

Merge Contacts



Course Overview

Use Merge Contacts to efficiently merge two contact records in CorrecTek Spark. While users should always perform a thorough database search before creating a new contact to prevent duplicates, integration delays with Jail Management (JMS) or Offender Management (OMS) systems may occasionally require you to create a record immediately and merge it at a later time.

This guide explains how to merge two contact records using the CorrecTek Spark EHR software. /

Use This Guide When

- Duplicate contacts are found
- Merging two contact records

What You'll Be Able to Do

- Merge Contacts

Merge Contacts



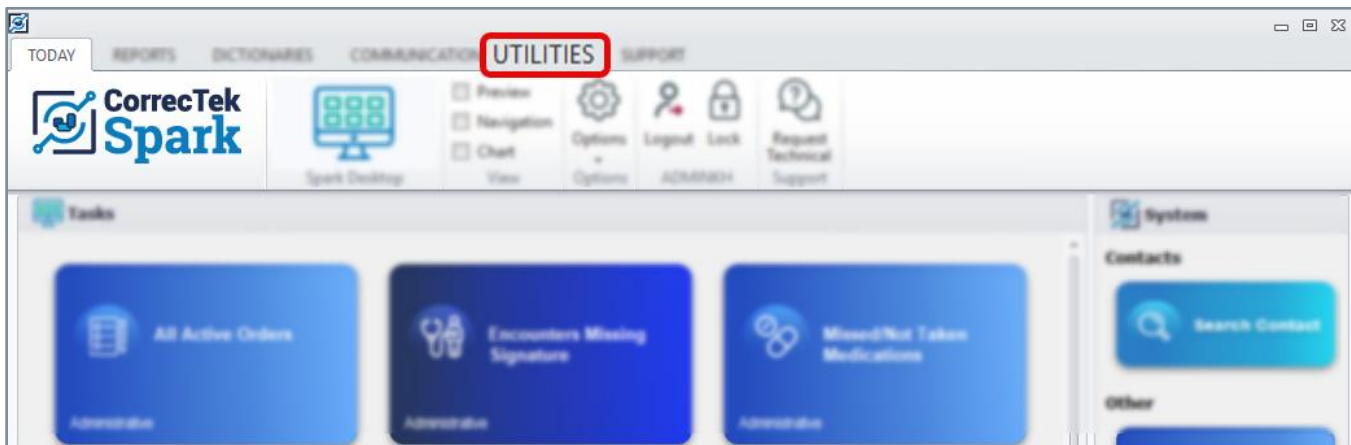
Topics Covered

Course Overview	1
Use This Guide When.....	1
What You'll Be Able to Do	1
Spark Desktop	3
Utilities	3
Return to Spark Desktop.....	9

Merge Contacts

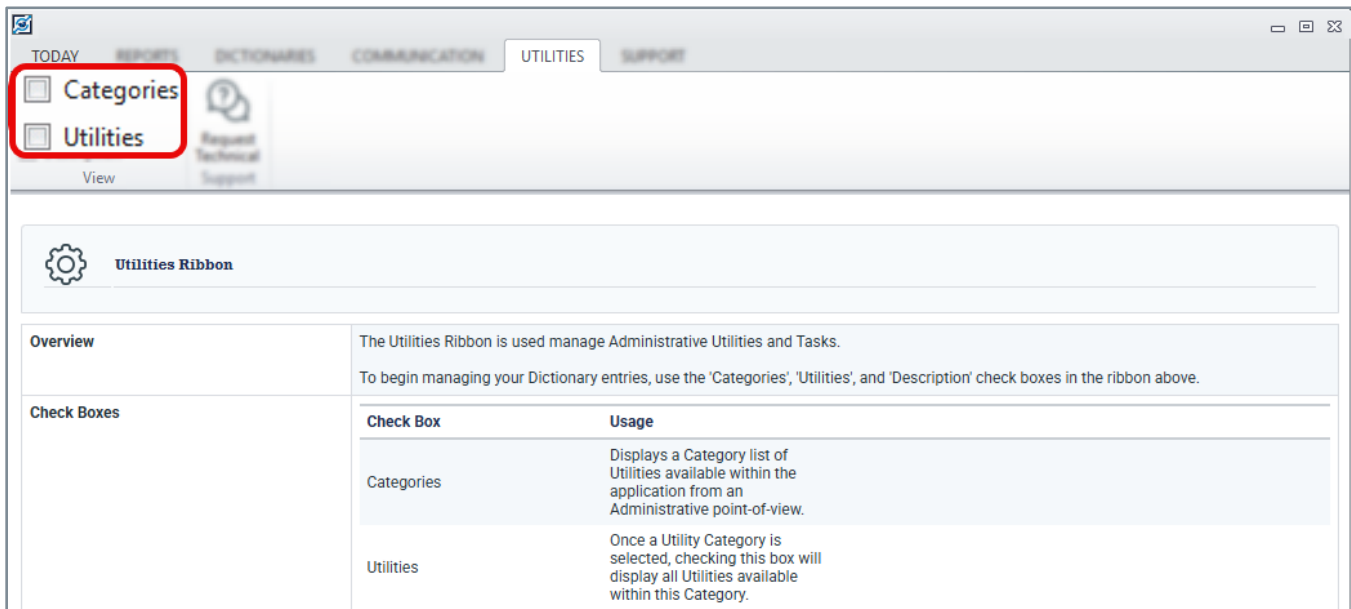
Spark Desktop

From the Spark Desktop, click **Utilities**.



