

How do I...

MERGE A PERSON PROVIDER2
MERGE AN ORGANIZATION PROVIDER3

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. ▪ In the Provider/Organization Name field enter the search criteria. ▪ Click Search. ▪ In the Providers Returned group box select the radio button for the searched criteria. ▪ Click Continue. ▪ In the Keep Provider group box click the Search hyperlink. ▪ In the Provider/Organization Name field enter the search criteria. ▪ Click Search. ▪ In the Providers Returned group box select the radio button for the searched criteria. ▪ Click Save. ▪ Question "Are you sure you want to merge these Providers?" Click "Yes" button. ▪ Click Close. ▪ From the Desktop menu select Create>Provider Inquiry. ▪ Select Person. ▪ Click Merge History tab. ▪ Click Close. 	<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.</i></p> <p><i>The Provider record to remain in FSFH 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>

How Do I...?	Selections	Tips & Guidelines
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. ▪ In the Provider/Organization Name field enter the search criteria. ▪ Click Search. ▪ In the Providers Returned group box select the radio button for the searched criteria. ▪ Click Continue. ▪ In the Keep Provider group box click the Search hyperlink. ▪ In the Provider/Organization Name field enter the search criteria. ▪ Click Search. ▪ In the Providers Returned group box select the radio button for the searched criteria. ▪ Click Save. ▪ Question "Are you sure you want to merge these Providers?" Click "Yes" button. ▪ Click Close. ▪ From the Desktop menu select Create>Provider Inquiry. ▪ Select Organization. ▪ Click Merge History tab. ▪ Click Close. 	<p><i>The Organization Provider displays.</i></p> <p><i>Four tabs comprise this window.</i></p>