

CM17: Person Merge

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Change History

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Table of Contents

1.1	Introduction	4
1.2	Pages	8
1.2.1	Page – Person Merge	8
1.2.1.1	Page Overview	8
1.2.1.2	Page Information.....	10
1.2.1.3	Background Processing.....	16
1.2.1.4	Save Processing	21
1.2.1.5	CRUD Matrix	26
1.2.2	Page – Person Delete	28
1.2.2.1	Page Overview	28
1.2.2.2	Background Processing.....	29
1.2.2.3	Save Processing	31
1.2.2.4	CRUD Matrix	31
1.3	Inventories.....	33
1.3.1	Reference Data.....	33
1.3.2	Drop Downs.....	34
1.3.3	List Boxes	34
1.3.4	Automated Messages	34
1.3.4.1	Person Merged	34
1.3.5	Checklists.....	34
1.3.6	Tasks Due	34
1.3.7	Notifications	35
1.3.8	Text Templates	35
1.3.9	Reports.....	35
1.3.10	Triggers/Common Routines.....	35
1.3.10.1	Person Merge Routine.....	35
1.3.11	Batch Processes	37
1.3.12	Batch Person Delete.....	40
1.4	Requirements Included	41



1.1 Introduction

For a variety of reasons, duplicate person records may be created when an individual already exists in the system. The existing business rules in Florida Safe Families Network (FSFN), along with best practices, will reduce the instances of duplicate Person records being created. However, there will still be some occasions where this will occur. One such occasion is when social security numbers (SSNs) are duplicated and not detected by a user. When the system detects a duplicate SSN, the person(s) with those numbers are identified by the system as needed to be reconciled. When this occurs, the person(s) may be identified and reconciled on the Potential Person Matches page. This page offers a link to the Person Merge page and the persons' names are pre-filled.

The person merge process can be described as an ID replace. The system requires the user to search out up to three person IDs, two called "Remove" IDs and one the "Retain" ID. The merge process searches throughout the database looking for all the instances of "Remove" IDs and replaces them with the "Retain" ID, eliminating all instances of the incorrect/duplicate person ID in FSFN. During the merge process, it is necessary to remove links between person records. For example, if two people are merged in FSFN, the person record for the "Remove" ID in the Person table needs to be removed.

The complexity of the merge process is affected by the content and processes stored on the person records that need to be merged. For example, if the intake worker clicks the Create button creating a duplicate Person record in error, the incorrect Person ID record must be deleted before any records are associated with the new person ID.

When duplicate records are created in the same case, it adds another layer of complexity to the merging process. Due to the database structure and constraints, merging records for duplicate persons in the same case can result in a primary key violation, causing the merge to fail. When this scenario occurs, the merge process updates all of the tables and columns where the result would not cause a primary key violation. Any records that were not updated will be left as is. The system will remove certain records or links between records in order to achieve the desired merge. Users will have the ability to view the records that were not updated during the merge process, through the application. For example, Person 1 and Person 2 are in the same case, and both have Medical Mental Health records. When the merge is initiated, the system recognizes that merging these Medical Mental Health records causes a primary key violation and those records are not updated. Instead, the system removes the link between the case and the Medical Mental Health record for the "Remove" person. The user can then conduct a search for the "Retain" person and expand the Person icon. Users will see the Merged Persons icon and can continue to expand to view all persons that were merged with that "Retain" person.



Additionally, the user can continue and expand the Person icon under the Merge Persons icon to drill down another level and see the work that was not merged due to a constraint or primary key violation.

The system supports both online and batch person merge.

A user can initiate the online person merge from several locations in FSFN, but the most straightforward way is by navigating from the Desktop to Utilities and then to the Person Merge option in the FSFN menu bar. When this option is selected, the Person Merge page launches and the user can search for the “Remove” person and the “Retain” person. The process can also initiate from the Person Search page, Person Management page, or the Potential Duplicate Person page. These locations make it easy to initiate the process within the flow of work.

If the “Remove” persons fail any of the error checks in FSFN, an Error Validation pop-up message displays when the user selects the Save command button on the Person Merge page. This message indicates that the merge process cannot be done and displays:

“Cannot Merge Remove Person Record with Person ID /XXXX” and then states the specific reason(s).

If the merge fails, a review of the records should be completed and an assigned user must manually fix the error(s). The merge will be successful as long as the two records being merged will not cause a failure of any of pre-defined error conditions as listed below. Upon successful completion of a person merge, users have the ability to search any of the “Remove” persons IDs that are stored as part of the merge process. The result of this search will return the “Retain” person.

If the person identified as the “Remove” person on the Person Merge page fails any of the following edit checks, it will result in the failure of the merge:

- The “Remove” person and the “Retain” person have any combination of overlapping Removal Episode(s) or Living Arrangement, or has Family Support Status.
- The “Remove” person or the “Retain” person is a worker in the system.
- The “Remove” person and the “Retain” person are in the same case and participants in a family assessment or case plan.
- The “Remove” person and the “Retain” person are in the same case and participants in a Family Functioning Assessment (FFA) – Investigation; Family Functioning Assessment (FFA) – Ongoing; Progress Update; Case Plan Worksheet or Judicial Review Worksheet.
- The “Remove” person and the “Retain” person both have an Unresolved MCR record.



- The “Retain” person is an “Unknown” person.
- The “Remove” person and the “Retain” person have overlapping Title IV-E Foster Care Eligibility records.
- The “Remove” person and the “Retain” person have overlapping Adoption TANF Eligibility records.
- The “Remove” person and the “Retain” person have overlapping Medicaid Eligibility records.
- The “Remove” person and the “Retain” person have a trust account of the same type in the same agency.
- The “Remove” person is pre-adoptive and the “Retain” person is post-adoptive.
- The “Remove” person is post-adoptive and the “Retain” person is pre-adoptive.
- The “Remove” person has a “Pending” private adoption page.
- The “Remove” person has a non-terminated (active) Child Placement Agreement. If any of the “Remove” persons has an active Child Placement Agreement page, upon attempting to perform Person Merge the following validation displays:
 - Cannot merge Remove Person record(s) with Person ID (ID). Remove person(s) cannot have an active Child Placement Agreement.
- If the Person identified as the “Remove” persons on the Person Merge page has a “Default Template,” the following error message displays when attempting to perform Person Merge:
 - “Cannot merge Remove Person record with Person ID: XXXXXXXX. Remove Person has a “Default Template” Legal Page.” <OK>.
 - **Note:** To proceed with the person merge, the “Default Template” must be deleted by a user with the appropriate security.
- Upon clicking the Merge button, if any of the selected “Remove” persons are under the age of 18 and the selected “Retain” person is 18 years of age or older, or any of the selected “Remove” persons are 18 years of age or older and the “Retain” Person is under the age of 18, the following validation message displays:
 - “You are about to merge person(s) who is/are under the age of 18 with person(s) who is/are 18 years of age or older. Do you wish to proceed with this merge?” <Yes><No>
 - Upon clicking “Yes”, the existing validation message displays indicating that