Utilities

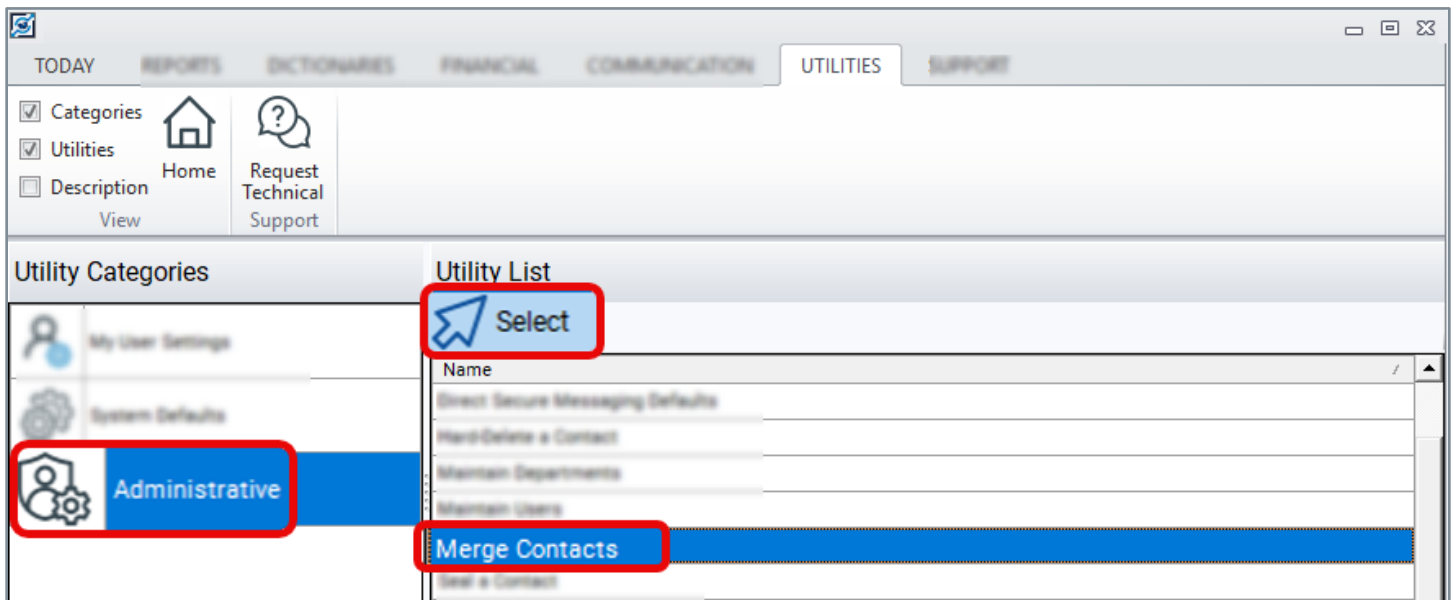
Select **Categories** and **Utilities**.



Merge Contacts

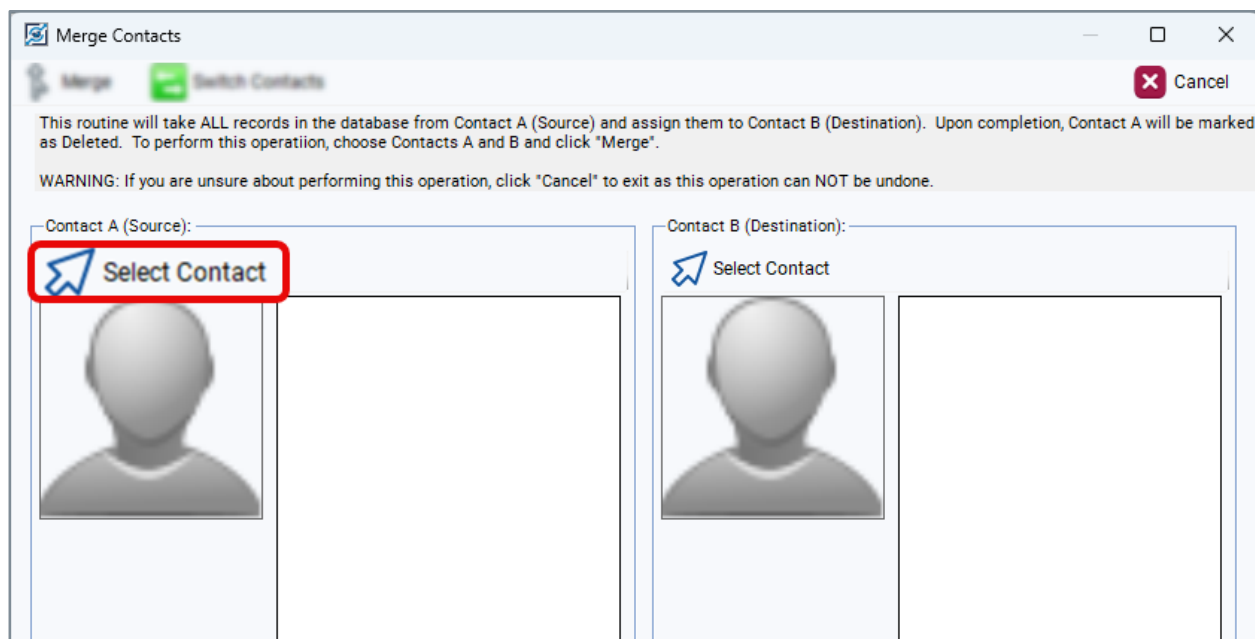
Select **Administrative**, then **Merge Contacts**.

