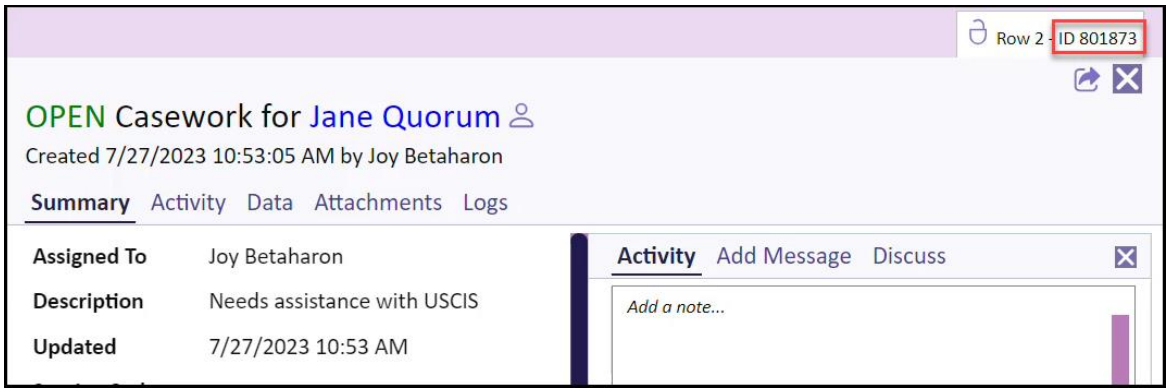
Merging Service Records

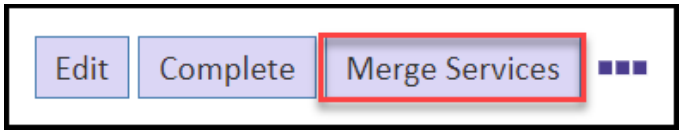
Market: House, Senate

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# of the duplicate record.



4. Navigate to the other record that will remain open.
5. Select either next to the record in the services list and select **Merge Services** or click the **Merge Services** button.



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

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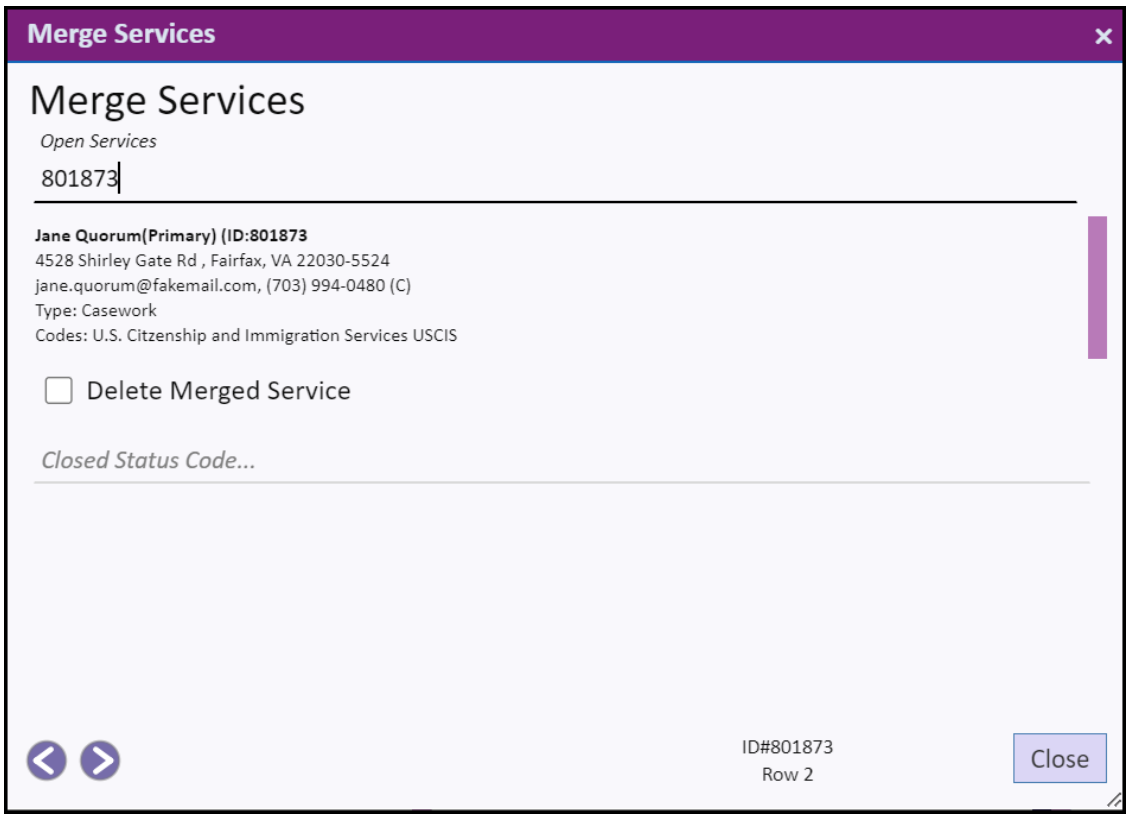