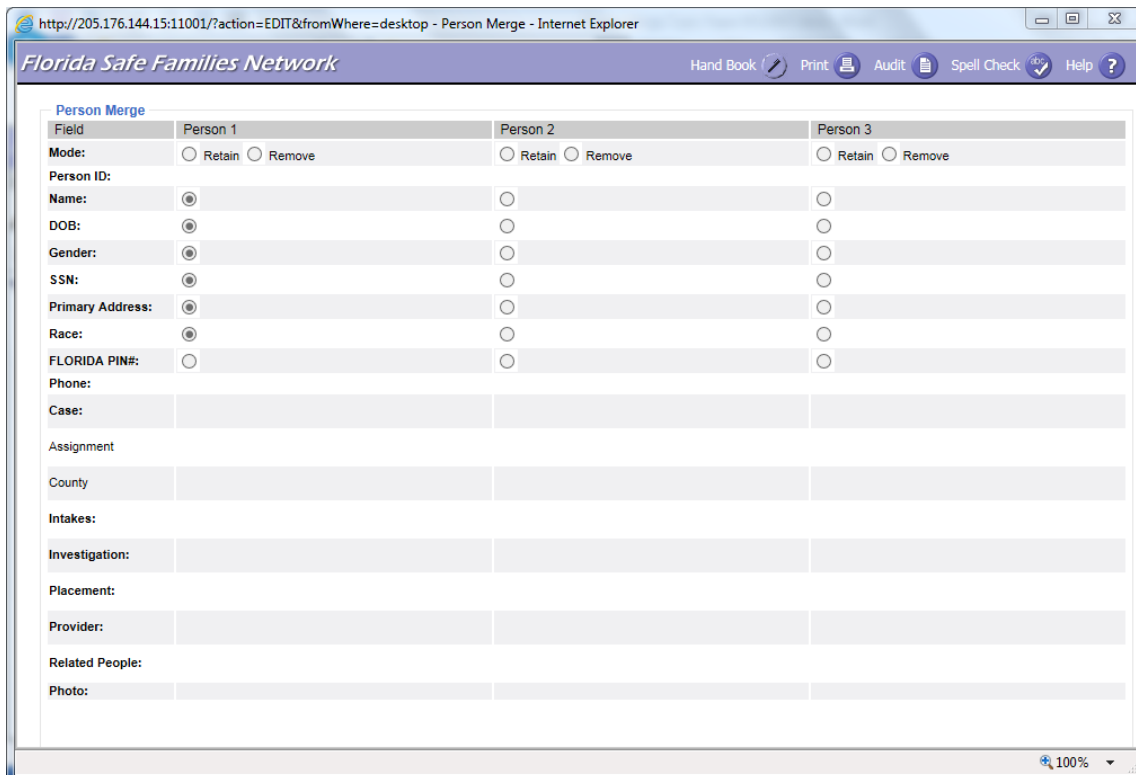
the user is about to merge persons.

- Upon clicking “No”, the user is returned to the Person Merge pop-up page where he or she can make the applicable updates or exit the merge process.

A regular batch process runs as a part of the regular batch processes to merge or delete persons who meet certain criteria. For a person’s record to be considered for deletion, the person must not be a case worker or not linked to an intake, case, or provider. Unknown persons are excluded from the merge and delete process. Automated messages are generated to notify CPS/APS workers or workers with active assignments when the automated processes merge persons in their cases and/or investigations.

1.2 Pages

1.2.1 Page – Person Merge



Field	Person 1	Person 2	Person 3
Mode:	<input type="radio"/> Retain <input type="radio"/> Remove	<input type="radio"/> Retain <input type="radio"/> Remove	<input type="radio"/> Retain <input type="radio"/> Remove
Person ID:			
Name:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
DOB:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gender:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSN:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Primary Address:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Race:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
FLORIDA PIN#:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Phone:			
Case:			
Assignment			
County			
Intakes:			
Investigation:			
Placement:			
Provider:			
Related People:			
Photo:			

1.2.1.1 Page Overview

Navigation

The Person Merge page can be accessed from the following methods:

- The main FSN menu by clicking Utilities on the menu bar and selecting Person Merge
- The Person Management page by clicking the Merge button
- Person Search by clicking the Merge hyperlink
- Inquiry Search by clicking the Merge hyperlink



Page Summary

On the Person Merge page, the records identified as “Remove” persons will be removed from the system. The “Retain” person is the record that will be retained in the system. In order to retrieve the “Remove” person ID or the “Retain” person ID, the user clicks the Search hyperlink to display the Person Data Retrieval Search page that is part of *CM10: Search* Common Application Function topic.

The user selects the record from the search results for both the “Remove” person or “Retain” person and clicks Continue to bring that record number back to the “Remove” Person or “Retain” Person group box on the Person Merge page. The user cannot search on the name “Unknown” as the “Remove” person or the “Retain” person. In instances where the “Unknown” person is being merged to a known person that exists in the system, the user must acquire the “Unknown” person’s ID from his or her Person Management record and input that information to the search criteria.

An “Unknown” person cannot be selected as the “Retain” person. There are exceptions to the above statements when the user navigates to this page from the Person Management page by clicking the Merge button or from the Potential Person Match page. When the page is accessed from the Potential Person Match page, the Search hyperlink does not display and the name is pre-filled from the person selected on the Potential Match page.

In addition to the Person ID fields, some basic information about the person, such as name and address, will pre-fill from various FSFN tables and display on the Person Merge page. These fields allow users to choose values to retain on the “Retain” person record. All of the radio buttons will default to the “Retain” person.

Clicking the View Photo hyperlink displays the Image Display page that is part of *CM01 Person Management module*, allowing the user to view the most recent photos for each person.

The person merge functionality will automatically compare both “Remove” person and “Retain” person records. If any values on the “Retain” person record are null and there are values on the “Remove” person record for the same field, the system automatically retains this value on the “Retain” person record. This process excludes the fields that the user is able to select on the Person Merge page. The following data from the Person Merge page will be automatically stored:

- The SSN not selected on the person merge (pre-merge SSN), only if the SSN is different
- All person identification IDs and types for the “Remove” person, only if they are



different

- The first, last, middle name not selected on the Person Merge page (as an AKA), only if they are different
- The “Removed” person ID (pre-merged person ID)

The background process determines whether the records should be merged; if this is not possible, an error validation message displays indicating why the two records cannot be merged. This process will read the database tables and check the edits that would prevent the “Remove” person and “Retain” person from being merged by the system, as described in the introduction section of this document.

Upon clicking the Merge button, if any of the selected “Remove” persons are under the age of 18 and the selected “Retain” person is 18 years of age or older, or any of the selected “Remove” persons are 18 years of age or older and the “Retain” person is under the age of 18, the following validation message displays:

“You are about to merge person(s) who is/are under the age of 18 with person(s) who is/are 18 years of age or older. Do you wish to proceed with this merge?”

<Yes><No>

- Upon clicking “Yes”, the existing validation message displays indicating that the user is about to merge persons.
- Upon clicking “No”, the user is returned to the Person Merge pop-up page where he or she can make the applicable updates or exit the merge process.

