No Value	No Value	No Value
Email	No Value	No Value	No Value
Primary Address	555 Main Street, Denver, CO 80202	555 Main Street, Denver, CO 80202	555 Main Street, Denver, CO 80202
Secondary Address	No Value	No Value	No Value
Home Phone	(303) 555-5555	(303) 555-5555	(303) 555-5555
Mobile Phone	No Value	No Value	No Value
Occupation	Steel Worker	Steel Worker	Steel Worker
Work Environment	No Value	No Value	No Value
Work Address	No Value	No Value	No Value
Work Phone	No Value	No Value	No Value
Supervisor Name	No Value	No Value	No Value

Cancel Merge Clients

6. For each unmatched item, select the appropriate radio button.

The selected item is now **green** highlighted.

The **Merge Clients** button is activated.

7. Click the **Merge Clients** button.

Merge Clients in SCRAM 24/7

The *Complete Client Merge* pop up appears.

Complete Client Merge

! Are you sure you want to merge these clients?

Once the clients are merged,

- The master client will be the only client that will be accessible.
- There is no way to "un-merge" the client data.
- ALL of the information that was associated with the clients being merged, will now be associated with the master client. This includes financial transactions, test results, notes, sanctions, cases, activities, etc.

Please verify that you understand the implications of merging the selected clients by typing "I Understand" in the text box:

I understand

Cancel Merge Clients

8. Enter "I understand" in the field.

The **Merge Clients** button is activated when the statement is correctly entered.

9. Click the **Merge Clients** button.

The merged client's *Profile* page appears.

Note: Depending on how many clients are being merged, consolidating all client data could take up to a few minutes to complete. **DO NOT** refresh the browser during the merge process.