
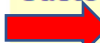


# Merging Cases:

[Watch Video](#)

There are times when a person accidentally gets a case added and it needs to be merged into another case. For example, Greg Brady already has a custody case in the system and we accidentally opened a new one when a Petition to Modify Custody was filed. Case number 2 needs to be merged into case number 1.

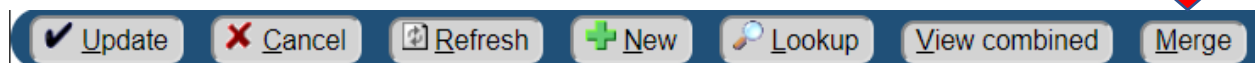
- Cases	Top
<b>Custody - 92JC1-2019-CUST-2 (Case Filed)</b>	
 Brady, Greg(Case 2) - Child from 1/24/2019 thru present	
<b>Custody - 92JC1-2018-CUST-125 (Case Filed)</b>	
 Brady, Greg(Case 1) - Child from 12/26/2018 thru present	
Brady, Mike(Case 1) - Petitioner from 12/26/2018 thru present	
Brady, Carol(Case 1) - Respondent from 12/26/2018 thru present	

Go to the case you wish to keep. In this example the case number 1.

When you merge cases, it is helpful to have the case number from the case you are going to merge into another. So in this example, I'm going to copy the case number from case 2.

- Case number history	Top
<u>2019CUST000002</u>	

On the Case Detail screen in case 1, click the Merge button.



This takes you to the Merge Cases screen.

Click the **Get case** button to go to the Name Search screen to find the case you wish to merge into this case.

## Merge Cases

Case number: 92JC1-2018-CUST-125; Custody  
Greg Brady (File# 19) - Child (Case# 1)  
Mike Brady (File# 20) - Petitioner (Case# 1)  
Carol Brady (File# 21) - Respondent (Case# 1)

Case to be merged into the above case:\*



Paste the case number into the case number field, then Click the **Submit** button.

## Name Search

Enter criteria and press Submit (use % and/or \_ for wild

At least one search criteria must be entered

Last: <input type="text" value="Wildcard search available"/>		First: <input type="text" value="Wildcard avail"/>
File Number: <input type="text"/>	Case: <input type="text" value="2019CUST000002"/>	
Race: <input type="text" value="-- Select --"/>	Sex: <input type="text" value="-- Select --"/>	DOB: <input type="text"/>
<input type="checkbox"/> File numbers only	<input type="checkbox"/> Addresses	<input type="checkbox"/> Show relatives



Click on the name of the person.

**Name Search**  
Enter criteria and press Submit (use % and/or \_ for wildcards in names)

Last: <input type="text" value="Wildcard search available"/>		First: <input type="text" value="Wildcard avail"/>	<input type="checkbox"/> Sound-a-like
File Number: <input type="text"/>	Case: <input type="text"/>	Petition: <input type="text"/>	
Race: (-- Select --)	Sex: (-- Select --)	DOB: <input type="text"/>	SSN/Tax ID: <input type="text"/>
<input type="checkbox"/> File numbers only	<input type="checkbox"/> Addresses	<input type="checkbox"/> Show relatives	<input checked="" type="checkbox"/> Auto clear criteria

[Click here for more screen options](#)

Name	File #	Race	Sex	DOB	SSN/Tax ID	AKA	Warrant Mom/Agency (*=User)
<a href="#">Add a new name</a> <a href="#">Add a new agency person</a>							
<a href="#">Brady, Greg</a>	19						
Most recent names used							

Which brings you to the Merge Cases screen. Verify that the case you wish to merge is correct. In this example case #2 is being merged into case #1. If this is correct, Click the **Update** button to continue.

**Merge Cases**

Case number: 92JC1-2018-CUST-125; Custody  
 Greg Brady (File# 19) - Child (Case# 1)

Mike Brady (File# 20) - Petitioner (Case# 1)  
 Carol Brady (File# 21) - Respondent (Case# 1)

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Case to be merged into the above case: **Case number: 92JC1-2019-CUST-2; Custody  
 Greg Brady (File# 19) - Child (Case# 2)**

NOTE: Once you press UPDATE, all data from this case (with the exception of case status history) will be merged into the case at the top of the window. You CANNOT undo this!

The cases are now merged. Case #2's case number has been added to the case number history, on bottom so case #1 case number is still the primary one.

- Case status history	<a href="#">Close case</a>	<a href="#">Top</a>
12/26/2018 - Case Filed		
- Case number history	<a href="#">Top</a>	
2018CUST000125		
2019CUST000002		
- Open Deac	<a href="#">Case Number Detail</a>	County Juvenile Court Servic
None		

You can delete and reuse that number or if you have documents with that number on them, you may want to leave it.

Everything from case #2 is not part of case #1. Filed Statutes, Requirements, Events, Documents, everything.

You can search for a name instead of a case number if you are searching for a different name. It will bring up a list of cases for that person and you can select the case. However, if you are searching for the same person, you need to search by case number.