

PROVIDER MERGE

USER GUIDE

PROVIDER MERGE

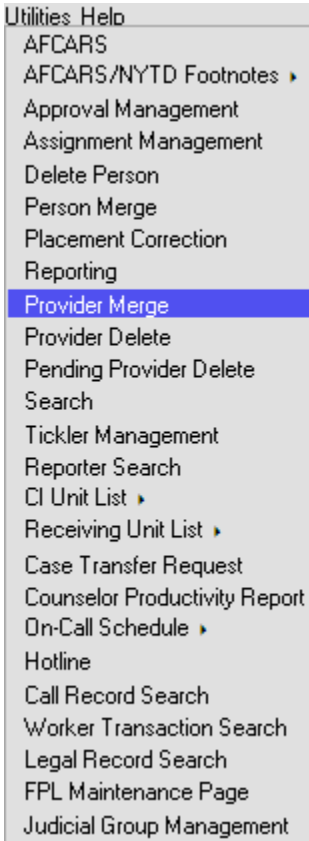
FUNCTIONALITY ADDRESSED:

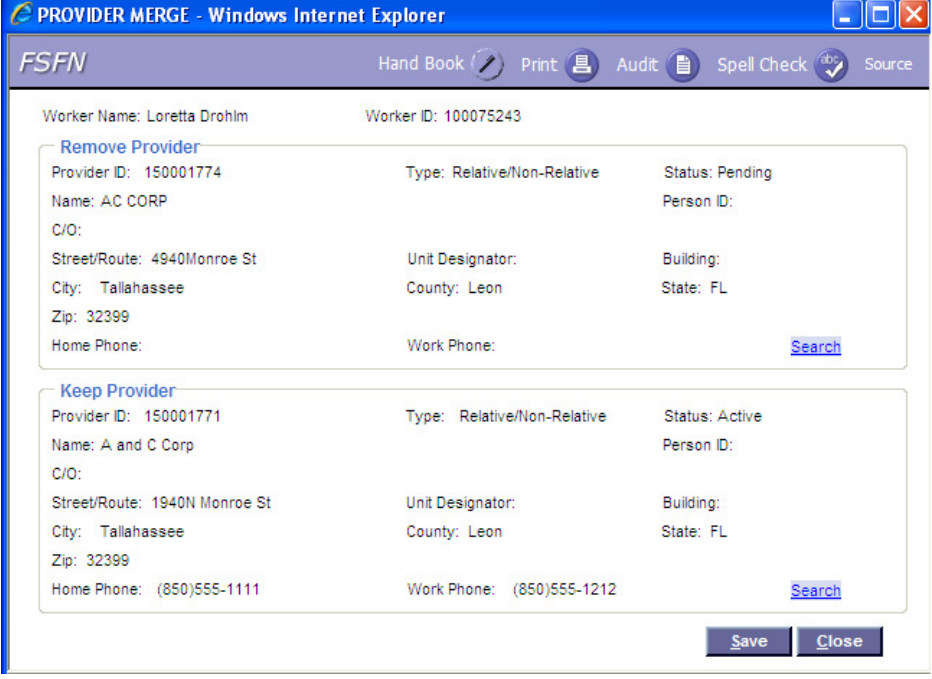
This guide outlines the steps to perform key tasks related to documenting a Provider Merge and a Provider Delete within the FSFN application.

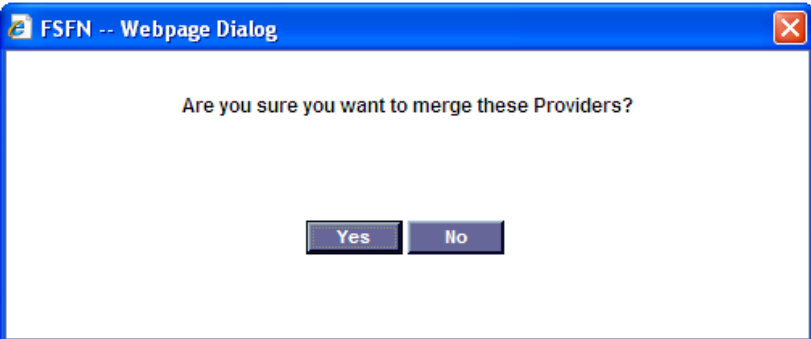
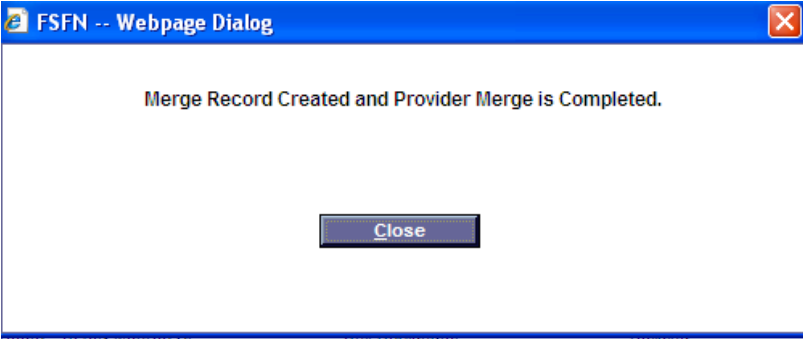
LEARNING OBJECTIVES:

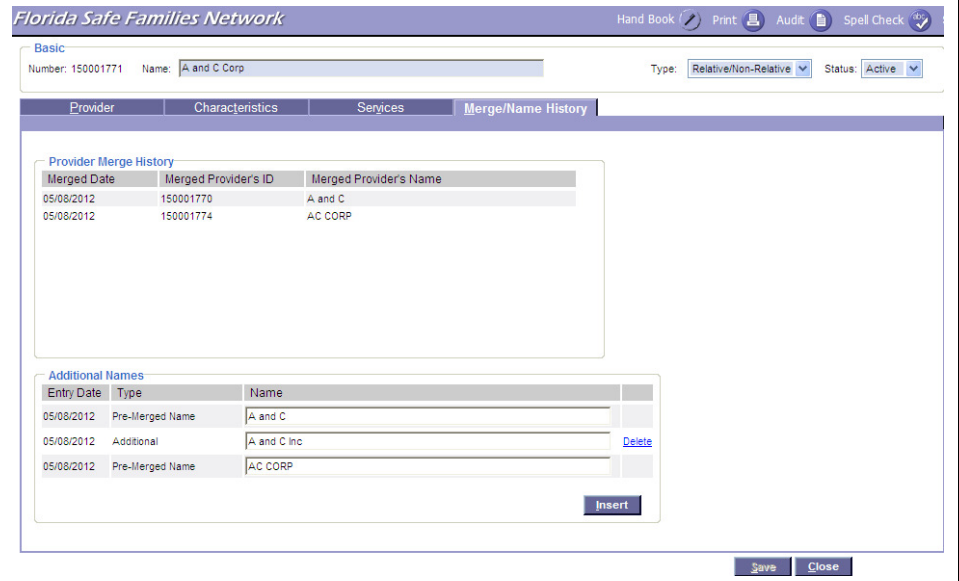
Upon completion of this course, the student will demonstrate the ability to:

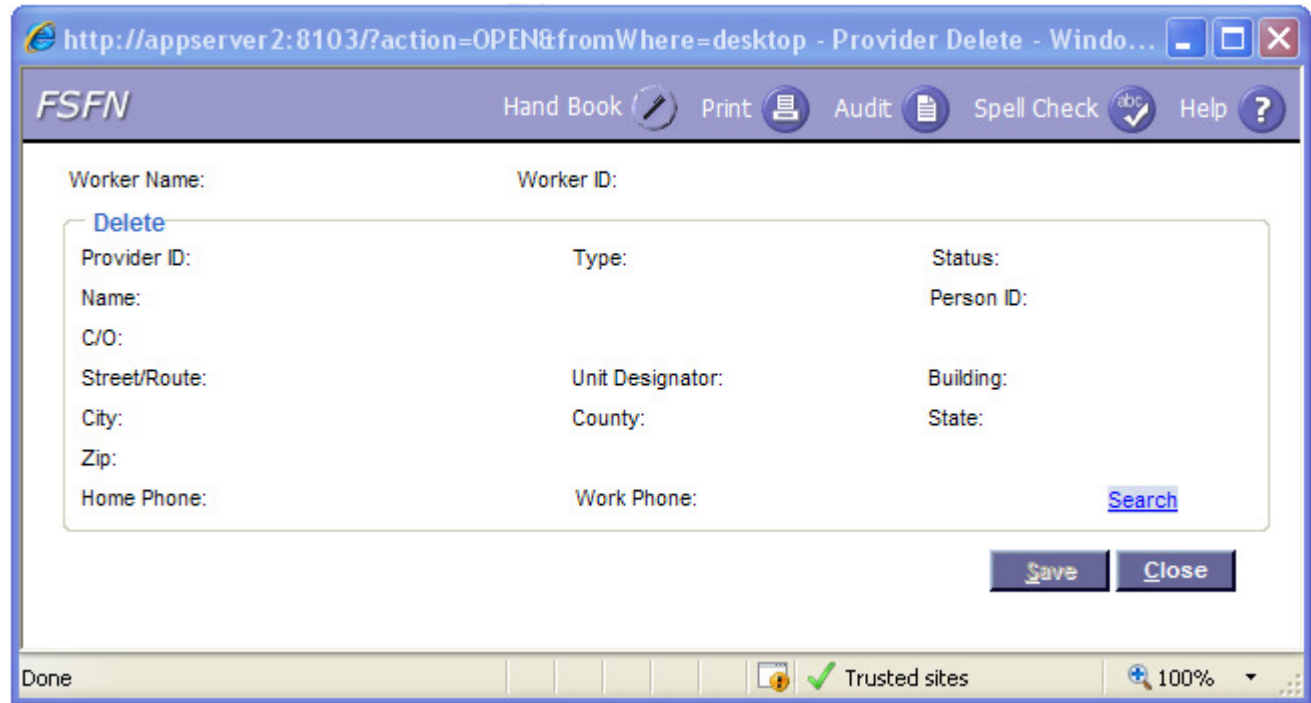
- Complete a Provider Merge
- Complete a Provider Delete

