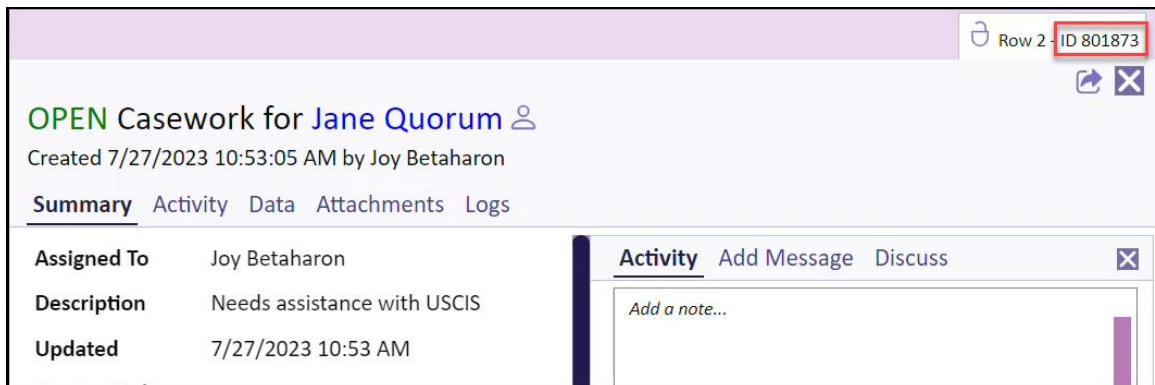


## Merging Service Records

**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.



Row 2 - ID 801873

**OPEN** Casework for Jane Quorum


Created 7/27/2023 10:53:05 AM by Joy Betaharon

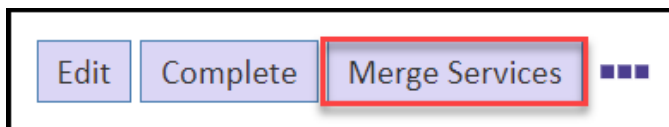
Summary Activity Data Attachments Logs

Assigned To	Joy Betaharon
Description	Needs assistance with USCIS
Updated	7/27/2023 10:53 AM

Activity Add Message Discuss

Add a note...

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.



Edit Complete Merge Services

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.

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. Citizenship and Immigration Services USCIS

☐ Delete Merged Service

Closed Status Code...

<

>

ID#801873  
Row 2

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

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. Citizenship and Immigration Services USCIS

☐ Delete Merged Service

Closed Status Code...

Closed Case Cancelled  
Closed Duplicate  
Closed Favorably  
Closed No Privacy Waiver Received  
Closed Unfavorably

ID#801873  
Row 2

Close

8. Click the **Merge** button.

Merge Services

## Merge Services

Open Services

Jane Quorum(Primary) (ID:801873)

---

☐ Delete Merged Service

Closed Status Code...

Closed Duplicate

---


<

>

ID#801873  
Row 2

Merge

Close

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 .

OPEN Casework - USCIS for Jane Quorum

Created 5/23/2023 1:05:39 PM by Joy Betaharon

[Summary](#)
[Activity](#)
[Data](#)
[Attachments](#)
[Logs](#)

Assigned To Joy Betaharon

Description Jane needs help with USCIS

Updated 8/04/2023 01:38 PM

Service Codes  
DIGITAL--Digital Privacy Release; USCIS--U.S. Citizenship and Immigration Services USCIS

All Messages 4

Primary Contact  
Jane Quorum  
jane.quorum@fakemail.com  
C: (703) 994-0480

Open Messages 1

Other Contacts  
Steve Koncar  
Chief, Legislative Affairs  
U.S. Citizenship and Immigration Services  
B: (202) 272 - 1978

Activity

Add Message

Discuss

Add a note...

Post

Joy Betaharon

Completed Merge of Workflow ID '801873' which was CLOSED with Status = 'CLOSED.DUPLICATE'.

Joy Betaharon

Summary Report Of Merged Workflow # 801873 801873\_Summary.txt