Introduction

Sometimes you may have duplicate accounts in Outcome Tracker. What that means is that you have two accounts for one person with one IDA each. For example, a Maria Joe is entered twice: Once as Maria Joe and the other as Maria H. Joe.

The proper way to enter Maria Joe should have been to add another IDA to the Maria Joe entry (instead of creating a whole new account).
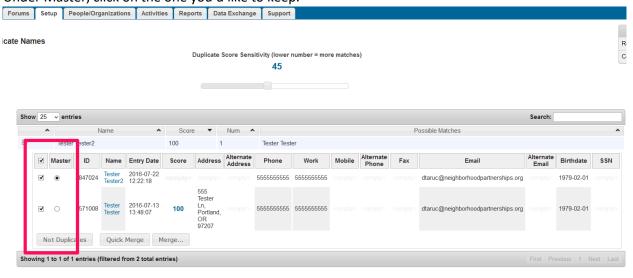
How to add another IDA to an existing account

1. Log in to Outcome Tracker.
2. Click People/Organization Tab, if not already there.
3. Search for the Client by typing into the search field then click "Search" or scroll down the list.
4. Click on the name of the Client.
5. Click on IDA Account, if not already there. On the left you should see a "Account List." If you do not see this, use your cursor to "pull out" the list or click on "Show Account List."
6. Click "New." This will clear the "Account Summary." You can now fill out the Account Summary fields. (Note: This did NOT delete the previous account, just cleared the form for a new one.)
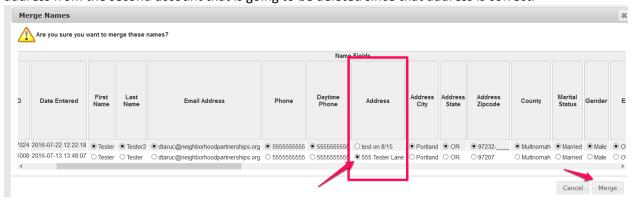7. Click "Create" when done.

How to merge duplicate accounts

If you already have duplicate accounts in Outcome Tracker, you can merge them to make one account. To do so:

1. Click Setup tab
2. Under "People & Organizations," click "Merge Duplicate Names." You will see a list of possible duplicates or none, if there are no duplicates. (Note: There is a "Duplicate Score Sensitivity" scale. You can adjust this to change the threshold of what OT considers a duplicate. It is set to "45" as default. This should be fine.)
3. Click on the Name of the account you'd like to merge. You will see a list of duplicate accounts.
4. Under Master, click on the one you'd like to keep.

5. Click "Merge." A new window will appear. This window will give you the chance to pick and choose which data to keep. So, in the example below, under "Address" I've chosen to keep the address from the second account that is going to be deleted since that address is correct.

6. Click "Merge"

How NP checks for duplicates across the network

Every quarter, the IDA team at NP checks for duplicate accounts across the network. What we are looking for are people who have two IDA accounts open at the same time.