

Merging Duplicate Persons for OhioKAN



Knowledge Base Article

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Merging Duplicate Persons for OhioKAN

Overview

This Knowledge Base Article discusses specific steps on how to merge person records in Ohio SACWIS.

The system only allows you to merge two person records at one time. However, before merging any records, you should conduct a thorough analysis to verify that the two people really are duplicates within Ohio SACWIS.

Once person records are merged, they cannot be unmerged. Therefore, do not substitute Ohio SACWIS's identifying duplicate person functionality for your own judgment.

Refer to the **Identifying Duplicate Persons for OhioKAN** Knowledge Base Article for steps on using this functionality.

Which Record Should Be Retained or Removed?

It is generally recommended that the person record containing more historical data (or more information) should be the retained record.

If both person records contain approximately the same amount of historical data or information, retain the record that has the more recent records attached to it.

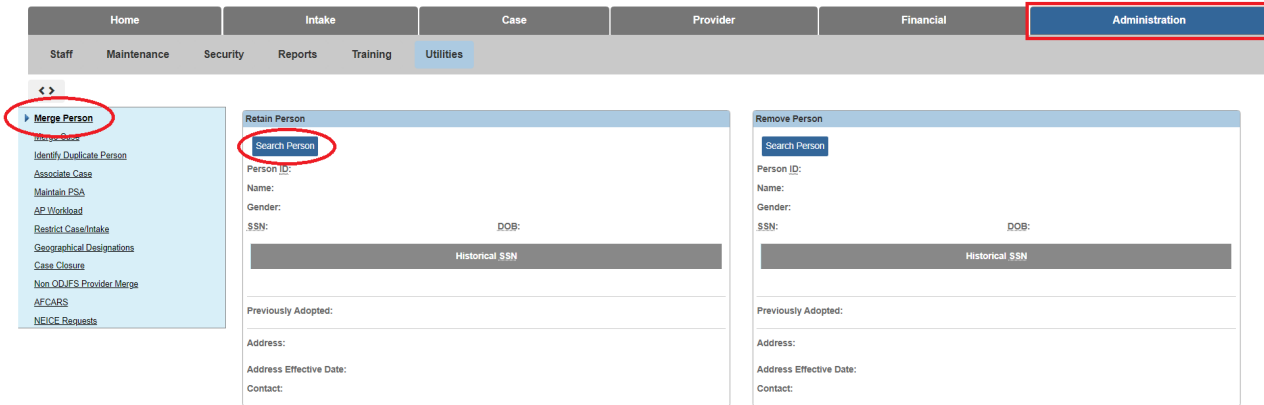
Important: For more guidelines, refer to the **Person Merge Information and Troubleshooting** section at the end of this Knowledge Base Article.

Merging Person Records in Ohio SACWIS

To merge duplicate person records, complete the following steps:

