

Identifying Duplicate Persons for OhioKAN



Knowledge Base Article

Identifying Duplicate Persons for OhioKAN

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Identifying Duplicate Persons for OhioKAN

Overview

This knowledge base article discusses how to use the **Identify Duplicate Person** functionality in Ohio SACWIS to locate potential duplicate person records, research each person's information, and exclude the duplicated records from future searches.

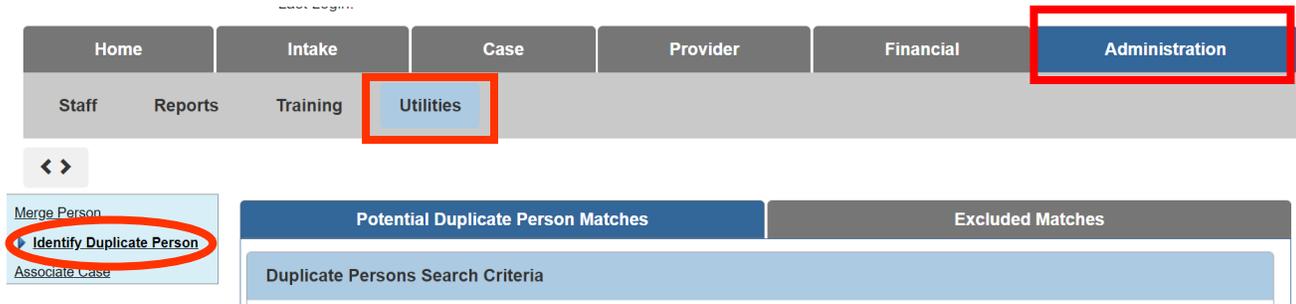
Important: Reference the **Merging Duplicate Persons** Knowledge Base Article for specific steps to complete a person merge.

Security Profile

Prior to using this functionality, you must have the **Person Merge Administrator** user group which will be assigned by the State.

Locating the Duplicate Person Records

1. On the Ohio SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Utilities** tab.
3. Click the **Identify Duplicate Person** link in the **Navigation** menu.



The **Duplicate Persons Search Criteria** screen appears.

Complete the following fields:

4. In the **Agency** field, OhioKAN will default in the drop-down.
5. In the **Begin Date** field, enter the appropriate date.
6. In the **End Date** field, enter the appropriate date.
7. In the **Match Score** field, select the appropriate number. This defaults to 4 and is typically sufficient to find duplicates.

Important: As shown in green below, if you hover your cursor over the , the following explanation message appears:

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Matches are scored based on similarities in data on both person records. A higher score indicated that there is a greater likelihood that person records are genuine duplicates. Regardless of the score, please confirm that the person records are genuine duplicates prior to completing a person merge.

- If needed, select a name from the **Duplicates Created By** field drop-down list to narrow your results.
- Click the **Search** button.

Matches are scored based on similarities in data on both person records. A higher score indicated that there is a greater likelihood that person records are genuine duplicates. Regardless of the score, please confirm that the person records are genuine duplicates prior to completing a person merge.

Duplicate Persons Search

Agency: * [Services Agency]

Begin Date: * [] End Date: * [10/31/2022]

Match Score: * [4.0] Duplicates Created By: []

Sort Results By: [Default]

Search

The results appear in the **Duplicate Persons Search Results** section as shown below.

Duplicate Persons Search Results								
Result(s) 1 to 15 of 48 / Page 1 of 4								
	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude <input type="checkbox"/>
Merge	Pen Person	28816	Pen Person	8036	04/05/2023	4	Wendy Worker	<input type="checkbox"/>
Merge	Ann Anyone	2881	Ann Anyone	8036	04/05/2023	4	Wendy Worker	<input type="checkbox"/>
Merge	Doug Duplicate	28818	Doug Duplicate	28785	04/07/2023	4	Wendy Worker	<input type="checkbox"/>

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Confirming the Duplicate Person Records

Before merging, you need to verify that the two records are for the same person and should be merged. To do so, complete the following steps:

1. In the **New Person ID** column of the search results, click the **Person ID** link in the appropriate row.

Duplicate Persons Search Results								
Result(s) 1 to 15 of 48 / Page 1 of 4								
	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude <input type="checkbox"/>
Merge	Pen Person	28816	Pen Person	8036	04/05/2023	4	Wendy Worker	<input type="checkbox"/>
Merge	Ann Anyone	2881	Ann Anyone	8036	04/05/2023	4	Wendy Worker	<input type="checkbox"/>
Merge	Doug Duplicate	28818	Doug Duplicate	28785	04/07/2023	4	Wendy Worker	<input type="checkbox"/>

The **Person Information** screen appears.

