



Florida Safe Families Network

Prepared for State of Florida Department of Children and Families

The Florida Safe Families Network (FSFN) **Person Merge** How Do I Guide helps you understand the steps to complete your work in the FSFN system. It is a desk reference companion to the User Guide that includes additional details. Visit the DCF FSFN Website (<http://fsfn.dcf.state.fl.us>) for the User Guide and additional resources.

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Perform Person Merge

How Do I...?	Selections	Tips & Guidelines
<p>Perform Person Merge</p>	<p>The Person Merge page can be accessed from Desktop and Person Management</p> <p>From the Desktop:</p> <ul style="list-style-type: none"> • From the Utilities menu, select Person Merge. • Search and select the “Remove” and “Retained” persons. • Click the Merge button. • Confirm the merge request. <p>From Person Management:</p> <ul style="list-style-type: none"> • Select Merge at the bottom of the page. • The selected candidate for merge will pre-fill the Merge Person page. • Search and select the “Retained” person. • Click the Merge button. • Confirm the merge request. 	<p><i>The Person Merge process can be described as an ID replace. The system allows the user to search out up to three Person IDs, two called the “Removed” IDs and the other as the “Retained” ID. The merge process searches throughout the database looking for all the instances of the “Remove” IDs and replace them with the “Retained” ID, eliminating all instances of the incorrect/duplicate Person IDs in FSFN. During the merge process it is necessary to remove links between person records in order to achieve the desired results. For example if we merge two people in FSFN we need to remove the person record for the “Removed” ID in the PERSON table. Search can be done on SSN as sole criteria.</i></p> <p><i>The Person Merge function is controlled by security access according to the following:</i></p> <ol style="list-style-type: none"> 1. <i>Merge Person View – only access that allows the user to select 2-3 people to compare using the Inquiry Search or Person Search page, and open the Person Merge page in view-only access to compare those people.</i> 2. <i>Merge Person Request – access that allows the user to create a Person Merge as a request and submit the page using the approval function to another user who has the authority to merge.</i> <p><i>Merge Person – access that allows the users who have the authority to merge to finalize a Person Merge Request by completing the merge, or not approving the request.</i></p>

Perform Person Merge, Continued

How Do I...?	Selections	Tips & Guidelines
Perform Person Merge, Continued		<p><i>Due to the database structure and constraints, merging records for duplicate people in the same case could result in a primary key violation causing the merge to fail. When this scenario occurs, the merge process will update all tables and columns where the result would not cause a primary key violation.</i></p> <p><i>Any records that were not updated will be left as is. The system will remove certain records or links between records in order to achieve the desired merge. Users will have the ability to view the records that were not updated during the merge process, through the application.</i></p> <p><i>For example, Person 1 and Person 2 are in the same case, and both have Medical/ Mental Health records. When the merge is initiated, the system would recognize that merging these Medical/ Mental Health records will cause a primary key violation and not update those records. Instead, the system would remove the link between the case and the Medical/ Mental Health record for the "Removed" person.</i></p> <p><i>The user could then conduct a search for the "Retained" person and expand the "Person" icon. The users will see the "Merged Persons" icon and can continue to expand to view all persons that were merged with that "Retained" person.</i></p> <p><i>Additionally, the user can expand the "Person" icon under the "Merge Persons" icon to drill down another level and see the work that was not merged due to a constraint or primary key violation.</i></p>

Perform Person Merge, Continued

How Do I...?	Selections	Tips & Guidelines
Perform Person Merge, Continued		<p><i>If the person identified as the “Remove” person on the Person Merge page fails any of the following edit checks, it will result in the failure of the merge:</i></p> <ol style="list-style-type: none"> 1. <i>The “Remove” Person and the “Retain” Person have any combination of overlapping Removal Episode(s) or Living Arrangement, or Family Support Status</i> 2. <i>The “Remove” Person or the “Retain” Person is a Worker in the System</i> 3. <i>The “Remove” Person and the “Retain” Person are in the same case and participants in a Family Assessment or Case Plan.</i> 4. <i>The “Remove” Person and the “Retain” Person are in the same case and participants in a Family Functioning Assessment (FFA) – Investigation; Family Functioning Assessment (FFA) – Ongoing; Progress Update; Case Plan Worksheet or Judicial Review Worksheet.</i> 5. <i>The “Remove” Person and the “Retain” Person both have an Unresolved MCR record.</i> 6. <i>The “Retain” Person is an ‘Unknown’ Person.</i> 7. <i>The “Remove” Person and the “Retain” Person have overlapping Title IV-E Foster Care Eligibility records.</i> 8. <i>The “Remove” Person and the “Retain” person have overlapping Adoption TANF Eligibility records.</i> 9. <i>The “Remove” Person and the “Retain” person have overlapping Medicaid Eligibility records.</i> 10. <i>The “Remove” Person and the “Retain” Person have a Trust Account of the same type in the same Agency.</i> 11. <i>The “Remove” Person is Pre-Adoptive and the “Retain” person is Post Adoptive.</i> 12. <i>The “Remove” Person is Post Adoptive and the “Retain” person is Pre-Adoptive. The “Remove” Person has a ‘Pending’ Private Adoption page.</i> 13. <i>The “Remove” person has a non-terminated (active) Child Placement Agreement.</i>

