

# Merge Complainants, Residents/Patients/Clients, Alleged Perpetrators

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## SA only

A right-click Merge option lets you consolidate redundant entries for complainants, residents/patients/clients, and alleged perpetrators without disrupting the underlying data. A merge action retains the correct record, removes incorrect record(s), and links the intakes involved.

For example, complainant Silas Brown Jr. is linked to intake A, while Silas Brown is linked to intake B. The SA determines that these two names represent the same person. A merge retains the correct record (Brown Jr.), removes the incorrect record (Brown), and links intake B to intake A.

Since RO users cannot see the complainant, resident, or alleged perpetrator directories, they cannot perform the type of merge activity that follows.

### To merge complainants, residents/patients/clients, or alleged perpetrators:

#### 1 Locate duplicate names

- Open **ACTS**.
- Activate the **HOSP OPEN** selection set.
- Expand the **Complainants** node and expand the **B** node.
- Locate the duplicate names, **Silas Brown** and **Silas Brown Jr.**
- Open the intakes for both to see how the names are listed in the intake:
  - Expand Silas Brown
  - Right-click the first open intake and select **Modify Intake**. Note the intake ID#.
  - Note the name in the Complainants grid.
- Do the same for Silas Brown Jr. Note the intake ID#.

#### 2 Locate incorrect name

- Locate the incorrect name, **Silas Brown**.
- Right-click the name and select **Merge Complainant**.

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**Note:** Merge options are not available in ARO.

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#### 3 INSTRUCTOR ONLY - Merge complainant

##### !!!Trainees – do not perform this step

- In the Find window, enter all or part of the correct Last Name of the complainant – Brown.
- Click **Find Now**.

If the inconsistency is with the first name, both correct and incorrect variants will appear in the Search Results area.

## MERGE COMPLAINANTS, RESIDENTS/PATIENTS/CLIENTS, ALLEGED PERPETRATORS

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- Double-click the correct variant (**Silas Brown Jr.**) in the Search Results box, or highlight it and then click **Select**.

A confirmation message indicates that the incorrect record (Silas Brown, the record you selected in the Tree view) will be deleted and any intakes to which that complainant is assigned will be linked to the correct record (Silas Brown Jr., the record you selected in Search Results).

- Click **OK** in the confirmation message.

The incorrect record is deleted, data from it is merged into the correct record, and any linked intakes are reassigned to the correct record.

- Click **OK** on the successfully completed notification.

Follow the preceding steps to merge Residents/Patients/Clients and Alleged Perpetrators as well.

### 4 View merged complainant

- Expand the **Complainants** node.

Silas Brown no longer exists.

- Expand **Silas Brown Jr.**

Note that both intakes are now listed under Silas Brown Jr.

Open both intakes. View name change on intake previously assigned to Silas Brown.