

# Completing a Case Merge



**Knowledge Base Article**

# Completing a Case Merge

## Table of Contents

<b>Overview</b> .....	3
<b>Navigating to the Merge Case screen</b> .....	3
<b>Example of a Case Merge Error Message</b> .....	7
<b>Example of a Switch Case ID</b> .....	8
<b>Example of Two Cases That Can Be Merged</b> .....	9
<b>Case Member Comparison Section</b> .....	10
<b>Worker Assignment Overlap Dates</b> .....	11
<b>Caretaker Section</b> .....	12
<b>Other General Rules about Merging Case</b> .....	12
<b>Appendix A</b> .....	13
<b>Appendix B</b> .....	14

# Completing a Case Merge

## Overview

This Knowledge Base Article discusses how to merge two case records in Ohio SACWIS and related information about the process. However, not all cases can be merged.

See the case merge guidelines throughout this Knowledge Base Article, Appendix A and Appendix B, as well as the **Other General Rules about Merging Cases** subsection towards the end of this document.

## Navigating to the Merge Case screen

1. On the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Utilities** tab.
3. Click the **Merge Person** link in the **Navigation** menu.



The **Retain Person / Remove Person** screen appears.

4. In the **Retain Person** section, click the **Search Case** button.



The **Case Search Criteria** screen appears.

5. To search for the retain case, enter information into one (or more) of the following fields:
  - Case Last Name
  - Case First Name
  - Case ID

## Completing a Case Merge

6. Click the **Search** button.

Search For Case

Case ID:  ~ OR ~ Case Last Name:

Case First Name:

OR

Case Reference Type:

Worker Last Name:

Worker First Name:

Agency:

Case Status:  Case Category:

Name Match Precision  
*Returns results matching entered names including AKA names/nicknames*

+ AKA/Nicknames

Fewer Results *More Results*

Sort by:  
Relevance (Highest-Lowest)

**Search** Clear Form Cancel

The results appear in the **Case Search Results** section.

**Important:** To merge, the Retained Case must be in one of the following categories:

- Assessment / Investigation
- Alternative Response Assessment
- Alternative Response Ongoing
- Ongoing
- ICPC
- ICAMA
- Adoption Subsidy Only

7. Click the **Select** link in the appropriate row.

## Completing a Case Merge

Search Results							
Result(s) 1 to 1 of 1 / Page 1 of 1							
		Case Name / ID	Case Address	Current Case Status / Effective Date	Category	Agency Primary Worker	Agency Phone / Email
<a href="#">select</a>	<a href="#">edit</a>	Sacwis, Susie / 123456	Test Address	Closed / 11/19/2001	Assess/Invest	Test County Department of Job and Family Services	

[View Case Members](#) ▾

The **Retain Case / Remove Case** screen appears with the information populated in the retain section as shown below.

8. In the **Remove Case** section, click the **Search Case** button.

Retain Case	Remove Case
<p><b>Search Case</b></p> <p>Case ID: 123456</p> <p>Name: Sacwis, Susie</p> <p>Agency: Test County Department of Job and Family Services</p> <p>Status: Closed</p> <p>Effective Date: 11/19/2001</p> <p>Category: Assess/Invest</p> <hr/> <p>Address: Test Address</p> <p>Geo Code:</p> <p>Phone:</p>	<p><b>Search Case</b></p>

The **Case Search Criteria** screen appears.

9. To search for the remove person, enter information into one (or more) of the following fields:

- Case Last Name
- Case First Name
- Case ID

10. Repeat the previous **Search** steps to **Add** a person to the Remove Person section.

**Important:** To merge, the remove person can have only one open case episode and can only be in one of the following categories: **Assessment / Investigation** or **Alternative Response Assessment**.

## Completing a Case Merge

11. Click the **Search** button.

The results appear in the **Case Search Results** section.

12. Click the **Select** link in the appropriate row.

Search Clear Form

Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1

	Case Name / ID	Case Address	Current Case Status / Effective Date	Category	Agency Primary Worker	Agency Phone / Email
<a href="#">select</a> <a href="#">edit</a>	Test, Person / 121212	Test Address		Assess/Invest	Test County Job and Family Services	

[View Case Members](#) ▾

The **Retain Person / Remove Person** screen appears with the information populated in the remove section as shown below.

