

# Identifying Duplicate Persons in SACWIS

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

You may also need the **Merging Duplicate Persons** Knowledge Base Article for specific steps to complete a person merge.

## Creating a Security Profile

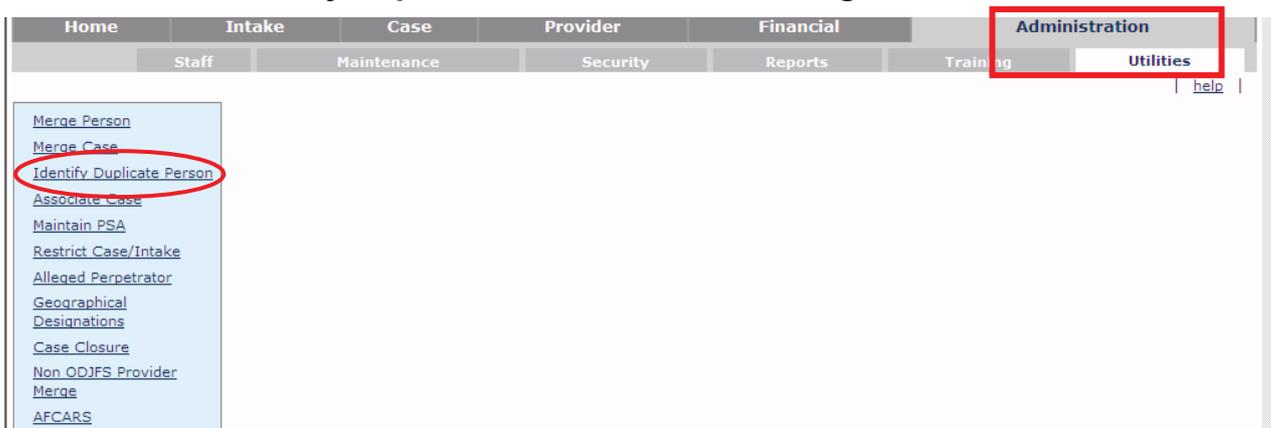
Prior to using this functionality, your agency must complete the following security steps to give you or other users the appropriate access rights:

1. Search for the existing user group called **Person Merge Administrator**.
2. For the **Person Merge Administrator** user group, add the following security profile: **Identify Duplicate Person Administrator**
3. Assign the **Person Merge Administrator** user group to the required user(s).

**Important:** To complete this process, you might also need the **Merging Duplicate Persons** Knowledge Base Article.

## Locating the Duplicate Person Records

1. On the 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.

## Identifying Duplicate Persons in SACWIS

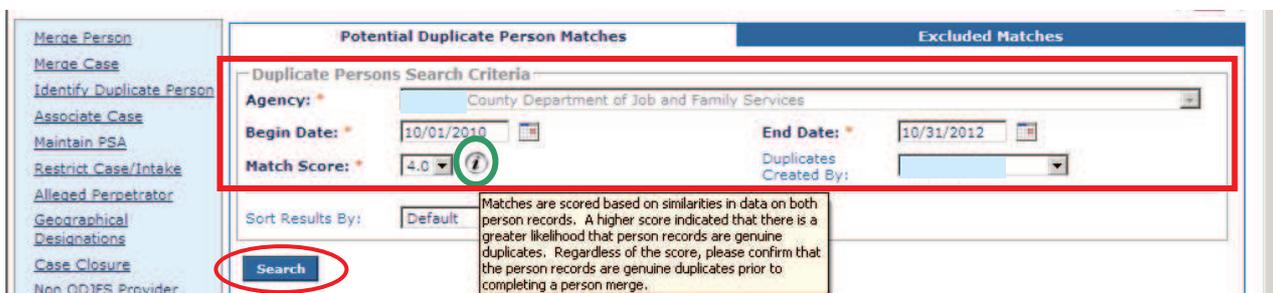
Complete the following fields:

4. In the **Agency** field, select the appropriate agency. (Your agency defaults.)
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.

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

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.

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



**Potential Duplicate Person Matches** | **Excluded Matches**

**Duplicate Persons Search Criteria**

**Agency:** County Department of Job and Family Services

**Begin Date:** 10/01/2010

**End Date:** 10/31/2012

**Match Score:** 4.0

**Duplicates Created By:**

Sort Results By: Default

**Search**

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.

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

# Identifying Duplicate Persons in SACWIS

## 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. The **Person Information** screen appears.
2. Verify the person's information is correct.
3. Click the **Cancel** button.
4. In the gray (cancel) **Message from Webpage** box, click the **OK** button. The **Duplicate Persons Search Criteria** screen appears.
5. Repeat the previous four steps with the link in the **Existing Person ID** column to verify that person's information also.

## 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.

The screenshot displays the 'Duplicate Persons Search Results' interface. On the left is a navigation menu with links like 'Merge Person', 'Merge Case', 'Identify Duplicate Person', etc. The main area is titled 'Potential Duplicate Person Matches' and contains search criteria: Agency (County Department of Job and Family Services), Begin Date (10/01/2010), End Date (10/31/2012), Match Score (4.0), and Sort Results By (Default). Below the criteria is a 'Search' button. The search results are shown in a table with columns: New Person Name, New Person ID, Existing Person Name, Existing Person ID, Creation Date Of New Person, Match Likelihood Score, Duplicates Created By, and Exclude. The first row of results has 'New Person ID' 1234567 and 'Existing Person ID' 7654321, both highlighted with red boxes. At the bottom of the results area, there are two buttons: 'Identify Duplicate Person Report' (circled in red) and 'Exclude from Potential Match'.

	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		1234567		7654321	06/17/2011	3		<input type="checkbox"/>
Merge					09/28/2011	3		<input type="checkbox"/>
Merge					09/28/2011	3.5		<input type="checkbox"/>
Merge					10/17/2011	3		<input type="checkbox"/>
Merge					10/17/2011	3		<input type="checkbox"/>

The **Report Details** screen appears.

## Identifying Duplicate Persons in SACWIS

**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.

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

Report History

ID	Date Created	Employee ID	Name
	09/28/2011 10:49 AM		

Document History

Select Report Output Format

PDF  
 Excel

Generate Report

A message appears showing your report is being created.

Your report is being created

Please wait ...

Report Requested: 05:46:33 PM  
Last Checked: 05:46:33 PM

The report appears on your screen.

4. If this gray message box appears, click either the **Open** or **Save** button.

**Important:** You can open/save the report now or see steps below to do so from the **Report Details** screen.

File Download

Do you want to open or save this file?

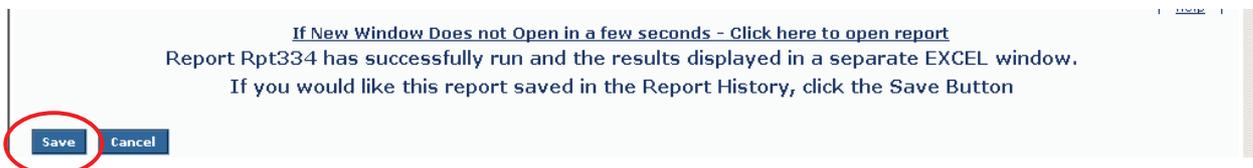
Name: temp.xls  
Type: Microsoft Office Excel 97-2003 Worksheet, 8.67 KB  
From: sacwisuat.odjfs.state.oh.us

Open Save Cancel

Always ask before opening this type of file

## Identifying Duplicate Persons in SACWIS

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



The report is saved to the **Report Details** screen (**Report History** section). The **Duplicate Persons Search Criteria** screen appears.