Click **Select**.



Merge Contacts

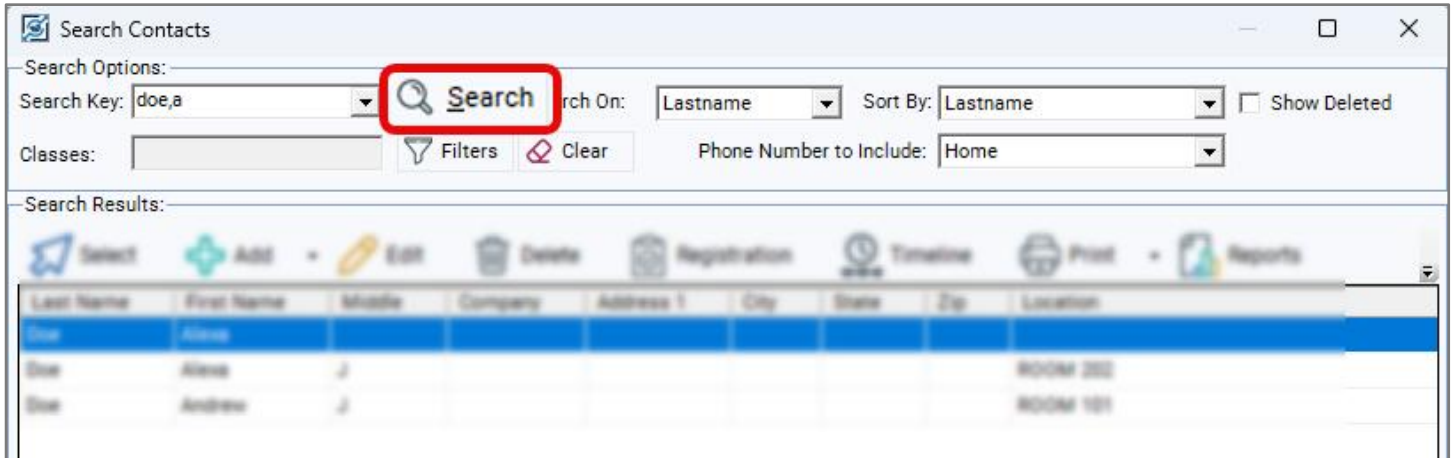
The Merge Contacts screen opens. Click **Select Contact** from the Contact A column. This is the contact record that will be merged into Contact B and then deleted.



Merge Contacts

Select Contact

Enter identifiable information in the **Search Key**, then click **Search**.



Search Contacts

Search Options:

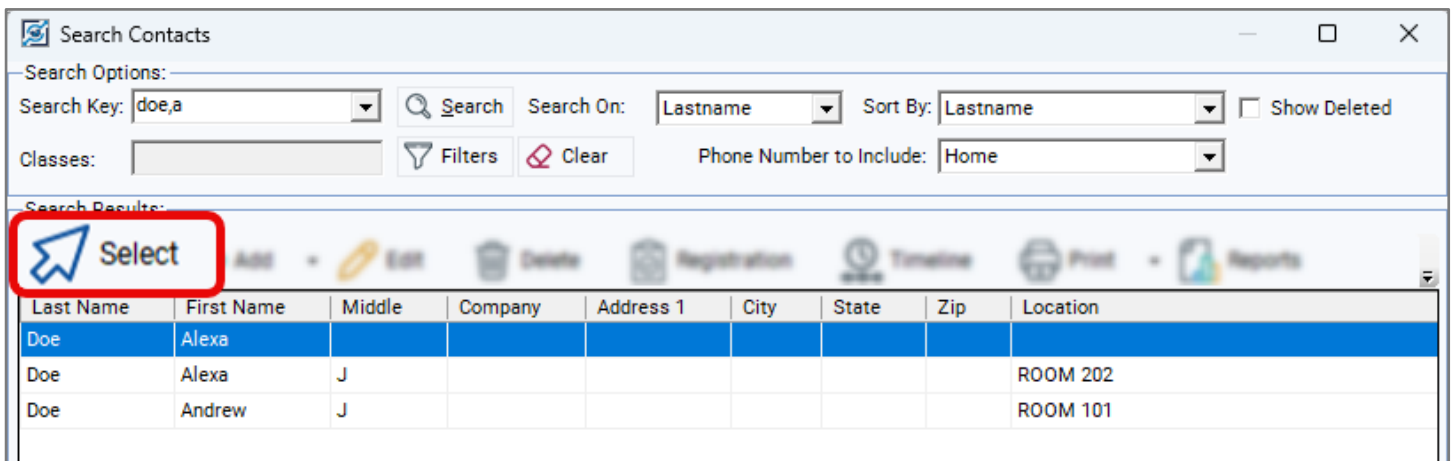
Search Key: **Search** Search On: Sort By: ☐ Show Deleted

Classes: Phone Number to Include:

Search Results:

Last Name	First Name	Middle	Company	Address 1	City	State	Zip	Location
Doe	Alexa							
Doe	Alexa	J						ROOM 202
Doe	Andrew	J						ROOM 101

Highlight the correct contact in the search results. Click **Select** to return to the Merge Contact screen.