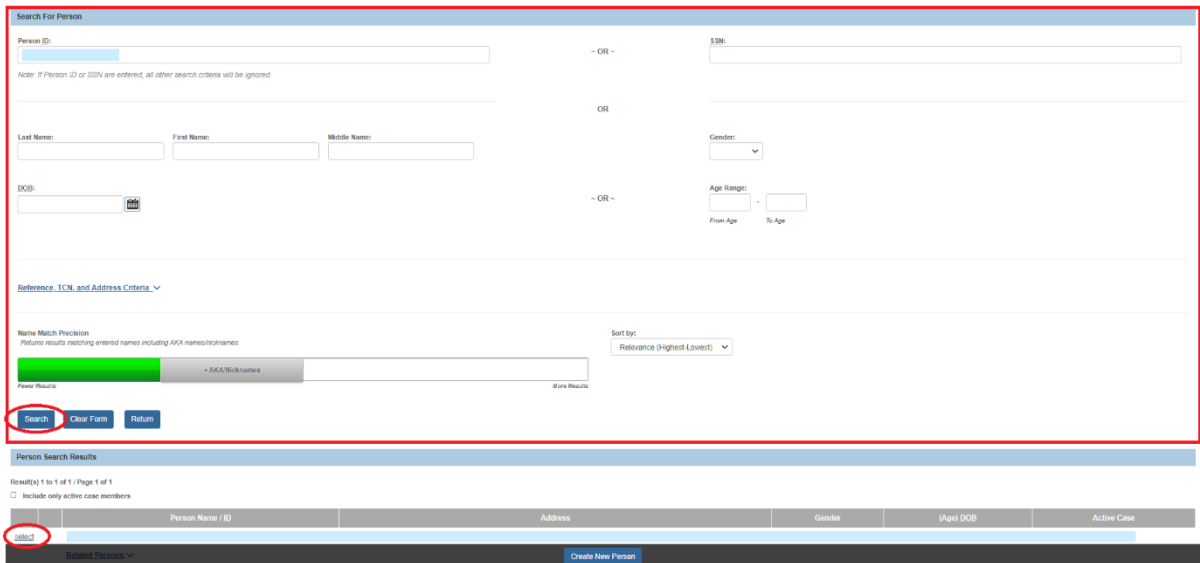
1. On the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Utilities** tab.
3. Click **Merge Person** link in the **Navigation** menu. The **Retain Person / Remove Person** screen appears.
4. In **Retain Person** section, click the **Search Person** button.

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The **Search For Person** screen appears.

5. Complete the filter criteria fields, as needed.
6. Click the **Search** button. The results appear in the **Person Search Results** section.
7. Click the **Select** link in the appropriate grid row.



The person's information appears on the **Retain Person** screen.

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The screenshot shows the OhioKAN system interface. At the top, there are navigation tabs: Home, Intake, Case, Provider, Financial, and Administration. Below these are sub-tabs: Staff, Maintenance, Security, Reports, Training, and Utilities. A sidebar on the left contains a menu with options like Merge Person, Identify Duplicate Person, Associate Case, etc. The main content area is divided into two sections: 'Retain Person' and 'Remove Person'. The 'Retain Person' section is highlighted with a green border. It contains a search bar, fields for Person ID, Name, Gender, SSN, and DOB, a 'Historical SSN' section with 'No Records Found', and fields for Previously Adopted, Address, Address Effective Date, and Contact. The 'Remove Person' section is identical but not highlighted.

8. Repeat the previous steps to populate the **Remove Person** section.

This screenshot is similar to the one above, but the 'Remove Person' section is now highlighted with a green border, indicating that the information has been populated there.

When complete, the information for both people appears on the **Retain Person / Remove Person** screen.

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- If needed, click the **Switch Person ID** button to swap the “retain” and “remove” person IDs.
- Click the **Compare Records** button.

The screenshot displays the OhioKAN system's navigation menu and utility sections. The navigation menu includes Home, Intake, Case, Provider, Financial, and Administration. The utility menu includes Staff, Maintenance, Security, Reports, Training, and Utilities. The main content area is divided into two panels: 'Retain Person' and 'Remove Person'. Both panels have a search bar and input fields for Person ID, Name, Gender, SSN, and DOB. Below these fields is a 'Historical SSN' section with a 'No Records Found!' message. At the bottom of each panel are fields for 'Previously Adopted', 'Address', 'Address Effective Date', and 'Contact'. Below the panels are two buttons: 'Compare Records' and 'Switch Person IDs'.

The **Person Record Comparison** section appears as shown below.

- In the **Person Record Comparison** section, click the radio button in each row to select the information **you want to retain**.

Important Reminder: Once person records are merged, they cannot be unmerged.

- After verifying that you do want to merge the records, click the **Merge** button.

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Compare Records | Switch Person IDs

Person Record Comparison

	Retain Person	Remove Person
Person ID	[Redacted]	[Redacted]
Name	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]
Primary Address	<input checked="" type="radio"/> RESIDENCE [Redacted]	<input type="radio"/> [Redacted]

Retain Person Relationships -	Remove Person Relationships -
<input checked="" type="radio"/> Related Adult [Redacted]	<input type="radio"/> Unspecified Relationship [Redacted]
<input type="radio"/> Unspecified Relationship [Redacted]	<input checked="" type="radio"/> Non-Related Adult [Redacted]

The **Merged Person Record Comparison** screen appears stating that the system successfully merged the duplicate persons.

