

Completing a Non-ODJFS Provider Merge



Knowledge Base Article

Completing a Non-ODJFS Provider Merge

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Completing a Non-ODJFS Provider Merge

Overview

This Knowledge Base Article discusses how to complete a non-ODJFS provider merge in Ohio SACWIS and other related information about the process.

In order to complete a non-ODJFS provider merge, a user must have the security role of **Non-ODJFS Merge Administrator**.

Your agency's security administrator can give this role to users who will be completing the provider merge function. However, it is important that those who are given the ability to merge are knowledgeable about the uses for non-ODJFS providers and how the existing data can be impacted after a merge.

Once a merge has successfully occurred, all non-retained provider information will be kept in the history throughout the resulting provider ID.

Navigating to the Non ODJFS Provider Merge Screen

1. On the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Utilities** tab.
3. Click **Non ODJFS Provider Merge** in the **Navigation** menu. The **Merge History Filter** screen appears.
4. To merge two non-ODJFS providers, click the **Add Merge Request** button.

The screenshot shows the Ohio SACWIS Administration Utilities Non ODJFS Provider Merge screen. The top navigation bar includes Home, Intake, Case, Provider, Financial, and Administration (highlighted). Below this is a sub-navigation bar with Staff, Maintenance, Security, Reports, Training, and Utilities (highlighted). A left-hand navigation menu lists various functions, with Non ODJFS Provider Merge highlighted. The main content area is titled 'Merge History Filter' and contains several input fields: From Date, To Date, Status (set to Failed), Requesting Agency (Test County Children Services Board), Requestor, and Sort Results By (Default). Below the filter fields are Filter and Reset buttons. A section titled 'Merge History Filter Results' contains a table with columns: Retained Provider Name/ID, Duplicate Provider Name/ID, Requestor, and Status Date. The table currently shows 'No Results Returned.' At the bottom of the results section is an 'Add Merge Request' button.

The **Provider Selection** screen appears.

Completing a Non-ODJFS Provider Merge

Locating the Retained Provider

1. In **Retained Provider** section, click the **Search** button.

The screenshot shows a navigation menu with tabs for Home, Intake, Case, Provider, Financial, and Administration. Under the Administration tab, there are sub-tabs for Staff, Maintenance, Security, Reports, Training, and Utilities. Below the menu, the breadcrumb path is Administration > Utilities > Non-ODJFS Provider Merge Requests. The main content area has three sections: 'Provider Selection' (highlighted with a green box), 'Retained Provider' (with a 'Search' button highlighted in a red box), and 'Duplicate Provider' (with a 'Search' button).

The **Provider Profile Search Criteria** screen appears.

Important: When searching for a non-ODJFS provider in the system:

- The county completing the merge **must be the recommending agency** for one of the providers or both the retained and duplicate provider must have the recommending agency be the Ohio Department of Job and Family Services.
- The provider category selected must be **non-ODJFS** provider.

2. In the **Provider Category** field, select **Non-ODJFS** from the drop-down list.
3. Enter a provider name in the **Provider Name** field, if needed.
4. Click the **Search** button.

The screenshot shows the 'Search For Provider Profile' screen. It has a header bar with the title 'Search For Provider Profile'. Below the header, there are three search criteria sections. The first section is 'Provider ID:' with a text input field. The second section is 'Provider Name:' with a text input field. The third section is 'Member Last Name:' and 'Member First Name:' with two text input fields, and 'Member Middle Name:' with a text input field. Below these sections, there is a 'Provider Category:' dropdown menu with 'Non-ODJFS' selected. The dropdown menu is highlighted with a red box.

Completing a Non-ODJFS Provider Merge

Agency Type:

Agency:

Provider Type: Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#)

Name Match Precision
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Fewer Results More Results

The search results appear in the **Provider Profile Search Results** section in the middle of the screen.

5. Click the **Select** link in the appropriate row.

Search Results

Result(s) 1 to 15 of 500 / Page 1 of 34

	Provider Name / ID	Provider Status	Provider Category	Address
<input type="button" value="select"/>	Counseling / 123456	ACTIVE	NONODJFS	123 Test Rd Test, Oh 12345

[View Provider Type Information](#)

The **Provider Selection** screen appears displaying the selected information in the **Retained Provider** section.