If no such conditions exist for the “Remove” person, then a dialog box will ask the user to confirm the decision to perform the merge. If the user clicks “Yes” and no error validation message is returned, a dialog box will display: “*Merge Record Created and Person Merge Successful*”.

1.2.1.2 Page Information

**Group
Box:** Person Merge

Fields: Column Header Column headers displayed as Person 1, Person



	2, and Person 3.
Mode	Select persons to 'Retain' or 'Remove' when executing Person Merge. Users can merge one 'Retain' person and up to two 'Remove' persons.
Person ID	<p>The selected person's ID number; system derived; not required. No default value when accessed from Utilities menu.</p> <p>When accessed from Person Search page, Potential Person Match page or Person Management page is pre-filled with ID of person selected; no default value.</p>
Name	<p>Person's full name (last name, first name, and middle name); system derived by concatenating all names into one name field; not required. No default value when accessed from Utilities menu.</p> <p>When accessed from Potential Person Match page, is it pre-filled with first name of the person selected on Potential Person Match page or the person selected on the Person Management page.</p>
DOB	Person's date of birth; system derived. Not required; no default value.
Gender	Person's gender; system derived. Not required; no default value.
Social Security Number	The selected person's SSN number; system derived. Not required; no default value.
Address (Line 1)	This is the first line of the person's primary residence home address; system derived. Not



	required; no default value.
Address (Line 1) [Canted]	
Address (Line 2)	This is the second line of the person's primary residence home address; system derived. Not required; no default value.
Address (Line 3)	This is the third line of the person's primary residence home address; system derived. Not required; no default value.
Race	Person's race; system derived by concatenating all races into one name field. Not required; no default value.
FLORIDA PIN #	User selected to identify which participant's FLORIDA PIN # should be retained and those that should not.
FLORIDA PIN # Details	Current FLORIDA PIN # captured from the participant's Person Management record; captures the "Date/Time Received from FLORIDA" for the record on the Summary tab of the Medicaid Eligibility page where the Action = Initial; if there is more than one Action = Initial, displays the maximum "Date/Time Received from FLORIDA"; if only one of the searched and selected Persons have a FLORIDA PIN #, that person's radio button will be defaulted and selected for FLORIDA PIN #; otherwise no default.
Phone	Displays phone number associated with the address displayed.
Case	Displays open cases on which the person is an active participant – Case Name, Case ID, Case Type, Case Status, and Status Date. If only



	closed cases are found, or person is only an inactive participant, the most recent entry the participant is associated with is displayed based on the date the participant was associated with the case (CASE_PART.ts_cr).
Assignment	Displays the most recent worker assignment to the associated open case –Worker Name Assignment Type, Role, Start Date. System derived; not required; no default value; system derived; not required; no default value.
County	Displays the county associated with case.
Intakes	Displays open intakes on which the Person is an active participant – Intake ID, Intake Name, Intake Type, County. If only closed intakes are found, the most recent entry the participant is associated with is displayed based on the date the participant was associated with the intake (INTAKE_PART.ts_cr).
Investigation	Display open investigations in which person is an active participant. Concatenating – Investigation ID, Investigation Name, Investigation Type, County. If only closed investigations are found, displays the most recent entry the participant is associated with based on the date the participant was associated with the investigation (INTAKE_PART.ts_cr – cd_intk_type =5).
Mode: Retain/Remove	Radio button at top of each Person column to identify which person to retain and which person(s) to remove.
Placement	Display active placements. Concatenating the Placement Date, Provider Name, County and



Removal Status into one field. If there are no active placements, will display the most recent entry with which participant is associated; system derived; Not required; No default value.

Provider

Display active provider's person is an active participant. Concatenating Provider Name, Provider ID, and Provider Status into one field. If there are no open providers, will display the most recent entry the participant is associated; system derived; Not required; No default value.

Related People

Display other people related to the participant. Concatenating the Person Name, Person ID, Gender, DOB, Ethnicity, and Race into one field; system derived; Not required; No default value.

Links

Search

Takes the user to the Person Data Retrieval Search Criteria page.

Photo

Hyperlink to the person photo (if applicable); Not required; No default value.

Options

Approval

Conditionally enabled for users without the appropriate security level to complete a merge. The pre-filled merge request will be forwarded to the worker's supervisor or designated user authorized to complete a merge. The Approval request will appear on the Desktop under Approvals expando.

Buttons:

Merge

Additional "validation" occurs upon clicking Merge that ONLY IF MORE THAN 1 of the selected persons has a FLORIDA PIN # documented on Person Management, the following message will display: "You have



selected to merge persons that have FLORIDA PIN #s documented. Are you sure you wish to proceed with merging the persons and the selected PIN # is valid? <Yes><No>”; if Yes is selected the merge process will run and if all other existing validations are met, the merge will complete; if Yes is selected but other validations are not met, the applicable validation message will display as is current functionality; if No is selected, the user will return to the Person Merge page and the merge process will not be triggered. Please refer to the Save Processing Section for additional details regarding FLORIDA PIN #s.

When a user who does **not** have security for the Merge button tries to save the approval, check to see if the case worker to whom approval will be sent to has security for merge; if not, the user receives a message:

“You are submitting the approval to a worker who does not have security access to finalize the merge. Please route the approval to a worker who has the security to merge people.”

Click OK to close message and return to page.

Close

The prompt to save the page is disabled for users who only have access to view the page (see additional details regarding security below in background processing). If the user accesses this page for a set of people selected on the Inquiry Search page, Person Search page, or Potential Person Matches page, clicking Close discards that set of people and returns the user to the originating page with the “Merge Bucket” cleared.



Search	Takes user to Person Search to allow user to select up to three people. Conditionally visible when accessed from the Menu > Utilities > Person Merge, Person Management page Merge button or Desktop > Approvals > Person Merge Approval hyperlink.
Save	Save Merge approval request; conditionally enabled for users without the appropriate security level to complete a merge. Upon clicking Save and only if more than one of the selected persons has a FLORIDA PIN # documented on Person Management, the following validation message will display “Are you sure you wish to proceed with merging the person and the selected PIN # is valid? <Yes><No>; if Yes is selected, the merge process will complete; if Yes is selected but other validations are not met, the applicable validation message will be displayed; if No is selected, the user will be returned to the Person Merge page and the merge process will not be triggered.

1.2.1.3 Background Processing

For the person selected from the Person Data Retrieval Search Criteria page through the Search hyperlink, the appropriate field(s) in the Remove Person box and the Retain Person box will pre-fill with the person’s demographic information.

Data for all fields is retrieved from the appropriate table using the ID entered from the data retrieval search.

