

PROVIDER MERGE

USER GUIDE

PROVIDER MERGE

FUNCTIONALITY ADDRESSED:

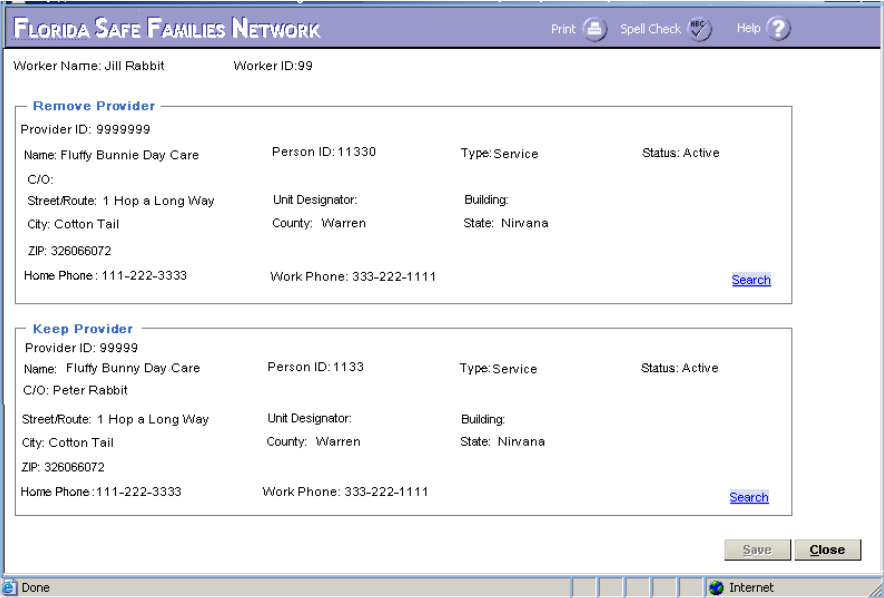
This guide outlines the steps to perform key tasks related to documenting a Provider Merge within the FSFN application.

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
DESKTOP MENU	Click <i>Utilities > Provider Merge</i> from the Utilities menu.	<p>FSFN allows multiple provider merges; however, the worker must complete each merge separately.</p> <p>What can be merged:</p> <ul style="list-style-type: none"> ▪ Providers with open placements and open investigations in the remove provider record. ▪ Person Providers can be merged into other Person Providers. ▪ Organization Providers can be merged into other Organization Providers. ▪ Active providers can be merged into active providers. ▪ Inactive providers can be merged into active providers. ▪ Inactive providers can be merged into inactive providers. ▪ Inactive providers can be merged into active providers. ▪ Pending providers can be merged into active providers. <p>What cannot be merged:</p> <ul style="list-style-type: none"> ▪ Person Providers into Organization Providers. ▪ Organization Providers with the status of pending, inactive or active cannot merge into an Organization Provider with a status of Pending. ▪ Active providers into inactive providers. ▪ If the Caregiver 1s for each provider have different Person IDS in FSFN, a Person Merge must be done first.

FSFN PAGE/ACTION	TASK DESCRIPTION/NAVIGATION STEPS	NOTES
<p>PROVIDER MERGE PAGE</p> 		<p>The Provider Merge page consists of two group boxes:</p> <ul style="list-style-type: none"> ▪ Remove Provider ▪ Keep Provider <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>PROVIDER MERGE PAGE</p>	<ul style="list-style-type: none"> ▪ Click the Search hyperlink from the Remove Provider group box. 	<p>Pieces of provider work associated with the remove provider that will not be merged are:</p> <ul style="list-style-type: none"> ▪ Household members (other than Caregiver 1) ▪ Person Provider Inquires ▪ Provider addresses ▪ Resource Types on the Resource tab
<p>PROVIDER SEARCH OPENS</p>	<ul style="list-style-type: none"> ▪ Search for the Provider to be removed. ▪ From the providers returned group box, click the radio button of the provider name. ▪ Click the Continue button. 	<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>
<p>PROVIDER MERGE PAGE DISPLAYS</p>	<ul style="list-style-type: none"> ▪ Select the Search hyperlink from the Keep Provider group box. 	

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