



Duplicate Members - Avoiding

The Member Tracking System provides numerous warnings about possible duplicate members, contacts and staff/volunteers being added to the system. Duplicate people will occur only if those warnings are ignored and the possible duplicates are not reviewed.

1. When adding new members into the Member Tracking System you can choose:
1st in Family or;
A member of the _____ Household or;
Additional Member of a Different Existing Family

Choose the 1st in Family if this is the first member in the household.

Choose the Add a member of the _____ Household if the new

member is a sibling of an existing member and you chose the sibling on the Members form first, and then clicked on the New Member button.

Choose the Additional Member of a Different Existing Family if the new member is a sibling of an existing member where you did not choose the sibling on the Members form before clicking the New Member button.

2. You will type in the Name of the new member and press the Enter or Tab key on your keyboard. The system automatically reviews the entire database for duplicates based on Last Name and First Initial of the First Name.
If there are any possible duplicates you will see them displayed on the screen. This list includes: the Person(s) Name, Unit, Household Name, Address, shows if the existing person(s) is a Member or Contact or Staff, shows their Age, DOB (Date of Birth) and Memb #.

Add New Member

Unit: 01 - Downtown Unit

Step 1: Add New Member Name: First: Middle: Last:

Step 2: Check here for possible duplicates:

Is this new member already on file? Check this list of other people with same last name and first initial.
- If the person is not on the list, just make one of the "choose one" selections below to continue.

IS THE PERSON(S) BELOW A POSSIBLE DUPLICATE MEMBER?

	Age	DOB	Memb #
--	-----	-----	--------

IS THE PERSON(S) ABOVE A POSSIBLE DUPLICATE MEMBER?
If the person is a duplicate, then click on the name and click on Jump to this Member to update the existing Member's record. (If the duplicate is Staff, then continue adding the new Member.)

Jump to this Member Make a Member Also

Step 3: Make a selection to describe the new member's household:

choose one:

1st in Family A member of the Archer Household Additional Member of a Different Existing Family

Cancel

Add New Member

Unit: 01 - Downtown Unit

Step 1: Add New Member Name: First: Jason Middle: Last: Brown

Step 2: Check here for possible duplicates:

Is this new member already on file? Check this list of other people with same last name and first initial.
- If the person is not on the list, just make one of the "choose one" selections below to continue.

IS THE PERSON(S) BELOW A POSSIBLE DUPLICATE MEMBER?

	Age	DOB	Memb #
Brown, Jada	10	8/16/07	10
Brown, John	10	5/1/07	11

IS THE PERSON(S) ABOVE A POSSIBLE DUPLICATE MEMBER?
If the person is a duplicate, then click on the name and click on Jump to this Member to update the existing Member's record. (If the duplicate is Staff, then continue adding the new Member.)

Jump to this Member Make a Member Also

Step 3: Make a selection to describe the new member's household:

choose one:

1st in Family A member of the Archer Household Additional Member of a Different Existing Family

Cancel

3. If the person you are entering into the database is a possible match to someone listed, then you will click on that person's name. If the person is a member, then click the Jump to this Member button. This will take you to the existing person's record so you can then UPDATE their record and avoid entering a duplicate person into the program. If they are a Contact for an existing member or are a Staff person, click the Make a Member Also button to add the existing person as a member. If none of the people listed are a match to the member you are adding, then choose one of the buttons under Step 3 explained in item #1 above.

The screenshot shows the 'Add New Member' form with the following details:

- Unit: 01 - Downtown Unit
- Step 1: Add New Member Name: First: Jason, Middle: , Last: Brown
- Step 2: Check here for possible duplicates:
 - Is this new member already on file? Check this list of other people with same last name and first initial.
 - If the person is not on the list, just make one of the "choose one" selections below to continue.
 - IS THE PERSON(S) BELOW A POSSIBLE DUPLICATE MEMBER?**

	Age	DOB	Memb #				
Brown, Jada	01	Brown Household	1601 Manchester Blvd	Member	10	8/16/07	10
Brown, John	01	Brown Household	1601 Manchester Blvd	Member	10	5/1/07	11

 - IS THE PERSON(S) ABOVE A POSSIBLE DUPLICATE MEMBER?**
 - If the person is a duplicate, then click on the name and click on Jump to this Member to update the existing Member's record. (If the duplicate is Staff, then continue adding the new Member.)
 - Buttons: Jump to this Member, Make a Member Also
- Step 3: Make a selection to describe the new member's household:
 - choose one:
 - Buttons: 1st in Family, A member of the Archer Household, Additional Member of a Different Existing Family, Cancel

4. If there are possible duplicates, once you click on one of the Step 3 buttons you will see the following message:

The dialog box contains the following text:

Possible Match Found

There is at least one member with a similar name. Are you sure this is not a duplicate member?

(Click 'No' to review the possible duplicates.)

Buttons: Yes, No, Cancel

If you answer Yes then you are indicating that this person is NOT a duplicate member and the program will allow you to continue to add that member into the database.

If you answer No then you are indicating that this person IS a duplicate member and you can then click on the person's name that is a possible duplicate and proceed as indicated in item #3 above.

NOTE: You can optionally look up a member in the Member Search screen or the Quick Find dropdown on the Members form to see if a person is already in the database before you click on the New Member button.