13. Click the **Compare Cases** button.

**Important:** This button compares the two cases that were searched to determine if they can be merged.

Retain Case	Remove Case
<p><b>Search Case</b></p> <p>Case ID: 123456</p> <p>Name: Sacwis, Susie</p> <p>Agency: Test County Department of Job and Family Services</p> <p>Status: Closed</p> <p>Effective Date: 11/19/2001</p> <p>Category: Assess/Invest</p> <hr/> <p>Address: Test Address</p> <p>Geo Code:</p> <p>Phone:</p>	<p><b>Search Case</b></p> <p>Case ID: 121212</p> <p>Name: Test, Person</p> <p>Agency: Test County Job and Family Services</p> <p>Status: Closed</p> <p>Effective Date: 10/24/1994</p> <p>Category: Assess/Invest</p> <hr/> <p>Address: Test Address</p> <p>Geo Code:</p> <p>Phone:</p>

**Compare Cases** Switch Case IDs

## Completing a Case Merge

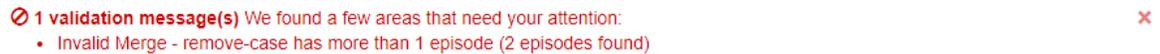
Depending on the cases selected, the system will:

- display an error message explaining why the persons can't be merged
- display a message asking you to switch the Case IDs
- allow you to merge the persons together successfully.

### Example of a Case Merge Error Message

If the cases cannot be merged, an error message appears at the top of the screen explaining why.

1. If possible, correct the case merge error.
2. Complete the previous steps to merge the cases again.

 1 validation message(s) We found a few areas that need your attention: ×

- Invalid Merge - remove-case has more than 1 episode (2 episodes found)

**Note:** The following things can prevent cases from being merged:

- Having certain work items on a remove case
- Having previously removed certain work items from a remove case
- The retain or remove case contains converted data.

To view a complete list of work items and their effect on merging cases, see **Appendix A**.

## Completing a Case Merge

### Example of a Switch Case ID

1. To switch Case IDs, click the **Switch Case IDs** button.

**Important:** This button switches the retain case with the remove case.

2. Click the **Compare Cases** button again.

Address:	123 Test Rd, Test Oh, 12345
Address	
Effective Date:	
Phone:	

Address:	345 Test Rd, Test Oh, 12345
Address	
Effective Date:	
Phone:	



The system switches the cases to the other column.

## Completing a Case Merge

### Example of Two Cases That Can Be Merged

If the cases can be merged successfully, the **Retain Case / Remove Case** screen appears displaying three sections (**Case Member Comparison**, **Case Assignment Comparison**, and **Caretaker**).

#### Important:

- The three sections are discussed in more detail below.
- In the **Status** fields (shown in green), the following values can appear for both remove and retain cases: **N/A**, **Open**, or **Closed**. If the retain case status is **N/A**, then the remove case must be owned by the same agency to merge the cases. If both the retain and remove case status is **Open**, then both cases must be owned by the same agency.

Retain Case	Remove Case
<b>Search Case</b>	<b>Search Case</b>
Case ID: 123456	Case ID: 121212
Name: Sacwis, Susie	Name: Test, Person
Agency: Test County Children Services Board	Agency: Test County Children Services Board
Status: Open	Status: Open
Effective Date: 04/08/2021	Effective Date: 01/05/2022
Category: Ongoing	Category: Assess/Invest
Address: Test Address	Address: Test Address
Geo Code:	Geo Code:
Phone:	Phone:

**Compare Cases** Switch Case IDs

Case Member Comparison	
Retain Case	Remove Case
Active Members	Active Members
01/09/1961-Biological Daughter	<input type="checkbox"/> Biological Mother

To merge the cases, fill out the information in each of the three sections.

