

How do I ...

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PROVIDER MERGE DELETE

Provider Merge Split Delete How Do I...Guide

How Do I...?	Selections	Tips & Guidelines
Know the Provider Merge Delete Functionality.	<ol style="list-style-type: none">1. FSFN allows users to delete providers under certain circumstances.2. A provider must pass the following edits for deletion:<ul style="list-style-type: none">▪ Provider's status is inactive▪ No Investigations▪ No Licenses▪ No Licensed or Other Services on the provider record.▪ No active/inactive out of home placements▪ No active/inactive Services▪ No financial activity▪ A child household member cannot have a Missing Child Report (MCR)▪ There are no meetings scheduled▪ There are no notes/narratives Provider cannot be a part of another delete or merge request.	<p><i>Retrieve a Provider by selecting the Search Hyperlink on the Provider Delete Page.</i></p> <p><i>On the Provider Search Page, select the Provider record from the Search results. Click Continue button.</i></p> <p><i>The provider demographic information displays on the Provider Delete page.</i></p> <p><i>A nightly batch process deletes all records associated with the Provider from the FSFN database.</i></p> <p><i>If the provider does not meet the criteria listed, the system denies the delete request and the user cannot complete the deletion.</i></p> <p><i>Note 1: Authorized user can delete provider delete request before the nightly batch.</i></p> <p><i>Note 2: Security for Provider Delete page is at the page level. i.e., only workers with access to the Provider Delete page will be able to delete providers.</i></p> <p><i>Additionally, the user with this security also has the ability to 'self-assign' a provider if there needs to be a fix to the provider to complete the merge.</i></p>

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How Do I...?	Selections	Tips & Guidelines
Document information in Pending Provider Delete Page	<ol style="list-style-type: none">1. On the FSFN main menu, click on the Utilities menu option.2. Select Pending Provider Delete Sub-option. Pending Provider Delete page launches and lists all the pending provider deletes initiated by the user.3. Select the checkbox in the Remove column next to the provider delete request to remove a provider delete request if applicable.4. Click Save. This generates the following edit message, "Are you sure you want to remove this provider from the 'delete provider' batch?"<ul style="list-style-type: none">▪ If 'Yes is selected on the edit message, the provider delete request marked for removal is removed from the system.▪ If the user takes no action on this page, the nightly delete provider batch removes the provider from FSFN.5. Click Close.	<p><i>Security for Pending Provider Delete page is at the page level. i.e., only workers with access to the Provider Delete page will be able to delete providers.</i></p> <p><i>Additionally, the user with this security also has the ability to 'self-assign' a provider if there needs to be a fix to the provider to complete the delete.</i></p>

PROVIDER MERGE DELETE

Provider Merge Split Delete How Do I...Guide

How Do I...?	Selections	Tips & Guidelines
Document information in Pending Provider Delink Selection Page.	<ol style="list-style-type: none">1. Access Person Provider >Basic tab, access Provider Delink Selection pop-up page.3. The Provider Delink Selection pop-up page displays ALL providers linked to the 'primary' provider. All check boxes default to unchecked.4. Select the Delink check box in front of the provider or providers to delink from the 'primary' provider if applicable.5. Select the Activate checkbox when delinking the provider if applicable, (i.e., after checking the Delink Check box for a provider). This sets the delinked provider's status to Active. On the other hand if the Activate checkbox is not selected, the provider is delinked with the status of Inactive.6. Click the Save button. On clicking save the user receives the validation message, "Are you sure you want to delink this provider?" Selecting 'Yes' generates the validation message, "The Provider delink is completed. Please update the Provider Type for the delinked Provider(s) on the Person/Organization page(s).	<p><i>Security for Pending Provider Delete is at the page level. This means that only workers with access to the Pending Provider Delete page will be able to delete providers.</i></p> <p><i>Additionally, the user with this security has the ability to 'self-assign' a provider if a fix to the provider is needed to complete the delete. For example, the 'fix' could be, but not limited to, a change in provider status.</i></p>

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How Do I...?	Selections	Tips & Guidelines
Document information in Pending Provider Delink Selection Page (cont'd)	<p>7. "The Provider Type, previously 'Duplicate', now is 'Inactive value: Delinked'".</p> <p>If the user modifies the Person or Organization Provider page, selecting Save generates a validation message, "The Delinked value is system generated and not a valid Provider Type. Please select a valid Provider Type."</p> <p>8. Select a valid Provider Type and click Close.</p> <p>9. Return to the Provider Delink Selection pop-up page, the linked provider no longer displays in Linked Providers group box.</p>	

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How Do I...?	Selections	Tips & Guidelines
Merge a Person Provider	<ul style="list-style-type: none"> ▪ From Desktop menu bar Click Utilities. ▪ From the Utilities dropdown select Provider Merge. ▪ In the Remove Provider group box click the Search hyperlink. ▪ Enter the search criteria. ▪ Click Search. ▪ In the Providers Returned group box select the radio button for your Remove Provider. ▪ Click Continue. ▪ In the Keep Provider group box click the Search hyperlink. ▪ Enter the search criteria. ▪ Click Search. ▪ In the Providers Returned group box select the radio button for your Keep Provider. 	<p><i>FSFN allows multiple provider merges: however, the user must complete each merge separately.</i></p> <p><i>On the Provider Merge page, the Provider ID that loses its original identity is the Remove Provider record. Note: Once the merge is completed, the Removed provider name is saved on the Merge/Name History page as an additional name on the Keep Provider with a type Pre-Merge Name</i></p> <p><i>The Provider record to remain in FSFN is the Keep Provider record.</i></p> <p><i>If the user tries to merge providers in any of the following circumstances an error validation pop-up message displays. "Cannot merge Remove Provider record with Provider ID XXXX" and then states the specific reason or reason(s).</i></p>

