

Service Insights: Managing Duplicates

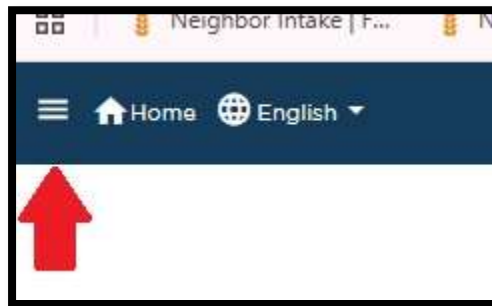
Updated July 2026



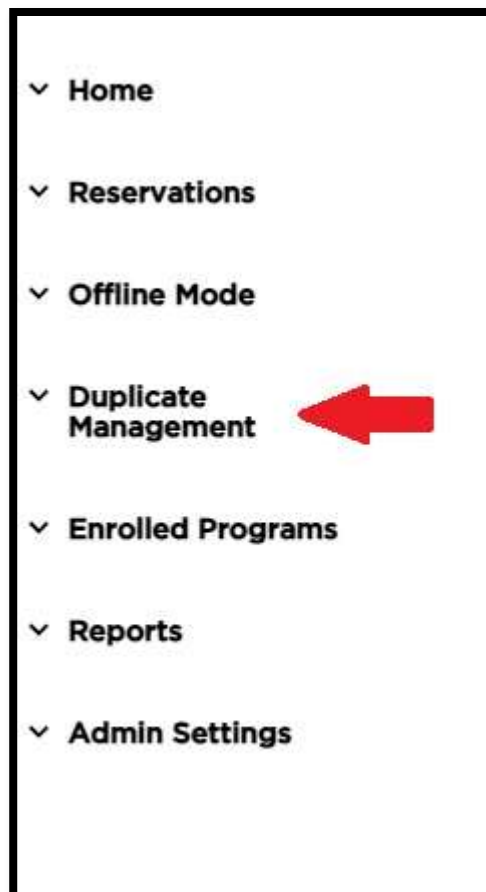
Service Insights automatically searches the database as you enter information and alerts you to potential duplicate records. These alerts help prevent the creation of multiple profiles for the same individual. Depending on your access level, you may be able to review and manage duplicate records during the intake process, as well as manage duplicates across your agency's database.

Merging Duplicates

Due to the nature of a network wide intake system duplicate accounts are bound to happen. To manage them we will use the built in Duplicate Management option. To access this option, navigate to the top left corner of the screen, next to the home button, you will see three lines we refer to as a hamburger.



Click the hamburger and it will bring up a dropdown. Choose Duplicate Management.



Then it will have another Duplicate Management option, click on the second duplicate management option to take you to the duplicates screen.



On the Duplicates screen, you will see a list of all potential duplicate records identified in the system. This includes records that were flagged as potential duplicates either by you during the intake process or automatically by Service Insights based on matching data. Click Begin Merge button to go into the profile.

Kara Stewart	Yes	1/1/1996	3355 S Purdue Ave Oklahoma City, Oklahoma 73179	2	1	38%	Begin Merge
Kara Stewart	Yes	2/10/1982	3355 S Purdue St Oklahoma City, Oklahoma 73179	5	1	38%	Begin Merge

The percentage indicates that there was enough information from another profile in the system to detect a possible duplicate. Start the process by clicking the Compare button.

2 Household Member Match								3 Household Details Match	
Name	Marked as Duplicate	DOB	Address	Household Size	# of Matches	Last Visit Date	# of Visits	Highest Match	
Kara Stewart	Yes	1/1/1996	3355 S Purdue Ave Oklahoma City, OK 73179	2	1	N/A	N/A		
Kara Stewart	No	2/10/1982	3355 S Purdue St Oklahoma City, OK 73179	5		N/A	N/A	38%	Compare

CancelNext

From this screen, you can view a side-by-side comparison of both profiles to help you determine whether they should be merged and to verify which record should remain as the primary profile.