13. When complete, click the **Close** button.

Successfully merged the duplicate persons.

Merged Person Record Comparison

	Retain Person	Remove Person	Merged Person
Person ID	[Redacted]	[Redacted]	[Redacted]
Name	[Redacted]	[Redacted]	[Redacted]
SSN	[Redacted]	[Redacted]	[Redacted]
DOB	[Redacted]	[Redacted]	[Redacted]
Primary Address	[Redacted]	[Redacted]	[Redacted]

The two people records are merged. The **Retain Person / Remove Person** screen appears displaying blank fields.

Important: When the merge is complete, Ohio SACWIS automatically adds the Person ID number from the remove person record as a reference number on the **Additional** tab (**Person Information** screen) of the retained person's record.

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Basic	Demographics	Address	Additional	Characteristics	Safety Hazard
Reference List					
	Reference Type	Reference Number	Description	Source System Code	
edit	Legacy Client ID	0500015353	SIS CLIENT FACSIS ID	SACWIS	delete
edit	Legacy Client ID	0500082684	SIS CLIENT FACSIS ID	SACWIS	delete
edit	Legacy Client ID	0500148155	SIS CLIENT FACSIS ID	SACWIS	delete
edit	Legacy System ID	050550869	SIS PERSON ID	SACWIS	delete
edit	Legacy System ID	05056654	SIS PERSON ID	SACWIS	delete
edit	Legacy System ID	050579091	SIS PERSON ID	SACWIS	delete
	Merged Person ID			SACWIS	

[Add Reference](#)

Person Merge Information and Troubleshooting

Merging Case Reference Persons

When both retain and remove person IDs are case reference persons (CRP), they can be merged as long as only one of the cases is open. Additionally, the CRP of the open case must be the retain person; the CRP of the closed case must be the remove person.

A Merge Cannot Occur If:

- There are pending payments on the remove person's record
- The remove person is known to SETS
- The retain and remove records have overlapping legal status or placement dates
- Both persons are members of the same intake, both are members of the same provider, or when updated descriptions of family are present for both person IDs
- Both person IDs have adoption assessor information on employee profiles.
- Both person IDs have a Yes answer in the previously adopted field in the person profile.

Pre-Adoptive or Post-Adoptive Person Records

If the record in question is a pre-adoptive or post-adoptive person record, merges can only occur under certain circumstances as discussed in this sub-section.

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In this Knowledge Base Article, a **pre-adoptive person record** is defined as a person record that is a past or present member of an adoption case.

A **post-adoptive person** record is the new record that was created in Ohio SACWIS upon the adoption finalizing. This person was made a member of the adoptive provider's home at finalization. (This occurs automatically in Ohio SACWIS.)

A pre-adoptive and post-adoptive person record **cannot** be merged. If it is attempted, an error message appears in Ohio SACWIS.

During a duplicate person merge, the remove person record **cannot** have an adoptive history as either the pre-adoptive or post-adoptive person. If this occurs, an error message appears in Ohio SACWIS.

A merge **can** be completed if the retain person record is a pre-adoptive or post-adoptive person record, and the remove person record is not associated to an adoption case.

As stated above, Ohio SACWIS allows a person merge of a post-adoptive person record as the retain record when the remove record does not have an association with an adoption record. **These records should only be merged if the remove record was created after the date of the adoption finalization.** (This is the date the post-adoptive person ID was created.)

Person records that have overlapping financial records **cannot** be merged. The following are specific financial work items that cannot have overlapping records for a merge to occur:

- Payment Request Records
- Contract Rate Records
- Conflicting Benefit Records
- Eligibility Records
- State Payment Records
- Agency Reimbursement Records
- Adoption Subsidy Records
- Service Authorizations

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .