

Florida Safe Families Network *How Do I... Guide*

How do I...Person Merge

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Person Merge*Person Merge How Do I...Guide*

How Do I...?	Selections	Tips & Guidelines
Create a Person Merge	<ul style="list-style-type: none"> ▪ From the desktop menu option, select Person Merge <ul style="list-style-type: none"> ▪ <i>Utilities > Person Merge</i> 	

Person Merge How Do I...Guide

How Do I...?	Selections	Tips & Guidelines
Search for the Remove Person	<ul style="list-style-type: none"> ▪ From the Person Merge page, select the Search hyperlink that is in the Remove Person group box. ▪ From the Person Search page, enter the last name of the remove person or the Person ID of the remove person and click Search. ▪ Select the radio button for the correct remove person and then click Continue. ▪ The Person Merge page displays with the Remove Person group box populated with the Remove Person's information. 	<p><i>An unknown can not be searched. When attempting to merge an Unknown, Unknown person record, search by Person ID.</i></p>

Person Merge How Do I...Guide

How Do I...?	Selections	Tips & Guidelines
Search for the Keep Person	<ul style="list-style-type: none"> ▪ From the Person Merge page, select the Search hyperlink that is in the Keep Person group box. ▪ From the Person Search page, enter the last name, first name and any identifying information of the remove person or utilize the Person ID of the remove person and click Search. ▪ Select the radio button for the correct keep person and then click Continue. ▪ The Person Merge page displays with the Keep Person group box populated with the Keep Person's information. 	<p><i>An unknown can not be searched. When attempting to merge an Unknown, Unknown person record, search by Person ID.</i></p>

How Do I...?	Selections	Tips & Guidelines
<p>Process the Merge</p>	<ul style="list-style-type: none"> ▪ From the Person Merge page click Save. ▪ The Person Merge popup will display that says “Are you sure you want to merge these people?” Click the Yes button. ▪ If the merge is successful the pop-up will say “merge record created successfully.” ▪ If the merge fails the pop-up will display the reasons that the person merge failed. 	<p><i>The Person Merge will fail for a variety of reasons. The system will not allow a Person Merge if any of the following conditions are present:</i></p> <p><i>If a Placement record/Service exists for the Remove Person.</i> <i>If a Living Arrangement exists for the Remove Person.</i> <i>If any Interim Child Information exists for the Remove Person.</i> <i>If Medical/Mental Health Information exists for the Remove Person.</i> <i>If the Remove Person is part of a removal episode.</i> <i>If the Remove Person is a Worker in the System.</i> <i>If the Remove Person is a provider participant.</i> <i>If the Remove Person and the Keep Person are participants in the same Investigation.</i> <i>If the Remove Person and the Keep Person are participants in the same Case.</i></p> <p><i>If the Persons are active in the same investigation or case, the user must remove one from the piece of work to successfully complete the Person Merge.</i></p> <p><i>As the Remove Participant process is completed during a Batch process, a Manual Tickler can be created to remind the user to complete the Person Merge. If the Person Merge is not created the Keep Person will not be linked to the work (such as Intakes) linked to the Remove Person.</i></p> <p><i>When the Person Merge is successful the system will replace the Remove person's ID with the Keep person's ID.</i></p>