## Completing a Case Merge

### Case Member Comparison Section

On the **Retain Case / Remove Case** screen, the **Case Member Comparison** section (**Remove Case** column) shows active case members on the remove case who are not on the retain case.

1. Click the check box next to any case members who you want to add to the retain case.

Case Member Comparison	
Retain Case	Remove Case
<b>Active Members</b>	<b>Active Members</b>
22222 - Test, Person 1 -01/09/1961-Biological Daughter	<input type="checkbox"/> 55555 - Test, Person 5 -10/19/2012-Biological Mother
33333- Test, Person 2 -06/07/2005-Biological Mother	<input type="checkbox"/> 66666 - Test, Person 6 -CASE REFERENCE PERSON
44444 - Test Person 3 -08/11/2008-Biological Mother	<input type="checkbox"/> 77777 - Test, Person 7 - intake 2102

The **Remove Person** section will list case members from the remove case, but not from the retain case. These case members will be grouped by “**Active**” or “**Inactive**” status.

For case members who have work items, their checkbox will automatically be checked and cannot be unchecked. However, you can select other case members to retain by clicking the check box next to their name.

### Case Assignment Comparison Section

On the **Retain Case / Remove Case** screen, the **Case Assignment Comparison** section (**Remove Case** column) shows assigned workers on the remove case who are not on the retain case.

If an assigned worker previously created work items on the remove case, their check box will automatically be checked and cannot be unchecked. And, that worker’s name will automatically appear within the **Assignment History** on the retain case.

1. Click the check box next to any assigned worker who you want to add to the retain case.

## Completing a Case Merge

Case Assignment Comparison	
Retain Case	Remove Case
Name	
	<input checked="" type="checkbox"/> Test, Worker
	<input checked="" type="checkbox"/> Test, Worker 2

### Worker Assignment Overlap Dates

If there are any worker assignment overlaps, the system automatically adjusts the dates as shown in these examples:

#### Example 1

**Retain Case** = Worker has assignment from **Jan 1** to **Feb 12**

**Remove Case** = Worker has assignment from **Feb 1** to **No End Date** (null)

After the case merge, the worker's assignment would show as beginning on Jan 1 and the end date would be removed, because the end date on the remove case was null.

#### Example 2

**Retain Case** = Worker has assignment from **Jan 1** to **Feb 12**

**Remove Case** = Worker has assignment from **Feb 1** to **Feb 15**

After the case merge, the retain case would show the worker was assigned beginning on Jan 1 and the system would update the end date to show Feb 15.

## Completing a Case Merge

### Caretaker Section

On the **Retain Case / Remove Case** screen, the **Caretaker** section allows you to choose which primary and secondary caregivers to retain on a case.

1. In the **Caretaker** section, select radio button(s) in **both** the **Remove Case** and **Retain Case** sections as needed.
2. When complete, click the **Merge** button.

The screenshot shows a web interface for selecting caregivers. At the top is a blue header labeled 'Caretaker'. Below it are two columns: 'Retain Case' on the left and 'Remove Case' on the right. Each column has two rows of radio buttons. The 'Retain Case' column has 'Primary:' and 'Secondary:' options, both with unselected radio buttons. The 'Remove Case' column has 'Primary: Test, Primary' and 'Secondary: Test, Secondary' options, both with selected radio buttons. At the bottom left, there are two buttons: 'Merge' and 'Cancel'.

A message displaying **Successful** appears. This means the case merge was successful.

**Appendix B** shows what **case details** you can expect to see on the retained case after a merge is complete.

### Other General Rules about Merging Case

- If a remove case is restricted, then the retain case will be restricted (if the retain case is not already restricted).
- If the retain case status is N/A, then the remove case must be owned by the same agency to merge the cases.
- The remove case can only have one episode in order to merge the cases. N/A status is not considered an episode.
- If both the retain and remove case status is Open, then both cases must be owned by the same agency.
- If a retain case is linked to a remove case, then that link will not move to the retain case.

## Completing a Case Merge

### Appendix A

This table provides a complete list of work items, specifies if their existence allows cases to merge, and mentions any limitations associated when merging a case with this work item.

Work Item	Merge if Present?	Limitation
Activity Logs	Yes	
Intake	Yes	
Safety Assessment	Yes	
Forms / Notices	Yes	
Safety Plan	Yes	
Family Assessment	Yes	
Ongoing Assessment	Yes	
Specialized Assessment	Yes	
Law Enforcement	Yes	
Justification / Waiver	Yes	
Case Services	Yes	Only if the retain case agency has ownership of all case services from the remove case.
Initial Removal	No	
Placement Request	No	
Placement	No	
Visitation Plan	Yes	
Case Plan	No	
Case Review / SAR	No	
Safety Reassessment	Yes	
Independent Living Plan	No	

## Completing a Case Merge

Work Item	Merge if Present?	Limitation
ICPC / ICAMA	No	
Case Closure	Yes	
Court	Yes	Legal Actions – Yes Legal Status – No
Case Conference Notes	Yes	
Reunification Assessment	No	
AR Case Decision	Yes	

### Appendix B

This table provides a complete list of case details and specifies what occurs with each one after a successful case merge.

Case Details	What Occurs After a Case Merge
Ticklers	All ticklers move from the remove case to the retain case
Ad Hoc Ticklers	Only ad hoc ticklers associated with the assignment (that was moved from the remove case) will merge
Assignment	This is user selectable and will appear as a list of non-duplicated assignments in the retain case. Also, the assignment(s) of workers who have completed or approved work items are automatically moved.  If overlapping worker assignments exist, Ohio SACWIS adjusts the dates to include the entire date range for that worker using the dates from both the retain and remove cases. See date example in the section above.
Caretaker	This is user selectable for both the remove and retain case. The selected caretaker(s) will move to the retain case.
Case Reference	Non-duplicated case references are moved automatically. The remove Case ID will be added as a case reference to the retain case.

## Completing a Case Merge

Case Details	What Occurs After a Case Merge												
Associated Persons	Non-duplicated associated persons are moved to the retain case automatically. Active date spans are adjusted as needed.												
Relationships	Relationships from the retain case will remain on the merged case. For selected members on the remove case, non-duplicated relationships will be moved to the retain case. <b>If a conflict exists, the retain case relationship takes priority.</b>												
Case Members (Active/Inactive)	<p>Non-duplicated case members on work items are automatically moved to the retain case. Non-duplicated case members who are not on work items are then presented for the user to select. Active date spans are adjusted as needed. If overlap exists, the dates will be adjusted to include the entire date range. The active date spans for non-duplicated case members are adjusted as shown:</p> <p><b>Example:</b></p> <table style="width: 100%; border: none;"> <tr> <td colspan="2">Retain Case</td> </tr> <tr> <td style="width: 50%;">Active Member</td> <td style="width: 50%;">Inactive Member</td> </tr> <tr> <td>Jan 1 – Feb 12</td> <td>Feb 12 – no date (null)</td> </tr> <tr> <td colspan="2">Remove Case</td> </tr> <tr> <td>Active Member</td> <td>Inactive Member</td> </tr> <tr> <td>Feb 1 – Feb 10</td> <td>Feb 10 – no date (null)</td> </tr> </table> <p>For the retain case, the system would show the person as being active on Jan 1 (the earliest date) and inactive on Feb 12 (the latest date). There cannot be an overlap.</p>	Retain Case		Active Member	Inactive Member	Jan 1 – Feb 12	Feb 12 – no date (null)	Remove Case		Active Member	Inactive Member	Feb 1 – Feb 10	Feb 10 – no date (null)
Retain Case													
Active Member	Inactive Member												
Jan 1 – Feb 12	Feb 12 – no date (null)												
Remove Case													
Active Member	Inactive Member												
Feb 1 – Feb 10	Feb 10 – no date (null)												
Linked Cases	Linked cases will move to the retain case with the following exception: <b>If a retain case is linked to a remove case, then that link will not move to the retain case.</b>												
Visitation Plan	Only non-overlapping visitation plans are moved to the retain case.												
All Other Work Items	Will move to the retain case.												

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).