Questions for Person Merge

1. The process of merging unknowns appears to have changed. Yesterday we were unable to merge an unknown into a name. Please explain how to merge unknowns. Previously the user selected the unknown to merge, you selected search, found the name, and then merged. Yesterday when we went through this process, we got an error message stating you cannot merge the unknown into the known person.

The design did not change the ability to merge an unknown person into a known person. There is a change to limit merging a person who is only on a pending intake, which presents two messages:

Once the first issue with the person as an intake participant is resolved, the second message should not appear.

2. Will unknown/unknowns be merged?

Unknown/unknown is excluded from the batch process. There is no change in the on-line process, see #1 above.

3. How do we know who is allowed to complete the merges in FSFN? What is the profile needed to be able to complete the person merge?

There are three levels of access to the Person Merge Page. The FSFN Security Matrix describes which User Groups have access to which Security Profile. It is available on the FSFN Website at http://fsfn.dcf.state.fl.us/docs/FSFNSecurityProfileMatrix.pdf. See page 3 for the following Security Profiles:

Merge Person - This is the same profile that has always existed to provide access to the Person Merge Page in order to complete a merge, and that profile remains active for the same User Groups as before this release. This profile provides the user with the ability to create and complete a merge. Only people with this profile will have the “Merge” button for completing the merge. These users can complete a merge in one step – they do NOT need to use the new
approval option in order to complete the merge using the Merge button – they can use the Merge button directly.

Merge Person Request – This is a new security profile that gives users the ability to create a merge “request” and route it to a person who has the above Merge Person security profile. They do NOT have access to the Merge button and cannot complete a merge. They will use the new Save button to save their request and the new approval option to route their request to the person in their organization who can complete the merge. Note: the person who can complete their merge request is not necessarily their supervisor. During the design process, the only users groups identified as needing this new access level were the API and API Screener. If additional users groups believe they should have access to this function, they may submit the request to the FSFN project for review.

Merge Person View – This is a new security profile that gives users the ability to access the Person Merge page in view mode. This new security was added to most user groups to provide users with the ability to do side-by-side comparisons of people in order to help them choose the right one to use, as part of the effort to reduce the number of new duplicate people created in FSFN.

4. **Are you saying that only supervisors can approve merges, or it just depends on the security level?**

   See #2 above, completing merge requests depends on security, regardless of whether they are the user’s supervisor.

5. **To clarify-if a staff member can merge, is there a change to their security?**

   Yes, see #2 above.

6. **How does one add the new security profile?**

   Security Profiles are managed on a statewide basis. If you think you should have access and do not, please submit a request to the FSFN project’s Help Desk. See also #2 above.

7. **Do supervisors have access to approval person merge?**

   See #2 above, users, regardless of whether they are a supervisor, who previously could perform person merges, have the ability to complete a person merge.

8. **Does every request for person merge have to be approved? Even as the Supervisor security level?**

   No, see #2 above.

9. **PIs that had access before can still complete merges? And they are automatically approved?**
10. You can merge up to 3 persons at one time. If there is a 4th or 5th person which you identify as the same person can you then go back and merge the 4th and 5th into the original 3 merged as 1?
Yes, first you complete the merge of the 3 people to one retained person, and then you merge the remaining 2 people into that retained person.

11. Can approval requests for merges come from more than one unit to the ‘merge person’? Question interpreted as “what happens if more than one person sends the same merge for approval?”
Once an occurrence has been approved, the next occurrence can be “not approved” and this will remove the merge request.

12. Is there an ability to unmerge an accidental merge?
No, there is no existing unmerge process and this design did not include an unmerge process. If you accidentally merge a person, you must manually recreate that person.

13. What is the best way to search for merge participants-SSN or name?
Use both; this is a judgment call for the worker. Worker may need additional information to make a better decision.

14. Will merge ever go away? The process is time consuming.
As long as the potential exists to create a duplicate person in FSFN, the need to merge people will remain. However, as we resolve the existing large number of duplicates in FSFN, the expectation is that the need to merge people will be less frequent.

15. Why are errors occurring?
Some of the reasons for the duplicates are the original conversion from multiple systems and the current Intake process.
Regardless of the source of the duplicate, any user who identifies a duplicate can participate in the resolution of the duplicate entries.

16. When will the merge be functional? It is not working now.
This process is functioning; however at the time of the presentation there was an error that prevented certain users from completing a merge. An Emergency Build, deployed the weekend of
5/17/2012 addresses this issue and everyone who was previously able to complete merges should now be able to do so.

17. **Call was attempting Person Merge-Worker is an investigator, and had tried to merge. Supervisor had to get done.**  
See #16 above for information about a fix that addresses this issue.

18. **When an automatic merge is completed by the batching process, will those individuals assigned be notified?**  
Yes, if they are NOT converted people, FSFN will send an e-mail to any active worker assignment to a case that the people are associated with. If the merged people are old conversion data, there will not be a notification.

19. **What about kids that are adopted and maintain their original name and social security number after adoption retains SSN?**  
If the pre-adoption and post-adoption occurred in FSFN, the system recognizes these and will not merge them. If the process happened outside of FSFN, there could be an attempt to merge these. One additional edit is added to the automated merge process to check for a case type of post adoption and to not automatically merge any person who is on that type of case.

20. **How often will the automated process run?**  
Possibly, once a week to see how many can be merged during the amount of time available to run the process. If the process is going well, the schedule may be adjusted to run more often.

21. **Are all the previously merged people over the last few years (that show in red) in FSFN going away from the FSFN screen?**  
Part of this issue is addressed going forward with one small change to the way person merge works, so that it will no longer save the removed person’s name if it is an exact match with either the retained person’s name, or any existing AKA for the retained person. In addition, there is a separate change request that addresses the way that people’s AKA are tracked and displayed in FSFN. Once that change request is completed, this issue will be addressed. Until then, a person may appear multiple times in search results with the red AKA indicator, regardless of the source of the AKA (via merge, or updating the person’s name and saving the old name as an AKA, or manually entering an AKA).
Questions for Provider Naming and Search

1. **What security is needed to complete the name amendment?**
   DCF Licensing Specialists are the only users with access to the License page where a name amendment can be initiated. This is because a new license must be issued with the new name.

2. **Will changing the provider name update the payee name?**
   No, because the payee name remains editable so that the user can enter the name as it appears on the check.

3. **Where do I access name amendment and why can’t name be changed when license is on-hold?**
   Name Amendment is accessed from Create Provider Work, License dropdown select “Name Amendment”, then select the provider, and click the Create button. You will need to resolve the hold first, and then you can either create a name amendment, or if you need to update whole license, you will have access to change the name at that point.

4. **Worker needs explanation again limitations to update Caregiver 1 and Caregiver 2**
   Caregiver 1 and 2 must be updated on the provider page. If licensed, must be accessed via the license process.

5. **Can searches for providers be done by social security number?**
   Yes, SSN searches will bring back Caregiver 1 and Caregiver 2 who have that SSN, or an Organization provider with that SSN. FEIN searches will match on the Person or Organization provider’s FEIN.

6. **If we update an address are we able to search by the updated address immediately?**
   Yes, note that address search uses the provider’s physical address.

7. **The upper right hand section on the license where we would be able to enter the name of the CBC has been eliminated. Can this section be reinstated?**
   Yes, the design did not specify a change to the template, but it was inadvertently removed as part of testing the release. A fix is being worked on with a target to be included in the next release.