Are these households the same?
You'll merge neighbors in the households in the next step

← Flip Primary and Potential Duplicate →

Primary Household

Household Info

Head of household	Marked as	Last Visit Date	# of Visits
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Potential Duplicate

Household Info

Head of household	Marked as	Last Visit Date	# of Visits
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If the record currently marked as the Potential Duplicate should instead be the Primary record, select Flip Primary and Potential Duplicate. This will switch the positions of the two records, ensuring that the correct profile remains as the primary record and the duplicate profile is merged into it. Before completing the merge, carefully review both records to confirm that the primary and duplicate designations are accurate.

To see the rest of the household information click View Additional Info.

Primary Household			
Household Info			
Head of household	Marked as duplicate	Last Visit Date	# of Visits
Kara Stewart	Yes	N/A	0
Address 3355 S Purdue Ave		Apt., Floor, etc.	
City Oklahoma City	*State OK	*Zip 73179	
*County Oklahoma			
Household Members Stewart, Joey			
View Additional Info			
Proxy N/A	SNAP Benefits No		
Other Government Programs Supplemental Security Income (SSI) Medicaid		Military Status Yes, on active duty in the past, but not now	
Languages N/A	Dietary Restrictions Low Fat Low Sugar		
Disability Status N/A	Living Situation N/A		

Potential Duplicate			
Household Info			
Head of household	Marked as duplicate	Last Visit Date	# of Visits
Kara Stewart	No	N/A	0
Address 3355 S Purdue St		Apt., Floor, etc.	
City Oklahoma City	*State OK	*Zip 73179	
*County Oklahoma			
Household Members Smith, Johnny Stewart, Bohnny Smith, John			
Dismiss			
View Additional Info			

By selecting View Additional Info for each profile, you can compare household and profile details side by side to help determine which record should remain as the Primary profile.

When reviewing potential duplicates, focus on key information such as:

- Last Visit Date: The profile with the most recent visit is often the best candidate for the primary record because it is more likely to contain the most current information.
- Completeness of Information: If the visit dates are similar, compare the amount of information in each profile. Look at the number of completed questions, household details, and other recorded data.

In general, the profile that is most recently updated and/or contains the most complete information should be selected as the Primary profile. Once you have identified the appropriate primary record and verified the information, click Next to continue the merge process.

From here you will be taken to a page that allows you to merge the members of the household if needed.

Are these the same people?
Please match household member on the right with household member on the left. You'll merge individual details in the next step.

Primary Household	Potential Duplicate
Household Members Kara Stewart, HOH Gender: Female Race/Ethnicity: N/A DOB: 1/1/1996 Age: 30 Joey Stewart Gender: Male Race/Ethnicity: N/A DOB: 1/1/2014 Age: 12	Household Members Kara Stewart, HOH Gender: N/A Race/Ethnicity: N/A Select DOB: 2/10/1982 Age: 44 * This is required Eli Stewart Gender: N/A Race/Ethnicity: N/A Select DOB: 5/1/2023 Age: 3 * This is required Johnny Smith Gender: N/A Race/Ethnicity: N/A Select DOB: 5/1/1977 Age: 49 * This is required Bohnnny Stewart Gender: N/A Race/Ethnicity: N/A Select DOB: 12/20/1980 Age: 45 * This is required

On the right side, you'll see potential duplicates. Choose the correct person to match the primary. Then click the dropdown in the name box to match it to the correct primary person.

Primary Household	Potential Duplicate
Household Members Kara Stewart, HOH Gender: Female Race/Ethnicity: N/A DOB: 1/1/1996 Age: 30 Joey Stewart Gender: Male Race/Ethnicity: N/A DOB: 1/1/2014 Age: 12	Household Members Kara Stewart, HOH Gender: N/A Race/Ethnicity: N/A DOB: 2/10/1982 Age: 44 Eli Stewart Gender: N/A Race/Ethnicity: N/A DOB: 5/1/2023 Age: 3 * This is required

When you match them, the potential will be merged into the Primary Household.