Search Contacts

Search Options:

Search Key: **Search** Search On: Sort By: ☐ Show Deleted

Classes: Phone Number to Include:

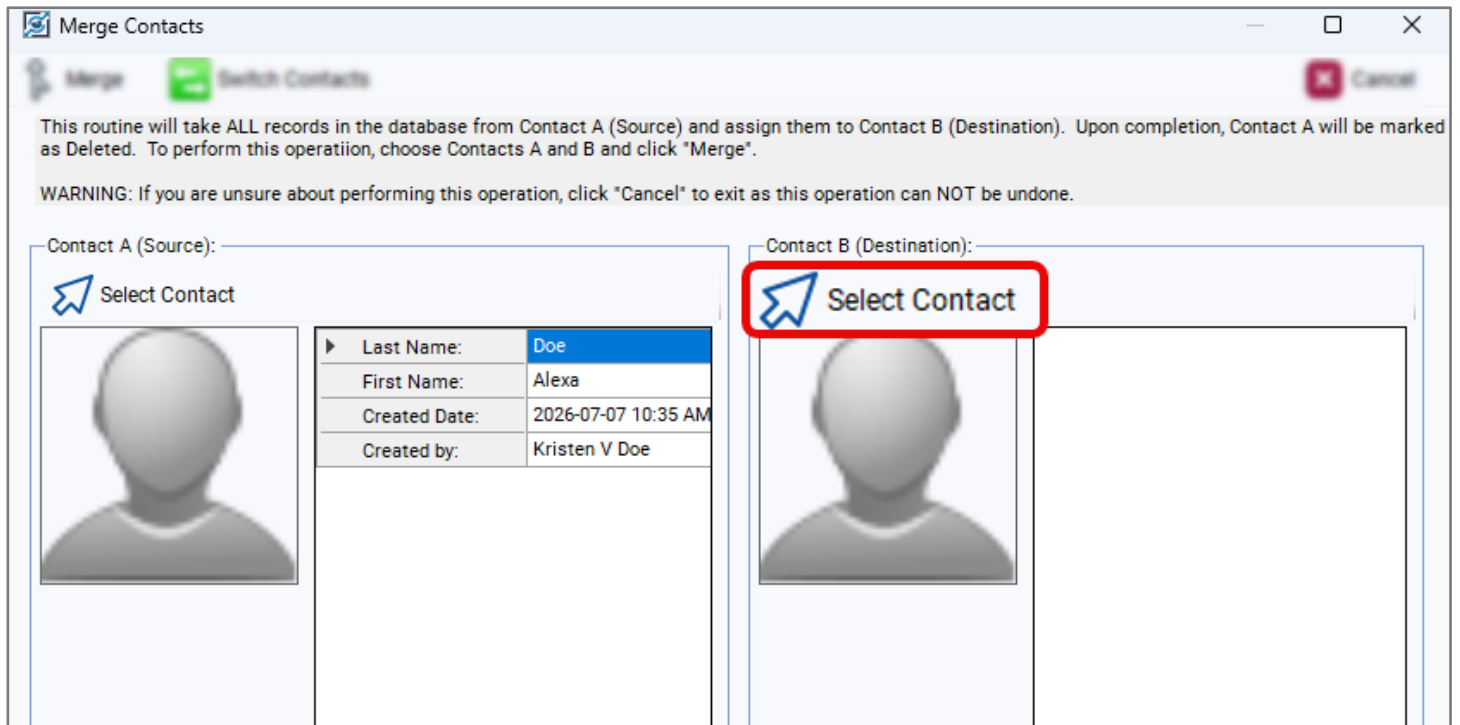
Search Results:

Select

Last Name	First Name	Middle	Company	Address 1	City	State	Zip	Location
Doe	Alexa							
Doe	Alexa	J						ROOM 202
Doe	Andrew	J						ROOM 101

Merge Contacts

Click **Select Contact** in the Contact B column. This contact generally contains the most information and remains after the merge is complete.



The "Merge Contacts" dialog box contains instructions and two contact selection areas. The instructions state that all records from Contact A (Source) will be assigned to Contact B (Destination) and Contact A will be marked as Deleted. A warning advises clicking "Cancel" if unsure. Contact A (Source) is pre-filled with a contact named Doe, Alexa, created on 2026-07-07. Contact B (Destination) is empty, and its "Select Contact" button is highlighted with a red box.

Merge Contacts

Merge Switch Contacts Cancel

This routine will take ALL records in the database from Contact A (Source) and assign them to Contact B (Destination). Upon completion, Contact A will be marked as Deleted. To perform this operation, choose Contacts A and B and click "Merge".