The system will determine if the “Remove” person meets any of the following situations:

- The “Remove” person and the “Retain” person have any combination of overlapping Removal Episode(s) or Living Arrangement.
- The “Remove” person and the “Retain” person have any of the following combination



of overlapping dates:

- Family Support page with Family Support page
- Family Support page with Out of Home Placement
- Family Support page with Living Arrangement
- The “Remove” person or the “Retain” person is a worker in the system.
- The “Remove” person and the “Retain” person are in the same case and participants in a Family Assessment or Case Plan.
- The “Remove” person and the “Retain” person are in the same case and participants in a Family Functioning Assessment (FFA) – Investigation; Family Functioning Assessment (FFA) – Ongoing; Progress Update; Case Plan Worksheet or Judicial Review Worksheet.
- The “Remove” person and the “Retain” person both have an Unresolved MCR record.
- The “Retain” person is an “Unknown” person.
- The “Remove” person and the “Retain” person have overlapping Title IV-E Foster Care Eligibility records.
- The “Remove” person and the “Retain” person have overlapping Adoption TANF Eligibility records.
- The “Remove” person and the “Retain” person have overlapping Medicaid Eligibility records.
- The “Remove” person and “Retain” person have a trust account of the same type of trust account in the same agency. (A DBCR will need to be submitted if this situation occurs.)
- The “Remove” person is pre-adoptive and the “Retain” person is post-adoptive.
- The “Remove” person is post-adoptive and the “Retain” person is pre-adoptive.
- The “Remove” person has a “Pending” Private Adoption page.
- The “Remove” person has a non-terminated (active) Child Placement Agreement.
- If the “Remove” person ID meets any of these conditions, the following Validation Error pop-up displays:
 - “Cannot merge Remove person record of person with Person ID XXXX” with the reason(s) the merge failed.



Upon clicking the Merge button, ONLY IF MORE THAN 1 of the selected persons has a FLORIDA PIN # documented on Person Management, the following message will display: "You have selected to merge persons that have FLORIDA PIN #s documented. Are you sure you wish to proceed with merging the persons and the selected PIN # is valid? <Yes><No>"; if Yes is selected, the merge process will be run and if all other existing validations are met, the merge will complete; if Yes is selected but other validations are not met, the applicable validation message will be displayed as is current functionality; if No is selected, the user will be returned to the Person Merge page and the merge process will not be triggered.

Also upon clicking the Merge button, if any of the selected "Remove" persons are under the age of 18 and the selected "Retain" person is 18 years of age or older, or any of the selected "Remove" persons are 18 years of age or older and the "Retain" person is under the age of 18, the following validation message displays:

"You are about to merge person(s) who is/are under the age of 18 with person(s) who is/are 18 years of age or older. Do you wish to proceed with this merge?"

<Yes><No>

- Upon clicking "Yes", the existing validation message displays indicating that the user is about to merge persons.
- Upon clicking "No", the user is returned to the Person Merge pop-up page where he or she can make the applicable updates or exit the merge process.
- If the "Remove" Person does not meet any of these conditions, a Validation pop-up message displays the following:

"Are you sure you want to merge these people?"

- If the user clicks "Yes," the records will be merged by writing a record to the PERSON_MERGE table and updates the "Remove" Person's ID with the "Retain" Person's ID.
- If "No" or "Cancel" is clicked, the user is returned to the Person Merge page.
- If the "Remove" Person has a "Default Template," the following error message displays when attempting to perform Person Merge:

"Cannot merge Remove Person record with Person ID: XXXXXXXX. Remove Person has a "Default Template" Legal Page." <OK>



There is, also, special background processing whenever Person Merge is performed on cases with a Post Adoption Services page:

- Upon performing Person Merge, if both participants have a Post Adoption Services page FSFN will automatically keep the Post Adoption Services page associated with the “keep” person but will MOVE all the information documented on the Post Adoption Services page associated with the “remove” person over to the “keep” person’s Post Adoption Services page. This will result in the “keep” person’s Post Adoption Services page continuing to reflect what was originally documented plus the information/ rows MOVED over from the “remove” person’s Post Adoption Services page. So NO information is being overwritten or lost but rather collated onto the “keep” person’s Post Adoption Services page. FSFN will automatically place the rows the MOVED rows to fall within the existing rows based on the Create Date. This will result in all rows captured being displayed based on the create date.
 - As part of this process to ensure data integrity on the BACK END within the tables, FSFN will automatically update all the demographic information, including Person ID, for the data being MOVED from the “remove” persons Post Adoption Services page to reflect the “keep” person’s information on the back end for the Post Adoption Services page. This will ensure that not only is the information now captured on the “keep” persons Post Adoption Services page, but is captured accurately in the table as well.
- Upon performing Person Merge, if the “keep” person has a Post Adoption Services page but the “remove” person does not, the information will remain as it was on the Post Adoption Services page.
- Upon performing Person Merge, if the “remove” person has a Post Adoption Services page but the “keep” person does not, FSFN will UPDATE the Post Adoption Services page with all the demographic information, including Person ID, to reflect the “keep” person’s information. Therefore, the page will reflect both on the user interface as well as in the database, the “keep” person’s information.

In order to proceed with the Person Merge, the “Default Template” must first be deleted by a user with the appropriate security.

- If the Person Merge page is launched from the Potential Person Matches page, the “Remove” and “Retained” Person pre-fills.
 - Merge page is launched from the Potential Person Matches page, the “Remove” and “Retained” Person pre-fills.



- When the Person Merge page is accessed from the Potential Person Match page, the Search button is disabled.
- When the **Person Merge** page is accessed from the **Person Management** page, the selected Person's information pre-fills.
- The merge process is now a common function called by this page and by the new Batch Person Merge process. Please refer to section 1.3.8.1 Person Merge Routine for details on the processing.

When the user selects more than one person as "Retain," the following message displays: "Please select only one Retain Person."

The Search button is conditionally visible when accessed from Menu > Utilities > Person Merge, Person Management page, Merge button or Desktop > Approvals > Person Merge Approval hyperlink.

Approval option allows users who do not have the security level to execute the person merge to use the approval workflow to forward the pre-filled merge request to their supervisor or other designated user who is authorized to execute the merge.

- Approval Request will appear on the user's Desktop under the Approvals expando:
Level 1: Retain Person Last Name, First Name (Person ID), Level 2: Person Merge,
Level 3 (standard): Worker Name, Request Date, Approval Status, Approval Action.
- When accessed by a person who is authorized to perform a merge, the option to "Not Approve" this merge request is provided. By selecting this option and returning to the page and saving the request, the request becomes frozen and no future processing is allowed.

The Merge button is conditionally visible depending on the user's security.

- Change to automatically add the final approval row for the merge.

The Close button to save the page does not display for users who only have access to view the page.

- If the user accesses this page for a set of people selected on the Inquiry Search page, Person Search page, or Potential Person Matches page, clicking Close will discard that set of people and return the user to the originating page with the "Merge Bucket" cleared.



- The security for this page is being changed from the current approach to only allow users with the authority to merge people access to the whole page, into a set of security resources that support the following three scenarios:
 - Merge Person View - Only access that allows the user to select two to three people to compare using the Inquiry Search, Person Search, or Potential Person Matches pages, and open the Person Merge page in view-only access to compare those people.