| FSFN PAGE/ACTION | TASK DESCRIPTION/NAVIGATION STEPS | NOTES |
|--|---|--|
| <p>DESKTOP MENU</p> <p>PROVIDER MERGE PAGE</p> | <p>Click <i>Utilities > Provider Merge</i> from the Utilities menu.</p>  <p>The screenshot shows a vertical list of menu items. 'Provider Merge' is highlighted in blue. Other items include: Utilities Help, AFCARS, AFCARS/NYTD Footnotes, Approval Management, Assignment Management, Delete Person, Person Merge, Placement Correction, Reporting, Provider Delete, Pending Provider Delete, Search, Tickler Management, Reporter Search, CI Unit List, Receiving Unit List, Case Transfer Request, Counselor Productivity Report, On-Call Schedule, Hotline, Call Record Search, Worker Transaction Search, Legal Record Search, FPL Maintenance Page, and Judicial Group Management.</p> | <p>FSFN allows multiple provider merges; however, the worker must complete each merge separately.</p> <p>What can be merged:</p> <ul style="list-style-type: none"> ▪ Providers with open placements and open investigations in the remove provider record. ▪ Person Providers can be merged into other Person Providers. ▪ Organization Providers can be merged into other Organization Providers. ▪ Active providers can be merged into active providers. ▪ Inactive providers can be merged into active providers. ▪ Inactive providers can be merged into inactive providers. ▪ Inactive providers can be merged into active providers. ▪ Pending providers can be merged into active providers. <p>What cannot be merged:</p> <ul style="list-style-type: none"> ▪ Person Providers into Organization Providers. ▪ Organization Providers with the status of pending, inactive or active cannot merge into an Organization Provider with a status of Pending. ▪ Active providers into inactive providers. ▪ If the Caregiver 1s for each provider have different Person IDS in FSFN, a Person Merge must be done first. |
| <p>PROVIDER MERGE PAGE</p> | | <p>The Provider Merge page consists of</p> |

| FSFN PAGE/ACTION | TASK DESCRIPTION/NAVIGATION STEPS | NOTES |
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|  | | <p>two group boxes:</p> <ul style="list-style-type: none"> ▪ Remove Provider ▪ Keep Provider <p>The Provider ID that loses its original identity is the Remove Provider record.</p> <p>The Provider record to remain in FSFN is the Keep Provider record.</p> |
| <p>PROVIDER MERGE PAGE</p> | <ul style="list-style-type: none"> ▪ Click the Search hyperlink from the Remove Provider group box. | <p>Pieces of provider work associated with the remove provider that will not be merged are:</p> <ul style="list-style-type: none"> ▪ Household members (other than Caregiver 1) ▪ Person Provider Inquires ▪ Provider addresses ▪ Resource Types on the Resource tab |
| <p>PROVIDER SEARCH OPENS</p> | <ul style="list-style-type: none"> ▪ Search for the Provider to be removed. ▪ From the providers returned group box, click the radio button of the provider name. ▪ Click the Continue button. | <p>The Provider Merge page displays with the selected provider's Provider ID and Name displayed in the Remove Provider group box.</p> <p>The Person ID will display if the provider selected is a person provider.</p> |
| <p>PROVIDER MERGE PAGE DISPLAYS</p> | <ul style="list-style-type: none"> ▪ Select the Search hyperlink from the Keep Provider group box. | |
| <p>PROVIDER SEARCH OPENS</p> | <ul style="list-style-type: none"> ▪ Search for the Provider to be | <p>The Provider Merge page displays</p> |

