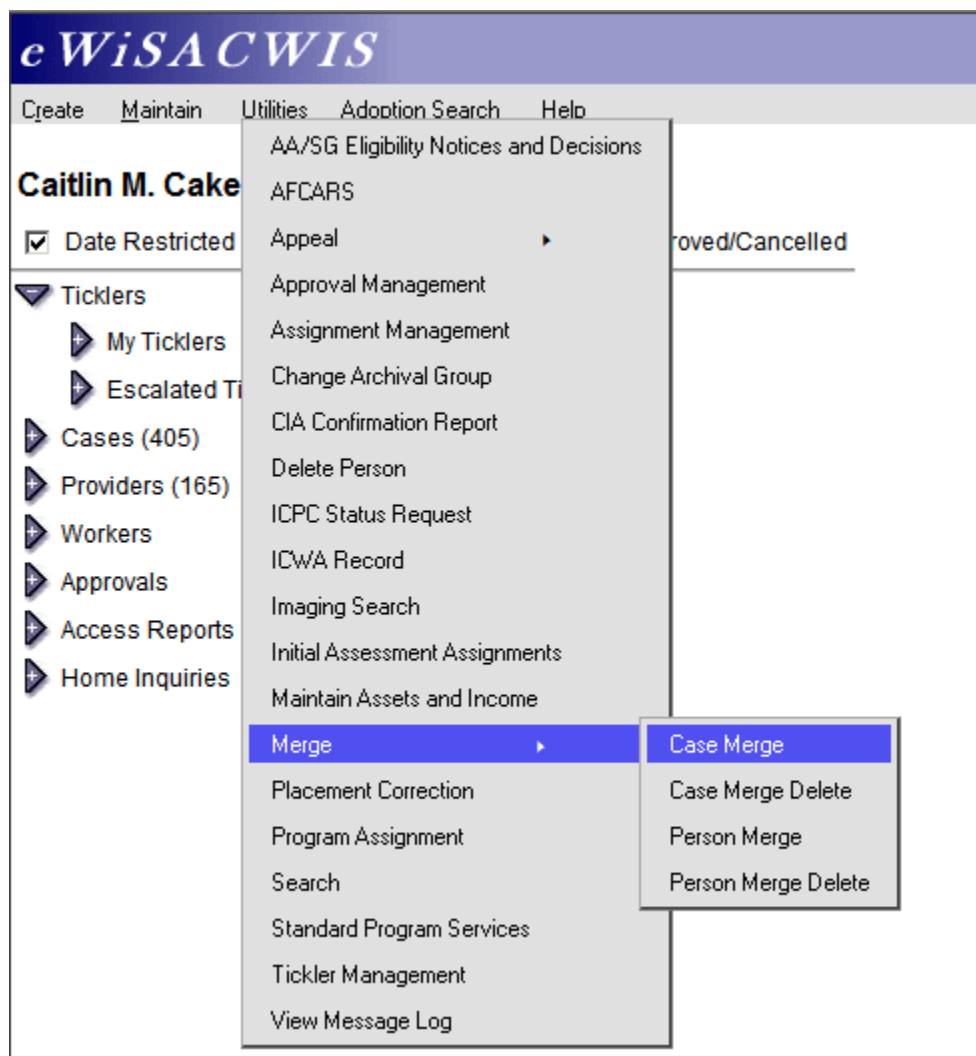


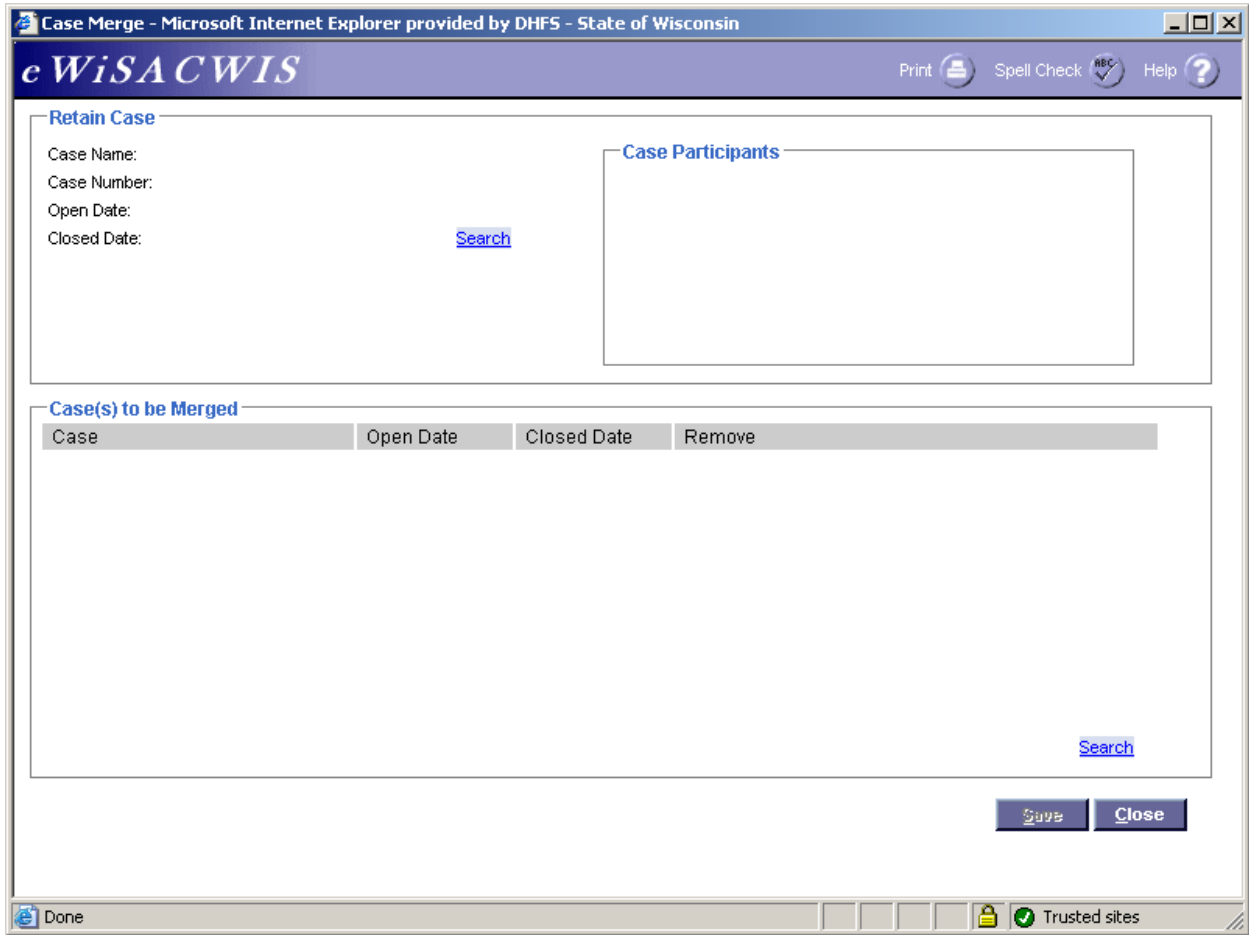
# Initiate Case Merge

## Day One

1. Confirm that all cases that you would like to merge have the same reference person with identical person IDs.
2. Go to the Utilities Menu > Merge > Case Merge. This will open the Case Merge page.



3. Click on the Search hyperlink in the Retain Case group box. This will open the Case Search page.



4. Search out the name of the case you would like to keep. Select the radio button next to the name of the case you would like to retain and click Continue.

Case Search -- Webpage Dialog

**eWISACWIS** Print Spell Check Help

**Search Criteria**

Last Name:  First Name:  Case ID:

Site:  ZIP Code:   Search Archives

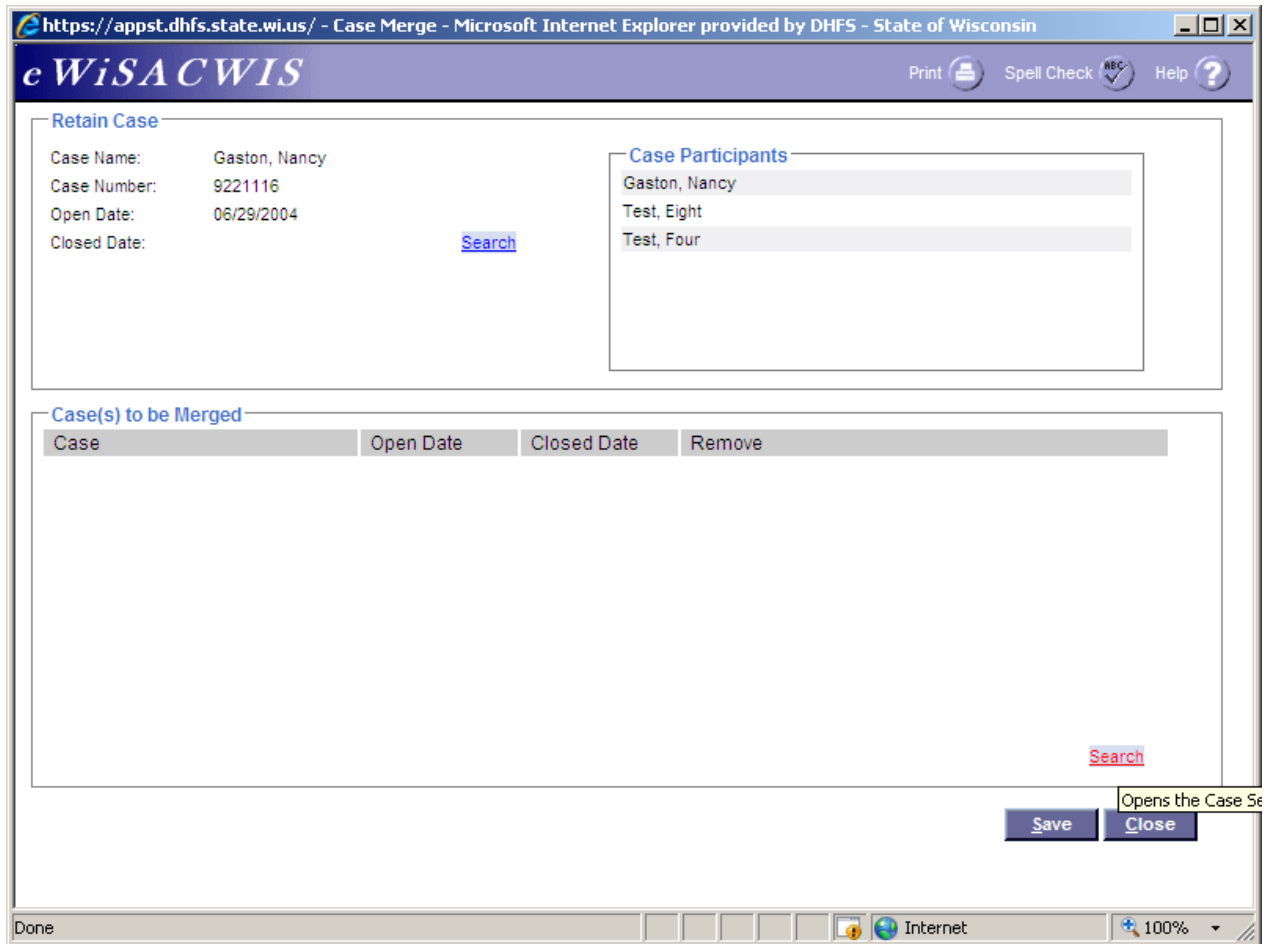
Search Precision:  Sort By:

Record 1 to 4 of 4

**Cases Returned**

- Gaston, Nancy ( 9221116 )  
CPS Family Status: Open 06/29/2004 Milwaukee-Site 1 452 Main Street , Lynxville, WI 54640
- Gaston, Nancy ( 9221124 )  
CPS Family Status: Open 06/30/2004 Cake, Caitlin (Supervisor) Ongoing Supervisor Milwaukee-Admin 452 Main Street , Lynxville, WI 54640
- Gaston, Nancy ( 9221123 )  
Child Welfare Status: Closed 06/30/2004 Milwaukee-Site 1 452 Main Street , Lynxville, WI 54640
- Gaston, Nancy ( 9221122 )  
CPS Family Status: Reopen 09/03/2004 Cake, Caitlin (Supervisor) Ongoing Supervisor Milwaukee-Admin 452 Main Street , Lynxville, WI 54640

- This will bring you back to the Case Merge page with the name of the Retain case filled in as well as the Case Number, the case open date and the case closed date, if applicable. Please note, if you are merging any open cases, the case you retain must be an open case.