This user will not have access to request or complete a merge. This resource should be added to existing profiles that include the Inquiry Search, Person Search, or Potential Person Matches pages.
 - Merge Person Request - Access that allows the user to create a Person Merge as a request and submit the page using the approval function to another user who has the authority to merge.

At a minimum, this profile should be added to API workers so they can initiate a request to their supervisor. Any other requests to add this Merge Person Request profile will go through the normal security request channels.
 - Merge Person - Access that allows users who have the authority to merge to finalize a Person Merge Request by completing the merge, or not approving the request.

These users may also create and immediately complete a merge.

1.2.1.4 Save Processing

If the “Remove” Person does not meet any failure conditions, a Validation pop-up message displays: “Are you sure you want to merge these people?”

If the user clicks “Yes,” the records will be merged by writing a record to the PERSON_MERGE table and updating the “Remove” person ID with the “Retain” person ID.

The following events will also happen:

- The “Remove” person ID will be stored as a “Pre-Merged ID” type in the PERSON_IDENTIFICATION table.
- The SSN not selected on the Person Merge page will be stored as a “Pre-Merged SSN” in the PERSON_IDENTIFICATION table.
- The name not selected on the Person Merge page will be stored as an AKA with a type of “Pre-Merged Name” in PERSON_AKA.



- If the “Retain” person record has a null value on his or her Person record and the “Remove” person does not for the same field, then the “Retain” record will be updated with the value.

Update the following:

- Replace the “Removed” person ID with the “Retain” person ID for all address types (If there are two active primary addresses, the one not selected as the “Retain” person address will be end-date).
- Replace the “Removed” person ID with the “Retain” person ID for all Alerts Participants.
- Replace the “Removed” person ID with the “Retain” person ID for all Intake Participants.
- Replace the “Removed” person ID with the “Retain” person ID for all Intake Relationships.
- Replace the “Removed” person ID with the “Retain” person ID for all Intake Allegations.
- Replace the “Removed” person ID with the “Retain” person ID for all Investigation Participants.
- Replace the “Removed” person ID with the “Retain” person ID for all Investigation Allegations.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Note Participants.
- Replace the “Removed” person ID with the “Retain” person ID for all Dispositions Detail.
- Replace the “Removed” person ID with the “Retain” person ID for all Living Arrangements.
- Replace the “Removed” person ID with the “Retain” person ID for all Out of Home Placement Records.
- Replace the “Removed” person ID with the “Retain” person ID for all Services.
- Replace the “Removed” person ID with the “Retain” person ID for all Interim Child Information.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Participant



information.

- Replace the “Removed” person ID with the “Retain” person ID for all Interim Child Information.
- Replace the “Removed” person ID with the “Retain” person ID for all Interim Child Information.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Plan Goals.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Plan Participation.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Plan Services.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Plan Task Review.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Plan Template.
- Replace the “Removed” person ID with the “Retain” person ID for all Case Progress Compliance.
- Replace the “Removed” person ID with the “Retain” person ID for all Education.
- Replace the “Removed” person ID with the “Retain” person ID for all TANF Eligibility records.
- Replace the “Removed” person ID with the “Retain” person ID for all Adoption TANF Eligibility records.
- Replace the “Removed” person ID with the “Retain” person ID for all Title IV-E Foster Care Eligibility records.
- Replace the “Removed” person ID with the “Retain” person ID for all Adoption Eligibility records.
- Replace the “Removed” Person ID with the “Retain” Person ID for all Medicaid Eligibility records.
- Replace the “Removed” person ID with the “Retain” person ID for all Employment.
- Replace the “Removed” Person ID with the “Retain” Person ID for all Imaging Participants.



- Replace the “Removed” Person ID with the “Retain” person ID for all Independent Living.

Note: Independent Living includes associated work:

- Life Skills Assessment
 - EFC Program Eligibility
 - PESS Program Eligibility
 - Young Adult Case Planning Worksheet
 - Young Adult Judicial Review Worksheet
 - Young Adult Court Involved Case Plan legal document
 - Young Adult Judicial Review legal document.
-
- Replace the “Removed” person ID with the “Retain” person ID in the Link Part table.
 - Replace the “Removed” person ID with the “Retain” person ID for all Ticklers.
 - Replace the “Removed” person ID with the “Retain” person ID for all Medical Mental Health.
 - Replace the “Removed” person ID with the “Retain” person ID for all MCR.
 - Replace the “Removed” person ID with the “Retain” person ID for all AKAs.
 - Replace the “Removed” person ID with the “Retain” person ID for all Person Photos.
 - Replace the “Removed” person ID with the “Retain” person ID for all Placement Corrections.
 - Replace the “Removed” person ID with the “Retain” person ID for all School information.
 - Replace the “Removed” person ID with the “Retain” person ID for all Relationships.
 - Replace the “Removed” person ID with the “Retain” person ID in Investigation Contacts.
 - Replace the “Removed” person ID with the “Retain” person ID for Legal Status and Legal Actions.
 - Replace the “Removed” person ID with the “Retain” person ID for **Family Support** pages.



- Replace the “Removed” person ID with the “Retain” person ID for all Family Functioning Assessment (FFA) – Investigation pages.

Note: This includes any fields on the FFA – Investigation page where the person ID is stored.

- Replace the “Removed” person ID with the “Retain” person ID for all Family Functioning Assessment (FFA) – Ongoing pages.

Note: This includes any fields on the FFA – Ongoing page where the person ID is stored.

- Replace the “Removed” person ID with the “Retain” person ID for all Progress Update pages.

Note: This includes any fields on the Progress Update page where the person ID is stored.

- Replace the “Removed” person ID with the “Retain” person ID for all Case Plan Worksheet pages.

Note: This includes any fields on the Case Plan Worksheet page where the person ID is stored.

- Replace the “Removed” person ID with the “Retain” person ID for all Judicial Review Worksheet pages.

Note: This includes any fields on the Judicial Review Worksheet page where the person ID is stored.

- Replace the “Removed” person ID with the “Retain” person ID for all Safety Plan pages.

Note: This includes any fields on the Safety Plan page where the person ID is stored.

When a Person is merged and is associated with an open investigation or open case, send an automated message to each active assignment – Please review activity for the following merged persons: Person [Removed - Last Name], [Removed - First Name], [Removed - Person ID] on [Investigation, Case] [Investigation ID – Investigation Name] [Case ID – Case Name] was merged into Person [Retained - Last Name], [Removed - First Name], [Removed - Person ID]



When a user who does not have security for the Merge button tries to save the approval, the system will validate that the case worker to whom the approval will be sent has security for merge, and if not, the user attempting to send the merge receives the following message stating that he or she must select a worker who has merge access:

“You are submitting the approval to a worker who does not have security access to finalize the merge. Please route the approval to a worker who has the security to merge people.”

- Upon clicking Merge, if all three persons have a FLORIDA PIN #, the FLORIDA PIN # that was selected to keep is captured as the “FLORIDA PIN” on the “kept” person’s Person Management page in the Identification Type group box; and of the remaining 2 FLORIDA PIN #s, the FLORIDA PIN # with the most recent “Date/Time Received from FLORIDA” will be captured as the “Previous FLORIDA PIN #” on the “kept” person’s Person Management page in the Identification Type group box.
- Upon clicking Save, if 2 of the three persons have a FLORIDA PIN #, the FLORIDA PIN # that was selected to keep is captured as the “FLORIDA PIN” on the “kept” person’s Person Management page in the Identification Type group box; and the other FLORIDA PIN will be captured as the “Previous FLORIDA PIN #” on the “kept” person’s Person Management page in the Identification Type group box.

1.2.1.5 CRUD Matrix

Table Name	Create	Read	Update	Delete
EPISODE		X	X	
WORKER		X		
PROVIDER_PART		X	X	
CA_MAIN		X	X	
MEDICAL_PROFILE		X	X	
PLACEMENT_CORRECTION_DETAIL		X	X	



LIVING_ARRANGEMENT		X	X	
PERSON		X	X	X
INTAKE_PART		X	X	
APPROVAL		X	X	
CASE_PART		X	X	X
PERSON_MERGE	X	X	X	
ADDRESS		X	X	
ALLEGATION		X	X	
RELATIONSHIP		X	X	
INVESTIGATION		X	X	
DISPOSITION_DETAIL		X	X	
CASE_PART_STAT		X	X	
ALERTS_PART		X	X	
INVS_SFTY_FCTRS_CHLD_IH_DTLS		X	X	
INVS_SFTY_FCTRS_ADULT_IH_DTLS		X	X	
INVS_SFTY_FCTRS_CHILD_II_DTLS		X	X	
INVS_SFTY_FCTRS_ADULT_II_DTLS		X	X	
COC_DETAIL		X	X	
CAPACITY_CONSENT		X	X	

1.2.2 Page – Person Delete



FSFN Hand Book Print Audit Spell Check Help

Delete

Person ID: SSN:
 Name: [Search](#) Gender:
 Address: DOB:
 City State: Zip:
 Country:

Save Close

1.2.2.1 Page Overview

Navigation

The Delete Person page can be accessed through the Desktop from locating the Utilities drop down and clicking Delete Person.

Page Summary

The Delete Person page allows the user to select a person for deletion by clicking the Search hyperlink. The process of finding an existing person record is discussed in the *CM10: Search* topic. Access to the Delete Person page is limited through security (see *CM09: Security*). A person can be deleted from the system if he or she is not associated with any pieces of casework. For example, if a user inserts a new case participant by mistake, and then realizes that this person should not be part of the case, the user would then request deletion of this person.



1.2.2.2 Background Processing

The system will determine if the “Delete” Person is a participant any of the following pieces of work:

- Safety Assessment
- Education
- Medical Mental Health
- Interim Child Information
- Legal
- Placements
- Living Arrangements
- Family Support
- Case Planning
- Safety Planning
- Special Conditions
- Family Assessment
- TANF Eligibility
- Adoption TANF Eligibility
- Title IV-E Foster Care Eligibility
- Adoption Eligibility
- Medicaid Eligibility
- Intake (Screened In)
- Independent Living

Note: Independent Living includes associated work:

- Life Skills Assessment
- EFC Program Eligibility
- PESS Program Eligibility



- Young Adult Case Planning Worksheet
- Young Adult Judicial Review Worksheet
- Young Adult Court Involved Case Plan legal document
- Young Adult Judicial Review legal document.
- Provider
- Narrative
- Worker
- Investigation
- MCR
- Legal
- Adoption Information
- Post Adoption Services
- Forms
- Payments
- Rate Setting
- Family Functioning Assessment (FFA) – Ongoing
- Progress Update
- Case Plan Worksheet
- Judicial Review Worksheet

If the person to be deleted meets any of these conditions, a Validation Error pop-up message displays: “Cannot delete this person, they are participant in a piece of casework.”

If the Person to be deleted does not meet any of these conditions, a Validation pop-up message displays: “Are you sure you want to delete this person?”

- If the user clicks “Yes,” the record(s) is deleted.
- If “No” or “Cancel” is clicked, the Person Delete page appears.



1.2.2.3 Save Processing

When the user clicks 'Save' on this page, a pop-up will display: "Are you sure you want to delete this person?"

- If the user clicks "Yes," the system deletes all associated records with the person (names, addresses, relationships) from the FSFN database.

1.2.2.4 CRUD Matrix

Table Name	Create	Read	Update	Delete
EPISODE		X		X
WORKER		X		X
PROVIDER_PART		X		X
CA_MAIN		X		X
MEDICAL_PROFILE		X		X
PLACEMENT_CORRECTION_DETAIL		X		X
LIVING_ARRANGEMENT		X		X
PERSON		X		X
INTAKE_PART		X		X
APPROVAL		X		X
CASE_PART		X		X
PERSON_MERGE		X		X
ADDRESS		X		X
ALLEGATION		X		X



RELATIONSHIP		X		X
INVESTIGATION		X		X
DISPOSITION_DETAIL		X		X
CASE_PART_STAT		X		X
ALERTS_PART		X		X
INVS_SFTY_FCTRS_CHLD_IH_DTLS		X		X
INVS_SFTY_FCTRS_ADULT_IH_DTLS		X		X
INVS_SFTY_FCTRS_CHILD_II_DTLS		X		X
INVS_SFTY_FCTRS_ADULT_II_DTLS		X		X
COC_DETAIL		X		X
CAPACITY_CONSENT		X		X



1.3 Inventories

1.3.1 Reference Data

Table Name	Description
CASE_PART	<p>This table maintains information pertaining to the PERSONs involved in a CASE about whom DCF, Sheriff’s Office, or CBC needs to Retain information for investigation or other purposes. A CASE PART may be any person who has a high degree of relevance to the family in question. A CASE PART is assisted by one or more case workers at any given time.</p> <p>SM04a (Maintain Case) processes build and maintain this table.</p>
PERSON	<p>This PERSON table maintains information that identifies an individual known to DCF, Sheriff’s Office, or CBC such as name, date of birth, social security number, race, sex, and so on. A PART. Primary search processing is centered on this data. Processes of CM01 (Person Management) build and maintain this information. PERSON can be a WORKER, INTAKE PART, REFERRAL PART, CASE PART or PROVIDER.</p>
PERSON_MERGE	<p>This table houses the requests for people to be merged together.</p>
PROVIDER_PART	<p>This table maintains information detail about the PERSONs associated with a provider (other than children in placement) about whom the State is required to collect and maintain information. Provider participants are associated only with Adoptive and Foster Homes. The PROVIDER PART record is created and updated in PM02a (Maintain Person Provider).</p>
WORKER	<p>The WORKER table maintains information pertaining to an individual (PERSON) who is</p>



	employed by DCF, Sheriff’s Office, or CBC and is in a job class that provides services and/or a job class that receives FSFN-defined work assignments. The information is created in CM18 (Manage Worker).
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1.3.2 Drop Downs

- None

1.3.3 List Boxes

- None

1.3.4 Automated Messages

1.3.4.1 Person Merged

Subject: Person Merged

Automated Message Text: “Please review activity for the following merged persons: Person [Removed - Last Name], [Removed - First Name], [Removed - Person ID] on [Investigation, Case] [Investigation ID – Investigation Name] [Case ID – Case Name] was merged into Person [Retained - Last Name], [Removed - First Name], [Removed - Person ID]”

Automated Message Description: When a Person is merged and is associated with an open investigation or open case, send an automated message to each active assignment.

