

# PERSON MANAGEMENT

# USER GUIDE

# PERSON MANAGEMENT

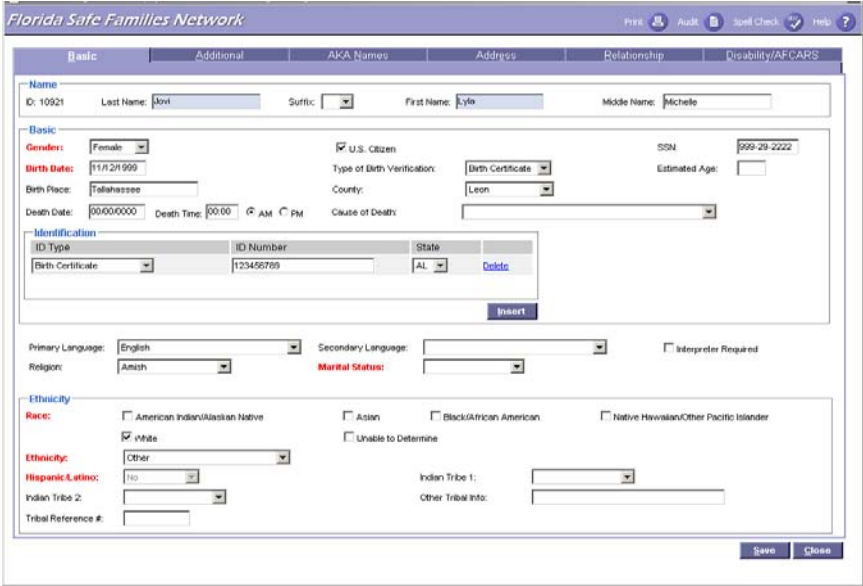
## **FUNCTIONALITY ADDRESSED:**

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

## **LEARNING OBJECTIVES:**

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

- Complete a Provider Merge

FSFN PAGE/ACTION	TASK DESCRIPTION/NAVIGATION STEPS	NOTES
<p><b>DESKTOP MENU</b></p>	<p>Click <i>Utilities &gt; Provider Merge</i> from the Utilities menu.</p>	<p>Person Management processing creates and maintains person records in the FSFN database. In FSFN, a person is defined as any individual who has a role defined as:</p> <ul style="list-style-type: none"> <li>▪ Receiving services.</li> <li>▪ Providing services.</li> <li>▪ Being of interest to a case, inquiry, referral, or intake.</li> <li>▪ Being an employee who is a user of the FSFN system.</li> </ul> <p>Only users assigned to the case or provider with which the person is associated are able to create or update person information.</p>
<p><b>PERSON MANAGEMENT WINDOW PAGE</b></p> 		<p>The Provider Merge page consists of two group boxes:</p> <ul style="list-style-type: none"> <li>▪ Remove Provider</li> <li>▪ Keep Provider</li> </ul> <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><b>PROVIDER MERGE PAGE</b></p>	<ul style="list-style-type: none"> <li>▪ Click the Search hyperlink from the Remove Provider group box.</li> </ul>	<p>Pieces of provider work associated with the remove provider that will <b>not</b> be merged are:</p> <ul style="list-style-type: none"> <li>▪ Household members (other than Caregiver 1)</li> <li>▪ Person Provider Inquires</li> <li>▪ Provider addresses</li> <li>▪ Resource Types on the Resource tab</li> </ul>

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<b>PROVIDER SEARCH OPENS</b>	<ul style="list-style-type: none"> <li>▪ Search for the Provider to be removed.</li> <li>▪ From the providers returned group box, click the radio button of the provider name.</li> <li>▪ Click the Continue button.</li> </ul>	<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>
<b>PROVIDER MERGE PAGE DISPLAYS</b>	<ul style="list-style-type: none"> <li>▪ Select the Search hyperlink from the Keep Provider group box.</li> </ul>	
<b>PROVIDER SEARCH OPENS</b>	<ul style="list-style-type: none"> <li>▪ Search for the Provider to be kept.</li> <li>▪ From the providers returned group box, click the radio button of the provider name</li> <li>▪ Click the Continue button.</li> </ul>	<p>The Provider Merge page displays 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>
<b>PROVIDER MERGE PAGE</b>	<ul style="list-style-type: none"> <li>▪ Click the Save button.</li> <li>▪ Confirmation pop-up displays "Are you sure you want to merge these providers?"</li> </ul>	<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 <b>not</b> 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>
<b>VALIDATION POPUP DISPLAYS</b>	<ul style="list-style-type: none"> <li>▪ Click the Close button.</li> </ul>	
<b>PROVIDER MERGE PAGE DISPLAYS</b>	<ul style="list-style-type: none"> <li>▪ Click the Close button.</li> <li>▪ Desktop displays.</li> </ul>	<p>To access the view only Merge History tab, see Person/Organization Provider User Guide.</p>