- The next step is to select the cases you would like to merge into the retain case. Click the Search hyperlink and search out the cases you would like to merge. You can select multiple cases to be merged into the retain case, however you must search them out individually. Any combination of the following cases can be merged; a closed into a closed case, an open into an open case, or a closed into an open case.

The screenshot shows a web browser window titled "Case Merge - Microsoft Internet Explorer provided by DHFS - State of Wisconsin". The URL is "https://appst.dhfs.state.wi.us/". The page features the "WisACWIS" logo and navigation links for Print, Spell Check, and Help.

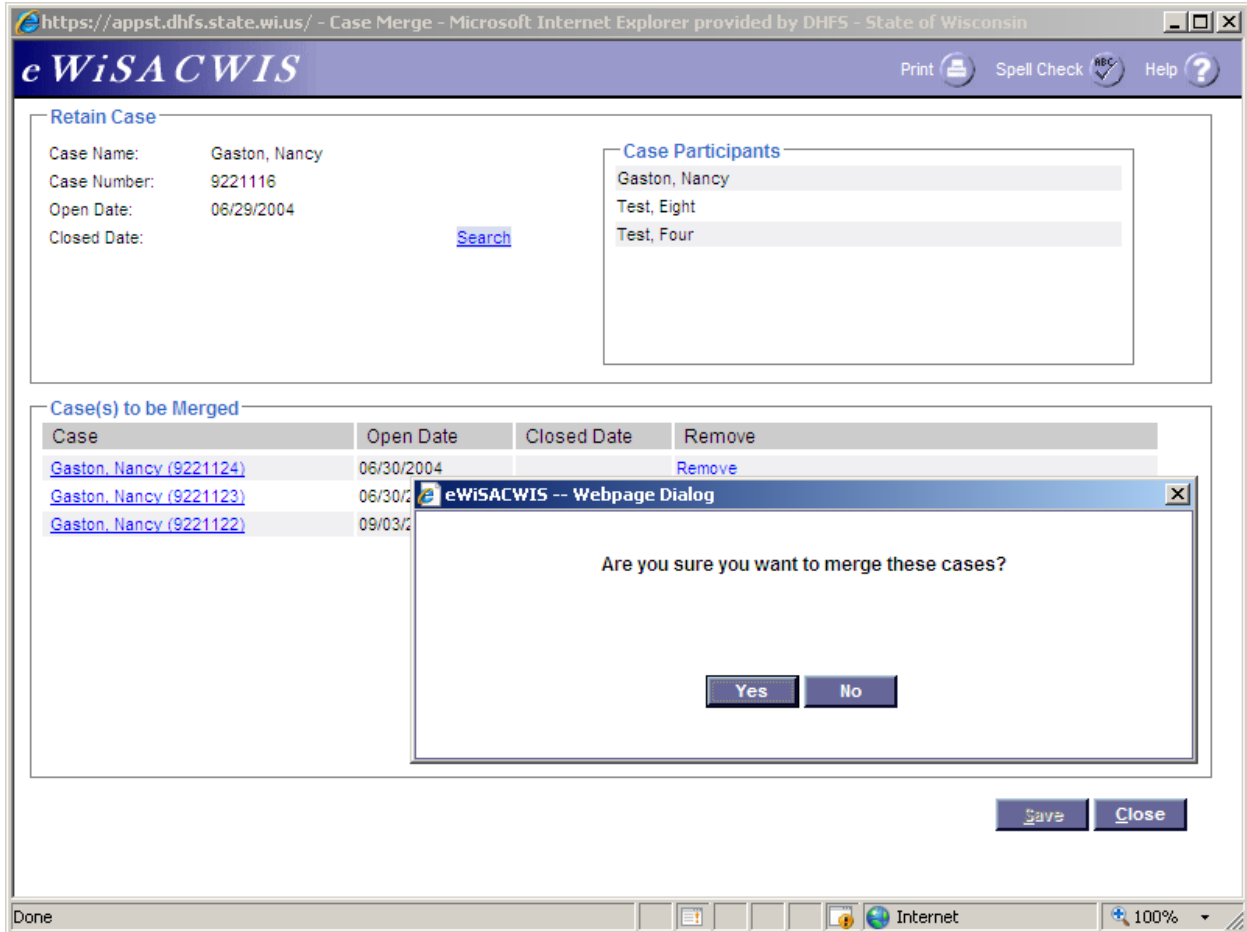
The main content area is divided into two sections:

- Retain Case:** Displays details for a case named "Gaston, Nancy" with Case Number "9221116", Open Date "06/29/2004", and a "Closed Date" field with a "Search" button next to it.
- Case Participants:** A list box containing "Gaston, Nancy", "Test, Eight", and "Test, Four".
- Case(s) to be Merged:** A table listing cases to be merged into the retain case.

| Case                                    | Open Date  | Closed Date | Remove                 |
|---|------------|-------------|------------------------|
| <a href="#">Gaston, Nancy (9221124)</a> | 06/30/2004 |             | <a href="#">Remove</a> |
| <a href="#">Gaston, Nancy (9221123)</a> | 06/30/2004 |             | <a href="#">Remove</a> |
| <a href="#">Gaston, Nancy (9221122)</a> | 09/03/2004 |             | <a href="#">Remove</a> |

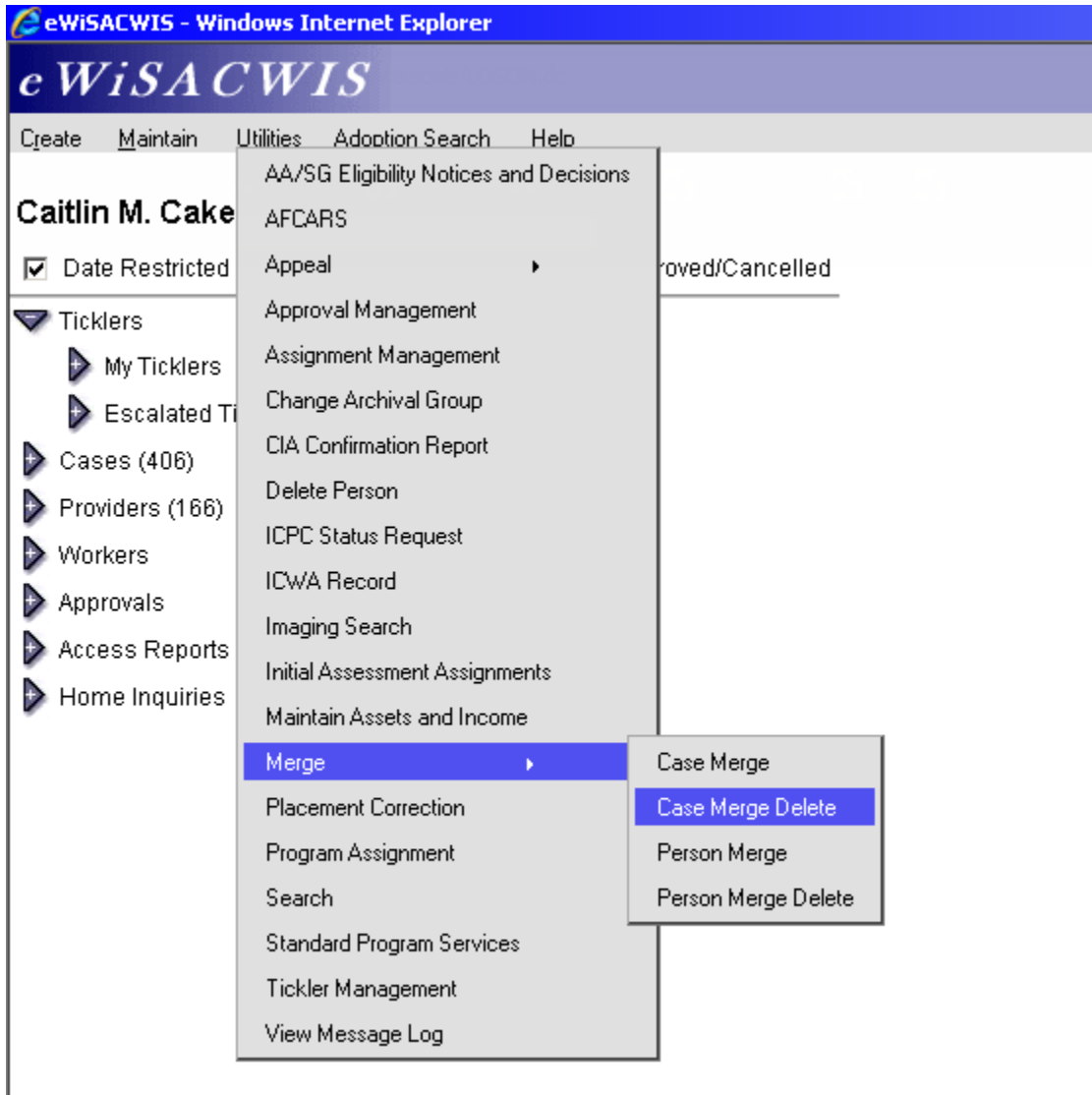
At the bottom of the "Case(s) to be Merged" section is a "Search" button. Below the table are "Save" and "Close" buttons.

