



Consolidate Households and People

The Member Tracking System provides warnings about possible duplicate members being added to the system. Duplicate members may occur if those warnings are not acknowledged. We have created 2 tools to consolidate the households that people live in and the people that are in those households.

This tool will consolidate all Attendance, Groups, Guidance/Accidents/Mentoring, Member Stars, and Charges/Payments.

Follow the steps below to consolidate households in your system.

1. Click on Procedures from the Main Menu of the Member Tracking System
2. Click on the Member-Specific Tools tab at the top of the screen
3. Click on the Consolidate Households button
4. On the left side of the screen choose the Household that you want to remove
NOTE: the households can be chosen by Household Name or Address. If selecting Address, please note that addresses will be listed AFTER those households with no address.
5. On the right side of the screen choose the Household that you want to keep

Consolidate Households

This procedure will consolidate members, contacts and staff from 2 different households into one household

Step by Step to consolidate duplicate households:
1. Choose to view the Households by Household Name or Address
2. Choose a household in the Take everyone out of this Household dropdown on the left (older or incorrect information)
3. Choose a household in the And move them into this Household dropdown on the right (newer or correct information)
4. Click on the Green Arrow
5. Choose the correct information for each line item from the left or right
6. Click Consolidate

Select by: Household Name Address

Select by: Household Name Address

Take everyone out of this household:
Brown Household: 1601 Manchester B

And move them into this household:
Brown Household: 1601 Manchester Blvd

Current members of household:

Full Name	DOB	Unit	M	C	S	Mmbr#
Brown, John	05/01/2007	01	M			71
Brown, Michael		01		C		
Brown, Sally		01		C		

Current members of household:

Full Name	DOB	Unit	M	C	S	Mmbr#
Brown, Dena		01		C		
Brown, Donna	01/01/2008	01	M			9
Brown, Jada	08/16/2007	01	M			10
Brown, John	05/01/2007	01	M			11
Brown, Michael		01		C		

6. Click on the Green Arrow to consolidate

7. On the Select Data to Merge screen choose the data that you want to keep – NOTE: you can choose from both sides as parts of the data may correct from each side and click Consolidate when done.

8. Answer yes to consolidate

NOTE: The process of consolidating households will then allow you to see any duplicate people.

Consolidate Households

This procedure will consolidate members, contacts and staff households into one household

Step by Step to consolidate duplicate households:

1. Choose to view the Households by Household Name or Address
2. Choose a household in the Take everyone out of this Household dropdown on the left (older or incorrect information)
3. Choose a household in the And move them into this Household dropdown on the right (newer or correct information)
4. Click on the Green Arrow
5. Choose the correct information for each line item from the left or right
6. Click Consolidate

Select by: Household Name Address

Select by: Household Name Address

Take everyone out of this household: [Dropdown]

And move them into this household: [Dropdown: Brown Household: 1601 Manchester Blvd]

Current members of household:

Full Name	DOB	Unit	M	C	S	Mmbr#
Brown, Dena		01		C		
Brown, Donna	01/01/2008	01	M			9
Brown, Jada	08/16/2007	01	M			10
Brown, John	05/01/2007	01	M			71
Brown, John	05/01/2007	01	M			11
Brown, Michael		01		C		
Brown, Michael		01		C		
Brown, Sally		01		C		

Follow the steps below to consolidate the duplicate people in your system.

1. While still in the Consolidate Households screen, click on the Consolidate Household Occupants button
2. On the left side of the screen choose the person you want to remove – this should be the older or incorrect information
3. On the right side of the screen choose the person you want to consolidate into
NOTE: You can view the details about either person by clicking on the corresponding View Person's Details buttons. Always consolidate the incorrect or oldest information into the correct or newest information.

Consolidate Occupants of Same Household

This procedure will consolidate ALL information for duplicated members, contacts and staff

To consolidate duplicate Occupants of a household:
 1. Choose a Household in the For this household dropdown
 2. Choose an occupant in the Occupant to be consolidated and DELETED box on the left
 3. Choose an occupant in the Select the occupant to be RETAINED box on the right
 4. Click on the Green Arrow
 5. Answer 'Yes for the 'Are you sure?' message
 6. Choose the correct information for each line item from the left or right
 7. Click Consolidate

For this household: Brown Household: 1601 Manchester Blvd

Occupant to be consolidated and DELETED:						Select the occupant to be RETAINED:					
FullName	Unit	DOB	M	C	S	FullName	Unit	DOB	M	C	S
Brown, Dena	01				C	Brown, Dena	01				C
Brown, Donna	01	01/01/2008	M			Brown, Donna	01	01/01/2008	M		
Brown, Jada	01	08/16/2007	M			Brown, Jada	01	08/16/2007	M		
Brown, John	01	05/01/2007	M			Brown, John	01	05/01/2007	M		
Brown, John	01	05/01/2007	M			Brown, Michael	01				C
Brown, Michael	01				C	Brown, Michael	01				C
Brown, Michael	01				C	Brown, Sally	01				C
Brown, Sally	01				C						

View this Person's Details M = Member, C = Contact, S = Staff View this Person's Details

Close

4. Click on the Green Arrow to consolidate
5. Answer yes to consolidate. Once you select yes, this procedure cannot be reversed.
6. If the member has overlapping Enrollment dates, you will see the below screen where you must fix the overlap. You can either change the entry and expiration dates or select an entire row and right-click to delete the record. Please verify that you have the correct information.

Enrollment History

You are seeing this screen because there is a problem with consolidating the enrollment records of the 2 members. There can be 1 of 2 problems:
 1. You have overlapping enrollment periods between 2 or more records.
 2. You have an enrollment record that doesn't have an expiration date, and it is NOT the most recent enrollment record.

You can change the existing records, delete records, or even add new ones.

However, you cannot continue with the consolidation until these have been resolved!

Entry Date	Expiration	Type	New/Renewal	Unit Code
05/06/2014	05/06/2015	Year Round	New	01
06/08/2015	07/31/2015	Summer Only	Renewing	01
08/10/2015	07/31/2016	Year Round	Renewing	01
09/06/2016	05/31/2017	Year Round	Renewing	01
01/25/2017	12/31/2017	Regular	Renewing	01
*				

Record: 1 of 5 No Filter Search

OK Cancel

7. On the Consolidate Household Occupants: Member-to-Member screen, select your data that you want to keep on the member. PLEASE view ALL of the tabs in the top right hand corner before consolidating.

Consolidate Household Occupants: Member-to-Member

Member Info Medical General Custom Fields

Member to Merge & DELETE: **Brown, John** Member being RETAINED: **Brown, John**

Which data to use?

First Name	John	☺	☺	John
Middle Name		☺	☺	
Last Name	Brown	☺	☺	Brown
Nickname		☺	☺	
Gender	M	☺	☺	M
Ethnicity	Caucasian	☺	☺	Multi-Racial
Date of Birth	05/01/2007	☺	☺	05/01/2007
Soc. Sec. #		☺	☺	
Membership Composite	71	☺	☺	11
Status	Active	☺	☺	Active
Teacher		☺	☺	
School	Green Holly Elementary	☺	☺	Green Holly Elementary
Grade Level	5	☺	☺	3
Fee Level	FRE - Eligible For Free Lunch	☺	☺	N - Non-Needy

PLEASE REVIEW ALL the information on ALL the tabs BEFORE you click the "Consolidate" button!

Consolidate Cancel

8. Click the Consolidate button.
9. You will receive a message stating "Consolidating Completed!"

NOTE: Please make absolutely sure you are consolidating the correct people into the correct Household. Once the procedure is complete it cannot be reversed.