Merging Duplicate Persons in Ohio SACWIS

Knowledge Base Article

Merging Duplicate Persons in Ohio SACWIS

Table of Contents

Ohio | Department of Job and Family Services

Last Revised: 06/27/2023

Merging Duplicate Persons in Ohio SACWIS

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 Records** Knowledge Base Article for steps on using this functionality.

What if Two Different Counties Own the Records?

In some cases, duplicate person records were created (so are "owned") by different counties. If an "owner" from County A wants to merge the two records, he or she should contact the Ohio SACWIS Coordinator from County B to discuss it. A list titled **SACWIS Coordinators** is posted on the Knowledge Base.

To determine which other county "owns" the record, complete a person search in the system and navigate to that individual's **Person Information** screen. Click the **SACWIS History** link at the top of that screen. An agency name is attached to all cases, intakes, and providers listed in the **SACWIS History**.

When contacted, the two counties should discuss the decision to merge the two records. They should also confirm that the records are in fact duplicates, as well as which person record should be retained in Ohio SACWIS and which removed.

Which County Should Perform the Merge?

When a person record is associated with an open intake, case, or provider, and the other person record is associated with a closed intake, case, or provider, the county who owns the open record is the "owner" and should perform the merge.

If both records are associated with a closed intake, case, or provider, the county who is associated with the most recently opened record is the county who should perform the merge.

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.

Ohio **Department of Job and Family Services**

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.
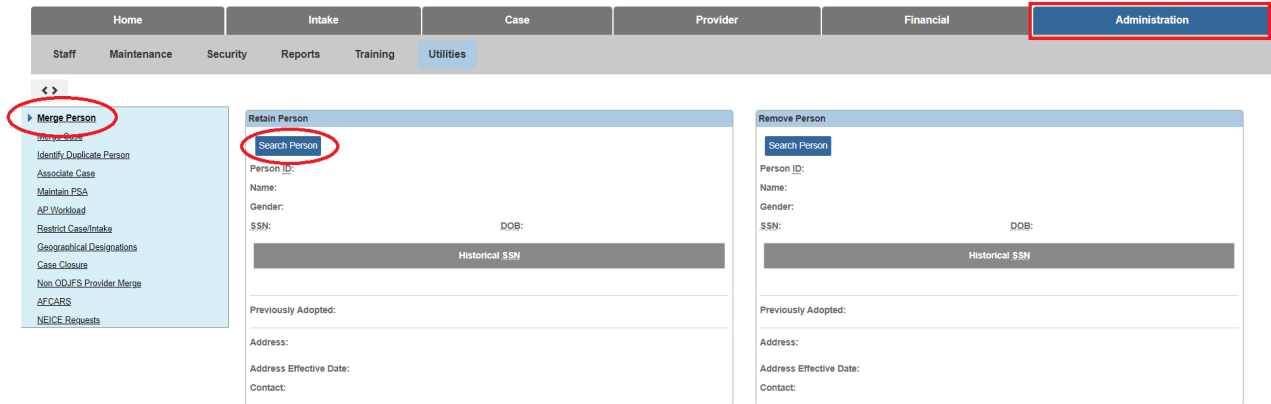
The **Search For Person** screen appears.

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.

Ohio | Department of Job and Family Services

Merging Duplicate Persons in Ohio SACWIS

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

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

Ohio Department of Job and Family Services

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

Merging Duplicate Persons in Ohio SACWIS

9. If needed, click the **Switch Person ID** button to swap the "retain" and "remove" person IDs.

10. Click the **Compare Records** button.

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

11. 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.

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

Ohio | Department of Job and Family Services

Last Revised: 06/27/2023

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

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

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.

Ohio | **Department of Job and Family Services**

	Basic	Demographics	Address	Additional	Characteristics	Safety Hazard

	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	050586854	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.

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.

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.

Ohio Department of Job and Family Services

Last Revised: 06/27/2023

Merging Duplicate Persons in Ohio SACWIS

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.)

The record is then linked to the adoption case. You can view the link by clicking the **View Original Person** link on the **SACWIS History** screen. However, this link is only available to users with the appropriate security roles.
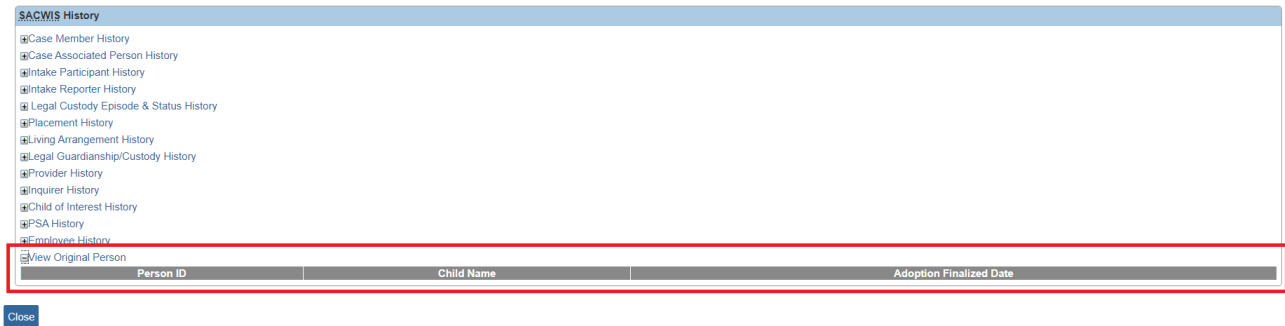
A pre-adoptive and post-adoptive person record **cannot** be merged. If it is attempted, an error message appears in Ohio SACWIS.

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.)

It is recommended that you view the Ohio SACWIS history of these records prior to merging them to ensure that the remove record was created after the creation of the post-adoptive person record.

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

Ohio | **Department of Job and Family Services**

Merging Duplicate Persons in Ohio SACWIS

- 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 .

Ohio | Department of Job and Family Services