	<ul style="list-style-type: none"> Click Save. Question “Are you sure you want to merge these Providers?” Click “Yes” button. Click Close. Webpage Dialog-“Merge Record Created and Provider Merge is Completed” Click Close. 	<table border="1"> <thead> <tr> <th colspan="6">Keep Provider ZZZ</th> </tr> <tr> <th>Remove Provider XXX</th> <th>Org (A)</th> <th>Org (I)</th> <th>Org (P)</th> <th>Person (A)</th> <th>Person (I)</th> </tr> </thead> <tbody> <tr> <td>Org (A)</td> <td>Pass</td> <td>Fail</td> <td>Fail</td> <td>Fail</td> <td>Fail</td> </tr> <tr> <td>Org (I)</td> <td>Pass</td> <td>Pass</td> <td>Pass</td> <td>Fail</td> <td>Fail</td> </tr> <tr> <td>Org (P)</td> <td>Pass</td> <td>Fail</td> <td>Pass</td> <td>Fail</td> <td>Fail</td> </tr> <tr> <td>Person (A)</td> <td>Fail</td> <td>Fail</td> <td>Fail</td> <td>Pass</td> <td>Fail</td> </tr> <tr> <td>Person (I)</td> <td>Fail</td> <td>Fail</td> <td>Fail</td> <td>Fail</td> <td>Pass</td> </tr> </tbody> </table>	Keep Provider ZZZ						Remove Provider XXX	Org (A)	Org (I)	Org (P)	Person (A)	Person (I)	Org (A)	Pass	Fail	Fail	Fail	Fail	Org (I)	Pass	Pass	Pass	Fail	Fail	Org (P)	Pass	Fail	Pass	Fail	Fail	Person (A)	Fail	Fail	Fail	Pass	Fail	Person (I)	Fail	Fail	Fail	Fail	Pass
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View Merge/Name History	<ul style="list-style-type: none"> Select the icon Select the provider hyperlink Select the Merge/Name History Page 	<p><i>The Additional Names group box shows worker entered names that the provider may be known as, in addition to the pre-merged names.</i></p>																																										

PROVIDER MERGE DELETE		<i>Provider Merge Split Delete How Do I...Guide</i>
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Merge an Organization Provider	<ul style="list-style-type: none"> From Desktop menu bar Click Utilities. From the Utilities dropdown select Provider Merge. In the Remove Provider group box click the Search hyperlink. Enter the search criteria. Click Search. In the Providers Returned group box select the radio button for your Remove Provider. Click Continue. In the Keep Provider group box click the Search hyperlink. Enter the search criteria. Click Search. In the Providers Returned group box select the radio button for your Keep Provider. Click Save. Question “Are you sure you want to merge these Providers?” Click “Yes” button. Click Close. Webpage Dialog-“Merge Record Created and Provider Merge is Completed” Click Close. Click close again to return to the desktop. 	<p><i>The Organization Provider displays.</i></p> <p><i>Four tabs comprise this window.</i></p> <p><i>On the Provider Merge page, the Provider ID that loses its original identity is the Remove Provider record. The name is saved on the Merge/Name History page as an additional name on the Keep Provider with a type of Pre-Merge Name</i></p>
View Merge History	<ul style="list-style-type: none"> Select the icon Select the provider hyperlink 	<p><i>The Additional Names group box provides the ability to track additional names that the organization provider</i></p>

	<ul style="list-style-type: none">▪ Select the Merge/Name History Page	<i>may be known as, in order to facilitate provider searching</i>
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Link a Provider	<ul style="list-style-type: none"> ▪ Select the 'Duplicate' value from the Type dropdown list. Selecting the 'Duplicate' value will: <ul style="list-style-type: none"> ○ Auto-select and disable the 'Inactive' Status value ○ Display the Search link ○ Display a 'Send Reminder' checkbox in the Basic group box ○ Display a 'Completed' checkbox in the Basic group box ○ Display a 'Send Reminder' date field in the Basic group box ○ Display a 'Completed' date field in the Basic group box ○ Continue to display the 'Duplicate' value as enabled ▪ Select the Search link. This link will open a new custom provider search that will only display the providers that are available to link. The first search is a required action if the type is set to 'Duplicate'. ▪ Once inactive duplicate providers are linked, those with 'Provider Link' security will be able to change which provider the duplicate provider is linked to. The 'Search' hyperlink will continue to be available to those with the appropriate security. 	<p><i>Only users with an assignment to the provider will be able to link provider records</i></p> <p><i>Note: The 'Search' link, 'Send Reminder' checkbox, the 'Completed' checkbox, the 'Send Reminder' date field, and the 'Completed' date field in the Basic group box, will only be displayed for those with an assignment to the provider.</i></p> <p><i>If a user selects the 'Save' button prior to selecting a provider the system will display the following message, 'Please access the Provider Search page by selecting the Search hyperlink to select a provider.'</i></p> <p><i>Custom Provider Search page – Search results will only display providers that are not already linked to a provider.</i></p> <p>Note: <i>A Person Provider can be linked to an Organization Provider and visa versa.</i></p>

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