Primary Household	Potential Duplicate
Household Members Kara Stewart, HOH Gender: Female Race/Ethnicity: N/A DOB: 1/1/1996 Age: 30 Joey Stewart Gender: Male Race/Ethnicity: N/A DOB: 1/1/2014 Age: 12	Household Members Kara Stewart, HOH Gender: N/A Race/Ethnicity: N/A DOB: 2/10/1982 Age: 44 Eli Stewart Gender: N/A Race/Ethnicity: N/A DOB: 5/1/2023 Age: 3 * This is required

You will come across occasions where a person listed is no longer listed as a member in the Primary Household. In Service Insights, the best way to address this when merging duplicates is to add them to the Primary Household and then inactivate them. *(Details on how to do following the completed merge.)*

Are these the same people?

Please match household member on the right with household member on the left. You'll merge individual details in the next step.

Primary Household	Potential Duplicate
Kara Stewart, HOH Gender: Female Race/Ethnicity: N/A DOB: 1/1/1996 Age: 30	Kara Stewart, HOH Gender: N/A Race/Ethnicity: N/A Select DOB: 2/10/1982 Age: 44 * This is required
Joey Stewart Gender: Male Race/Ethnicity: N/A DOB: 1/1/2014 Age: 12	Eli Stewart Gender: N/A Race/Ethnicity: N/A Select DOB: 5/1/2023 Age: 3 * This is required
	Johnny Smith Gender: N/A Race/Ethnicity: N/A Select DOB: 5/1/1977 Age: 49 * This is required
	Bohnnny Stewart Gender: N/A Race/Ethnicity: N/A Select DOB: 12/20/1980 Age: 45 * This is required

In the Possible Duplicate column, from the drop-down menu, select Add to Primary. This will add them to the Primary Household.

Johnny Smith
Gender: **N/A**
Race/Ethnicity: **N/A**
DOB: **5/1/1977** Age: **49**

Bohnnny Stewart
Gender: **N/A**
Race/Ethnicity: **N/A**
DOB: **12/20/1980** Age: **45** * This is required

Select
Search...
Match to Joey Stewart
Add to primary
Select * This is required

This next screenshot illustrates that additional members were successfully added to the Primary Household. You will have to go back into the account later to inactivate them but for now, once you have everyone go ahead and click Next. *(Details on how to inactivate members following the completed merge.)*

Note: Do not click Dismiss, as this will dismiss the entire household as not being a duplicate.

Gender	Race/Ethnicity	DOB	Age	Action
N/A	N/A	1/1/2014	12	
Ell Stewart	N/A	5/1/2023	3	Added To Household
Johnny Smith	N/A	5/1/1977	48	Added To Household
Bohnnny Stewart	N/A	12/20/1980	45	Added To Household
John Smith	N/A	5/4/2024	2	Added To Household

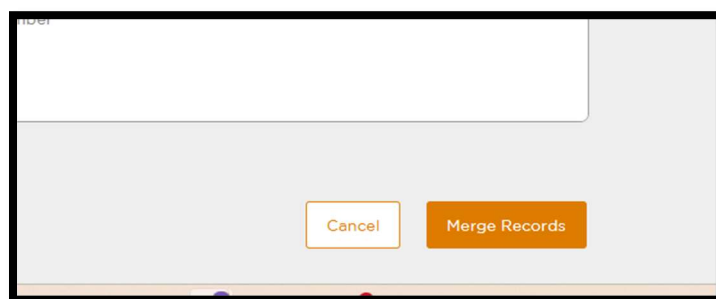
Gender	Race/Ethnicity	DOB	Age	Action
N/A	N/A	5/1/2023	3	Add to primary
Johnny Smith	N/A	5/1/1977	49	Add to primary
Bohnnny Stewart	N/A	12/20/1980	45	Add to primary
John Smith	N/A	5/4/2024	2	Add to primary