WARNING: If you are unsure about performing this operation, click "Cancel" to exit as this operation can NOT be undone.

Contact A (Source):

Select Contact

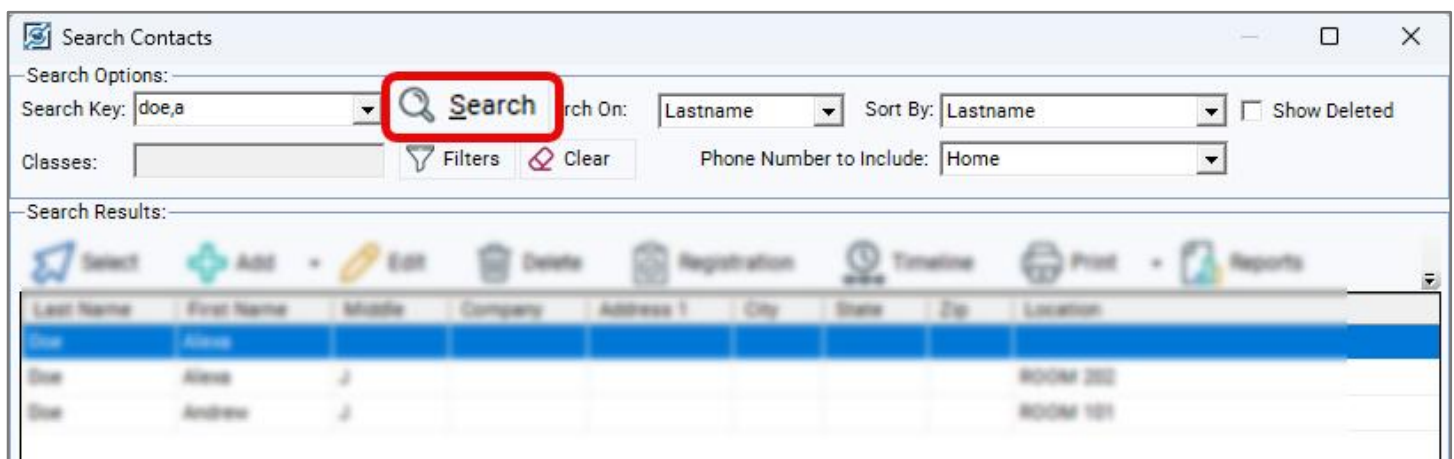
Last Name:	Doe
First Name:	Alexa
Created Date:	2026-07-07 10:35 AM
Created by:	Kristen V Doe

Contact B (Destination):

Select Contact

Select Contact

Enter identifiable information in the **Search Key**, then click **Search**.



The "Search Contacts" dialog box shows search options and results. The "Search Key" is set to "doe,a" and the "Search" button is highlighted with a red box. Search options include "Search On: Lastname", "Sort By: Lastname", and "Show Deleted" checkbox. The "Search Results" section shows a table with columns: Last Name, First Name, Middle, Company, Address 1, City, State, Zip, and Location. The results table shows three contacts: Doe, Alexa, J; Doe, Alexa, J; and Doe, Andrew, J.

Search Contacts

Search Options:

Search Key: doe,a Search Search On: Lastname Sort By: Lastname Show Deleted

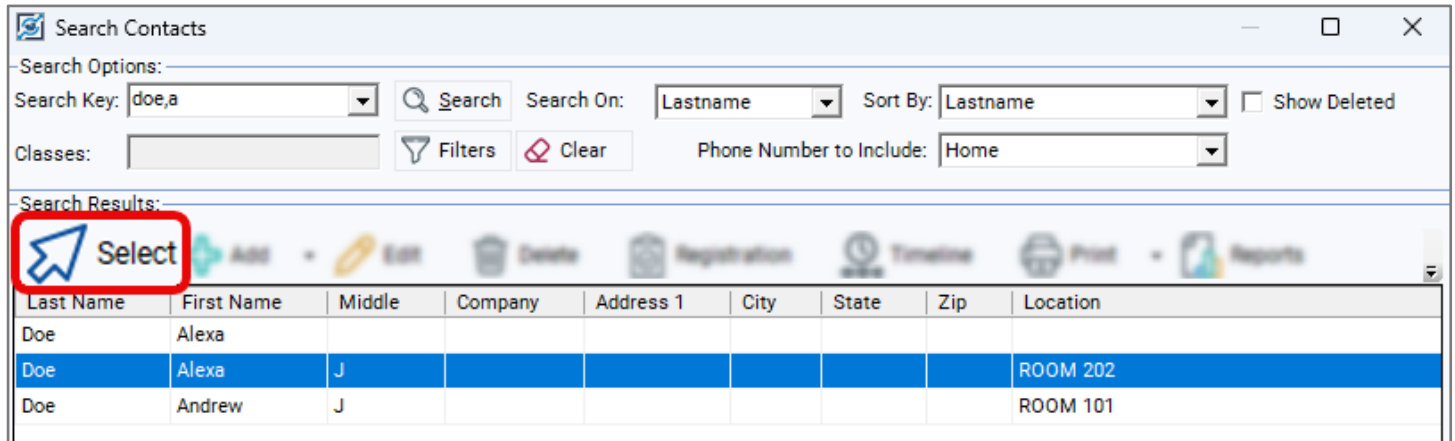
Classes: Filters Clear Phone Number to Include: Home

Search Results:

Last Name	First Name	Middle	Company	Address 1	City	State	Zip	Location
Doe	Alexa	J						
Doe	Alexa	J						ROOM 202
Doe	Andrew	J						ROOM 101

Merge Contacts

Highlight the correct contact in the search results. Click **Select** to return to the Merge Contact screen.



