

MERGING CASES

THE MERGE FUNCTION

The **Merge** function allows multiple cases to be combined into one DCS case. It can be used when a number of cases need to be consolidated, or when a defendant is sent to the Crown Court after his co-accused.

When the cases are merged, all defendants and listed users will be copied across to the merged case.

All documents, comments and memos will be copied across to the merged cases, but a de-duplication process will ensure that only one copy of each unique document will end up in the merged case. Where there are different comments on the same document in multiple cases, these will be consolidated as part of the de-duplication process.

Any access permissions applied to documents in sections with defence access restrictions will remain in place on the new merged case.

HOW TO MERGE CASES

Only users of role **HMCTS Admin** have access to the **Merge** function.

Open any of the cases to be merged and click on the **Merge** button.



On the **Merge Cases** screen:

The top left section of the screen will display details about the current case, namely the case name, URN and Crest case numbers. It will also list the defendants attached to this case.

The top right section of the screen will display proposed details for the new merged case.

1. The **New Case Name** will default to the existing case name so will likely need to be amended to include the names of the additional defendants.
2. The **New Case URN** will default to the existing URN with (M) added on the end. Amend as necessary.



The URN will be used to maintain the Two Way Interface so must match that used on CMS. Confirm the URN to be used with the CPS. See Job Card for further information.



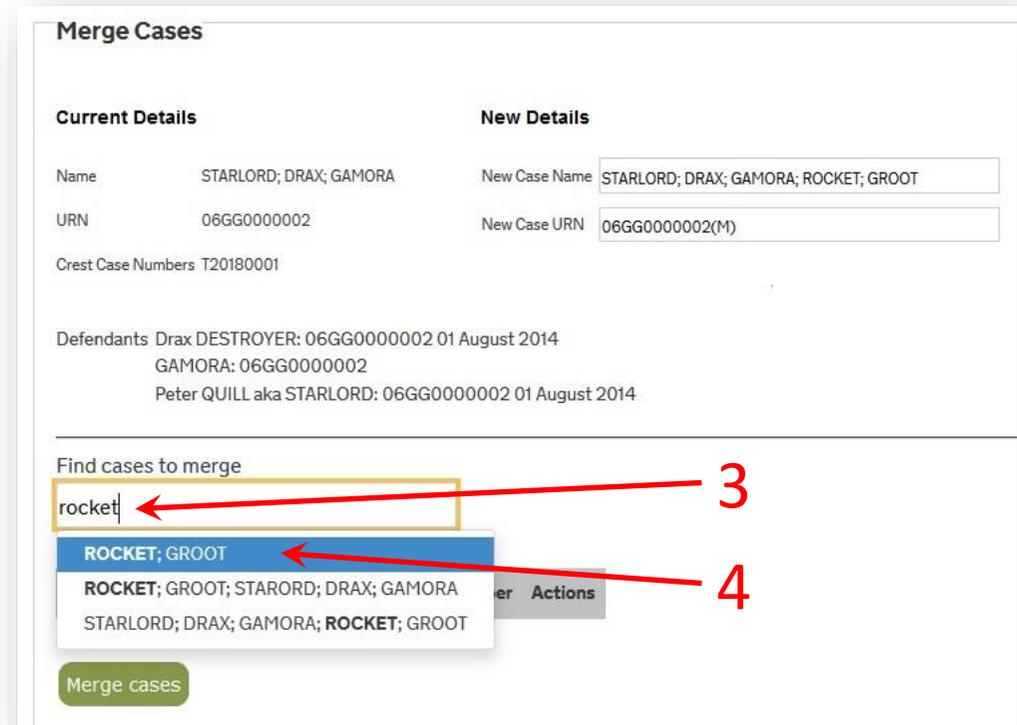
There is no need to edit the Crest Case Numbers, as these remain attached at the defendant record level and so transfer automatically. The new case will include all applicable Crest Case Numbers.