 Dismiss

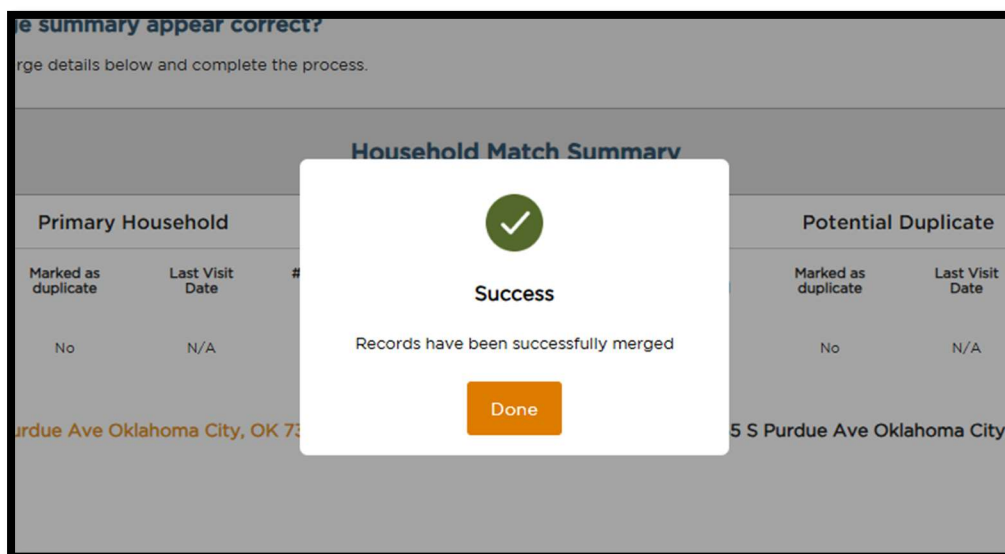
Next you will be taken to a page where you can conduct a final comparison to make sure you have everyone matched to the proper primary or added to the primary as needed. If nothing needs to be changed, click next. This will be the final page that allows you to ensure what you are seeing is what you want.

Head of Household	Marked as duplicate	Last Visit Date	# of Visits		Head of Household	Marked as duplicate	Last Visit Date	# of Visits	
Jane Rudolph	No	N/A	0		Jane Rudolph	No	N/A	0	
3355 S Purdue Ave Oklahoma City, OK 73179				← Matched to	3355 S Purdue Ave Oklahoma City, OK 73179				
Final Primary Members					Potential Duplicate Members				
Status: Active Jane Rudolph, HOH Gender: Female : White DOB: 1/1/1966 Age: 60					← Matched to	Status: Active Jane Rudolph, HOH Gender: N/A : N/A DOB: Age:			
Status: Active Cheryl Rudolph Gender: Female : White DOB: 1/1/1936 Age: 90					← Existing Household Member	Not Matched			
Status: Active Smudge Rudolph Gender: Female : White DOB: 5/8/1949 Age: 77					← Existing Household Member	Not Matched			

If everything looks good, click Merge Records.



When the Success window pops up, click Done, and you have successfully merged records!



Inactivating Household Members from a Merged Account:

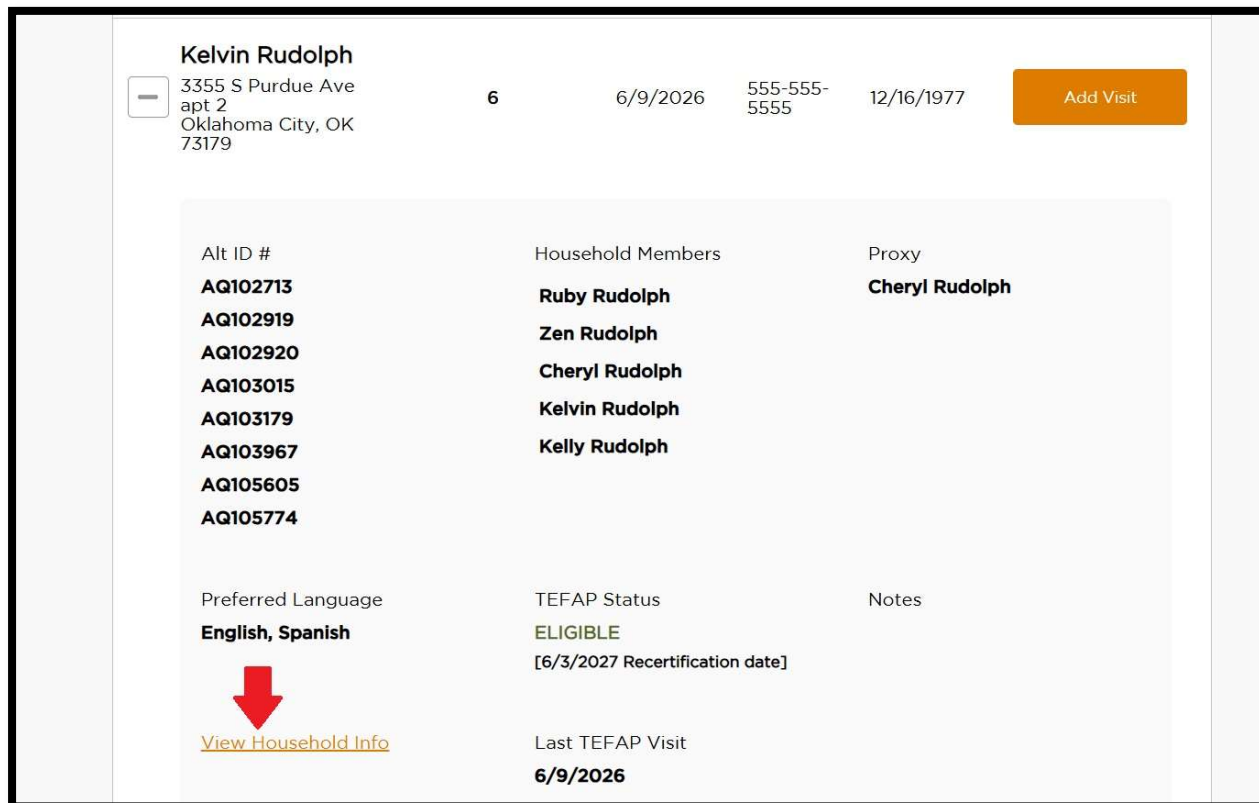
If, during the merge process, household members were added to the Primary Household but are no longer part of that household, those household members should be marked as Inactive. To do this, begin from the Home Screen and navigate to the household record via the Search field.



Once the household record is found, next to the neighbor's name, Click the plus sign.



This will bring up the household information. Click the View Household Info link.



Alt ID #	Household Members	Proxy
AQ102713	Ruby Rudolph	Cheryl Rudolph
AQ102919	Zen Rudolph	
AQ102920	Cheryl Rudolph	
AQ103015	Kelvin Rudolph	
AQ103179	Kelly Rudolph	
AQ103967		
AQ105605		
AQ105774		

Preferred Language: English, Spanish

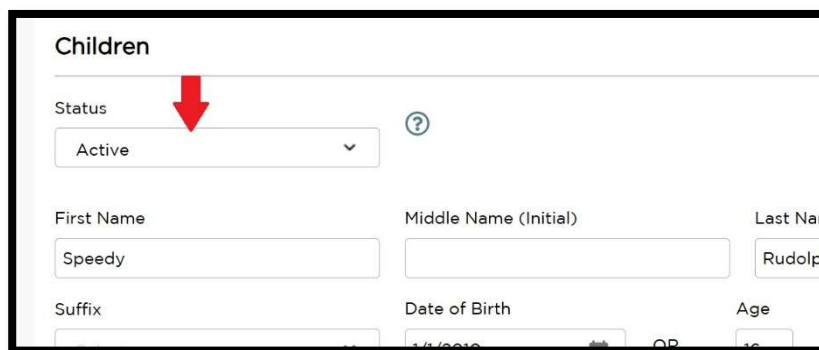
TEFAP Status: ELIGIBLE

Notes: [6/3/2027 Recertification date]