- Once you have selected all cases you would like to merge, you can save the page. This will then prompt any error messages informing you if your merge cannot continue. If no errors exist, you will get a message asking if you are sure you would like to merge these cases. Click Yes.



- Your merge has now been saved and you may close out of the page. If at any point during day one you would like to reverse your case merge, you may do so on the Case Merge Delete page.

9. To perform a case merge delete, go to Utilities > Merge > Case Merge Delete. This will open the Case Merge Delete page.



10. The Case Merge Delete page will show you a record of all pending merges you currently are attempting. Click the checkbox under Delete for any cases you would like to delete from the case merge process and click Save.

The screenshot shows a web browser window with the URL <https://appst.dhfs.state.wi.us/?action=EDIT&fromWhere=desktop> and the page title "Case Merge Delete". The page header includes the "eWiSACWIS" logo and navigation links for Print, Spell Check, and Help. The main content area is titled "Pending Merge" and contains a table with the following data:

| Delete                   | Submitted by  | Date Requested | Retain Case             | Case(s) to be Merged    |
|--------------------------|---------------|----------------|-------------------------|-------------------------|
| <input type="checkbox"/> | Cake, Caitlin | 06/11/2009     | Gaston, Nancy (9221116) | Gaston, Nancy (9221124) |
| <input type="checkbox"/> | Cake, Caitlin | 06/11/2009     | Gaston, Nancy (9221116) | Gaston, Nancy (9221123) |
| <input type="checkbox"/> | Cake, Caitlin | 06/11/2009     | Gaston, Nancy (9221116) | Gaston, Nancy (9221122) |

At the bottom right of the table area, there are two buttons: "Save" and "Close". The browser's status bar at the bottom shows "Done", "Internet", and "100%".

## Day Two

1. Your cases should be merged. Information from the merged cases will appear in the Retain case.
2. You can see a history of case merges in the Merged Cases group box on the Closing/Merge History tab of the Maintain Case page.

Maintain Case - ID: 9221122 - Windows Internet Explorer

**eWISACWIS** Print Spell Check Help

Case: 9221122

Name: Gaston, Nancy Case Type: CPS Family - Initial Assessment Status: Reopen 09/03/2004

County: Milwaukee Site/Region: Milwaukee-Admin W-2 Region:

CARES Case #: County Case #:  Restricted

Participants Address Collaterals **Closing/Merge History**

**Case History**

| Open Date  | Closed Date | Reason            | Initiated by             |                            |
|------------|-------------|-------------------|--------------------------|----------------------------|
| 05/13/2011 | 06/29/2011  | Closing Disrupted | Vickery, Tanya (6205681) | <a href="#">Historical</a> |

**Merged Cases**

| Open Date  | Merged Date | Former Case No. | Former Case Name | Initiated by             |
|------------|-------------|-----------------|------------------|--------------------------|
| 06/04/2011 | 06/06/2011  | 60000266        | AAMain Mom       | Vickery, Tanya (6205681) |
| 05/27/2011 | 06/17/2011  | 60000244        | AAMain Child     | Burks, Angela (10415)    |

**Case Record Location**

Status: Location:

Last Modified By: Date:

Options:

Done Internet 100%