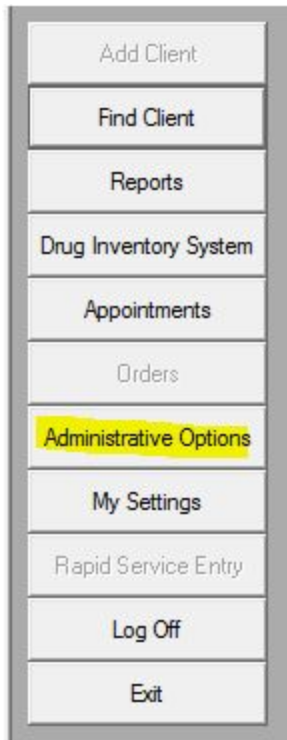


Make sure to back up your data, by following the instructions [here](#), before merging subservices.

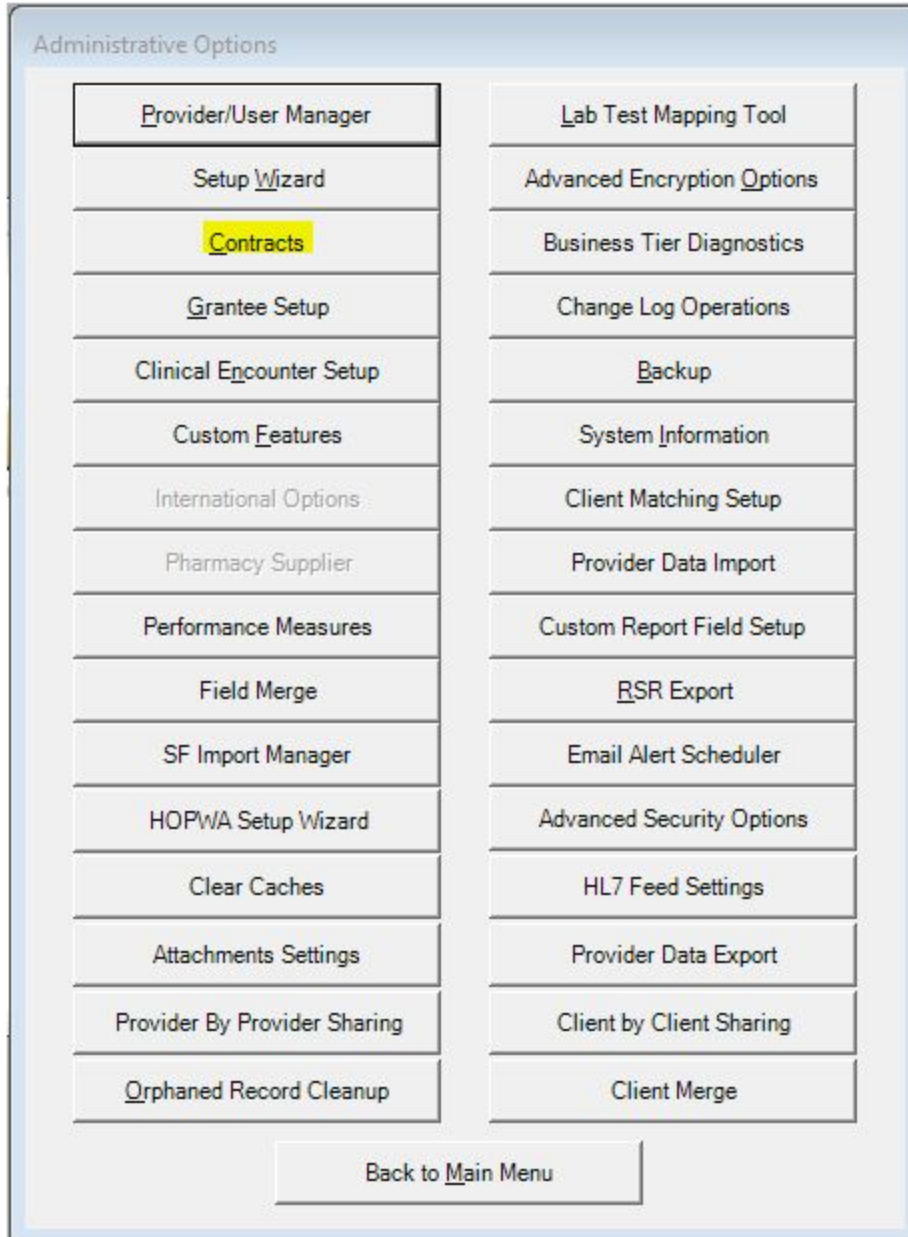
The CAREWare Subservice Manager offers a feature for merging two subservices provided to clients. In Central Administration, the subservice merge is performed for all contracts. In a provider domain, the subservice merge can be limited to just a single contract for that provider.

