Merging Service Records

Market: House, Senate

Description: This guide provides instructions on how to merge active service records in cases of duplicate records.

- 1. Navigate to Services → My Open Services view.
- **2.** The results display all active services assigned to you. Select the duplicate service record that you want to delete or close.
- **3.** Note the ID# and/or name of the Primary Contact of the duplicate record.



- 4. Navigate to the other record that will remain open.
- 5. Select the Merge Services button within the Service.

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| ⊞ ơ ⊒ ♦ | Created 7/23/2024 1:14:39 PM by Jonathan Kilgore Summary Activity Data Attachments Logs | 2 |
| | Assigned: Jonathan Kilgore Release Updated: 7/23/2024 01:51 PM Alert: 7/26/2024 12:00 AM Description: Alert: Needs help with getting their passport expedited. Codes: Image: Codes: StATE-Department of State Messages: S Total 2 Open | Post |
| | Primary Contact Other Contacts ① Image: Contact ② Other Contacts ③ Lt. Roy Quorum ③ ④ Mr. Johnny C. Bravo ⑤ ⑥ Image: Contact ③ Image: Contact ③ 12134 Monument Dr 12134 Monument Dr 12134 Monument Dr Fairfax, VA 22033-5531 Fairfax, VA 22033-5531 Fairfax, VA 22033-5531 H: (098) 765-4321 H: (098) 765-4321 Received E-Mail from Mr. Johnny C. Bravo on 07/23/2024 | < |

6. In the Merge Services window, enter the ID# or Primary Contact in the Open Services field. IQ will automatically search for that record and display the results.

| Merge Services | | × |
|--|-----------|-------|
| Merge Services Open Services 801873 | | |
| Jane Quorum(Primary) (ID:801873 4528 Shirley Gate Rd , Fairfax, VA 22030-5524 jane.quorum@fakemail.com, (703) 994-0480 (C) Type: Casework Codes: U.S. Citzenship and Immigration Services USCIS Delete Merged Service Closed Status Code | | |
| | ID#801873 | Close |

7. Choose to either Delete Merged Service or close the service and select the appropriate *Closed Status Code*.

| Merge Services | | × |
|--|--------------------|-------|
| Merge Services Open Services Lt. Roy Quorum(Primary) (ID:802146) | | |
| Delete Merged Service | | |
| Closed Status Code | | |
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| ♦ | ID#802089 Row 2 | Close |

8. Click the Merge button.



| Open Services Lt. Roy Quorum(Primary) (ID:802146) Delete Merged Service Closed Status Code Closed Duplicate | Merge Services | | × |
|---|-------------------------------------|--------------------|-------------|
| Open Services Lt. Roy Quorum(Primary) (ID:802146) Delete Merged Service Closed Status Code Closed Duplicate | Merge Services | | |
| Lt. Roy Quorum(Primary) (ID:802146) Delete Merged Service Closed Status Code Closed Duplicate | Open Services | | |
| Delete Merged Service Closed Status Code Closed Duplicate | Lt. Roy Quorum(Primary) (ID:802146) | | |
| Closed Duplicate | Delete Merged Service | | |
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9. In the service record that remains open, the Activity Tab will list the merge action, as well as the Summary Report of Merged Workflow (this will be an attachment indicated with a

| ≡ | My Open Casework ➤ Find Open Casework ➤ Find Open Casework ➤ Find | 0 🛈 |
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| 創 | ← ⊕ New ∨ Change ∨ Report ∨ More ∨ | ⊖ Row 2 - ID 802089 |
| 0.∎ | * S OPEN Casework - DEPT OF STATE for Lt. Roy Quorum & ' Created 7/23/2024 1:14:39 PM by Jonathan Kilgore C Summary Activity Data Attachments Logs | r 🔁 🔀 |
| | Assigned: Jonathan Kilgore Release Updated: 11/05/2024 04:18 PM Alert: 7/26/2024 12:00 AM Description: Needs help with getting their passport expedited. Codes: Image: Codes: STATE-Department of State Messages: Messages: 5 Total 2 Open | Activity Add Message Discuss Image: Completed Merge of Workflow ID '802146' which was CLOSED with Status = 'CLOSED.DUPLICATE'. 11/5/2024-04:18 PM |
| × (114) | Primary Contact Other Contacts ① Lt. Roy Quorum Image: Contact Contacts ① Mr. Johnny C. Bravo Image: Contact Contacts ① 12134 Monument Dr 12134 Monument Dr 12134 Monument Dr Fairfax, VA 22033-5531 Fairfax, VA 22033-5531 H: (098) 765-4321 H: (098) 765-4321 Edit Complete Merge Services | Jonathan Kilgore & Summary Report Of Merged Workflow # 802146 |