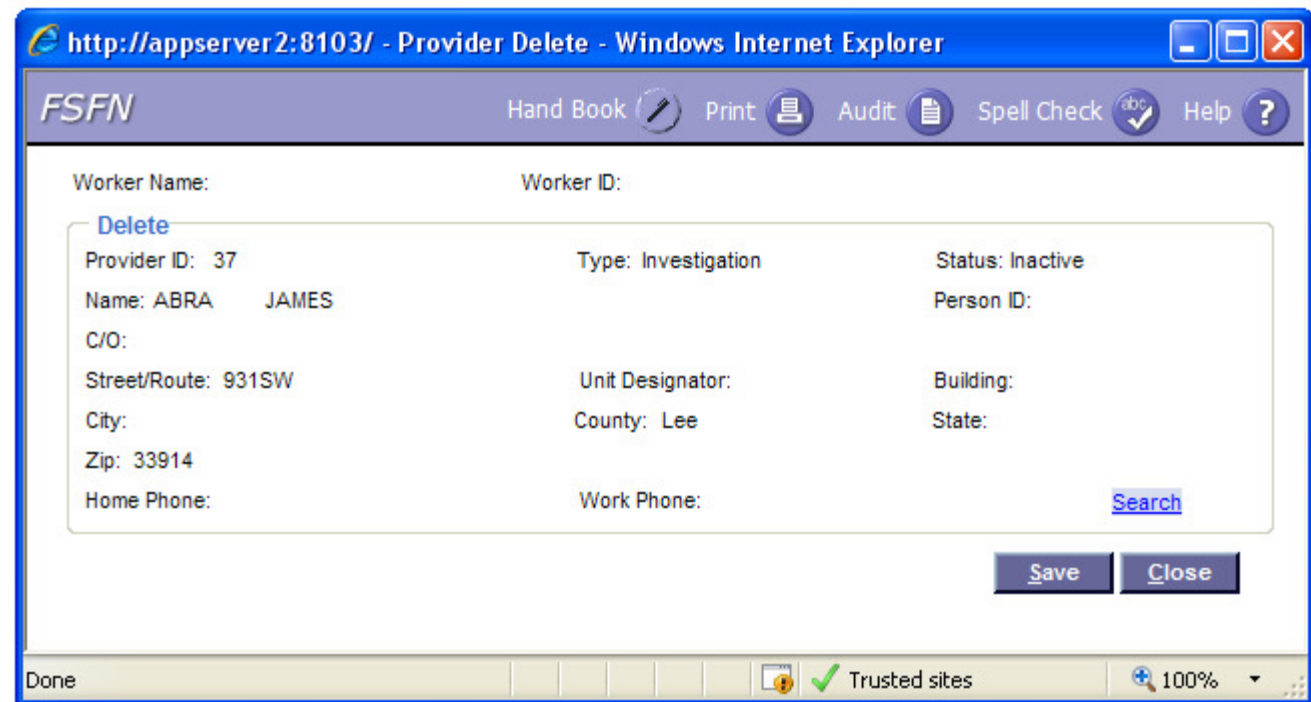
| FSFN PAGE/ACTION | TASK DESCRIPTION/NAVIGATION STEPS | NOTES |
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| | <p>kept.</p> <ul style="list-style-type: none"> From the providers returned group box, click the radio button of the provider name Click the Continue button. | <p>with the selected provider's Provider ID and Name displayed in the Keep Person group box.</p> <p>The Person ID will display if the provider selected is a person provider.</p> |
| <p>PROVIDER MERGE PAGE</p> | <ul style="list-style-type: none"> Click the Save button. Confirmation pop-up displays "Are you sure you want to merge these providers?" | <p>If you click the No button or the Cancel button, changes will be not saved. You are returned to the Provider Merge page to close the page or make changes to the Provider Merge request.</p> <p>If you click the Yes button, one of the following messages will display:</p> <p>If the merge is allowed –</p> <p>"Merge Record Created and Provider Merge is Completed."</p> <p>If the merge is not allowed - "Cannot merge the Provider record of Provider ID XXXX with Provider ID XXXX."</p> <p>The reason(s) the merge failed will be displayed.</p> |
| <ul style="list-style-type: none">  | | <p>Click yes to complete the merge.</p> |
| <p>VALIDATION POPUP DISPLAYS</p> | | |
| <ul style="list-style-type: none">  | | <p>Click the Close button.</p> <p>Click close to return to the desk top</p> |
| | | |

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| MERGE/NAME HISTORY PAGE | <ul style="list-style-type: none"> Select the provider icon Select the provider hyperlink Select the Merger/Name History tab | |
|  | | <p>This page displays:</p> <p>Merge History group box-merge date, merged provider IDs, and the merged provider Name</p> <p>Additional Names group box- additional names, all pre-merged names, and previously known as names. The Delete link is present when the name type is additional</p> |
| DESKTOP MENU PROVIDER DELETE PAGE | <ul style="list-style-type: none"> Select <i>Utilities</i> > Provider Delete <p>The Provider Delete page is launched.</p> | <p>In order for a deletion to take place, the provider to be deleted must not have any associated work.</p> |