Completing a Non-ODJFS Provider Merge

Locating the Duplicate Provider

1. In **Duplicate Provider** section, click the **Search** button.

The screenshot shows a web interface with a header 'Provider Selection'. Below it are two main sections: 'Retained Provider' and 'Duplicate Provider'. The 'Retained Provider' section contains a 'Search' button and a form with the following fields: Provider ID: 123456, Name: Test Provider 1, Primary Member, Secondary Member, Marital Status, and Address: 123 Test Rd Test, Oh 12345. Below this form are four expandable links: Placements/Services History, Adoption/KGAP Subsidy History, Tax Return Address History, and Tax Payer Identification Number (TIN) History. The 'Duplicate Provider' section contains a 'Search' button.

The **Provider Profile Search Criteria** screen appears.

Similar to previous steps:

2. In the **Provider Category** field, select **Non-ODJFS** from the drop-down list.
3. If needed, enter the duplicate provider's name in the **Provider Name** field.
4. Click the **Search** button.

The screenshot shows a 'Search For Provider Profile' form. It has a 'Provider ID:' field, a 'Provider Name:' field, and a 'Provider Category:' dropdown menu with 'Non-ODJFS' selected. To the right, there are fields for 'Member Last Name:', 'Member First Name:', and 'Member Middle Name:'. An 'OR' label is positioned between the 'Provider ID' and 'Member Last Name' fields. A 'Search' button is located at the bottom right of the form.

Completing a Non-ODJFS Provider Merge

Agency Type:

Agency:

Provider Type: Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#)

Name Match Precision
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Fewer Results More Results

The search results appear in the **Provider Profile Search Results** section in the middle of the screen.

5. Click the **Select** link in the appropriate row for the duplicate provider (a different provider than was chosen in the previous sub-section).

Search Results

Result(s) 1 to 15 of 500 / Page 1 of 34

	Provider Name / ID	Provider Status	Provider Category	Address
<input type="button" value="select"/>	Test Provider 2	ACTIVE	NONODJFS	123 Test Rd Test, Oh 12345

[View Provider Type Information](#)

The **Provider Selection** screen appears displaying your selection in the **Duplicate Provider** section as shown in green on the next page. At this time, both the **Retained Provider** section and the **Duplicate Provider** section of the screen are populated with the providers to be merged.

Completing a Non-ODJFS Provider Merge

Viewing the Service History

1. If needed, click the **Placement/Service History** link.

Note: This link displays all children who currently or historically have received placement or case services from this provider.

Provider Selection

Retained Provider

Search

Provider ID: 123456
Name: Test Provider 1
Primary Member:
Secondary Member:
Marital Status:
Address: 123 Test Rd Test, Oh 12345

Duplicate Provider

Search

Provider ID: 121212
Name: Test Provider 2
Primary Member:
Secondary Member:
Marital Status:
Address: 123 Test Rd, Test Oh 12345

[Placements/Services History](#)
[Adoption/KGAP Subsidy History](#)
[Tax Return Address History](#)
[Tax Payer Identification Number \(TIN\) History](#)

Compare Providers **Switch Provider IDs**

The **Services Filter Criteria** screen appears. The **Services** section of the screen displays any child who has been placed with or received a service from this provider. This information can be used as a reference to verify that you really want to merge the two providers.

2. View the information.
3. When complete, click the **Collapse** button.

Provider Selection

Retained Provider

Search

Provider ID: 123456
Name: Test Provider 1
Primary Member:
Secondary Member:
Marital Status:
Address: 123 Test Rd Test, Oh 12345

Duplicate Provider

Search

Provider ID: 121212
Name: Test Provider 2
Primary Member:
Secondary Member:
Marital Status:
Address: 123 Test Rd, Test Oh 12345

[Placements/Services History](#)

Person ID	Person Name	Begin Date	End Date	Service	Placement Type	CIE	Person ID	Person Name	Begin Date	End Date	Service	Placement Type	CIE
-----------	-------------	------------	----------	---------	----------------	-----	-----------	-------------	------------	----------	---------	----------------	-----

[Adoption/KGAP Subsidy History](#)
[Tax Return Address History](#)
[Tax Payer Identification Number \(TIN\) History](#)

Completing a Non-ODJFS Provider Merge

The **Provider Selection** screen appears.

