


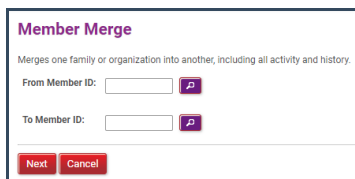
Member Merge

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Member Merge

Find Member > Access Account to be Merged

1. Click **Find Member** > Search for the **From** account (the account to be merged into another unit).
2. Click the **Merge**  icon on the profile screen (permission-based).
3. Use the magnifying glass to search for the **To** unit (the account that the from account will be merged to) and click **Next**.



4. For each person in the **From** household account, select from the dropdown to tell the system whether that person should be merged with an existing person in the **To** household (if they are the same person) or become a new family member (if they are a separate person who doesn't yet exist in the **To** household unit). Click **Next**.
5. Select which demographic details and contact information to retain for each merged person.
6. Click **Finish** to finalize the merge. Remember, the merge is **final** and **cannot be reversed**. The From account will appear in the system as if it never existed.

IMPORTANT: *Merge is final and cannot be undone. Do not merge unless you are certain.*

The merge process combines household accounts. This means everyone in the **From** household is merged into the **To** household. Individuals cannot be extracted from a household account and merged into another household unit. All individuals in the from account must be merged.

If someone is no longer part of a household, they should be **hidden**, and a new account should be created. This keeps the history intact from when they were part of the old household unit.
