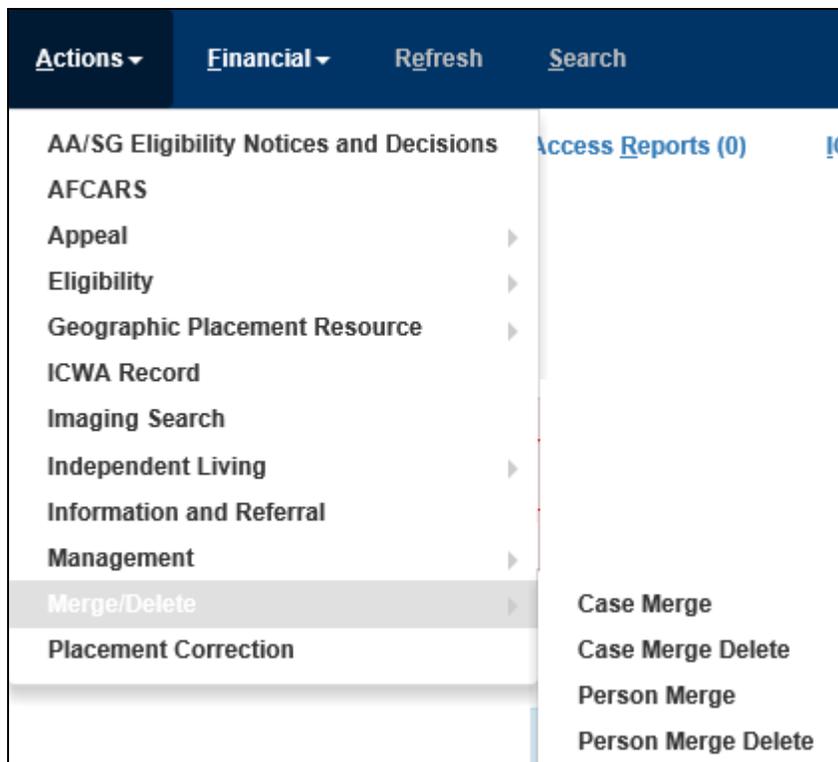


Initiate Case Merge

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 Actions Menu > Merge/Delete > 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.

Case Merge - Internet Explorer

eWiSACWIS Print Help

Retain Case

Case Name:
Case Number:
Open Date:
Closed Date: [Search](#)

Case Participants

Case(s) to be Merged

Case	Open Date	Closed Date	Remove
------	-----------	-------------	--------

[Search](#)

100%

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 Print Help

Search Criteria

Last Name: First Name: Case ID:

Site: ZIP Code:

Search Precision: Low Med High Sort By:

Record 1 to 10 of 10

Cases Returned

- Gaston, Nancy (9222321)
Child Welfare Status: Open 02/04/2008 Cake, Caitlin M., IV Program Manager Milwaukee-Region 1 123 Pendleton Dr. , Madison, WI 53704
- Gaston, Nancy (9222073)
CPS Family - Initial Assessment Status: Open 02/19/2007 Dane, Supervisor (Supervisor) Inactive ERO-DCFS-Green Bay C/O: CareofLine Name Street , Apt.#12 , addressline3 , Lynxville, WI 54640
- Gaston, Nancy (9222076)
CPS Family - Initial Assessment Status: Open 02/20/2007 Cake, Caitlin M., IV (Supervisor) Program Manager Milwaukee-Region 1 C/O: CareofLi 452 Main Street , Apt.#12 , addressline3 , Lynxville, WI 54640
- Gaston, Nancy (9222074)

- 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.

Retain Case

Case Name: Gaston, Nancy

Case Number: 9222321

Open Date: 02/04/2008

Closed Date: [Search](#)

Case Participants

- Aardvark, Child M., III
- Bagel, Dad
- Example, Daughter
- Example, Mother

Case(s) to be Merged

Case	Open Date	Closed Date	Remove
Search			

[Save](#) [Close](#)

100%

- 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.

Retain Case

Case Name: Gaston, Nancy
 Case Number: 9222321
 Open Date: 02/04/2008
 Closed Date: [Search](#)

Case Participants

- Aardvark, Child M., III
- Bagel, Dad
- Example, Daughter
- Example, Mother

Case(s) to be Merged

Case	Open Date	Closed Date	Remove
Gaston, Nancy (9222076)	02/20/2007		Remove
Gaston, Nancy (9222073)	02/19/2007		Remove

[Search](#)

[Save](#) [Close](#)

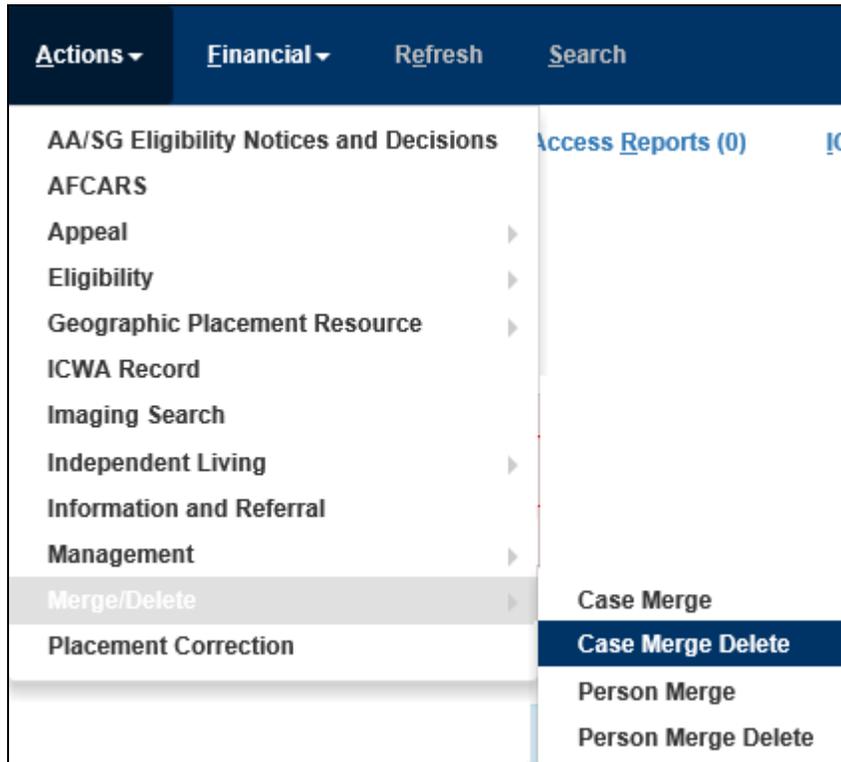
7. Once you have selected all cases you would like to merge, you can save the page. This will then prompt any error messages informing you if your merge cannot continue. If no errors exist, you will get a message asking if you are sure you would like to merge these cases. Click Yes.

Confirmation

Are you sure you want to merge these cases?

8. 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 Actions > Merge/Delete > 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.

Case Merge Delete - Internet Explorer

eWiSACWIS Print Help

Pending Merge

Delete	Submitted by	Date Requested	Retain Case	Case(s) to be Merged
<input checked="" type="checkbox"/>	Cake, Caitlin, M.	10/12/2018	Gaston, Nancy (9222074)	Gaston, Nancy (9221116)
<input checked="" type="checkbox"/>	Cake, Caitlin, M.	10/12/2018	Gaston, Nancy (9222074)	Gaston, Nancy (9221123)
<input checked="" type="checkbox"/>	Cake, Caitlin, M.	09/11/2018	Gaston, Nancy (9222321)	Gaston, Nancy (9222076)

Save Close

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: 9222321 - Internet Explorer

eWiSACWIS Print Help

Case: 9222321

Name: Case Type:

County: Site/Region:

CARES Case #: County Case #: W-2:

Restricted Designation: [Select Program](#) Status: Open 02/04/2008

[Participants](#) [Address](#) [Collaterals](#) **[Closing/Merge History](#)**

Case History

Open Date	Closed Date	Reason	Initiated by

Merged Cases

Open Date	Merged Date	Former Case No.	Former Case Name	Initiated by
02/20/2007	00/00/0000	9222076	Gaston Nancy	Cake, Caitlin M., IV (10173)

Options:

100%