Viewing the Adoption/KGAP Subsidy History

1. If needed, click the **Adoption/KGAP Subsidy History** link.

Note: This link displays all children who have received either Adoption or KGAP from this provider at any time.

The screenshot shows the 'Provider Selection' interface. It is divided into two main sections: 'Retained Provider' and 'Duplicate Provider'. Each section contains a search form with fields for Provider ID, Name, Primary Member, Secondary Member, Marital Status, and Address. Below these sections are several expandable menu items: 'Placements/Services History', 'Adoption/KGAP Subsidy History' (highlighted with a red box), 'Tax Return Address History', and 'Tax Payer Identification Number (TIN) History'. At the bottom, there is a table with two identical headers: 'Person ID', 'Person Name', 'Begin Date', 'End Date', and 'Subsidy Type'.

The **Provider Subsidy History** screen appears.

2. View the information as available.
3. When complete, click the **Collapse** button.

The **Provider Selection** screen appears.

Completing a Non-ODJFS Provider Merge

Comparing the Two Selected Providers (Before the Merge)

Completing these steps verifies that the two providers are eligible for a merge.

1. Click the **Compare Providers** button on the **Provider Selection** screen.

Provider Selection

Retained Provider	Duplicate Provider
<p>Search</p> <p>Provider ID: <u>123456</u> Name: Test Provider 1 Primary Member: Secondary Member: Marital Status: Address: 123 Test Rd Test, Oh 12345</p> <p>Placements/Services History Adoption/KGAP Subsidy History Tax Return Address History Tax Payer Identification Number (TIN) History</p>	<p>Search</p> <p>Provider ID: <u>121212</u> Name: Test Provider 2 Primary Member: Secondary Member: Marital Status: Address: 123 Test Rd, Test Oh 12345</p>

Compare Providers **Switch Provider IDs**

Important: One of two possible outcomes will occur:

- An Ineligible Validation Message(s) will appear stating why the merge cannot proceed.
- The **Provider Comparison** section will appear to compare the providers.

Completing a Non-ODJFS Provider Merge

Ineligible Validation Messages

If you click the **Compare Providers** button and the **providers are not eligible for a merge**, the system displays one of the following ineligible validation messages:

Note: After you click the **Merge** button (later in this process), you may get additional ineligible merge messages, which are also discussed in this Knowledge Base Article.

- The duplicate provider does have an open-ended placement for a child who is currently placed with the retained provider. In rare cases, a child appears to be placed in two providers at the same time.
- Both the retained and duplicate providers are on an adoption potential match (or adoption match) list that was generated for {Adoptive Child's Name} by agency {Agency Name from the Potential Match List (or Adoption Match) record}, and one of the providers is not being considered. A merge request is ineligible unless both of the providers are being considered.
- If the retained provider and the duplicate provider are **used as a placement setting and as any type of leave setting for the same time period**, then the following message will display: By merging this provider, the placement and the leave placement will be the same provider. **In order to proceed with the merge, you must correct this in Ohio SACWIS.**
- If neither the retained provider nor the duplicate provider has a primary address, then the following message will display: There must be a primary address on at least one of the provider records that you selected for merge. **In order to proceed with the merge, you must correct this in Ohio SACWIS.**
- If the retained and the duplicate provider each have an active or on-hold provider payment plan, then the following message will display: These records cannot be merged due to both records having an active or on-hold provider payment plan.

Reason: The merged provider can't have two active provider payment plans at the same time. The two providers can't both have an active and/or on-hold payment plan.

Completing a Non-ODJFS Provider Merge

Viewing the Provider Comparison

If no ineligible validation messages apply, the **Provider Comparison** section appears as shown in this example:

Compare Providers
Switch Provider IDs

Provider Comparison

Provider Type

Provider Type	Recommending Agency	Begin Date	Retain
Ohio Department of Education	Test County Children Services Board	03/26/2007	<input type="checkbox"/>

Provider Type	Recommending Agency	Begin Date	Retain
Ohio Department of Education	Test County Children Services Board	03/26/2007	<input type="checkbox"/>

Provider Member

[View Member History](#)

Person ID	Name	Effective Date	Role	Retain
				<input type="checkbox"/>

Primary Address

Effective Date	Address	Retain
03/26/2007	123 Test Rd Test, Oh 12345	<input type="checkbox"/>

Provider Payment Information Selection

Payee Information

Future Payee	Effective / End Date	Type	Account	Retain
				<input type="checkbox"/>

Child Specific Payee Information

Payee	Child	Effective / End date	Type	Account

Medicaid Mailing Information Selection

Mailing Information

Future C/O	Effective / End Date	Retain
		<input type="checkbox"/>

Child Specific Mailing Information

C/O	Child	Effective / End Date

Merge
Cancel

Completing a Non-ODJFS Provider Merge

Completing the Provider Type Section

On the **Provider Comparison** screen, complete the following steps:

1. In the **Retain** columns of the **Provider Type** section, select at least one provider type by clicking the appropriate check box.

The screenshot shows the 'Provider Comparison' interface. At the top, there are two buttons: 'Compare Providers' and 'Switch Provider IDs'. Below these is a header for 'Provider Comparison' and a sub-header for 'Provider Type'. The main content consists of two side-by-side tables. Each table has four columns: 'Provider Type', 'Recommending Agency', 'Begin Date', and 'Retain'. The 'Retain' column contains a checkbox. The data in both tables is identical: 'Ohio Department of Education' as the Provider Type, 'Test County Children Services Board' as the Recommending Agency, and '03/26/2007' as the Begin Date. Red boxes highlight the 'Retain' checkboxes in both tables.

Provider Type	Recommending Agency	Begin Date	Retain
Ohio Department of Education	Test County Children Services Board	03/26/2007	<input type="checkbox"/>

Provider Type	Recommending Agency	Begin Date	Retain
Ohio Department of Education	Test County Children Services Board	03/26/2007	<input type="checkbox"/>

Important Things to Know About the Provider Type:

- If provider type values display for selection, you must select at least one provider type for retention. (Click a check box in one of the two **Retain** columns.)
- If no provider types display, that means that all provider types on both records are end-dated, and these historic provider types will be retained with end-dates in the merge.
- You can select multiple provider type records for retention.
- **Closed providers can be merged.**
- Ohio SACWIS displays all provider types with a null end-date.
- Only the provider types with a null end-date display a check box and can be selected.
- End-dated provider types are not selectable (no check box appears).
- All end-dated provider types will be kept in the Ohio SACWIS history.

Completing a Non-ODJFS Provider Merge

Completing the Provider Member Section

On the **Provider Comparison** screen, complete the following steps:

1. In the **Retain** columns of the **Provider Member** section, select one **primary member** for retention by clicking the appropriate check box:

Provider Member					View Member History				
Person ID	Name	Effective Date	Role	Retain	Person ID	Name	Effective Date	Role	Retain
11111		01/01/2000	Adult Household Member	<input type="checkbox"/>	22222		01/01/2000	Primary Member	<input type="checkbox"/>

Important Things to Know About Provider Member:

- **Selecting a primary member is required if any of the following provider types apply** (shown in the blue box):

Adoptive Care – International	Emergency Caregiver
Adoptive Home Provider – Out of State	Host Home Independent Living Provider
Alternative Caregiver	Out of State Foster Home
Babysitter / Child Care Provider	Out of State Kinship Care Provider – Non-Relative
Child Care Provider – Type A	Out of State Kinship Care Provider – Parent
Child Care Provider – Type B	Out of State Kinship Care Provider – Relative

- All active provider members will be displayed for selection.
- Only one primary member and one secondary member (if applicable) can be selected for retention.
- If a secondary member is selected, a primary member must also be selected.
- Provider members with the same **Person ID** number cannot be selected for retention.
- You can click the **View Member History** link (shown in green above) to view historical members for both the retained and duplicate providers.
- If a drop-down list appears in the **Role** field after making a selection, refer to the next step.

Completing a Non-ODJFS Provider Merge

When you clicked a **Retain** check box, a drop-down list field appears in the **Role** column.

2. Select **Primary Member** or **Secondary Member** for that provider.
 - This drop-down list allows you to retain both of the provider members and choose which one will become the primary and secondary member.
 - Your selection in this drop-down list determines which members will be primary and secondary in the post-merge record.
 - All other members will have a read-only label with no drop-down list.

Completing the Primary Address Section

On the **Provider Comparison** screen, complete the following steps:

1. In either of the **Retain** columns of the **Primary Address** section, select one address for retention by clicking the appropriate radio button.

Important: This is a mandatory selection. At least one (and only one) primary address must be selected.

Primary Address		
Effective Date	Address	Retain
03/26/2007	123 Test Rd Test, Oh 12345	<input type="radio"/>
Effective Date	Address	Retain
03/26/2007	123 Test Rd Test, Oh 12345	<input type="radio"/>

Completing the Payee Information Section

On the **Provider Comparison** screen, complete the following steps:

1. In the **Payee Information** section, click one radio button in either of the **Retain** columns to select the **Provider Payment Information** for retention.

Completing a Non-ODJFS Provider Merge

Provider Payment Information Selection										
Payee Information										
Future Payee	Effective / End Date	Type	Account	Retain		Future Payee	Effective / End Date	Type	Account	Retain
Current Payee	Effective / End date	Type	Account	Retain		Current Payee	Effective / End date	Type	Account	Retain

Important Things to Know About Payee Information:

- All active (future end-dated or non-end-dated) provider payment payee information will display. A **Retain** radio button will be available for each active record.
 - If no payee information is recorded in Ohio SACWIS for the selected providers, no provider payment information will display.
 - If there are no effective provider payment information records, you will be given no selection choices. The merged provider will then have no effective provider payment information upon a successful merge.
 - The bottom row (shown in green above) shows the:
 - **Last Used** field displaying the last payment created date that was used for that payee.
 - **Service Type** field displaying the service type of the payment.
 - You can only select **one non-end-dated payment information record** to be retained and **no more than one active end-dated payment information record** to be retained. If a current payee and a future payee have been recorded, a provider may have one future-ended and one open-ended payee record at the same time.
 - Active “default” payment information records that are not discarded based on the above edits will be updated with the **Retained Provider ID**.
2. In the **Child Specific Payee Information** section, view the relevant information. This is a read-only section.

Completing a Non-ODJFS Provider Merge

Completing the Medicaid Mailing Information Selection Section

On the **Provider Comparison** screen, complete the following steps:

1. In the **Mailing Information** section, click one radio button in either of the **Retain** columns to select the **Mailing Information** record for retention.

Note: As shown in this example, if data is not available, no radio button will appear in a **Retain** column.

Medicaid Mailing Information Selection					
Mailing Information					
Future C/O	Effective / End Date	Retain	Future C/O	Effective / End Date	Retain
Current C/O	Effective / End date	Retain	Current C/O	Effective / End date	Retain

Important Things to Know About Medicaid Mailing Information:

- **If no override Medicaid Card Address records have been created**, then no selection is required.
- **If override Medicaid Card Address records have been created:**
 - The **Provider Comparison** screen displays the Medicaid Card Address data. Ohio SACWIS displays all active (future end-dated or non-end-dated) Medicaid Card Address records and a **Retain** checkbox is available for each active record.
 - If multiple active 'default' Medicaid Card Address records have been selected for retention that would cause a date overlap, the system will prevent the provider merge.
 - You can only retain the following:
 - One non-end-dated Medicaid Card Address record, and
 - One active end-dated Medicaid Card Address
 - If you select more than one, the following validation appears: "Please select only one non-end-dated Medicaid mailing record and only one active end-dated payment information record.
 - If there are any effective Medicaid Card address records, at least one of them must be retained as active.
 - If two valid active records exist (one end dated and one non-end dated) and you choose to only select the future non-ended record, the following

Completing a Non-ODJFS Provider Merge

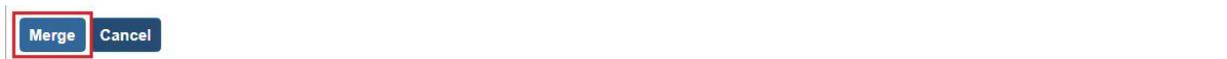
- validation message appears: Provider Merge cannot be completed because the current active record exists and has not been selected, please review.
- If two valid active records (one end dated, one non-end dated) exists and you choose to only select the current (end-dated) record, the following validation message appears: Provider Merge cannot be completed because a future record exists and has not been selected, please review.

2. In the **Child Specific Mailing Information** section, view the relevant information. This is a read-only section.

Child Specific Mailing Information					
C/O	Child	Effective / End Date	C/O	Child	Effective / End Date

Important: The system prevents provider merge if an active record for the same child exists on both providers and the resulting merge would cause an overlap of dates for the child.

3. After completing the **Provider Comparison** screen, click the **Merge** button at the bottom of the screen.



Unsuccessful Merge

If the provider merge is not successful, a message will display under the **Merge History Filter Results** section as a **FAILED** merge. A merge would only fail if there was system issue at the time of the merge. A Non-ODJFS Merge Administrator would then need to request the merge again. This instance occurs only rarely.

Completing a Non-ODJFS Provider Merge

Successful Merge

If the provider merge is successful, the **Merge History Filter** screen appears displaying the following message:

The screenshot shows a web application interface with a top navigation bar containing tabs for Home, Intake, Case, Provider, Financial, and Administration. Below this is a secondary navigation bar with tabs for Staff, Maintenance, Security, Reports, Training, and Utilities. On the left is a sidebar menu with options like Merge Person, Identify Duplicate Person, Associate Case, Maintain PSA, AP Workload, Restrict Case/Intake, Geographical Designations, Case Closure, Non ODJFS Provider Merge (highlighted), and AFCARS. The main content area features a green notification banner at the top that says "Merge Successfully Completed". Below the banner is the "Merge History Filter" form, which includes fields for From Date, To Date, Status (set to Failed), Requesting Agency (Test County Children Services Board), Requestor, and Sort Results By (Default). Filter and Reset buttons are located at the bottom of the form.

Successful Merge Auto-Notifications

A successful merge occurs in Ohio SACWIS immediately. You do not need to wait overnight to view the results.

After a merge has been completed, the system automatically sends a notification to the:

- Non-ODJFS Merge Administrator for the duplicate provider
- Non-ODJFS Merge Administrator for any agencies that have services on the duplicate provider.

The notification informs these individuals as to what the newly retained Provider ID is for this resource.

Completing a Non-ODJFS Provider Merge

Viewing Completed Merges

For a **Merge Administrator** to view their completed merge requests, complete the following steps:

1. On the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Utilities** tab.
3. Click **Non ODJFS Provider Merge** in the **Navigation** menu. The **Merge History Filter** screen appears.
4. In the **Status** field, choose **Completed** from the drop-down list.
5. Click the **Filter** button.

The screenshot shows the 'Merge History Filter' interface. The top navigation bar includes 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. The 'Administration' tab is active, and the 'Utilities' sub-tab is selected. The left navigation menu lists various options, with 'Non ODJFS Provider Merge' highlighted. The main form contains the following fields: 'From Date' and 'To Date' (both empty), 'Status' (set to 'Completed'), 'Requesting Agency' (set to 'Test County Children Services Board'), 'Requestor' (empty), and 'Sort Results By' (set to 'Default'). Below the form are 'Filter' and 'Reset' buttons.