		<p>IMPORTANT NOTE: <i>When a Person Merge is performed or data is received from FLORIDA via the bi-directional interface and a new PIN # is provided, the FLORIDA PIN field will be updated on the FLORIDA Tab of the Medicaid Eligibility page to reflect the correct, current FLORIDA PIN. In addition, there are validations that FSFN must perform in order to ensure the necessary data is sent from FSFN to FLORIDA.</i></p> <p><i>Due to the restriction, as noted above, regarding the merging of two persons with overlapping Medicaid Eligibility record, the user will only be able to before Person Merge within FSFN if one Medicaid Record is closed and the other is open.</i></p>
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Perform Person Merge, Continued

How Do I...?	Selections	Tips & Guidelines
Perform Person Merge, Continued		<p><i>If the Person identified as the “Remove” Persons on the Person Merge page has a ‘Default Template’ the following error message will display when attempting to perform Person Merge:</i></p> <p><i>Cannot merge Remove Person record with Person ID: XXXXXXX. Remove Person has a ‘Default Template’ Legal Page. <OK>.</i></p> <p><i>NOTE: In order to proceed with the Person Merge, the ‘Default Template’ must first be deleted by a user with the appropriate security.</i></p> <p><i>Upon selecting the Merge button, if any of the selected “Remove” Persons are under the age of 18 and the selected “Retain” person is 18 years of age or older, or any of the selected “Remove” Persons are 18 years of age or older and the “Retain” Person is under the age of 18, the following validation message will be displayed:</i></p> <ul style="list-style-type: none"> ○ <i>You are about to merge person(s) who is/are under the age of 18 with person(s) who is/are 18 years of age or older. Do you wish to proceed with this merge? <Yes><No></i> • <i>Upon selecting “Yes” the existing validation message will then be displayed indicating that the user is about to merge persons.</i> • <i>Upon selecting “No” the user will be returned to the Person Merge pop-up page where s/he can make the applicable updates or exit the merge process.</i> <p><i>The Person Merge functionality will automatically compare both “Remove” person and “Retain” Person records. If any values on the “Retain” Person record are null and there are values on for the “Remove” person record for the same field, the system will automatically retain this value on the “Retain” Person record. This process excludes the fields that the user is able to select on the Person Merge page. The following data from the Person Merge page will be automatically stored:</i></p>

Perform Person Merge, Continued

How Do I...?	Selections	Tips & Guidelines
<p>Perform Person Merge, Continued</p>		<ul style="list-style-type: none"> • <i>The SSN not selected on the Person merge (Pre-Merge SSN), only if the SSN is different</i> • <i>All Person Identification IDs and Types for the “Remove” Person, only if they are different</i> • <i>The First, Last, Middle Name not selected on the Person Merge page (As an AKA), only if they are different</i> • <i>The ‘Removed’ Person ID (Pre-Merged Person ID)</i> <p><i>Upon performing Person Merge, if both participants have a Post Adoption Services page FSFN will automatically keep the Post Adoption Services page associated with the “Retain” person but will MOVE all the information documented on the Post Adoption Services page associated with the “Remove” person over to the “Retain” person’s Post Adoption Services page.</i></p> <p><i>Upon performing Person Merge, if the “Retain” person has a Post Adoption Services page but the “Remove” person does not, the information will remain as it was on the Post Adoption Services page.</i></p> <p><i>Upon performing Person Merge, if the “Remove” person has a Post Adoption Services page but the “Retain” person does not, FSFN will UPDATE the Post Adoption Services page with all the demographic information, including Person ID, to reflect the “Retain” person’s information. Therefore, the page will reflect both on the user interface as well as in the database, the “keep” person’s information.</i></p>

Merge Unknown, Unknown

How Do I...?	Selections	Tips & Guidelines
	<ul style="list-style-type: none"><li data-bbox="414 352 803 409">• Follow the steps listed above for merge.	<i>When attempting to remove an unknown participant, the user is directed to navigate to the Person Management page to merge the unknown person to an existing person prior to removing.</i>

Perform Person Delete

How Do I...?	Selections	Tips & Guidelines
<p>Perform Person Delete</p>	<ul style="list-style-type: none"> • From the Desktop Utilities menu, select Delete Person. • Search and select the appropriate person and click Save. • Confirm the delete request. 	<p><i>Access to the Delete Person page is limited through security (see CM09: Security). A person can be deleted from the system if they are not associated with any pieces of case work.</i></p> <p><i>The system will determine if the “Delete” person is a participant in any of the following pieces of work:</i></p> <ul style="list-style-type: none"> • Safety Assessment • Education • Medical Mental Health • Interim Child Information • Legal • Placements • Living Arrangements • Family Support • Case Planning • Safety Planning • Special Conditions • Family Assessment • TANF Eligibility • Adoption TANF Eligibility • Title IV-E Foster Care Eligibility • Adoption Eligibility • Medicaid Eligibility • Intake (Screened In) • Independent Living • Provider • Narrative • Worker • Investigation • MCR • Legal • Adoption Information • Forms • Payments • Rate Setting • Family Functioning Assessment (FFA) – Ongoing • Progress Update • Case Plan Worksheet • Judicial Review Worksheet