

PM09 Provider Merge and Delete

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1.1. Introduction Provider Merge and Delete

The process described in this document are Provider Merge and Delete, this design will address the full scope of Provider Merge and Delete functionality in FSFN.

The existing business rules for searching provider records before creating a new provider in FSFN will reduce the instances of duplicated provider records. For a variety of reasons, there may still be occasions when a user creates duplicate records erroneously. When the user discovers the duplication, the user corrects the duplication by merging the two Provider records into a single record. However, with the addition of financial functionality in FSFN, the merging of placements is not allowed if there is financial data attached to the placement.

Provider Merge

The merge process is complex. If the duplicate Provider records have information associated with them, such as placements (without payments) or investigations, they display with the keep provider. The merging process can be subjective and may require more detailed analysis before the user can merge the records. For example, existing provider work can affect the decision of which provider record to keep or which provider record to remove.

The Provider Merge design handles the merging of duplicate Provider records by searching out both the “remove” Provider and the “keep” Provider and replacing the “remove” Provider’s ID with the “keep” Provider’s ID, thus replacing the incorrect/duplicate Provider ID throughout FSFN.

The Provider records are merged through the Utilities> Provider Merge option on the FSFN main menu. Selecting this menu option, displays the Provider Merge page and the two group boxes contained on the page, one for the remove Provider ID and one for the keep Provider ID.

The following table identifies the provider merge requests allowed and not allowed:

	Keep Provider ZZZ				
Remove Provider XXX	Org (A)	Org (I)	Org (P)	Person (A)	Person (I)
Org (A)	Pass	Fail	Fail	Fail	Fail
Org (I)	Pass	Pass	Pass	Fail	Fail
Org (P)	Pass	Fail	Pass	Fail	Fail
Person (A)	Fail	Fail	Fail	Pass	Fail
Person (I)	Fail	Fail	Fail	Fail	Pass

If the user tries to merge providers in any of the above circumstances, an error validation popup message displays when the user selects the Save button on the Provider Merge page. This message indicates that the user cannot merge the providers and reads, “Cannot merge Remove Provider ID XXX with Provider ID ZZZ” and then states the specific reason or reason(s). The user must review the duplicate Provider ID records and an assigned user must correct the failed edits before a provider merge can be successful. Once corrected, the user reinitiates the online merge process that removes the provider’s previous Provider ID from FSFN.

FSFN allows multiple provider merges; however, the user must complete each merge separately.

The functionality for not approving an Organization Provider was modified, so that when a user selects “Not Approved” on the Approval History page, the Organization Provider’s status will be set to “Inactive.” This allows an Organization Provider that has a status of ‘Inactive’ as a result of not being approved by the user to be merged into an Organization Provider that has a status of ‘Inactive’ due to the user manually selecting the value from the Status dropdown on the Organization Provider page.

Additionally, when a user performs a merge among Organization Providers with statuses of “Pending,” the providers will truly be pending.

Security for Provider Merge is at the page level. Only workers with access to the Provider Merge page will be able to merge providers. Additionally, the user with this security has the ability to ‘self-assign’ a provider if a fix to the provider is needed to complete the merge. For example, the ‘fix’ could be, but not limited to, a change in provider status.

Provider Delete

Requirement SR327 requires that the system allow for the deletion of a provider if no placements, payments, or an associated Child Safety Assessment (CSA) exists for the provider. FSFN allows users to delete providers under certain circumstances. The Delete Person page allows the user to retrieve a Provider by selecting the Search hyperlink on the page. On the Provider Search Page, the user selects the Provider record from the Search results and selects the Continue button. The provider demographic information displays on the Provider Delete page for the user to review.

A nightly batch processes all records associated with the Provider from the FSFN database. If the provider does not meet the following criteria, the system denies the delete request and the user cannot complete the deletion.

The provider must pass the following edits:

- Provider’s status is inactive
- No Investigations
- No Licenses

- No Licensed or Other Services on the provider record
- No active/inactive out of home placements
- No active/inactive Services
- No financial activity
- A child household member cannot have a Missing Child Report (MCR)
- There are no meetings scheduled
- There are no notes/narratives
- Provider cannot be a part of another delete or merge request

Security for Provider Delete page is at the page level. This means that only workers with access to the Provider Delete page will be able to delete providers. Additionally, the user with this security also has the ability to ‘self-assign’ a provider if they find that there needs to be a fix to the provider to complete the merge. For example, the ‘fix’ could be, but not limited to, a change in provider status.

Provider Delink

Provider delinking allows a user, with an assignment to the ‘primary’ provider, to separate a previously linked provider. The user will retain the primary assignment to the delinked provider. If the user did not have the primary assignment to the provider before it was linked, they will be given the primary assignment after delinking. The user then has primary assignment to the original provider and the delinked provider, as well.