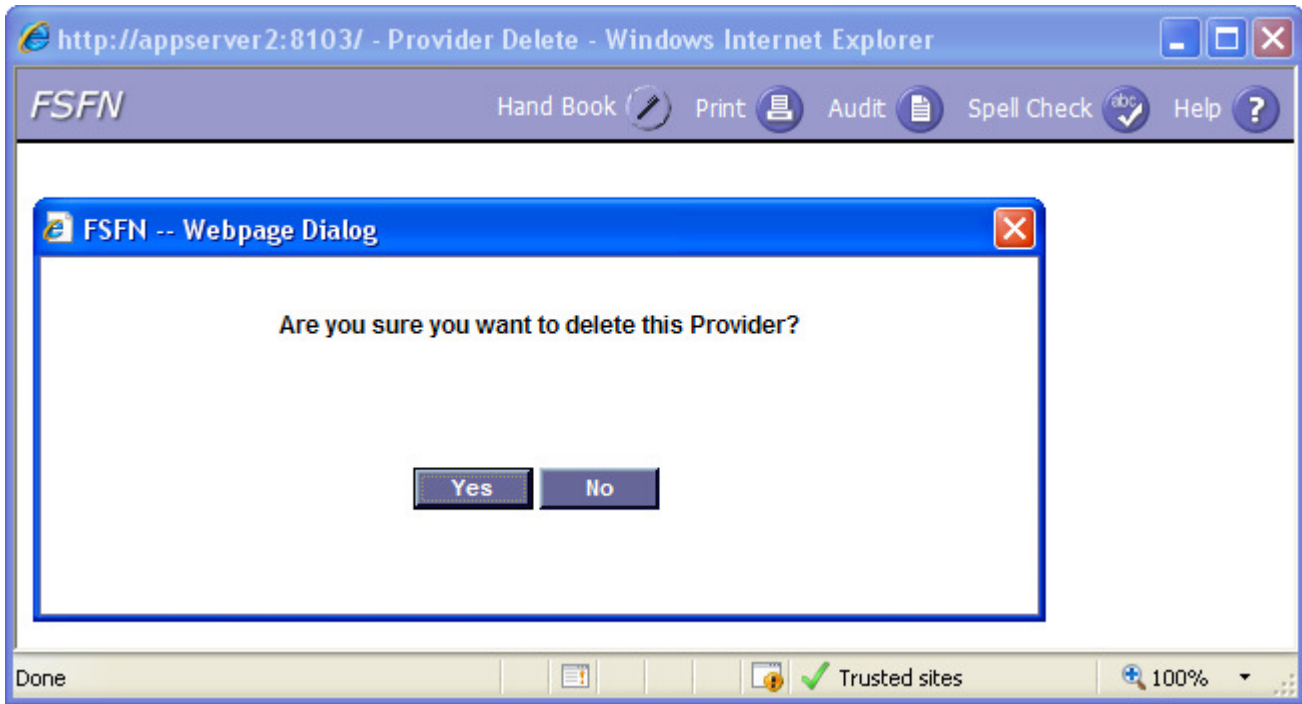


PROVIDER DELETE PAGE

- Select the search hyperlink.
- From the Provider/Organization search page, retrieve the provider to be deleted.