Search Contacts

Search Options:

Search Key: Search Search On: Sort By: ☐ Show Deleted

Classes: Filters Phone Number to Include:

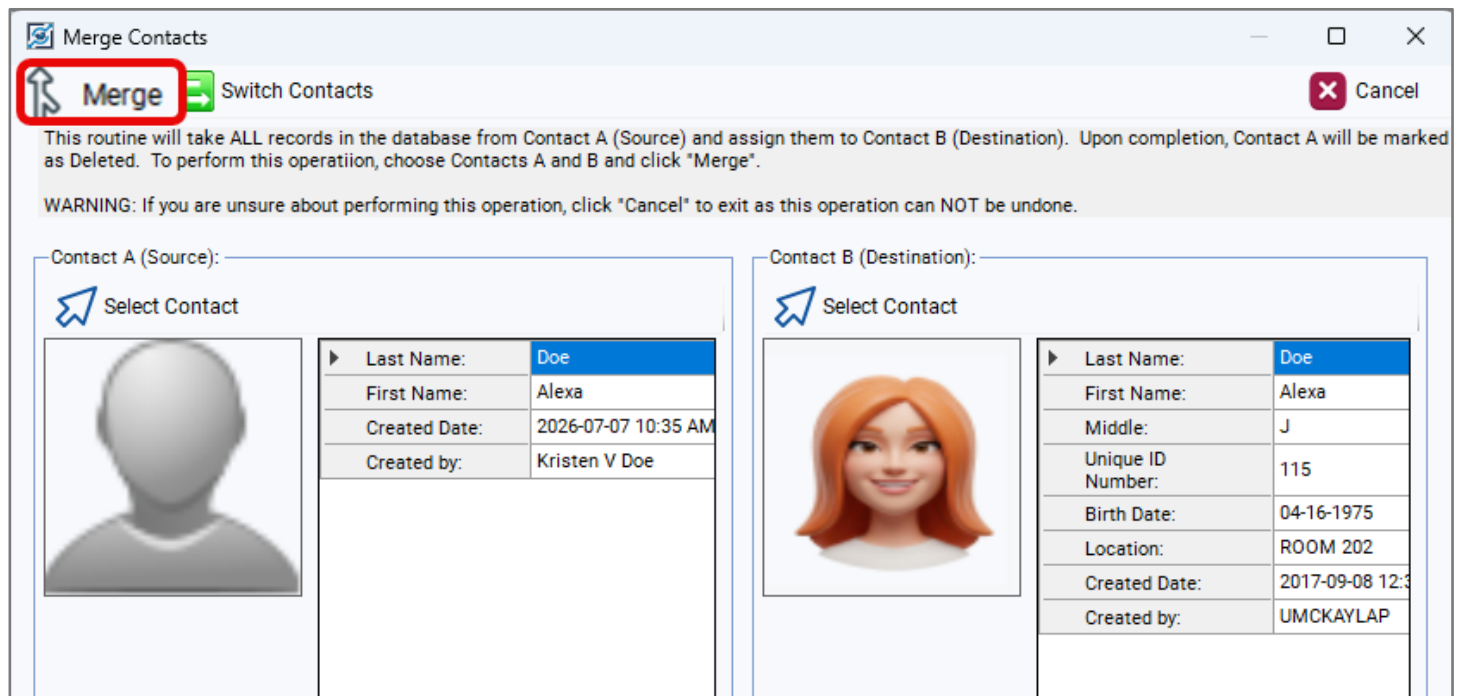
Search Results:

Select

Last Name	First Name	Middle	Company	Address 1	City	State	Zip	Location
Doe	Alexa							
Doe	Alexa	J						ROOM 202
Doe	Andrew	J						ROOM 101

Merge

Click **Merge** to merge the records.



Merge Contacts

Merge

This routine will take ALL records in the database from Contact A (Source) and assign them to Contact B (Destination). Upon completion, Contact A will be marked as Deleted. To perform this operation, choose Contacts A and B and click "Merge".

WARNING: If you are unsure about performing this operation, click "Cancel" to exit as this operation can NOT be undone.