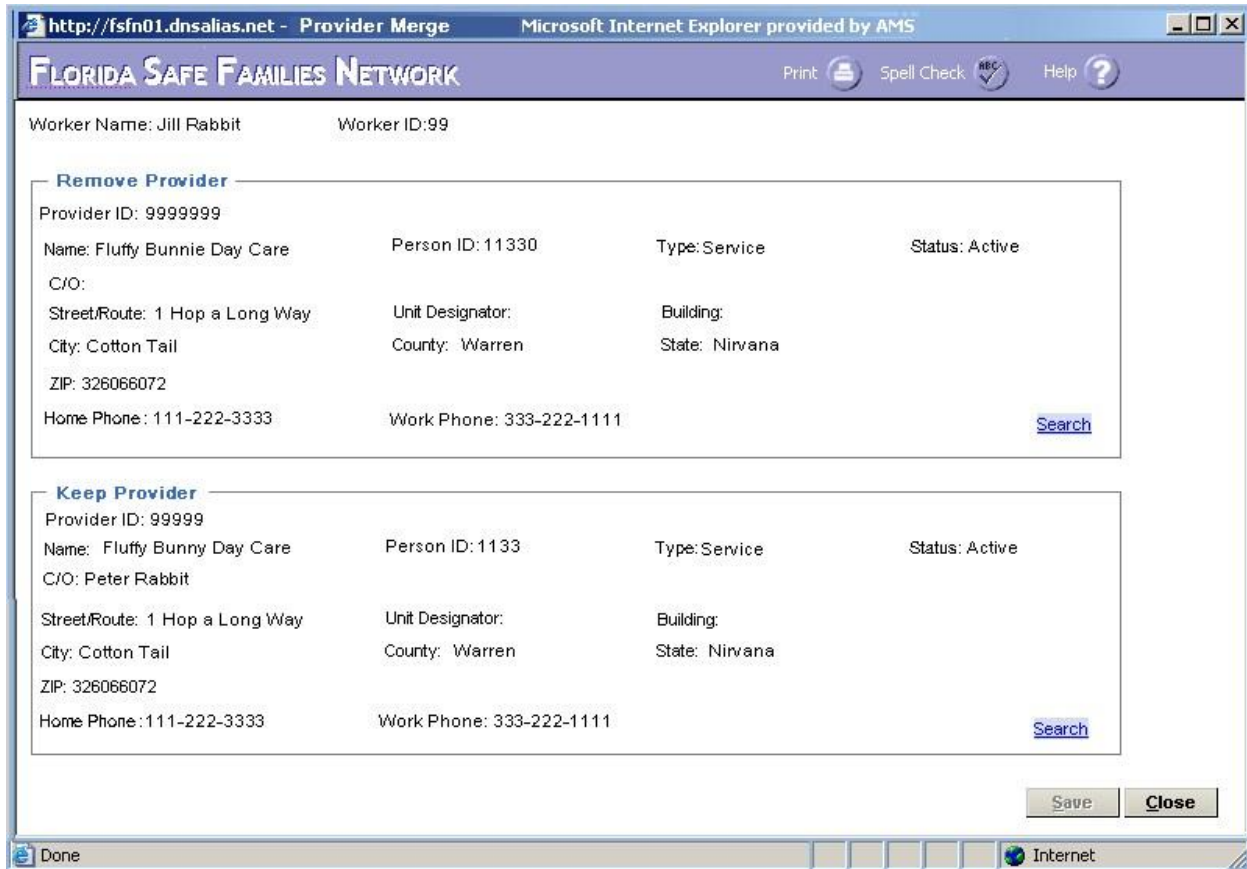
Provider delinking is an on-line process and users see the removal of the linked provider from the Provider Delink Selection pop-up page after it is saved, closed, and reopened.

The delinked provider remains inactive and returns to its condition at the time it was linked, updates made to the ‘primary’ provider since the linking will not be reflected in the delinked provider. For example, if the primary provider has had a change of address this change will not be reflected in the delinked provider.

Providers can be delinked from an active or inactive primary provider.

1.2. Pages

1.2.1. Page – Provider Merge



Worker Name: Jill Rabbit Worker ID:99

Remove Provider

Provider ID: 9999999

Name: Fluffy Bunny Day Care	Person ID: 11330	Type: Service	Status: Active
C/O:			
Street/Route: 1 Hop a Long Way	Unit Designator:	Building:	
City: Cotton Tail	County: Warren	State: Nirvana	
ZIP: 326066072			
Home Phone: 111-222-3333	Work Phone: 333-222-1111		Search

Keep Provider

Provider ID: 99999

Name: Fluffy Bunny Day Care	Person ID: 1133	Type: Service	Status: Active
C/O: Peter Rabbit			
Street/Route: 1 Hop a Long Way	Unit Designator:	Building:	
City: Cotton Tail	County: Warren	State: Nirvana	
ZIP: 326066072			
Home Phone: 111-222-3333	Work Phone: 333-222-1111		Search

[Save](#) [Close](#)

1.2.1.1. Page Overview

Navigation

The user can access the Provider Merge page from the FSFN main menu by clicking on the Utilities menu option and selecting the Provider Merge sub option.

Page Summary

On the Provider Merge page, the Provider ID that loses its original identity is the Remove Provider record. The Provider record to remain in FSFN is the Keep Provider record. In order to retrieve the remove Provider ID or keep Provider ID, the user must select the “Search” hyperlink to open the Provider Search Page. The user selects the record from the Search results, which represents the remove provider ID, or keep

provider ID and selects the Continue button to bring that record number back to the Remove Provider or Keep Provider group box of the Provider Merge page.

In addition to the Provider ID fields, the search retrieves some basic information about the Provider, such as name, address, and Home Phone #, from various FSN tables.

The user selects the “Save” button to attempt to merge the records.

A background process determines whether the provider records should merge; if this is not possible, an error validation message displays indicating that the two records cannot merge and displays the error reasons. This process will read the database tables that prevent the remove and keep Provider IDs from merging in the system, as described in the introduction section of this document. If no such conditions exist for the Provider ID, then a dialog box will ask the user to confirm the decision to perform the merge. If the user selects “Yes,” the records subsequently merge.

Pieces of provider work associated with the remove provider that are not merged are:

- Household members (Caregiver 1 must be manually added to the keep provider or merged through a Person Merge)
- Person Provider Inquires
- Provider addresses
- Provider characteristics on the Characteristics tab

The merge will delete Person Provider Inquiries and Provider addresses. A user must manually add Household Members and Characteristics to the keep Provider prior to the merge.

Additionally, the system will add a designator to the Outliner after the provider’s name if other providers have been merged with it. The designator will be: “<Provider’s Name> (Merged).”

1.2.1.2. Page Information

Header:	Worker Name:	Name of user completing the provider the merge
	Worker ID:	Worker ID of user completing the provider the merge
Group Box:	Remove Provider	
Field:	Provider ID:	The selected Provider’s ID number; system derived from Search page
	Name:	Person Provider or Organization

		Provider's full name; system derived
	C/O:	"Care of" address line; system derived from provider's physical address
	Street/Route:	This is the number and street of the provider's primary physical address; system derived
	City:	The selected Provider's city; system derived from provider's physical address
	Zip:	The selected Provider's zip code; system derived from provider's physical address
	Home Phone:	Home phone of the provider; system derived from provider's physical address
	Person ID:	Person ID of Caregiver 1 of the Person Provider
	Unit Designator:	Unit Designator of provider address; system derived from provider's physical address
	County:	The selected Provider's county; system derived from provider's physical address
	Work Phone:	Work phone of the provider; system derived from provider's physical address
	Type:	The type of the provider (Investigation, Placement, Other Placement, Services); system derived
	Building:	Building Number or Description of provider address; system derived
	State:	The selected Provider's state; system derived from provider's physical address
	Status:	The status of the Provider [Active, Inactive, Pending (Organization Providers only)]; system derived
Links:	Search	Launches Provider Search Page
Group	Keep Provider	

Box:		
Fields:	Provider ID:	The selected Provider's ID number; system derived from Search page
	Name:	Person Provider or Organization Provider's full name; system derived
	C/O:	"Care of" address line; system derived from provider's physical address
	Street/Route:	This is the number and street of the provider's primary physical address; system derived
	City:	The selected Provider's city; system derived from provider's physical address
	Zip:	The selected Provider's zip code; system derived from provider's physical address
	Home Phone:	Home phone of the provider; system derived from provider's physical address
	Person ID:	Person ID of Caregiver 1 of the Person Provider
	Unit Designator:	Unit Designator of provider address; system derived
	County:	The selected Provider's county; system derived from provider's physical address
	Work Phone:	Work phone of the provider; system derived from provider's physical address
	Type:	The type of the provider (Investigation, Placement, Other Placement, Services); system derived
	Building:	Building Number or Description of provider address; system derived
	State:	The selected Provider's state; system derived from provider's physical address

	Status:	The status of the Provider [Active, Inactive Pending (Organization Providers only)]; system derived
Links:	Search	Conveys the user to the Provider Data Retrieval Search Criteria Page
Buttons:	Save	Standard Save Processing
	Close	Standard Close Processing
Options:	None	

1.2.1.3. Background Processing:

1. Security for Provider Merge is at the page level. This means that only workers with access to the Provider Merge page will be able to merge providers
2. The District/County/Agency or Department of Children and Families (DCF) can decide who will have the security in their office; it's not necessary to have an assignment to the provider
3. The system ends all worker assignments to the remove provider
4. All worker assignments to the keep provider remain active
5. For Person Providers, the system will not merge Person Provider Inquiries and Household Members.
6. For the Provider selected from the Provider Search Page through the "Search" hyperlink, the appropriate field(s) in the Remove Provider box and the Keep Provider box will populate with the Provider's demographic information.
7. The Merge process retrieves data for all fields from the appropriate table using the ID selected from the Data Retrieval Search.
8. The following edits apply to a provider merge request (please refer also to the table on page 3):
 - a) The system allows a merge when -
 - o there are open Relative/Non-relative placements without paid services
 - o there are closed Institutional Investigations in the remove provider record

- o there are closed, expired, or revoked licenses in the remove provider record
 - o there are linked providers in the remove provider (all linked providers will point to the keep provider)
 - o both of the providers are Person Providers
 - o both of the providers are Organization Providers
 - o both providers have an Active status
 - o both providers have an Inactive status
 - o the remove provider has inactive or pending status (Organization Providers only) and the keep provider has an active status
- b) The system does not allow a merge when -
- o one of the providers is a Person Provider and the other is an Organization Provider
 - o the remove Organization Provider has a status of “active” the keep Organization Provider with a status of pending
 - o the keep provider has an inactive or pending status (Organization Providers only) and the remove provider has an active status
 - o the Caregiver 1 for each Person Provider has different Person IDs in FSFN (Caregiver 1 must be manually added to the keep provider or merged through a Person Merge)
 - o either the remove Person Provider has a household member who is a participant in an open Case
 - o the remove Person Provider has a household member who is a participant in an open In-Home or Institutional Investigation
 - o the remove Person Provider has a household member who is a participant in any past or current financial transactions in FSFN
 - o the remove Organization Provider has any past or current financial transactions in FSFN
 - o the remove provider has active or inactive, licensed or unlicensed, paid services
 - o the remove Provider has open or closed paid placements
9. If the user attempts to merge providers in any of the allowed conditions listed in Item # 8.a, a validation pop-up message will appear displaying the following: “Are you sure you want to merge these Providers?” If the user selects “Yes” the records merge by writing a record to the PROVIDER_MERGE table and replacing the remove Provider’s ID with the keep Provider ID. The merging of the Provider records removes all records associated with the remove Provider ID from the FSFN database and replaces them with the keep Provider ID. If “No” or “Cancel” is selected, the user will be returned to the Provider Merge page.

10. If the user attempts to merge providers in any of the conditions not allowed listed in Item #8.b, a validation error pop-up message will appear displaying the following: “Can not merge the Provider record of Provider ID XXXX with Provider ID XXXX” and the reason(s) the merge failed will display.
11. FSFN allows multiple provider merges, however the user must process each merge separately.
12. In the event the remove provider has a physical, mailing, or billing address, the merge process deletes the address. The user must manually update the keep provider’s address if necessary.
13. For Provider Notes, the system will replace the Provider ID of the remove provider with the Provider ID of the keep provider. Provider Notes for both providers will then display under the keep provider’s Narrative icon on the Desktop.
14. There are no batch processes involved. FSFN processes the Provider Merge online.
15. Once merged, any Institutional Investigations for the remove provider record display under the Prior History icon on the keep provider record.
16. Once merged, any open Relative/Non-relative placements without paid services for the remove provider record displays under the Placement icon on the keep provider record.
17. Additionally, the user with this security has the ability to ‘self-assign’ a provider if a fix to the provider is needed to complete the merge. For example, the ‘fix’ could be, but not limited to, a change in provider status.
18. Additionally, the system will add a designator to the Outliner after the provider’s name if other providers have been merged with it. The designator will be: “<Provider’s Name> (Merged).”
19. If a Unified Home Study exist for the remove provider after the provider merge is complete that Unified Home Study will be moved to the keep provider
20. .Once merged the “Remove” Provider’s Name is saved an Additional Name on the “Retain” Provider with a type of “Pre-Merged Name”.
21. For Organization Provider, also populate the uppercase provider name field on the Additional Name.

1.2.1.4. Save Processing:

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering ‘Yes’ when the system asks the user if they would like to ‘Save changes before closing the page.’
2. When the user elects to merge providers in any of the above allowed conditions, a validation pop-up message will appear displaying the following: “Are you sure you want to merge these providers?” If the user selects “Yes”, the records will merged by writing a record to the PROVIDER_MERGE table and replacing the remove

Provider ID with the keep Provider ID. The following events will also happen. If “No” or “Cancel” is selected, the user will be returned to the Provider Merge Page.

1.2.1.5. Page CRUD Matrix

Table Name	Create	Read	Update	Delete
PROVIDER_MERGE	X	X	X	
PROVIDER_ORG	X			
PROVIDER_PART	X			
CODE_DESC	X			
ADDRESS	X			
ASSIGNMENT	X			
EPISODE	X			
CASE_MASTER	X			
LICENSE	X			
PROVIDER_SERVICE	X			
PROVIDER_LINK	X			
PROVIDER_TRAINING	X		X	
CP_TASK_ITEM_DETAIL			X	
CNTRCT_AGENCY_PROV_XREF			X	
ARE_MATCHES			X	
SAFETY_PLAN_ITEM_DETAIL			X	
SCHOOL_CARE_PROV_XREF			X	
INTAKE_PART				X
PARENT_AGENCY				X
APPROVAL				X
APPROVAL_HISTORY				X



CHECKLIST				X
Table Name	Create	Read	Update	Delete
CHECKLIST_ITEM				X
PROVIDER_ORG				X
HOME_INQUIRY				X
INVESTIGATION			X	
ACCESS_REPORT			X	
EPISODE			X	
PAN_TEXT_EVENT			X	
SAFETY_PLAN_OH			X	
SAFETY_PLAN_ITEM_DE TAIL			X	
PLACEMENT_CORRECTI ON_DETAIL			X	
HOME_STUDY			X	

1.2.2. Tab - Person /Organization Provider –Merge/Name History

Florida Safe Families Network Hand Book Print Audit Spell Check Source

Basic
 Number: 8000181 Name: [Provider Search](#) Type: Status:

Provider Characteristics Services **Merge/Name History**

Provider Merge History

Merged Date	Merged Provider's ID	Merged Provider's Name

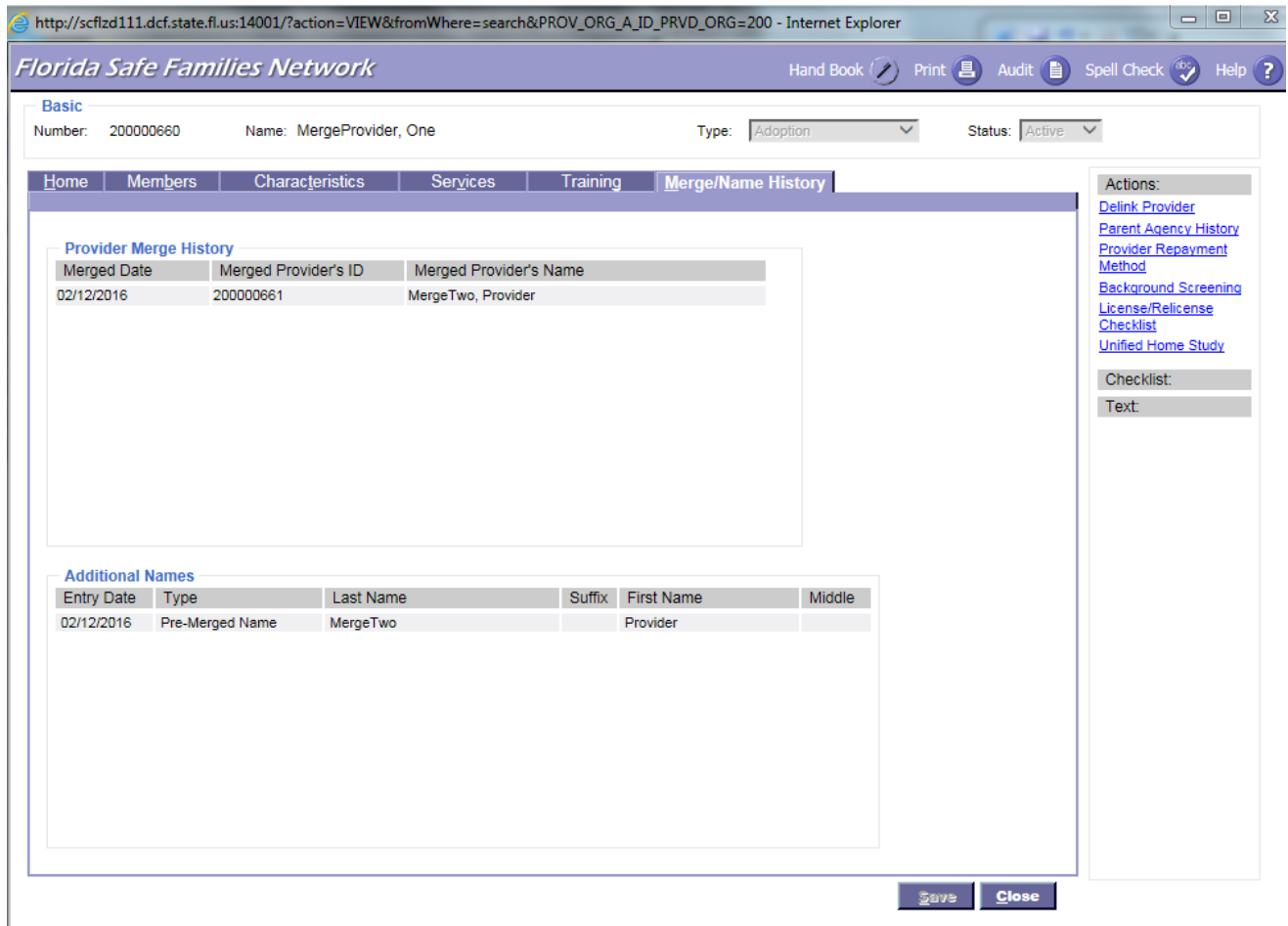
Additional Names

Entry Date	Type	Name	
09/15/2011	Additional	<input type="text" value="Milton"/>	Delete
09/10/2011	Previously Known As	Kirkland	
09/01/2011	Additional	<input type="text" value="Mary Martini's Group Home"/>	Delete

[Insert](#)

[Save](#) [Close](#)

Organization Provider Screenshot displaying the Merge/Name History Tab



The screenshot shows a web browser window with the URL: http://scflzd111.dcf.state.fl.us:14001/?action=VIEW&fromWhere=search&PROV_ORG_A_ID_PRVD_ORG=200. The page title is "Florida Safe Families Network". The main content area is titled "Basic" and shows provider information: Number: 200000660, Name: MergeProvider, One, Type: Adoption, Status: Active. Below this is a navigation menu with tabs: Home, Members, Characteristics, Services, Training, and Merge/Name History (selected). The "Merge/Name History" tab displays two tables. The first table, "Provider Merge History", has columns: Merged Date, Merged Provider's ID, and Merged Provider's Name. It contains one row: 02/12/2016, 200000661, MergeTwo, Provider. The second table, "Additional Names", has columns: Entry Date, Type, Last Name, Suffix, First Name, and Middle. It contains one row: 02/12/2016, Pre-Merged Name, MergeTwo, Provider, Provider. On the right side, there is an "Actions" menu with links: Delink Provider, Parent Agency History, Provider Repayment Method, Background Screening License/Relicense Checklist, and Unified Home Study. Below the actions menu are "Checklist:" and "Text:" labels. At the bottom right of the main content area are "Save" and "Close" buttons.

Person Provider Screenshot displaying the Merge/Name History Tab

1.2.2.1. Page Overview

Navigation

The user can access the Merge/Name History tab from the Person Provider page or the Organization Provider page in FSFN. Even though the Organization Provider page and the Person Provider page display different tabs on their respective pages, the Merge/Name History tabs on each page display the same information.

Page Summary

The Provider Merge History group box displays on the Merge History tab of the keep provider and maintains a history of the remove providers merged into the Provider. The Provider Merge History group box contains three fields: Merged Date, Merged Provider's ID, and the Merged Provider's Name. If the user merges more than one provider, all the merged providers will display in the Provider Merge History group box sorted in reverse chronological order, the latest provider merge data displaying in

the first line. The Additional Names group box provides the ability to track additional names that the organization provider may be known as, in order to facilitate provider searching

1.2.2.2. Page Information

Tab:	Merge History	
Group Box:	Provider Merge History	
Field:	Merged Date:	The date the Merge process merges the removed provider into the kept provider; system derived.
	Merged Provider's ID:	The Provider ID number of the removed provider; system derived.
	Merged Provider's Name:	The name of the removed provider; system derived.
Group Box	Additional Names	
Field	Entry Date	Displays the date the entry was created.
	Type	Identifies the type of additional name. Values are Additional, Previously ,Known As, Pre-Merged Name.
	Name	Person Provider Page; System derived field populated ONLY if the First Name, Last Name, Middle Name or Suffix is modified on Person Management for the person identified as Caregiver 1; please note that when modifying the name on Person Management and FSFN prompts the user if s/he would like to create an AKA, this is specific to the Person Management record AKA Names tab and does not apply to the Person Provider Page; regardless if the user selects No to create an AKA, FSFN will generate a row within this group box due to a change to any of the four fields identified directly above.

		Organization Provider Page: User entered, allows up to 70 characters and accepts additional characters including numbers [0-9], Ampersand [&], Equal [=], Exclamation [!], At [@], Pound [#], Dollar [\$], Percent [%], Backslash [\], Forward slash [/], Comma [,], Period [.], Parenthesis [()], Plus[+], Question mark [?], Colon, [:], Semicolon [;], Underscore [_]. Preserve existing characters for Dash (-), and Apostrophe ('). Note: Asterisk [*] may not be stored in name since it is used as the wildcard character.
Options:	None	
Links:	Delete	New link to remove the Additional Name row. Visible when Type is "Additional".
Buttons:	Insert	Adds a new row in the Additional Name Group Box.
	Save	Standard Save Processing.
	Close	Standard Cancel Processing.

1.2.2.3. Background Processing:

When additional names are entered, populate a hidden field for the upper case provider name with the provider's name in all uppercase, stripped of spaces and special characters, but leaving all alphanumeric characters (letters and numbers).

1.2.2.4. Save Processing:

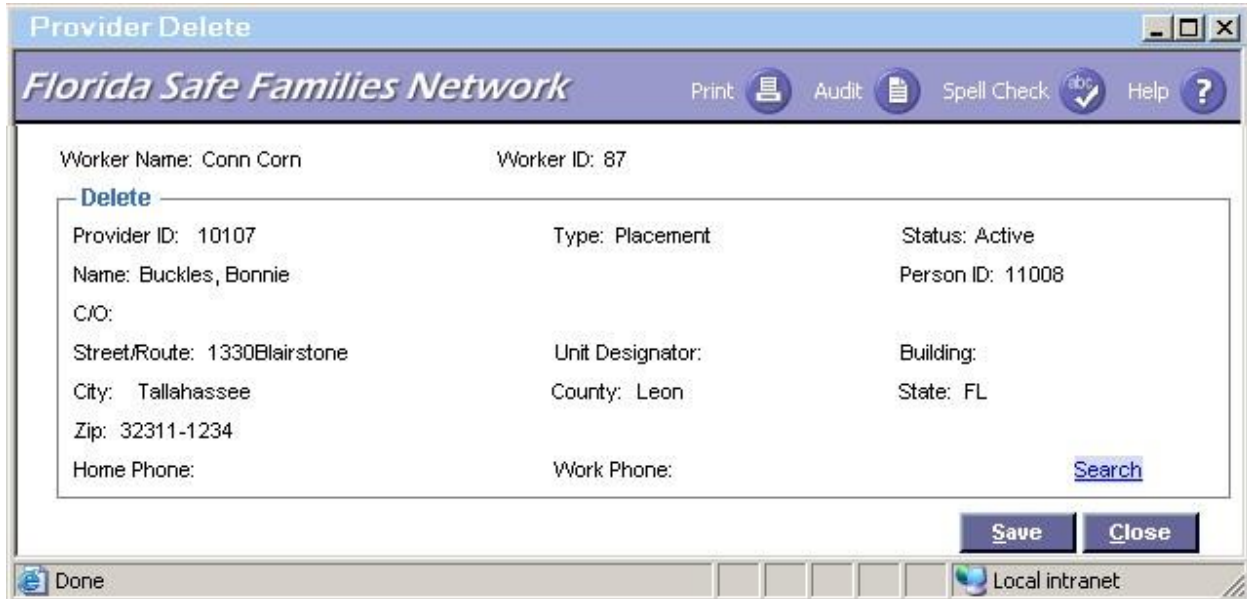
- There is no Save Processing for a view-only tab.

1.2.2.5. CRUD Matrix

Table Name	Create	Read	Update	Delete
PROVIDER_MERGE		X		
PROVIDER_ORG		X		
PROVIDER_PART		X		
PROVIDER_PART_STAT		X		

1.2.3. Page - Provider

Delete



Provider Delete

Florida Safe Families Network Print Audit Spell Check Help

Worker Name: Conn Corn Worker ID: 87

Delete

Provider ID: 10107	Type: Placement	Status: Active
Name: Buckles, Bonnie		Person ID: 11008
C/O:		
Street/Route: 1330Blairstone	Unit Designator:	Building:
City: Tallahassee	County: Leon	State: FL
Zip: 32311-1234		
Home Phone:	Work Phone:	Search

Save Close

Done Local intranet

1.2.3.1. Page Overview

Navigation

The user can access the Provider Delete page from the FSFN main menu by clicking on the Utilities menu option and selecting the Provider Delete sub-option.

Page Summary

The Provider Delete page allows the user to retrieve a Provider for deletion by selecting the Search hyperlink on the page. On the Provider Search Page, the user selects the Provider record from the Search results and selects the Continue button.

Security for Provider Delete is at the page level. This means that only workers with access to the Provider Delete page will be able to delete providers. Additionally, the user with this security has the ability to ‘self-assign’ a provider if a fix to the provider is needed to complete the delete. For example, the ‘fix’ could be, but not limited to, a change in provider status.

A nightly batch processes all successfully deleted records associated with the Provider from the FSFN database. The next day, the user has the opportunity to review the providers scheduled for deletion and remove one if deleted in error.

1.2.3.2. Page Information

Header:	Worker Name:	Name of user completing the provider delete
	Worker ID:	Worker ID of user completing the provider delete
Group Box:	Delete	
Field:	Provider ID:	The selected Provider's ID number; system derived from Search page
	Name:	Person Provider or Organization Provider's full name; system derived
	C/O:	"Care of" address line; system derived from provider's physical address
	Street/Route:	This is the number and street of the provider's primary physical address; system derived
	City:	The selected Provider's city; system derived from provider's physical address
	Zip:	The selected Provider's zip code; system derived from provider's physical address
	Home Phone:	Home phone of the provider; system derived from provider's physical address
	Type:	The type of the provider; system derived
	Unit Designator:	Unit Designator of provider address; system derived from provider's physical address
	County:	The selected Provider's county; system derived from provider's physical address
	Work Phone:	Work phone of the provider; system derived from provider's physical address
	Status:	The status of the Provider [Active, Inactive, Pending (Organization Providers only)]; system derived
	Person ID:	Person ID of Caregiver 1 if the provider is a Person Provider

	Building:	Building Number or Description of provider address; system derived
	State:	The selected Provider's state; system derived from provider's physical address
	Status:	The status of the Provider [Active, Inactive, Pending (Organization Providers only)]; system derived
Links:	Search	Conveys the user to the Provider Search Page
Buttons:	Save	Standard Save Processing
	Close	Standard Close Processing
Options:	None	

1.2.3.3. Background Processing:

1. Security for Provider Delete is at the page level. This means only workers with access to the Provider Delete page will be able to delete providers
2. Deleting a provider record removes all records associated with the provider from the FSFN database. A nightly batch process records the deletion in which the provider is marked for deletion and purged from the FSFN database. Therefore, the user does not directly delete a provider record; the user can only schedule the provider record for deletion.
3. For the Provider retrieved from the Provider Search Page through the Search hyperlink, the appropriate field(s) in the Provider Delete group box will populate with the Provider's demographic information.
4. The Delete process retrieves data for all fields from the appropriate table using the ID selected from the Data Retrieval Search.
5. The following edits apply to a provider delete request:
 - Providers status is inactive
 - No Investigations
 - No Licenses
 - No Licensed or Other Services on the provider record
 - No active/inactive out of home placements
 - No active/inactive Services
 - No financials
 - A child household member cannot have a MCR
 - There are no meeting scheduled

- There are no notes/narratives
 - Provider cannot be a part of another delete or merge request
6. Additionally, the user with this security has the ability to ‘self-assign’ a provider if a fix to the provider is needed to complete the merge. For example, the ‘fix’ could be, but not limited to, a change in provider status.

1.2.3.4. Save Processing:

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering ‘Yes’ when the system asks the user if they would like to ‘Save changes before closing the page.’
2. When the user elects to delete a provider, a validation pop-up message will appear displaying the following: “Are you sure you want to delete this provider?” If the user selects “Yes”, the provider record is marked for deletion and the user receives the validation message, “The deletion has been successfully scheduled.” The following events will also happen. If “No” or “Cancel” is selected, the user will be returned to the Provider Delete page.

1.2.3.5. Page CRUD Matrix

Table Name	Create	Read	Update	Delete
PROVIDER_DELETE	X	X		
PROVIDER_PART	X			
PROVIDER_ORG	X			
CODE_DESC	X			
ADDRESS	X			
INVESTIGATION	X			
LICENSE	X			
EPISODE	X			
PAYMENT	X			
CHECKS	X			



PAN_TEXT_EVENT	X			
PROVIDER_MERGE	X			
PROVIDER_SERVICE	X			
MISSING_CHILD_MAIN	X			
MEETING	X			
CATEGORY_TYPE	X			
PROVIDER_DELETE	X			X
PROVIDER_ORG	X			

1.2.4. Page – Pending Provider Delete



Remove	Submitted By	Date Requested	Provider ID	Provider Name
<input type="checkbox"/>	Rabbit, Jill	10/16/2007	9218549	Annabel Abby
<input type="checkbox"/>	Rabbit, Jill	10/16/2007	9999999	Fluffy Bunnie Day Care

Save Close

1.2.4.1. Page Overview

Navigation

The user can access the Pending Provider Delete page from the FSFN main menu by clicking on the Utilities menu option and selecting the Pending Provider Delete sub-option.

Page Summary

The Pending Delete group box lists all pending provider deletes initiated by the user. To remove a provider delete request, the worker must select the checkbox in the Remove column next to the provider delete request and click the Save button. The system prompts them with an edit message asking them to verify their decision. Once verified, the system will remove the provider delete request.

Security for Pending Provider Delete is at the page level. This means that only workers with access to the Pending Provider Delete page will be able to delete providers. Additionally, the user with this security has the ability to ‘self-assign’ a provider if a fix to the provider is needed to complete the delete. For example, the ‘fix’ could be, but not limited to, a change in provider status.

1.2.4.2. Page Information

Group Box:	Delete Provider Information	
Field:	Remove:	When checked, removes the provider delete from the batch process; user editable, not required; defaults to not checked
	Submitted By:	Name of user who submitted the provider delete request; system derived
	Date Requested:	Date user submitted the provider delete request; system derived
	Provider ID:	The selected Provider's ID number; system derived from Search page
	Provider Name:	Person Provider or Organization Provider's full name; system derived
Buttons	Save	Standard Save Processing
	Close	Standard Close Processing

1.2.4.3. Background Processing:

1. Selecting the Save button after selecting the 'Remove' check box, when a provider delete request is marked for removal, generates the following edit message, "Are you sure you want to remove this provider from the 'delete provider' batch?"
2. If 'Yes' is selected on the edit message, the provider delete request marked for removal is removed from the system.
3. If the user takes no action on this page, the nightly delete provider batch removes the provider from FSFN.

1.2.4.4. Save Processing:

1. The selected delete request is removed once selecting the Save button and the "Yes" button on the pop-up edit message.

1.2.4.5. Page CRUD Matrix

Table Name	Create	Read	Update	Delete
PROVIDER_DELETE		X		X
PROVIDER_ORG		X		

1.2.5. Pop-up Page - Provider Delink Selection



1.2.5.1. Pop-up Page Overview

Page Navigation

The Provider Delink Selection pop-up page opens when the user selects ‘Provider Delink’ from the Options dropdown on the Basic tab of the Person Provider or the Provider tab of the Organization Provider page. (See *PM02a Person Provider* and *PM02b Organization Provider* for provider linking details.)

Page Summary

The Provider Delink Selection pop-up page displays ALL providers linked to the ‘primary’ provider. All check boxes default to unchecked. The user enters the Provider Delink Selection page and selects the check box in front of the provider or providers they want to delink from the ‘primary’ provider.

Opposite the Delink checkbox is the Activate? checkbox. If the user selects this checkbox when delinking the provider, the delinked provider’s status is Active. If the Activate? checkbox is not selected, the provider is delinked with the status of Inactive.

Upon selecting the Save button, the user receives the validation message, “Are you sure you want to delink this provider?” Selecting ‘Yes’ generates the validation message, "The Provider delink is completed. Please update the Provider Type for the delinked Provider(s) on



the Person/Organization page(s)." The Provider Type, previously ‘Duplicate’, now is ‘Inactive value: Delinked”. If the user modifies the Person or Organization Provider page, selecting Save generates a validation message, “The Delinked value is system generated and not a valid Provider Type. Please select a valid Provider Type.”

The user selects Close and returns to the originating Person or Organization Provider page. When the user returns to the Provider Delink Selection pop-up page, the linked provider no longer displays in Linked Providers group box.

The user must have an assignment to the ‘primary’ provider in order to perform delinking. Users without an assignment to the ‘primary’ provider have view only access to the Provider Delink Selection pop-up page. The user delinking the provider retains or obtains the primary assignment to the delinked provider. The delinked provider returns to its condition prior to the link; updates made to the ‘primary’ provider since the linking are not reflected in the delinked provider. For example, if the primary provider’s address is updated, the delinked provider’s address will not reflect the updated address.

Providers can be delinked from an active or inactive provider.

(**Note:** Organization Providers can be linked to Person Providers and Person Providers can be linked to Organization Providers. For more information regarding Provider Linking, refer to the *PM02a Person Provider Topic Paper*.)

1.2.5.2. Page Information

GroupBox:	Header	
Fields:	Name:	The ‘primary’ Person Provider or Organization Provider’s name; system derived, not user editable.
	Provider ID:	The ‘primary’ Person Provider or Organization’s Provider ID number; system derived; not user editable.
Group Box:	Linked Providers	
Fields:	Provider Name:	The name of the Person Provider or Organization Provider that is linked to the ‘primary’ provider; system derived, not user editable.
	Provider ID:	The Person Provider or Organization Provider’s ID number of the provider linked to the ‘primary’ provider; system derived; not user editable.
	Delink:	When checked, indicates which provider to delink from the ‘primary provider; user editable, not required; defaults to not checked.



	Activate?	When checked, indicates that the provider’s status will be set to Active; user editable, not required; defaults to not checked.
Buttons:	Save	Standard Save processing.
	Close	Standard Close processing.

1.2.5.3. Background Processing

1. All providers linked to the ‘primary’ provider display in the Linked Providers group box.
2. All check boxes default to unchecked.
3. Users must have an assignment to the ‘primary’ provider in order to perform delinking.
4. Users without an assignment to the ‘primary’ provider have view only access to the Provider Delink Selection pop-up page.
5. The delinked provider becomes active if the Activate? checkbox is checked.
6. User performing the ‘delink’ is assigned the delinked provider, if not currently the primary worker.
7. The user delinking the provider retains the primary assignment to the delinked provider.
8. Updates made to the ‘primary’ provider since the linking are not reflected in the delinked provider.

1.2.5.4. Save Processing

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering ‘Yes’ when the system asks the user if they would like to ‘Save changes before closing the page.’
2. Upon selecting Save, the selected provider(s) automatically delinks from the ‘primary’ provider.

1.2.5.5. CRUD Matrix

Table Name	Create	Read	Update	Delete
PROVIDER_LINK		X		X



1.3. Inventories

1.3.1. Reference Data

None

1.3.1.1. Drop Downs

None

1.3.1.2. List Boxes None

1.3.2. Automated Messages

Duplicate Provider Merge Notification

Field	Required	Parameters Passed
To	Yes	All open assignments to the “remove” and “keep” provider All workers assigned to cases involving children in placement with the “remove” and “keep” provider
Cc	No	
Subject	Yes	Duplicate Provider Merge Notification – Potential Change in provider/placement information
Message Box	Yes	Provider <provider name> (<provider ID>) has been identified as a duplicate provider record of Provider <provider name> (<provider ID>). These two provider records have been merged in FSFN. Please review for potential changes in provider/placement information. If you have any questions please contact the helpdesk or <name of person inactivating provider record with e-mail address>

1.3.3. Checklists

None

1.3.4. Ticklers

None

1.3.5. Notifications

None



1.3.6. Text Templates

None

1.3.7. Reports

1.3.8. Triggers

None

1.4. Batch Programs

1.4.1. Provider Delete

1.5. Requirements Covered in This Paper

- RMR-001
- RMR-002