To merge subservices:

1. Log into CAREWare.
2. Click *Administrative Options*.




3. Click *Contracts*.



4. Click *Subservice Manager*.


Service Contracts

Provider: 

Manage Subservices

Copy Contract

Reports

Search 

Add View/Edit Delete Close

5. Click *Merge Subservices*.

Subservice Manager

Custom Service Categories **Merge Subservices** Close

Subservices

Category: Short Name: Long Name: Save Cancel

Category:	ShortName:	Long Name:	Under Cont...
Case Management (non-medical)	Non MCM	Non MCM	Yes
Case Management (non-medical)	Nurse Visit	Nurse Visit	Yes
Face-to-face Case Management	Case Management	Case Management	Yes
Home Health Care	Home Dental Care	Home Dental Care	Yes
Medical Case Management	MCM	MCM	Yes
Medical Case Management	Medical Case Mana...	Medical Case Management	Yes
Medical Transportation Services	Medical Transportat...	Medical Transportation Se...	Yes
Medical Transportation Services	transportation 2	Medical transportation 2	Yes
Mental Health Services	Mental	Mental Health	Yes
Mental Health Services	Mental Health Scre...	Mental Health Screening	Yes
Non CARE Act Service	H CF Permanent Fa...	H CF Permanent Facility E...	Yes
Non CARE Act Service	H CF Permanent Fa...	H CF Permanent Facility E...	Yes
Non CARE Act Service	H Permanent Facilit...	H Permanent Facility Enroll...	Yes

Add Subservice Edit Subservice Delete Subservice List Contracts for Subservice

6. The *Filter By Category* drop down menu can help narrow down the list of subservices by selecting a single category. This step is optional.
7. Click the drop down for *Subservice* under *Source* to select the subservice that will be merged.
8. Click the drop down for *Subservice* under *Destination* to select the subservice that the first subservice will merge into.

Subservice Merge

<p>Source</p> <p>Filter By Category (Optional): <input type="text" value="Oral Health Care"/></p> <p>Subservice: <input type="text" value="dental"/></p> <p>Contract (Optional): <input type="text" value="Only available for real-time providers."/></p> <p style="text-align: center;"><input type="button" value="Preview"/></p>	<p>→</p>	<p>Destination</p> <p>Filter By Category (Optional): <input type="text" value="Oral Health Care"/></p> <p>Subservice: <input type="text" value="Dental Care"/></p> <p style="text-align: center;"><input type="button" value="Cancel"/></p>
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The services to be merged can be seen in the client record on the services tab.

Test, Test Test

[Appointments](#) | [Orders](#) | [Forms](#) | [ChangeLog](#) | [Client Report](#) | [Duplicate Client](#) | [De](#)

[Demographics](#) | [Drug Services](#) | [Service](#) | [Annual Review](#) | [Encounters](#) | [Referrals](#) | [HIV C&T](#) | [Relation](#)

[New Service](#) | [Edit Service](#) | [Delete Service](#)

Search

↓ Date	Subservice	Contract	Units	Price	Total	Amou...	DomainName
08/25/2016	dental	Dental Care	1	\$0.01	\$0.01	\$0.00	Tester
08/25/2016	Dental Care	First Contract	1	\$0.01	\$0.01	\$0.00	Tester
06/15/2016	Medical Cas...	First Contract	1	\$0.01	\$0.01	\$0.00	Tester
02/08/2016	Nurse Visit	First Contract	1	\$0.00	\$0.00	\$0.00	Tester

In this case, all *dental* services will be merged into *Dental Care* services.


Subservice Merge Preview

This process will redefine all service records and contracts that currently specify the SOURCE subservice:

but only those related to this contract:

... so that those service records and contracts now point to the DESTINATION subservice:

The SOURCE subservice is used by:	The DESTINATION subservice is used by:
2 Domain(s)	2 Domain(s)
5 Contract(s)	4 Contract(s)
52 Service(s)	3851 Service(s)

 **There is no way to undo this merge once it is complete. Do not click "Merge" unless you have backed up your data file.**

This is a preview of the merge process for the Central Administration domain. In a provider domain, users have the option of selecting a specific contract for the subservices merged.

Subservice Merge

Source	Destination
Filter By Category (Optional): Oral Health Care	Filter By Category (Optional): Oral Health Care
Subservice: dental	Subservice: Dental Care
Contract (Optional): Dental Care	
<input type="button" value="Preview"/>	<input type="button" value="Cancel"/>

When a specific contract is chosen, only the services funded by that contract will be affected.

Subservice Merge Preview

This process will redefine all service records and contracts that currently specify the SOURCE subservice:

dental

but only those related to this contract:

Dental Care

... so that those service records and contracts now point to the DESTINATION subservice:

Dental Care

The SOURCE subservice is used by:

1 Domain(s)

1 Contract(s)

3 Service(s)

The DESTINATION subservice is used by:

1 Domain(s)

2 Contract(s)

2465 Service(s)



There is no way to undo this merge once it is complete. Do not click "Merge" unless you have backed up your data file.

Merge

Cancel

For this demonstration, we are merging subservices in Central Administration for all contracts for all providers.

9. Click *Merge*.


Subservice Merge Preview

This process will redefine all service records and contracts that currently specify the SOURCE subservice:

but only those related to this contract:

... so that those service records and contracts now point to the DESTINATION subservice:

The SOURCE subservice is used by:	The DESTINATION subservice is used by:
2 Domain(s)	2 Domain(s)
5 Contract(s)	4 Contract(s)
52 Service(s)	3851 Service(s)

 **There is no way to undo this merge once it is complete. Do not click "Merge" unless you have backed up your data file.**

Success!



The merge operation is complete. The subservice definition has not been deleted but you can delete it from the subservice manager if it is no longer in use.

The merge success message informs users the subservice that was merged is not deleted. The subservice can be deleted after the merge process if the intention is to eliminate it from use.

Subservice Manager

Custom Service Categories Merge Subservices Close

Subservices

Category: Short Name: Long Name: Save Cancel

Category:	ShortName:	Long Name:	Under Cont...
Mental Health Services	Mental	Mental Health	Yes
Mental Health Services	Mental Health Scre...	Mental Health Screening	Yes
Non CARE Act Service	H CF Permanent Fa...	H CF Permanent Facility E...	Yes
Non CARE Act Service	H CF Permanent Fa...	H CF Permanent Facility E...	Yes
Non CARE Act Service	H Permanent Facilit...	H Permanent Facility Enroll...	Yes
Non CARE Act Service	H TBRA Enrollment	H TBRA Enrollment/HOP...	No
Oral Health Care	dental	dental	No
Oral Health Care	Dental Care	Dental Care	Yes
Oral Health Care	Dental Cleaning	Dental Cleaning	Yes
Oral Health Care	Dental Exam	Dental Exam	Yes
Outpatient/Ambulatory Medical Care	A/O Medical Care	A/O Medical Care	Yes
Outpatient/Ambulatory Medical Care	Intake	Intake	Yes
Outpatient/Ambulatory Medical Care	o/a mc	o/a mc	Yes

Add Subservice Edit Subservice Delete Subservice List Contracts for Subservice

To delete the subservice:

1. Click the subservice to highlight it.
2. Click *Delete Subservice*.

In the client's services tab, we can see the service name has changed.

Test, Test Test

Appointments Orders Forms ChangeLog Client Report Duplicate Client De

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Relation

[New Service](#) [Edit Service](#) [Delete Service](#)

Search

↓ Date	Subservice	Contract	Units	Price	Total	Amou...	DomainName
08/25/2016	Dental Care	First Contract	1	\$0.01	\$0.01	\$0.00	Tester
08/25/2016	Dental Care	Dental Care	1	\$0.01	\$0.01	\$0.00	Tester
06/15/2016	Medical Cas...	First Contract	1	\$0.01	\$0.01	\$0.00	Tester