2. Verify the person's information is correct.
3. Click the **Close** button.

ICWA			
Date Family Was Asked	Possible Tribal Affiliation	Tribe Name	Response/Outcome
<div style="text-align: center;">Close</div>			

4. The **Duplicate Persons Search Results** screen appears.
5. Repeat the previous four steps with the link in the **Existing Person ID** column to verify that person's information.

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Duplicate Persons Search Results								
	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude <input type="checkbox"/>
Merge	Pen Person	28816	Pen Person	8036	04/05/2023	4	Wendy Worker	<input type="checkbox"/>
Merge	Ann Anyone	2881	Ann Anyone	8036	04/05/2023	4	Wendy Worker	<input type="checkbox"/>
Merge	Doug Duplicate	28818	Doug Duplicate	28785	04/07/2023	4	Wendy Worker	<input type="checkbox"/>

Merging Duplicate Person Records

After identifying the duplicate person records using the report, if you determine that two person records do need to be merged, complete the following steps:

1. In the **Duplicate Persons Search Results** section, select the **Merge** link in the appropriate row.

[Merge Case](#)

[Identify Duplicate Person](#)

[Associate Case](#)

[Maintain PSA](#)

[AP Workload](#)

[Restrict Case/Intake](#)

[Geographical Designations](#)

[Case Closure](#)

[Non ODJFS Provider Merge](#)

[AFCARS](#)

Potential Duplicate Person Matches
Excluded Matches

Duplicate Persons Search Criteria

Agency: *

Begin Date: *

End Date: *

Match Score: *

Duplicates Created By:

Sort Results By:

4

Duplicate Persons Search Results

Result(s) 1 to 8 of 8 / Page 1 of 1

	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude <input type="checkbox"/>
Merge								

The **Retain Person / Remove Person** screen appears.

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2. Refer to the **Merging Duplicate Persons** Knowledge Base Article for specific steps on completing a person merge.

Creating a Comparison Report

Important: The report will present information for all people who are shown in the grid. You cannot specify a report for just a single row (person).

1. To compare the two people's information in report format (PDF or Excel), click the **Identify Duplicate Person Report** button.

Potential Duplicate Person Matches Excluded Matches

Duplicate Persons Search Criteria
Agency: *
Begin Date: * End Date: *
Match Score: * Duplicates Created By:
Sort Results By:

Duplicate Persons Search Results
Result(s) 1 to 8 of 8 / Page 1 of 1

	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude <input type="checkbox"/>
Merge					04/25/2022	4		<input type="checkbox"/>
Merge					05/19/2022	4		<input type="checkbox"/>
Merge					05/31/2022	4		<input type="checkbox"/>

The **Report Details** screen appears.

Important: In the **Report History** grid (shown below in green), note that only one report currently appears in this example.

2. Select either the **PDF** or **Excel** radio button.
3. Click the **Generate Report** button.

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Report Details

Report Category: Report Title: Potential Duplicate Persons By Agency Report

Report Type:

Report History

ID	Date Created	Employee ID	Name
	10/25/2011 03:50 PM		Caseworker, Ohio

Document History

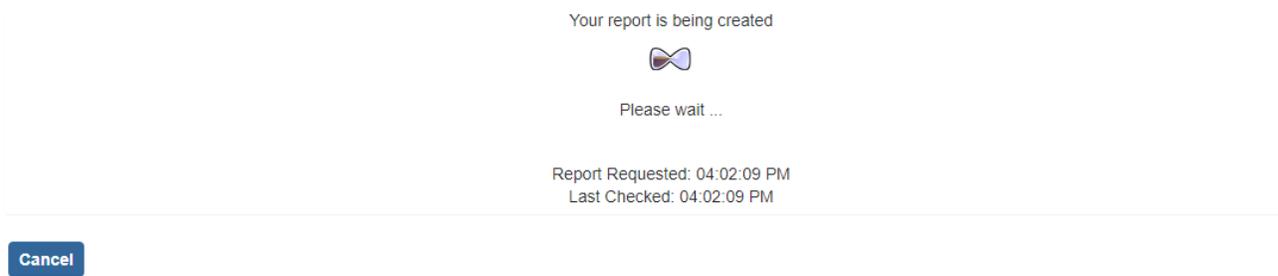
Select Report Output Format

PDF

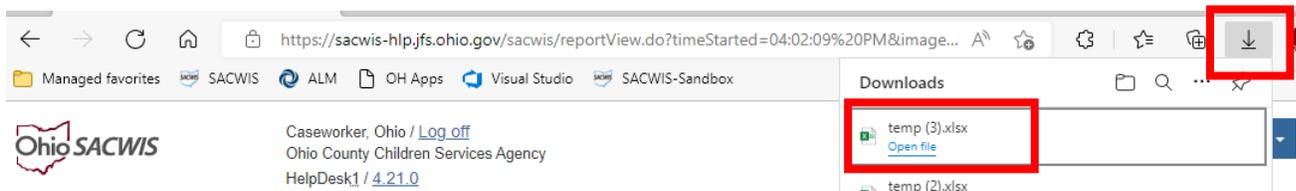
Excel

Generate Report

A message appears showing your report is being created.



The report appears in your downloads section in the top of your **Microsoft Edge** web browser.



4. Click the **Open File**.

Important: You can save the report to an Excel or PDF (depending on the format option you chose) or see steps below to do so from the **Report Details** screen.

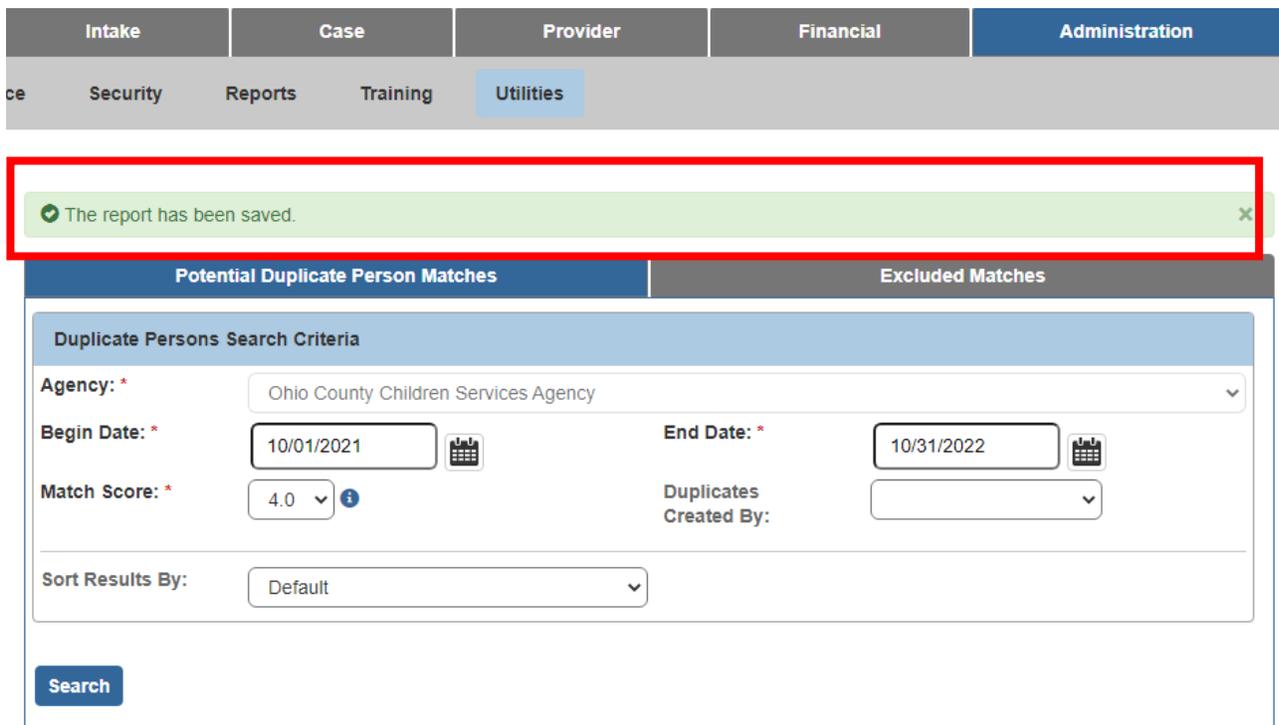
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5. If this message appears, click the **Save** button.