Merge Cases

Current Details	New Details
Name: STARLORD; DRAX; GAMORA	New Case Name: <input type="text" value="STARLORD; DRAX; GAMORA; ROCKET; GROOT"/>
URN: 06GG0000002	New Case URN: <input type="text" value="06GG0000002(M)"/>
Crest Case Numbers: T20180001	
Defendants: Drax DESTROYER: 06GG0000002 01 August 2014 GAMORA: 06GG0000002 Peter QUILL aka STARLORD: 06GG0000002 01 August 2014	

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3. Search for the cases to be merged by typing in the **Find cases to merge** box. You can search by Case Name, URN or Crest Case Number. Results will be filtered to cases at the same courthouse as the current case.
4. As you type a drop-down box will auto-populate with a list of matching cases. Click on a case to add it to the list of cases to be merged.



The screenshot shows the 'Merge Cases' interface. It is divided into 'Current Details' and 'New Details' sections. Below these is a list of defendants. At the bottom, there is a search box labeled 'Find cases to merge' containing the text 'rocket'. A dropdown menu is open below the search box, showing three options: 'ROCKET; GROOT', 'ROCKET; GROOT; STARORD; DRAX; GAMORA', and 'STARLORD; DRAX; GAMORA; ROCKET; GROOT'. A red arrow points from the number '3' to the search box, and another red arrow points from the number '4' to the first dropdown option. A 'Merge cases' button is located at the bottom left of the interface.

Current Details		New Details	
Name	STARLORD; DRAX; GAMORA	New Case Name	STARLORD; DRAX; GAMORA; ROCKET; GROOT
URN	06GG0000002	New Case URN	06GG0000002(M)
Crest Case Numbers T20180001			
Defendants Drax DESTROYER: 06GG0000002 01 August 2014 GAMORA: 06GG0000002 Peter QUILL aka STARLORD: 06GG0000002 01 August 2014			
Find cases to merge			
rocket		3	
ROCKET; GROOT		4	
ROCKET; GROOT; STARORD; DRAX; GAMORA			
STARLORD; DRAX; GAMORA; ROCKET; GROOT			
Merge cases			

5. If a case is added to the list in error, it can be removed with the **Remove from Merge** button.
6. When all the cases to be merged have been added to the list, confirm the **New Case Name** and **New Case URN** and then click on **Merge cases** button.

Merge Cases

Current Details

Name: STARLORD; DRAX; GAMORA

URN: 06GG0000002

Crest Case Numbers: T20180001

Defendants: Drax DESTROYER: 06GG0000002 01 August 2014
 GAMORA: 06GG0000002
 Peter QUILL aka STARLORD: 06GG0000002 01 August 2014

New Details

New Case Name: STARLORD; DRAX; GAMORA; ROCKET; GROOT

New Case URN: 06GG0000002(M)

Find cases to merge

ROCKET; GROOT

Case Name	URN	Defendants	Crest Case Number	Actions
ROCKET; GROOT	06GG0000001	GROOT: 06GG0000001 01 August 2014 Rocket RACOON: 06GG0000001 01 August 2014	G20170001 G20170002	Remove from Merge

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A status bar will display detailing the progress of the merge.
Once completed you will be taken to the new merged case.

Merge Cases

Current Details		New Details	
Name	STARLORD; DRAX; GAMORA	New Case Name	<input type="text" value="STARLORD; DRAX; GAMORA; ROCKET; GROOT"/>
URN	06GG0000002	New Case URN	<input type="text" value="06GG0000002(M)"/>
Crest Case Numbers T20180001			
Defendants Drax DESTROYER: 06GG0000002 01 August 2014 GAMORA: 06GG0000002 Peter QUILL aka STARLORD: 06GG0000002 01 August 2014			

Find cases to merge

Case Name	URN	Defendants	Crest Case Number	Actions
ROCKET; GROOT	06GG0000001	GROOT: 06GG0000001 01 August 2014 Rocket RACOON: 06GG0000001 01 August 2014	G20170001 G20170002	Remove from Merge

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