Contact A (Source):



Last Name:	Doe
First Name:	Alexa
Created Date:	2026-07-07 10:35 AM
Created by:	Kristen V Doe

Contact B (Destination):

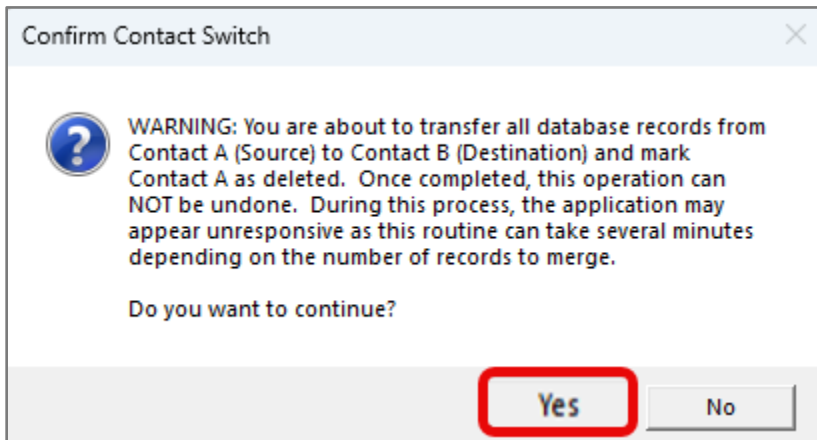


Last Name:	Doe
First Name:	Alexa
Middle:	J
Unique ID Number:	115
Birth Date:	04-16-1975
Location:	ROOM 202
Created Date:	2017-09-08 12:3
Created by:	UMCKAYLAP

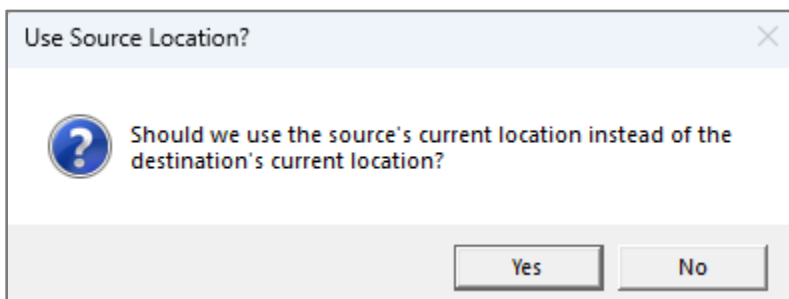
Tip: If the contacts are selected in the wrong order, click **Switch Contacts**.

Merge Contacts

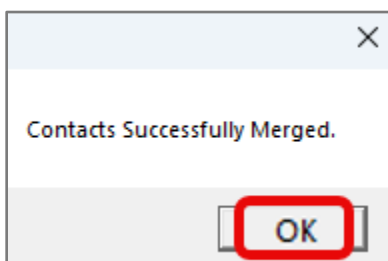
Click **Yes** to confirm the merge.



When prompted, select **Yes** or **No** to determine whether the source location should replace the destination location.

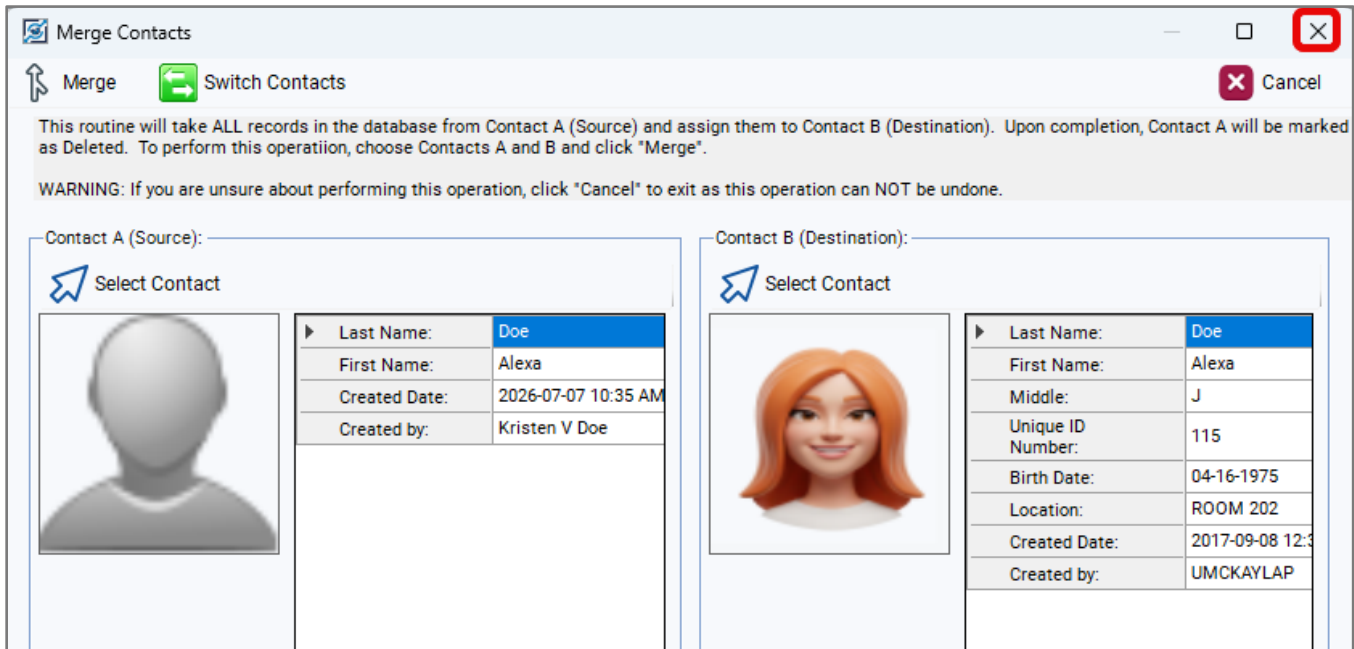


Click **OK** after the merge is completed.