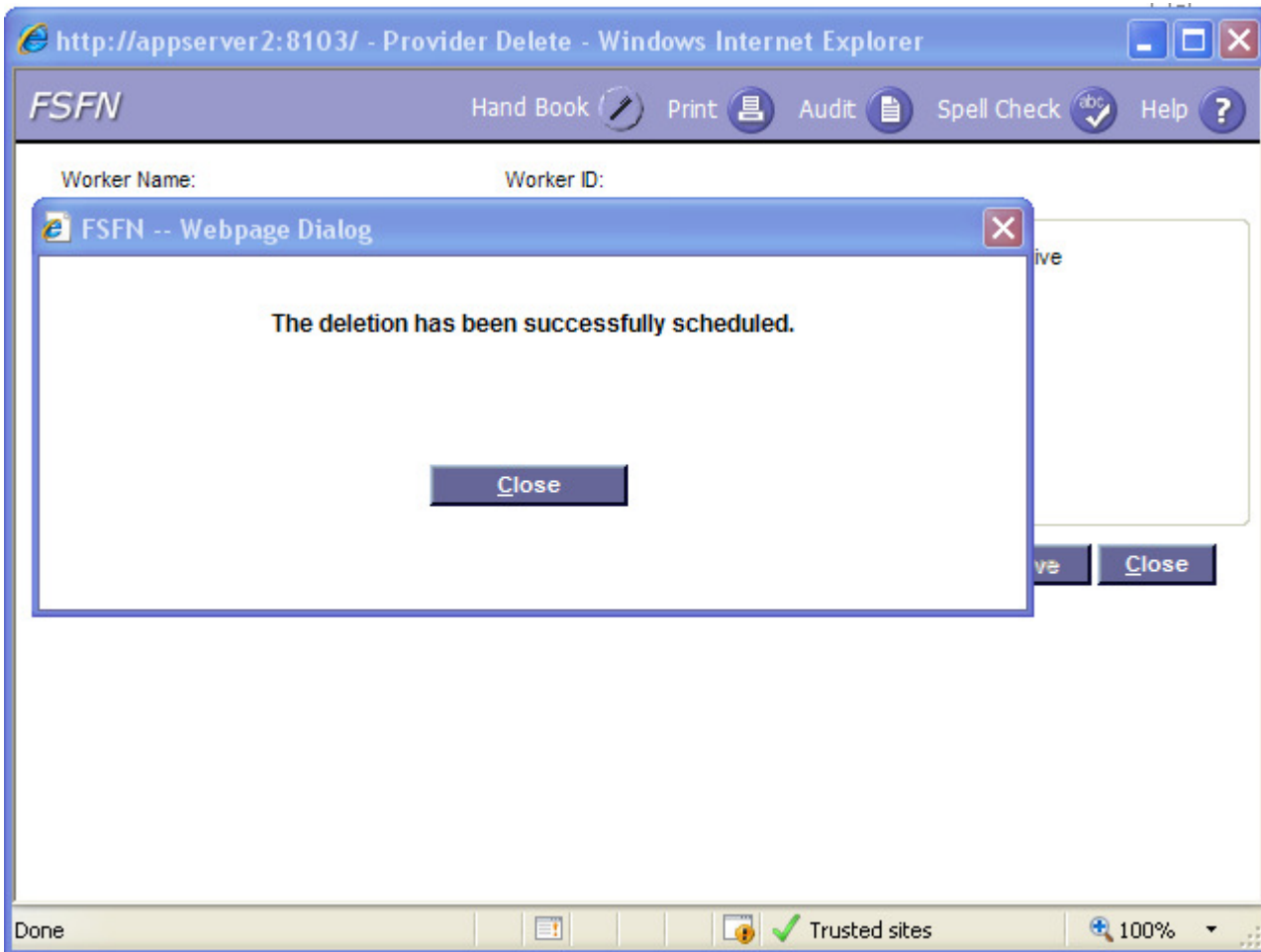


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| | <ul style="list-style-type: none"> Click Save The user will receive a prompt asking to confirm that the user wants the provider to be deleted. | |