The results display in the **Merge History Filter Results** section as shown in this example (refer to the next page for further explanation):

The screenshot shows the 'Merge History Filter Results' section. Above the table are 'Filter' and 'Reset' buttons. The table has the following data:

Retained Provider Name/ID	Duplicate Provider Name/ID	Requestor	Status Date
Test Provider / 12345	Test Provider 2 / 121212	Test Worker	12/28/2023

Below the table is an 'Add Merge Request' button.

Completing a Non-ODJFS Provider Merge

Important Things to Know When Viewing Completed Merges:

Some rows in the **Retained Provider Name/ID** column (shown in green above) **do not have names**, only numbers (e.g., / 1234567).

Reason: If a retained provider is subsequently used as a duplicate provider, the merge transaction will display, but the provider's name will not display for the retained provider.

Example:

Provider A and Provider B are merged into Provider A.

Provider A record will display in a row showing a name in the **Retained Provider Name/ID** column.

If Provider C and Provider A are then merged, and A is now the duplicate, the previous row (mentioned above) will display with a number, but no name.

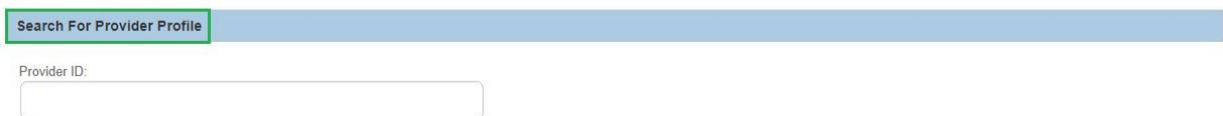
This is because Provider A got merged with Provider C.

Locating an "Old" Retained Provider ID

(Old Provider ID number compared to **New** Provider ID number)

To find out what the Retained Provider ID was originally, you will need to search on a Duplicate Provider ID. To do so, complete the following steps:

1. Locate the **new Provider ID** number.
2. On the **Home** screen, click the Provider tab.
3. Click the **Provider Search** tab.

A screenshot of a search bar. The search bar is a light blue horizontal bar with the text 'Search For Provider Profile' on the left. Below the search bar, there is a label 'Provider ID:' followed by a white rectangular input field.

Completing a Non-ODJFS Provider Merge

The **Provider Profile Search Criteria** screen appears.

4. In the **Provider Reference Type** field, choose **Other Reference ID** from the drop-down list.
5. In the **Provider Reference Number** field, type in the new **Provider ID** number.
6. Click the **Search** button.

Address, Contact and Provider Reference Criteria ^

Address Lookup:

Unit Name: Unit Number:

Phone: County:

Provider Reference Type: Provider Reference Number:

Name Match Precision
Returns results matching entered names including AKA names/nicknames

+ AKA/Nicknames

Fewer Results More Results

As shown in green below, the retained result appears in the **Provider Profile Search Results** screen (**Provider Name / ID** column).

Search Results

Result(s) 1 to 15 of 500 / Page 1 of 34

	Provider Name / ID	Provider Status	Provider Category	Address
view edit	Test Provider / 123456	ACTIVE	NONODJFS	123 Test Rd Test, Oh 12345

Completing a Non-ODJFS Provider Merge

Recommending Agency as ODJFS

After a successful merge, all provider type records that were involved in the merge will be updated with ODJFS as the recommending agency, excluding the provider types of **Volunteer and Child Care Provider – Type B**.

Below is an example from the **Provider Name Information** screen:

Basic
Address
Members
Relationships
Capacity

Provider Name Information

Provider Name	Effective Date	End Date
Test Provider	03/26/2007	

Provider AKA Name Information

Provider AKA

Provider Type Information

Closed Type Status: Exclude Include
 Foster to Adopt (1692): Exclude Include

Provider Type/Child Name	Agency	Type Effective Date	Type End Date	Type Status
view Other	Ohio Department of Job and Family Services	03/26/2007		Active

Provider Status Information

[View Status History](#)

Provider Status	Reason	Status Effective Date
view Active		03/26/2007

Provider Reference Information

Reference Type	Reference Number	Description
view Other Reference ID	123456	Merged Duplicate Non-ODJFS Provider

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

Completing a Non-ODJFS Provider Merge