Merge Contacts

Once the operation is complete, click **X** to close the Merge Contacts screen.



The Merge Contacts dialog box contains the following elements:

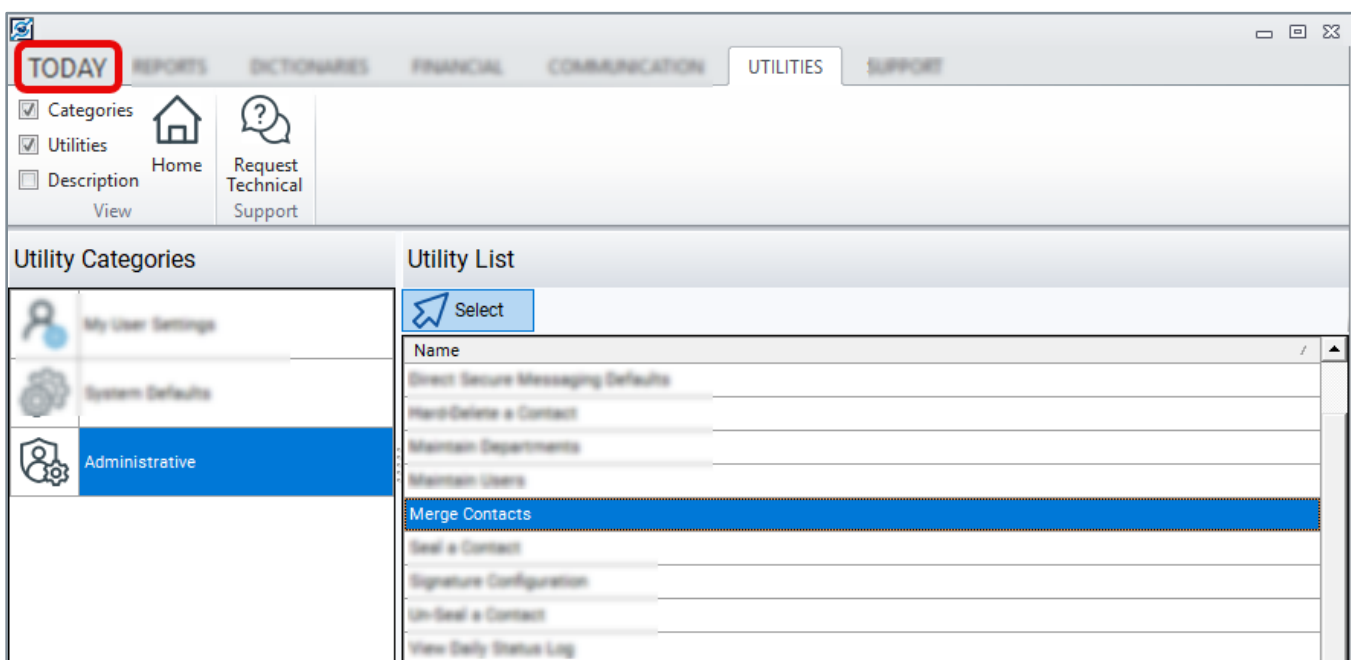
- Buttons:** Merge, Switch Contacts, and Cancel.
- Warning:** This routine will take ALL records in the database from Contact A (Source) and assign them to Contact B (Destination). Upon completion, Contact A will be marked as Deleted. To perform this operation, choose Contacts A and B and click "Merge".
- Warning:** WARNING: If you are unsure about performing this operation, click "Cancel" to exit as this operation can NOT be undone.
- Contact A (Source):**
 - Select Contact button
 - Placeholder image of a person
 - Table:

Last Name:	Doe
First Name:	Alexa
Created Date:	2026-07-07 10:35 AM
Created by:	Kristen V Doe
- Contact B (Destination):**
 - Select Contact button
 - Placeholder image of a person
 - Table:

Last Name:	Doe
First Name:	Alexa
Middle:	J
Unique ID Number:	115
Birth Date:	04-16-1975
Location:	ROOM 202
Created Date:	2017-09-08 12:3
Created by:	UMCKAYLAP

Return to Spark Desktop

Click **TODAY** to return to the Spark Desktop.



The Spark Desktop interface shows the following elements:

- Navigation Bar:** TODAY, REPORTS, DICTIONARIES, FINANCIAL, COMMUNICATION, UTILITIES, SUPPORT.
- Left Sidebar:**
 - Categories, Utilities, Description (with checkboxes)
 - Home icon
 - Request Technical Support button
- Utility Categories:**
 - My User Settings
 - System Defaults
 - Administrative (selected)
- Utility List:**
 - Select button
 - Name column header
 - List of utilities: Direct Secure Messaging Defaults, Hard Delete a Contact, Mainframe Departments, Mainframe Users, Merge Contacts (highlighted), Seal a Contact, Signature Configuration, Un-Seal a Contact, View Daily Status Log.