[If New Window Does not Open in a few seconds - Click here to open report](#)
Report Rpt334 has successfully run and the results displayed in a separate EXCEL window.
If you would like this report saved in the Report History, click the Save Button



The report is saved to the **Report Details** screen and indicated by a green message stating “report has been saved” on the **Duplicate Persons Search Criteria** screen appears.



The screenshot shows a navigation menu with tabs: Intake, Case, Provider, Financial, Administration, Security, Reports, Training, and Utilities. Below the menu is a green message bar: "The report has been saved." Below that is a form titled "Duplicate Persons Search Criteria" with the following fields:

- Agency: * (Ohio County Children Services Agency)
- Begin Date: * (10/01/2021)
- End Date: * (10/31/2022)
- Match Score: * (4.0)
- Duplicates Created By: *
- Sort Results By: (Default)

A "Search" button is located at the bottom left of the form.

Viewing a Saved Report

1. To view the saved report, click the **Identify Duplicate Person Report** button again.



Exclude from Potential Match

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The **Report Details** screen appears displaying the new report in the **Report History** section (with a PDF or Excel icon). As shown in green below, two reports now appear in this grid example.

2. Click the report number link to open the file and further research the information.

Report Details			
Report Category:	Report Title:	Potential Duplicate Persons By Agency Report	
Report Type:			
Report History			
ID	Date Created	Employee ID	Name
[Redacted] 	10/25/2011 03:50 PM	[Redacted]	Caseworker, Ohio
[Redacted] 	10/10/2022 05:56 PM	[Redacted]	Caseworker, Ohio

3. Report will show in your download tab, click the **Open**.

The Excel report appears as shown below.

A	B	C	D	E	F	G
Potential Duplicate Persons by Agency Report						
1						
2						
3	Agency:	[Redacted]				
4	Dates:	[Redacted]				
5	New Persons Created By:	[Redacted]				
6	Report Date:	[Redacted]				
7	Batch Run Date:	[Redacted]				
8						
9	*NOTE** Matches are scored based on similarities in data on both person records. A higher score indicates that there is a greater likelihood that person records are genuine duplicates. Regardless of the score, please confirm that the person records are genuine duplicates prior to completing a person merge.					
10						
11						
12						
13	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score
14	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
15	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
16	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

The PDF report appears as shown:

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Last Login:

Potential Duplicate Persons by Agency Report

Agency: [Redacted]
 Dates: [Redacted]
 New Persons Created By: [Redacted]
 Report Date: [Redacted]
 Batch Run Date: [Redacted]

NOTE* Matches are scored based on similarities in data on both person records. A higher score indicates that there is a greater likelihood that person records are genuine duplicates. Regardless of the score, please confirm that the person records are genuine duplicates prior to completing a person merge.

New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicate Created By
[Redacted]						

Excluding Non-Duplicate Person Records from Searches

If you've determined that the two people are not duplicates in Ohio SACWIS and should not be merged, but rather excluded from potential match searches in the future, complete the following steps:

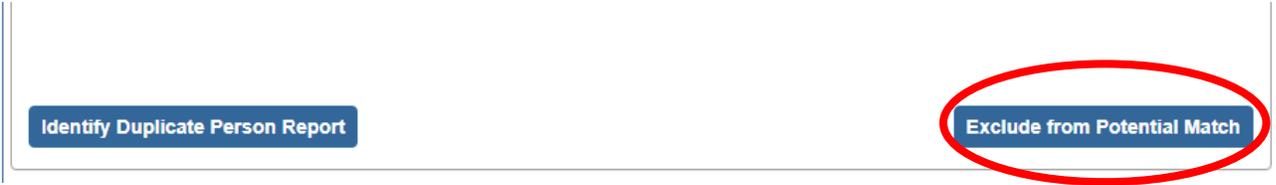
1. Navigate to the **Duplicate Persons Search Criteria** screen using the steps previously discussed.
2. In the **Duplicate Persons Search Results** section, select the **Exclude** check box in the appropriate row.
3. Click the **Exclude from Potential Match** button.