Subject: Merge/Save Warning

1.3.5 Checklists

- None

1.3.6 Tasks Due

- None



1.3.7 Notifications

- None

1.3.8 Text Templates

- None

1.3.9 Reports

- Pre and Post Merge reports
- Person Merge Statistical report
- Duplicate SSN report

1.3.10 Triggers/Common Routines

1.3.10.1 Person Merge Routine

This is not a new process, but since both Batch Person Merge and the Person Merge pages use this routine, the changes are documented here instead of on both of the online pages.

Merge Processing – Name	Modify	Processing	When processing the merge of the “Remove” person’s main name, first look at the “Retain” person’s existing main name and AKA names to see if the “Remove” person’s main name is already there as any type. If found, do not create a new AKA for the “Retain” person.
Merge Processing – AKA	Modify	Processing	When processing the merge of the “Remove” person’s AKA names, first look at the “Retain” person’s existing main name and AKA names to see if the “Remove” person’s AKA name is already there as any type. If found, do not create a new AKA for the “Retain” person.
Merge Processing – AKA (Canted)			
Merge Processing – SSN	Modify	Processing	When processing the merge of the “Remove” person’s SSN, first look at the “Retain” person’s



			existing SSN and Other Person Identifiers to see if the “Remove” person’s SSN is already there as any type. If found, do not create a new Other Person Identifier for the “Remove” person’s SSN.
Merge Processing – Other Identifiers	Modify	Processing	When processing the merge of the “Remove” Person’s Other Person Identifiers, first look at the “Retain” person’s existing SSN and Other Person Identifiers to see if the “Remove” person’s Other Person Identifier is already there as the same type. If found, do not create a new Other Person Identifier for the “Retain” person.
Merge Processing – 3 People	Modify	Processing	<p>Modify processing to handle merging for three people at once. For the pre-merge edits, first run the edits on the combination of “Retain” person and first “Remove” person, and if there are errors, the merge fails.</p> <p>If there are no errors, process this first merge, but do not completely save it before running the edits on the combination of the “Retain” person that now has the first “Remove” person’s updates, and second “Remove” person, and if there are errors, the merge fails. If no errors, merge the second “Remove” person with the “Retain” person. If there are no errors, run the edits on the combination of the “Retain” person and the second “Remove” person, and if there are errors, the merge fails. If there are still no errors, run the edits on the combination of the two “Remove” persons, and if there are errors, the merge fails. If there are no errors, merge the “Remove” people into the “Retain” person.</p>
Merge Processing – TANF	Modify	Processing	TANF records can have overlapping dates – remove the edit for overlapping dates on TANF records and allow the merge to proceed.
Merge Processing	Modify	Processing	Do not allow user to merge a person who is an



– Intake			<p>intake participant on an intake that is not completed. Message: You may not merge [Person Last Name, First Name, ID] because they are an intake participant on an intake that is not yet completed. You may either remove the person from the intake, or wait until the intake is completed. Click OK to close the message.</p>
Merge Processing – Batch Historical Placements	Modify	Processing	<p>Modify processing such that if “Retain” and “Remove” person have an overlapping placement record, it will go ahead and update the “Remove” person’s placement record with the “Retain” person’s ID, if the placement record is ended before 2007-08-01 – the date of FSFN conversion.</p>
Merge Processing – Investigation Contacts	Modify	Processing	<p>Ensure that person ID on tables for Investigation Contacts (INVESTIGATION_CNTC) and Case Note Participant (CAN_PART) are updated with “Retain” person ID. This issue was reported early 2011 and is associated with Service Ticket CALL2003689 / IM471462. Also see original incident #2893 that was put into production early 2008. There still seems to be an issue.</p>

1.3.11 Batch Processes

- Definition: Converted People – These are person records that were created by the original conversion process and have not since been updated by any process (the Created By and Updated By user IDs are both the ID of the original Conversion process – 1000 or 1001). Records with last/first name of “Unknown, Unknown” are excluded.
- Parameter “Conversion,” values **Y**, **N**, defaults to **N**. Specify whether this process is being run only for “Converted People” (**Y**), or for “All People” (**N**).
- Parameter “Threshold,” defaults to 10,000. Specifies the number of merges to perform in a given batch run.
- This process will run once a week as part of the regularly scheduled batch process until all the “Converted People” are processed.
- Parameter matching criteria for use when the prompt “Conversion” is **Y**, indicating



the process is run only for “Converted People:”

- Last name, First name, DOB, Created By User ID in (1000, 1001) [Conversion User IDs], Updated User ID in (1000,1001)
- Last name, First name, SSN, Created By User ID in (1000, 1001) [Conversion User IDs], Updated User ID in (1000,1001)
- Last name, First name, Person Identification (PERSON_IDENTIFICATION) ID Type (CD_IDTFCN_TYPE) and ID Number (TX_IDTFCN_TYPE), Created By User ID in (1000, 1001) [Conversion User IDs], Updated User ID in (1000,1001)
- After the above merge of converted people is complete, potential duplicates may still exist. This process will select Person records based on the below Matching criteria regardless of whether the conversion process created the record.
- Definition: All People – These are all Person records, regardless of what process created or updated them, after the above merge is completed for Converted People. Records with Last/First name of “Unknown, Unknown” are excluded.
- Parameter Matching criteria:
 - Last name, First name, DOB and SSN (after invalid SSN’s are excluded)
 - Remove the following criteria, since there are too many instances of a common or pseudo name used in combination with a pseudo DOB, and there are too many duplicate person identifiers.
 - Last name, First name, DOB, gender, and SSN is blank
 - Last name, First name, SSN and gender, and DOB is blank
 - Last name, First name, SSN, gender is blank or unknown, and DOB is blank
 - Last name, First name, DOB, gender is blank or unknown, and SSN is blank
 - Last name, First name, Person Identification (PERSON_IDENTIFICATION) ID Type (CD_IDTFCN_TYPE) and ID Number (TX_IDTFCN_TYPE)
- Make each Matching criteria a parameter that will allow the batch process to be run for a subset of the matching criteria. For example, the conversion run (Conversion Parameter = “Y”) can be run with only the first of the three conversion matching



criteria (Last name, First name, DOB, Created by User ID in (1000, 1001) [Conversion User IDs], Updated User ID in (1000, 1001)).

