Vision Computer Programming Services, Inc.
801 2nd Street North, Suite A Safety Harbor, FL 34695
888-425-6964   email@visioncps.com   www.visioncps.com

Duplicate Members Report

The Member Tracking System™ provides warnings about possible duplicate members being added to the system. Duplicate members will occur if those warnings are ignored and members are added again. You can pull a list of duplicate members by following the instructions below.

1. Click on Reports from the Main Menu of the Member Tracking System
2. Click on the Members 3 tab at the top of the screen
3. Choose the Duplicate Members Report in the center of the screen
4. Choose the criteria you would like to use on the Universal Selection Engine – All Members in the System is best to get a list of ALL duplicate members
5. Click the Continue button on the bottom right corner of the Universal Selection Engine
6. Choose to Check for Duplicates in the Entire Organization or a Specific Unit
7. In the Fields to show on report box (left) double click on each of the fields that you want to see on the report – MOST COMMON are Member Name, Unit, Date of Birth, Address, Primary Phone, Date/Time Added and Added By
    o You can change the order of the fields by clicking on one of the fields and using the up or down arrows
    o Click on the Group at Top to move the selected fields to the top of the list
8. In the Fields to check for duplicates box (right) double click on the fields that you want to check for actual duplicates – MOST COMMON are Last Name, First Name, Date of Birth

    o You can also change the order and Group at Top for these fields
    o NOTES: Each field you choose to check for duplicates will have to match exactly to be considered a duplicate
        ▪ Examples if you asked for Last Name and First Name:
        ▪ Smith, Sam and Smith, Samantha would be considered duplicates
        ▪ Jacobs, Tom and Jacobs, Thomas would NOT be considered duplicates

        ▪ Examples if you asked for Last Name and First Name Initial
        ▪ Smith, Sam and Smith, Samantha would be considered duplicates
        ▪ Jacobs, Tom and Jacobs, Thomas would be considered duplicates
9. Optionally, fill in a Report Subtitle – Example: Duplicates as of __/__/____
10. Click on Preview or Export to Excel to see your list

You would then use the Consolidate Households and Consolidate Household Occupants Tool in Procedures to consolidate these duplicate people.