Last TEFAP Visit: 6/9/2026

[View Household Info](#)

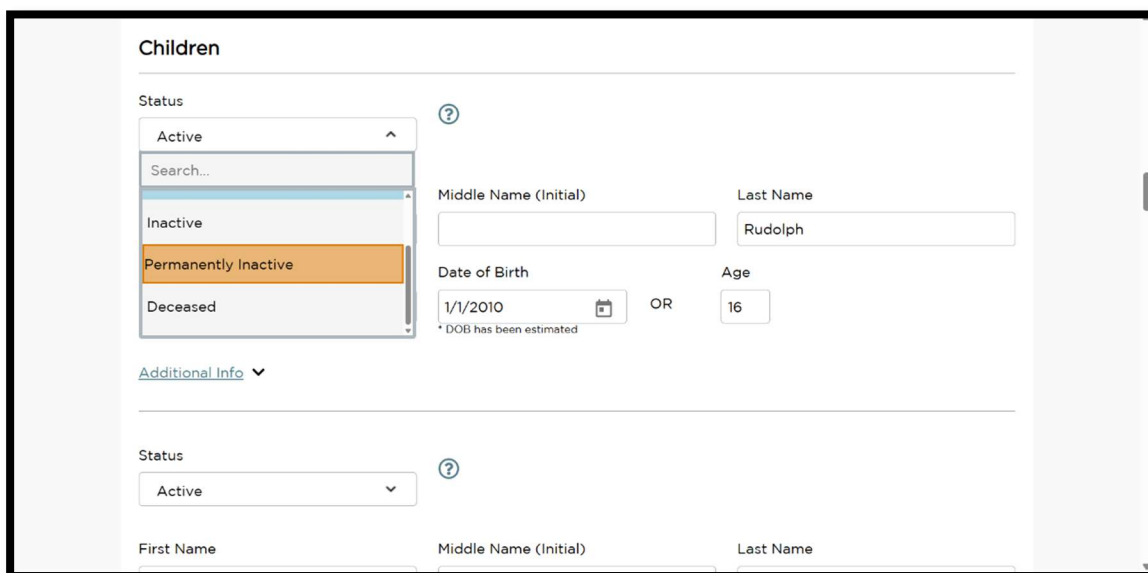
As you view the household's profile, scroll down to the household member's section. Look for the Status field, located above the first name field.



The screenshot shows the 'Children' section of a form. The 'Status' dropdown menu is open, showing 'Active' as the selected option. A red arrow points to the 'Status' field. Below the status field, there are input fields for 'First Name' (Speedy), 'Middle Name (Initial)', 'Last Name' (Rudolph), 'Suffix', 'Date of Birth' (1/1/2010), and 'Age' (16).

In the Status field, here are the inactive options to choose from:

- **Inactive:** No longer part of the household but may return. (This is a good option for kids in joint custody or if they stay with relatives for extensive periods.)
- **Permanently Inactive:** No longer part of the household, not expected to come back. (This is a good option for ex-roommates, divorced members, etc.)
- **Deceased:** Use only if the person has passed away.



The screenshot shows the 'Children' section of a form. The 'Status' dropdown menu is open, showing 'Active' as the selected option. Below 'Active', there are three options: 'Inactive', 'Permanently Inactive' (highlighted in orange), and 'Deceased'. A red arrow points to the 'Status' field. Below the status field, there are input fields for 'Middle Name (Initial)', 'Last Name' (Rudolph), 'Date of Birth' (1/1/2010), and 'Age' (16). A note below the date of birth says '* DOB has been estimated'.

Select the most correct option and then scroll to the bottom of the screen and click Save.

As you review the household profile, you will see it removed them from the household.

If you ever need to add them back into the household, you will just repeat the process and instead look for Inactive Members of the Household and click the plus sign, then choose active as their status.



The screenshot shows the 'Add Senior' button and the 'Inactive Household Members' section. A red arrow points to the plus sign next to 'Inactive Household Members'. Below this, there is a 'Proxy' section with a plus sign and an upward arrow.