Duplicate Persons Search Results [Redacted]

Result(s) 1 to 8 of 8 / Page 1 of 1

	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude
Merge	[Redacted]				04/25/2022	4	[Redacted]	<input type="checkbox"/>
Merge	[Redacted]				05/19/2022	4	[Redacted]	<input checked="" type="checkbox"/>

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As shown in green, the selected row disappears from the grid.

	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude
Merge					04/25/2022	4		<input type="checkbox"/>

The excluded record now appears in the **Excluded Match Search Results** section as shown on the next page.

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Viewing Excluded Person Records

1. Click the **Excluded Matches** tab. The **Excluded Match Search Results** screen appears.
2. Enter the filter criteria in the fields.
3. Click the **Search** button. The excluded record appears in the **Excluded Match Search Results** section as shown in green below.
4. In the **Reason for Exclusion** field, type a reason, such as **Different people/Different DOB's**.
5. Click the **Apply Reason(s)** button.

Potential Duplicate Person Matches | **Excluded Matches**

Excluded Match Search Criteria

Agency: * Ohio County Children Services Agency

Begin Date: * 10/04/2022 | End Date: * 10/31/2022

Search

Excluded Match Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1

New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Reason for Exclusion	Include
					4		<input type="text"/>	<input type="checkbox"/>

Apply Reason(s) | **Include as Potential Match**

The information on the excluded matches list will not display again on any new potential duplicate person match searches.

Important: This record exclusion can be reversed. See the steps below to do so.

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Including a Person Record that should not have been Excluded

If you excluded a person record, but later determined the record should be included in future searches, complete these steps to change the status:

1. Navigate to the **Excluded Match Search Criteria** screen using the steps previously discussed.
2. Enter the appropriate filter criteria in the fields at the top.
3. Click the **Search** button. The results appear in the **Excluded Match Search Results** section.
4. Click the **Include** check box in the appropriate grid row.
5. Click the **Include as a Potential Match** button.

The screenshot displays the 'Excluded Match Search Criteria' and 'Excluded Match Search Results' sections. The search criteria include Agency (Ohio County Children Services Agency), Begin Date (10/14/2021), and End Date (10/31/2022). A 'Search' button is highlighted with a red circle. The results table has columns for New Person Name, New Person ID, Existing Person Name, Existing Person ID, Creation Date Of New Person, Match Likelihood Score, Duplicates Created By, Reason for Exclusion, and Include. The first row has a checked 'Include' checkbox, which is also highlighted with a red box. At the bottom right, an 'Include as Potential Match' button is highlighted with a red box.

New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Reason for Exclusion	Include
					4			<input checked="" type="checkbox"/>
					4			<input type="checkbox"/>
					4			<input type="checkbox"/>
					4			<input type="checkbox"/>

The row disappears from the **Excluded Match Search Results** screen.

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6. Click the **Potential Duplicate Person Matches** tab. The **Duplicate Persons Search Criteria** screen appears.
7. Enter the appropriate filter criteria (in the fields at the top) to locate the formerly excluded record.
8. Click the **Search** button.

Duplicate Persons Search Results								
Result(s) 1 to 7 of 7 / Page 1 of 1								
	New Person Name	New Person ID	Existing Person Name	Existing Person ID	Creation Date Of New Person	Match Likelihood Score	Duplicates Created By	Exclude <input type="checkbox"/>
Merge					04/25/2022	4		<input type="checkbox"/>
Merge					05/31/2022	4		<input type="checkbox"/>

The excluded person's record now appears in the **Duplicate Persons Search Results** grid and will appear during future searches.

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