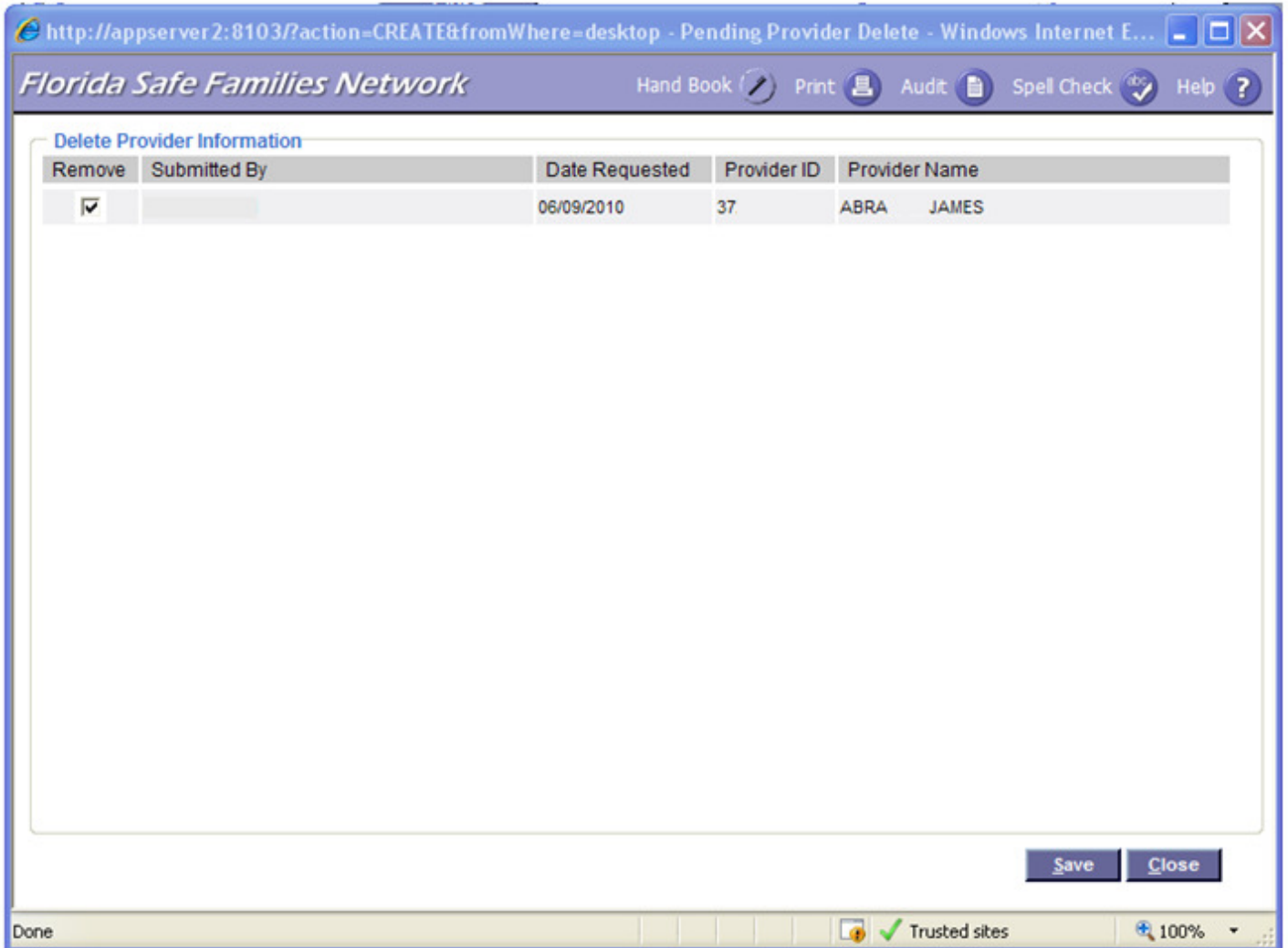


| | | |
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| | <ul style="list-style-type: none"> Click the Yes button | |
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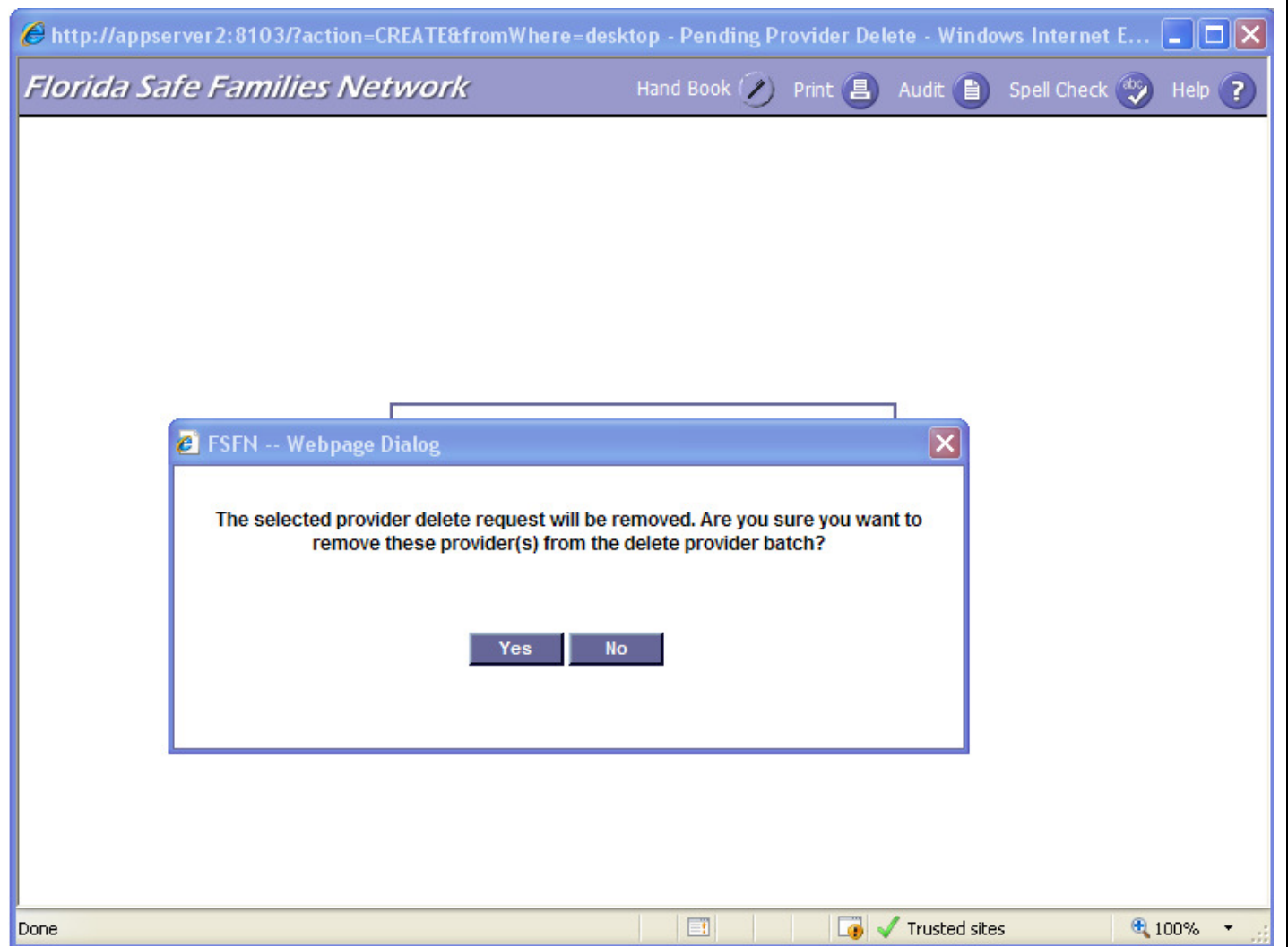