- For each set of duplicate people, select a unique list of “Retain” people based on the person most recently created. For each “Retain” person, find each “Remove” person who has the specified matching criteria, and verify that he or she are not liked via an Adoption Match record.
- Generate output indicating when the Person Merge was not successful, including the reason. Once there is an error for a “Remove” person/”Retain” person combination, exclude this combination from future batch merge processing so the process doesn’t pick up these people who erred out over and over again.
- Generate automated messages as specified in **Error! Reference source not found. Error! Reference source not found.** when the program is run for “All People” (Conversion Parameter = “N”). If the e-mail server is down at the point this program runs, generate an error and do not continue merge processing. If a single e-mail for a particular merge fails, generate an error, but continue processing the merge. Automated messages will not be created when the program is run for converted people (Conversion Parameter = Y). This is due to the high volume of these records and the low probability that they are associated with any active assignment.
- Process the resulting set of data using the same rules currently used by the online Person Merge process with the following modifications:
 - Modify processing such that if “Retain” and “Remove” Person have an overlapping placement record, it will go ahead and update the “Remove” Person’s placement record with the “Retain” Person’s ID, if the placement record is ended before 2007-08-01 – the date of FSFN conversion.
 - Ensure that Person ID on tables for Investigation Contacts (INVESTIGATION_CNTC) and Case Note Participant (CAN_PART) are updated with Retain person ID. This issue was reported early 2011 and is associated with Service Ticket CALL2003689 / IM471462. Also see original incident #2893 that was put into production early 2008. There still seems to be an issue.
- Parameter “Limit” that specifies the maximum people that can match in order for them to be selected for merging. This is to address the issue that people with common or pseudo names and pseudo DOBs are matching with dozens of other people. The initial value will be set to a conservative maximum of 3. If there are more than 3 Person records matching the criteria, the automate process will not



select these for merge and users will have to use the online system to either correct the Person's information or merge them manually. See below for additional changes to the Duplicate Person Listing report to facilitate reconciling these large numbers of matching records.

- Exclude adopted children who may not have an Adoption Match record in the system. Once a pair of people are selected based on the above matching criteria, include a check to see if either Person is an active case participant with a Role of **Child** on a case with a Case Type of **Post Adoption**. If found, do not merge these Person records. This restriction applies only to the automated process – the user can bypass this rule using the **Merge** page.
- Safety Plan, Family Functioning Assessment (FFA) – Investigation, Family Functioning Assessment (FFA) – Ongoing, Progress Update, Case Plan Worksheet, and Judicial Review Worksheet, must be available from Case Book and Person Book once a Person Merge is complete, from the “Retained” person. Furthermore, the Person reflected on these pieces of work must reflect the “Retained” Person once the Person Merge is complete.

1.3.12 Batch Person Delete

The batch process that selects and deletes person records runs on a regular schedule (monthly). Person records that are not workers and are not affiliated with any intake, case, or provider are candidates for automatic deletion from the system.



1.4 Requirements Included

Requirement Number	Requirement Description	Requirement Type
REQT 2.6	<p>The system must provide a means to view child functioning, adult functioning, general parenting, and parenting discipline from Person Management. Ensure child functioning, adult functioning sections are linked to the person ID.</p> <p>Note: Child Functioning is captured as Domain 3 and Parent/Adult Functioning is captured as Domain 4; Parenting is captured as Domains 5 and 6.</p>	Existing
REQT 2.6.1	The system must capture the history of the Domain information and not replace previous information with the most current information, providing users with a historical view and the ability to see how and when the Domain information changed.	Existing
REQT 2.6.2	The system must pull in the Domain information from both the FFA - Investigation and the FFA - Ongoing, identifying from which the information is pre-filling.	Existing
REQT 2.7	The system must provide the ability to document multiple Ethnicities, as well as include the following additional values for races: Unknown and Multi-racial-one or more races not known.	Existing
REQT 2.7.1	The system must ensure that if the Race of "Unable to Determine," "Declined," or "Unknown" is selected, the user is not able to select other Race check boxes.	Existing
REQT 2.7.2	The system must ensure that if the Race of "Multi-racial-one or more races not known" is selected, the user is required to select at least one other Race check box.	Existing
REQT 2.7.3	The system must provide the ability for the user to	Existing



	multi-select Ethnicities as they are currently able to do for Race.	
REQT 2.7.4	The system must ensure that if the Ethnicity of "Unable to Determine" or "Unknown" is selected, the user is not able to select other Ethnicity values.	Existing
REQT 2.8	The system must be modified to not default "Has this Child Ever Been Adopted" to "No" and instead have no default value and be "null."	Existing
REQT 2.10	<p>The system must be updated so that the ICWA information currently captured in various areas of FSFN be consolidated and documented on a new tab on the Person Management page. The proposed label is to be "Child ICWA Information." The fields will remain on the existing pages/tabs, but in view- only mode.</p> <p>Note: During design sessions, the design session participants agreed that this requirement was met due to, other than Person Management, the only other place that asked ICWA questions was on the Out of Home Plan, which is being removed from the application in Release 2. Therefore, the only remaining page capturing ICWA information is Person Management = 1 location.</p>	Existing
REQT 2.37	The system must provide an edit on Person Merge that appears when attempting to merge two people, if one person is 17 or under and the other person is 18 or older. This is regardless of which person is the "remove" person, and which is the "retain" person. Upon attempting to merge the two persons, a validation message will display indicating that the user has chosen to merge a child participant with an adult participant and are they sure they wish to proceed <Yes><No>.	Existing
REQT 2.37.1	The system must provide a new security resource	Existing



	<p>that allows a user to "unmerge" two persons previously merged.</p> <p>Note: During design sessions, the design session participants agreed that this functionality was not needed due to the fact that in the rare circumstances that it is absolutely necessary to "unmerge" two people, a Database Change Request/CQ can be entered and request the unmerge, at which point a developer would manually perform the unmerge process. The unmerge process takes a lot of effort, trying to ascertain which pieces should be unmerged, especially when a merge involves the merging of more than two people. Group agreed that this was a process that could remain as is and not necessary within FSFN.</p>	
<p>REQT 2.37.2</p>	<p>The system must provide the ability for a user, based on security, to unmerge two persons that have been merged incorrectly. See Person Merge topic paper for reference of current functionality relative to what pieces of work are merged together. This will indicate what pieces of work would need to be unmerged.</p> <p>Note: During design sessions, the design session participants agreed that this functionality was not needed due to the fact that in the rare circumstances that it is absolutely necessary to "unmerge" two people, a Database Change Request/CQ can be entered and request the unmerge, at which point a developer would manually perform the unmerge process. The unmerge process takes a lot of effort, trying to ascertain which pieces should be unmerged, especially when a merge involves the merging of more than two people. Group agreed that this was a process that could remain as is and not necessary within FSFN.</p>	<p>Existing</p>
<p>REQT 6.7</p>	<p>Modify the program code to check if a race value that is in the Ethnicity field has been selected. If so, then</p>	<p>Existing</p>



	map it to the appropriate race value in this element.	
REQT 6.9	<ol style="list-style-type: none"> 1) Modify the screen to allow for selection of multiple Ethnicities. 2) Modify the program code to map "unknown" to blank. 3) If no values for Hispanic are found, map to blank, not "No." 	Existing
CR607	Amendment 8 Adoption Changes	