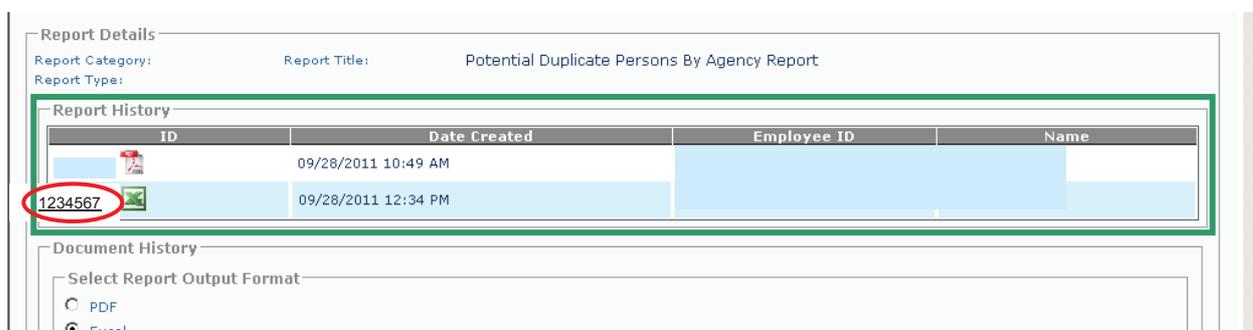
### Viewing a Saved Report

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



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.



## Identifying Duplicate Persons in SACWIS

3. If the gray message box appears again, click the **Open** or **Save** button, as needed.

The Excel report appears as shown below.

Potential Duplicate Persons by Agency Report						
Agency:						
Dates:						
New Persons Created By:						
Report Date:						
Batch Run Date:						
*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	Existing Person ID	Creation Date Of New	Match Likelihood	Duplicate Created
				05/22/2011	4	
				05/19/2011	4	

The PDF report appears as shown:

Potential Duplicate Persons by Agency Report						
Agency:						
Dates:						
New Persons Created By:						
Report Date:						
Batch Run Date:						
*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
				05/22/2011	4	
				05/19/2011	4	

# Identifying Duplicate Persons in SACWIS

## 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.

The screenshot shows the 'Duplicate Persons Search Results' section of the SACWIS interface. On the left is a navigation menu with links like 'Merge Person', 'Merge Case', etc. The main area is titled 'Potential Duplicate Person Matches' and contains search criteria: Agency (County Department of Job and Family Services), Begin Date (10/01/2010), End Date (10/31/2012), Match Score (4.0), and Sort Results By (Default). Below the search criteria is a 'Search' button. The search results are displayed in a table with the following columns: New Person Name, New Person ID, Existing Person Name, Existing Person ID, Creation Date Of New Person, Match Likelihood Score, Duplicates Created By, and Exclude. The first row of results shows a 'Merge' link in the first column, which is highlighted with a red box. The table also shows a 'Result(s) 1 - 9 of 9' and 'Page 1 of 1'.

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

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

The screenshot shows the 'Retain Person / Remove Person' screen in the SACWIS interface. The navigation menu at the top includes 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration'. The 'Merge Person' link in the left navigation menu is highlighted with a green box. The main area is divided into two panels: 'Retain Person' and 'Remove Person'. Each panel has a 'Search Person' button and input fields for Person ID, Name, Gender, SSN, and Address. Below the input fields is a 'Historical SSN' section with a 'No Records Found!' message. At the bottom of the screen are two buttons: 'Compare Records' and 'Switch Person IDs'.

The two person records are now merged.

## Identifying Duplicate Persons in SACWIS

### Excluding Non-Duplicate Person Records from Searches

If you've determined that the two people are not duplicates in 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

Result(s) 1 - 2 of 2 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
<a href="#">Merge</a>					03/22/2011	4		<input type="checkbox"/>
<a href="#">Merge</a>					05/19/2011	4		<input checked="" type="checkbox"/>

[Identify Duplicate Person Report](#) [Exclude from Potential Match](#)

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

Duplicate Persons Search Results

Result(s) 1 - 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	Exclude
<a href="#">Merge</a>					03/22/2011	4		<input type="checkbox"/>

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

# Identifying Duplicate Persons in SACWIS

## 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: \* County Department of Job and Family Services

Begin Date: \* 01/01/2011 End Date: \* 09/30/2011

Search

Excluded Match Search Results

Result(s) 1 - 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="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.

## Identifying Duplicate Persons in SACWIS

### 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 shows the 'Excluded Match Search Criteria' screen. The 'Search' button is circled in red. The 'Include' checkbox in the results table is checked. The 'Include as a Potential Match' button is also circled in red.

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"/>

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

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.

The screenshot shows the 'Duplicate Persons Search Results' screen. The second row in the results table is highlighted with a red border.

	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					03/22/2011	4		<input type="checkbox"/>
Merge					05/19/2011	4		<input type="checkbox"/>

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