7. Choose to either Delete Merged Service or close the service and select the appropriate *Closed Status Code*.

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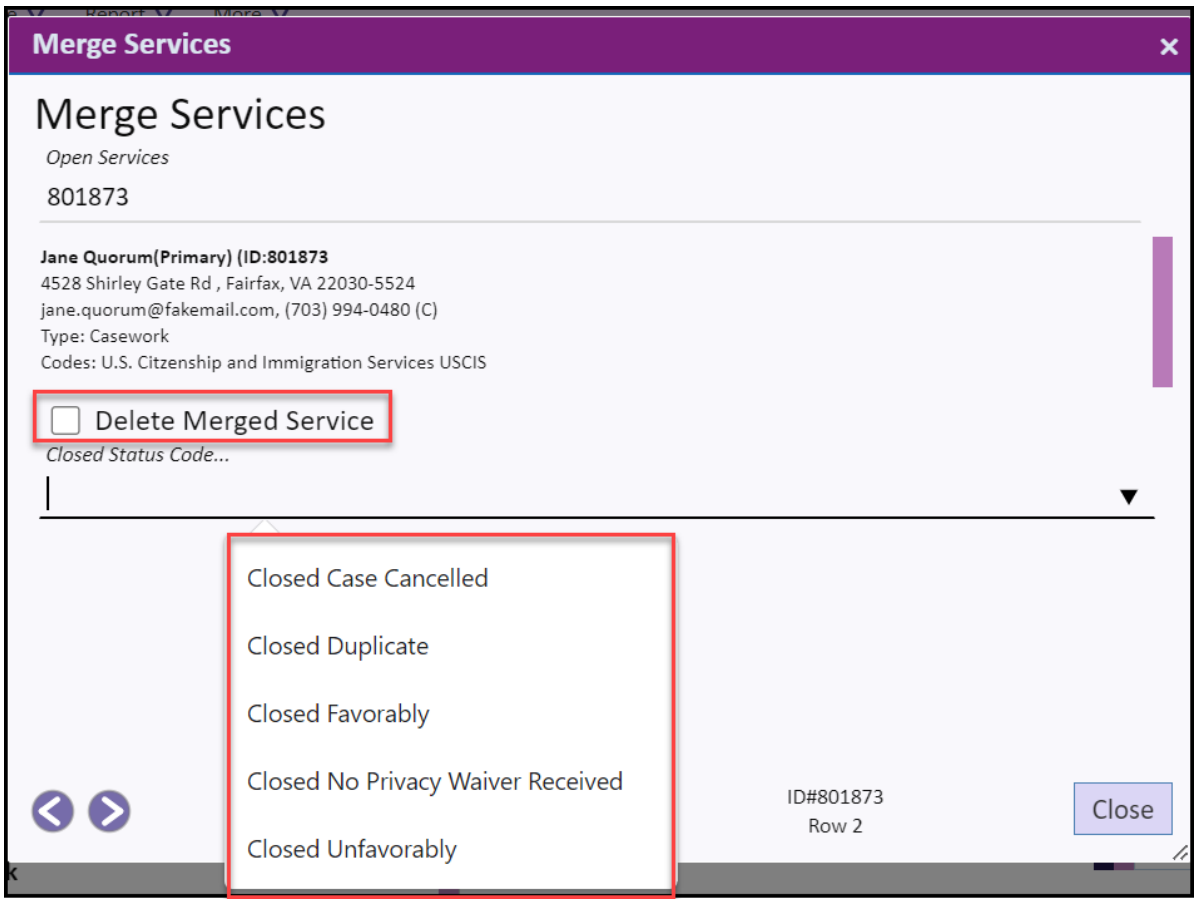

8. Click the **Merge** button.

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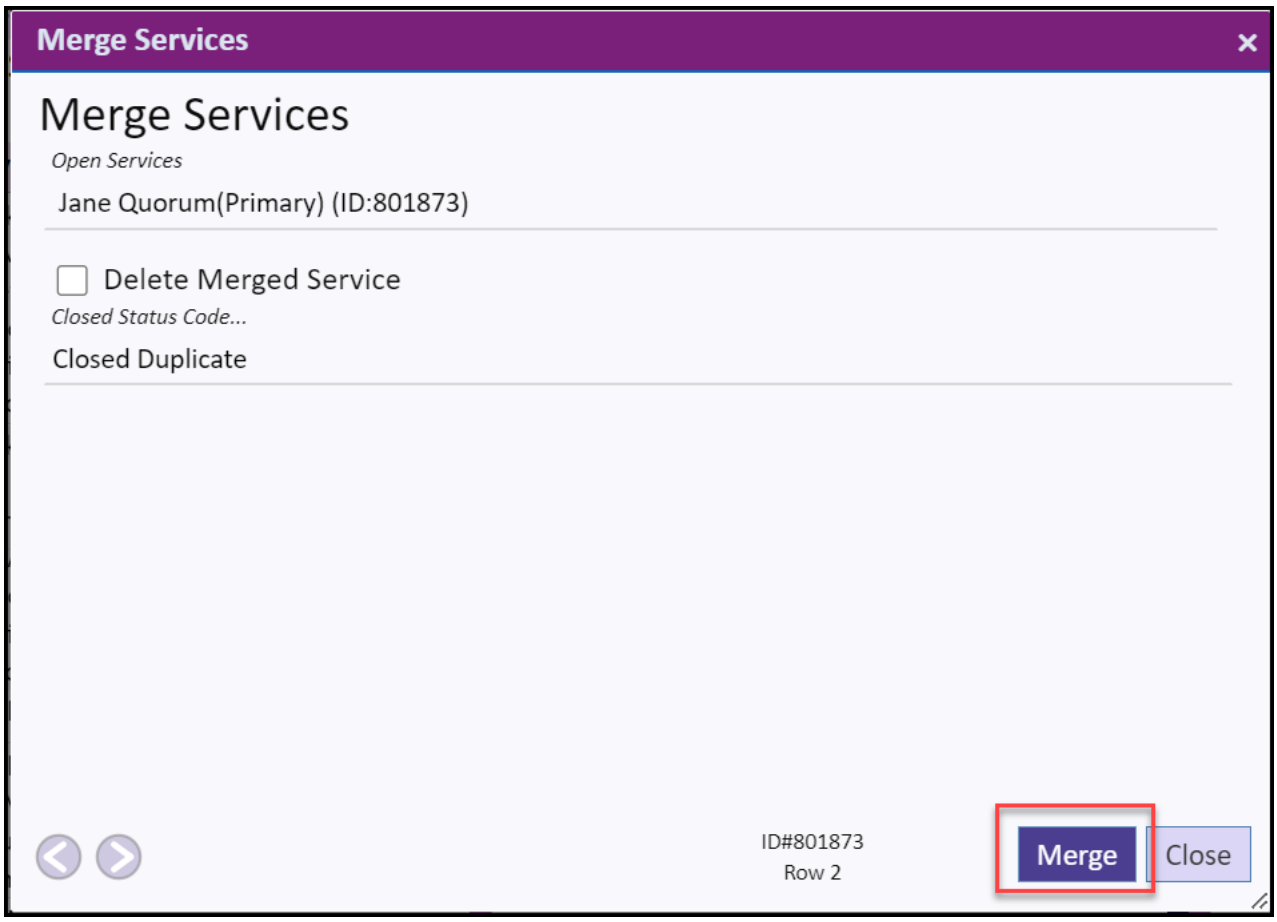
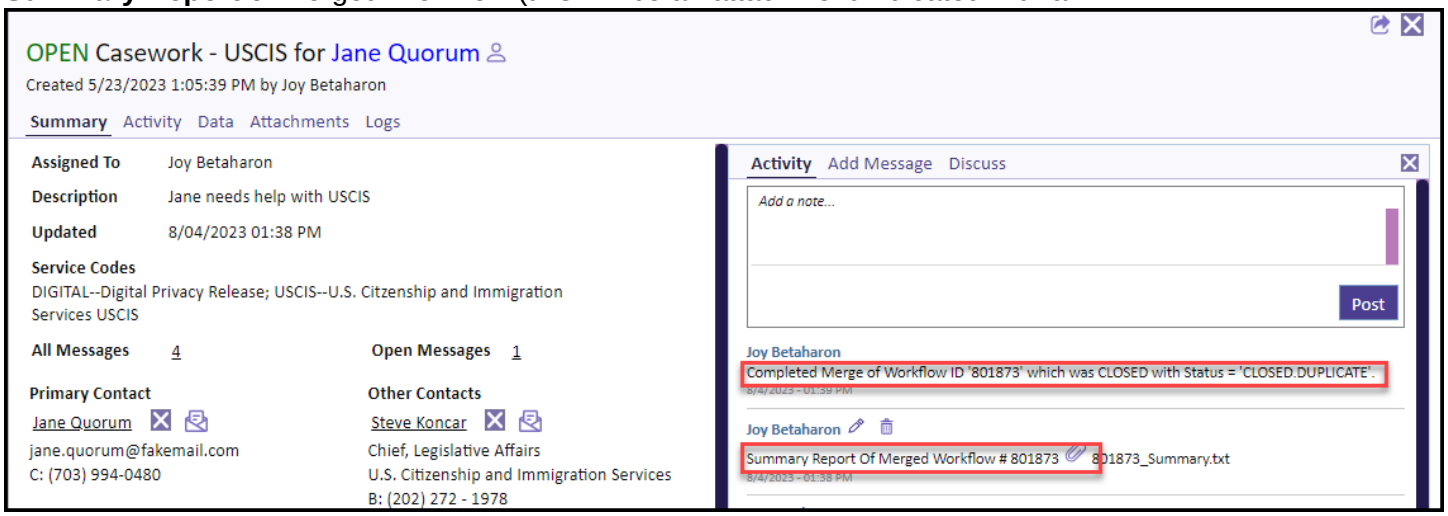


9. In the service record that remains open, the **Activity Tab** will list the merge action, as well as the **Summary Report** of Merged Workflow (this will be an attachment indicated with a .



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