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| | <ul style="list-style-type: none"> ▪ The deletion will complete once the nightly provider delete batch runs | |
| <p>PENDING PROVIDER DELETE</p> | <ul style="list-style-type: none"> ▪ A provider deletion can be halted prior to the running of the batch that will actually delete the provider. ▪ Select <i>Utilities</i> > Pending Provider Delete | <p>Note – a deletion cancellation request has to take place before the provider delete batch runs.</p> |

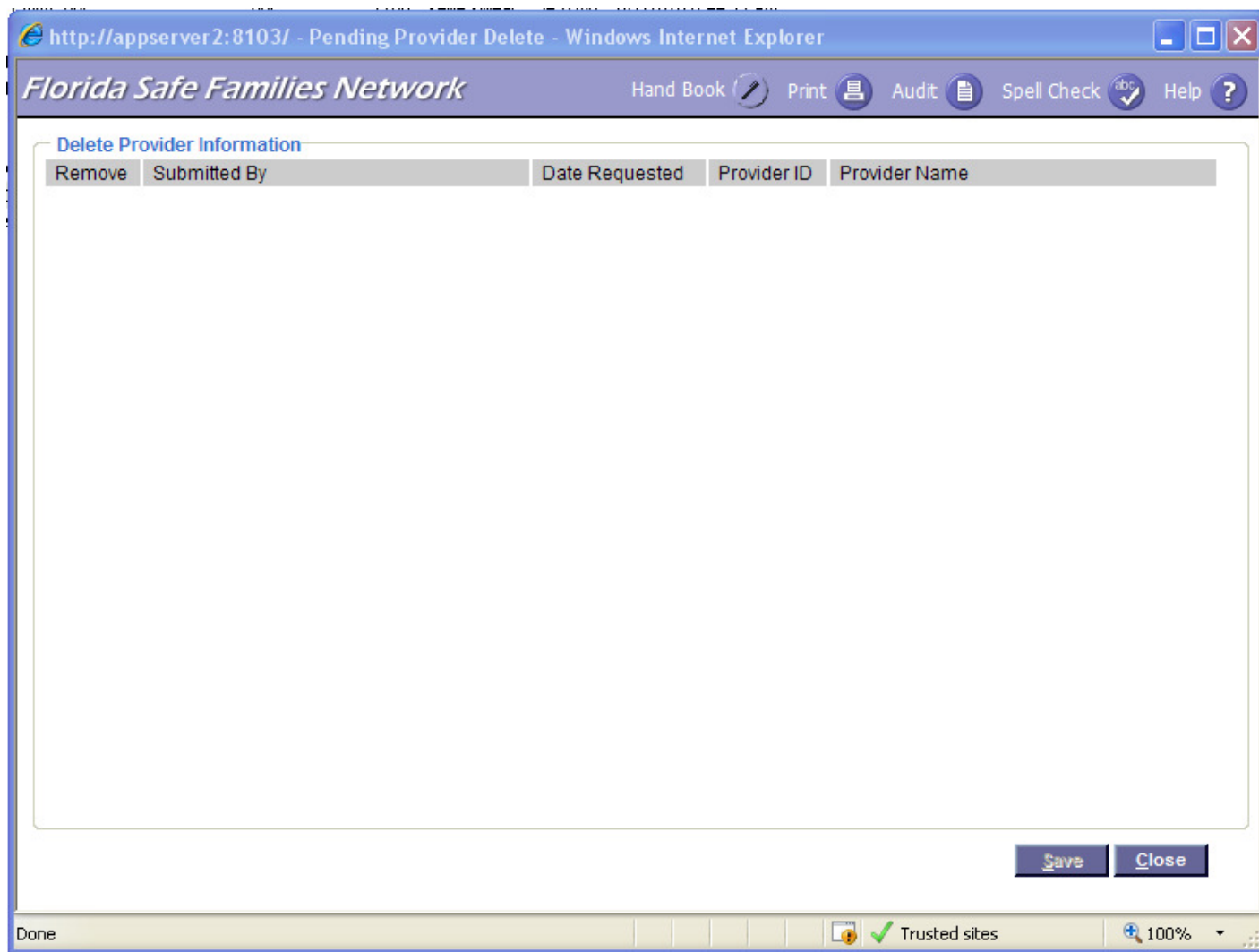


PENDING PROVIDER REMOVE

- Select the **Remove** check box and click **Save**.
- The user is prompted to confirm that they want to cancel the provider deletion request.



▪ Click **Yes**



▪ The request will be cancelled.

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