

Merging Duplicate Persons in SACWIS

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

Once person records are merged, they cannot be unmerged. Therefore, do not substitute 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 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 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.

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Merging Person Records in SACWIS

To merge duplicate person records, complete the following steps:

1. On the 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 screenshot shows the SACWIS Administration Utilities page. The 'Administration' and 'Utilities' tabs are highlighted with red boxes. In the left navigation menu, the 'Merge Person' link is circled in red. The main content area is divided into two sections: 'Retain Person' and 'Remove Person'. Both sections have a 'Search Person' button circled in red. Below these buttons are input fields for Person ID, Name, Gender, SSN, and DOB, with a 'Historical SSN' button below the SSN field. There are also fields for Address and Phone.

The **Person Search Criteria** 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 screenshot shows the 'Person Search Criteria' screen. The search criteria fields are highlighted with a red box. The fields include Prefix, Last Name, First Name, Suffix, Middle Name, DOB, Gender, Person ID, From Age, To Age, Race, and Hispanic/Latino. There are checkboxes for 'AKA' and 'Sounds Like'. Below the search criteria is an 'Advanced Search Criteria' section and a 'Sort Results By' dropdown set to 'Last Name Ascending'. At the bottom, there are 'Search', 'Clear Form', and 'Return' buttons. The 'Search' button is circled in red. Below the buttons is the 'Person Search Results' section, which shows a table with one result. The 'select' link in the first row of the table is circled in red.

Person ID	Name	Street	City	State/Zip	Gender	Age	DOB	Active Case
1234567								Yes

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

The screenshot shows the SACWIS interface with the 'Retain Person' section highlighted in green. The 'Retain Person' section contains a search bar with 'Person ID: 1234567', 'Name: Sacwis, Susie', and 'Gender: Female'. Below this is a 'Historical SSN' section with the message 'No Records Found!'. The 'Remove Person' section is also visible but empty.

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

The screenshot shows the SACWIS interface with the 'Remove Person' section highlighted in red. The 'Remove Person' section contains a search bar with 'Person ID: 1234567', 'Name: Sacwis, Susie', and 'Gender: Female'. Below this is a 'Historical SSN' section with the message 'No Records Found!'. The 'Retain Person' section is also visible but empty.

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

Merging Duplicate Persons in SACWIS

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

Merge Person

- Identify Duplicate Person
- Associate Case
- Maintain PSA
- Restrict Case/Intake
- Alleged Perpetrator
- Geographical Designations
- Case Closure
- AFCARS

Retain Person

Search Person

Person ID: 1234567
Name: Sacwis, Susie
Gender: Female
SSN: [Redacted] DOB: [Redacted]

Historical SSN
No Records Found!

Address: [Redacted]
Phone: [Redacted]

Remove Person

Search Person

Person ID: 7654321
Name: Sacwis, Susie Q.
Gender: Female
SSN: [Redacted]

Historical SSN
No Records Found!

Address: [Redacted]
Phone: [Redacted]

Compare Records 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 SSN records are merged, they cannot be unmerged.

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

Compare Records Switch Person IDs

Person Record Comparison

	Retain Person	Remove Person
Person ID	1234567	7654321
Name	<input checked="" type="radio"/> SACWIS, Susie	<input type="radio"/> SACWIS, Susie Q.
SSN	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]
DOB	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]
Hospital of Birth	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]
Primary Address	<input checked="" type="radio"/> RESIDENCE [Redacted]	<input type="radio"/> RESIDENCE [Redacted]
Primary Contact	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]

Merge Cancel

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

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

Successfully merged the duplicate persons. [close confirmation](#)

	Retain Person	Remove Person	Merged Person
Person ID			
Name			
SSN			
DOB			
Previous Adopted Code			
Primary Address			
Primary Contact			

[Close](#)

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

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

[Profile](#) | [Education](#) | [Medical](#) | [Employment](#) | [Military](#) | [Delinquency](#) | [SACWIS History](#)

[Basic](#) | [Demographics](#) | [Address](#) | [Add'l](#) | [Background](#) | [Characteristics](#) | [Safety Hazard](#) | [Confidential Information](#)

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.

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Person Merge Information and Troubleshooting, continued

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

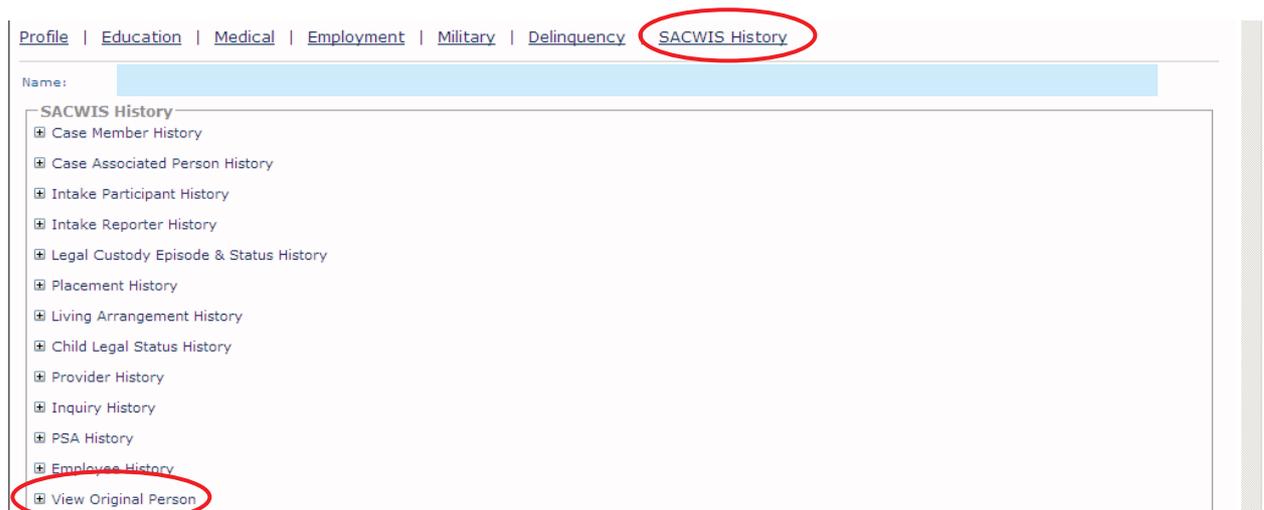
Pre-Adoptive or Post-Adoptive Person Records

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.

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



The screenshot shows the SACWIS History screen. At the top, there are navigation tabs: Profile, Education, Medical, Employment, Military, Delinquency, and SACWIS History. The SACWIS History tab is circled in red. Below the tabs, there is a Name field with a redacted value. Underneath, there is a list of history items, each with a plus icon and a redacted value. The items are: SACWIS History, Case Member History, Case Associated Person History, Intake Participant History, Intake Reporter History, Legal Custody Episode & Status History, Placement History, Living Arrangement History, Child Legal Status History, Provider History, Inquiry History, PSA History, Employee History, and View Original Person. The View Original Person link is circled in red.

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

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Person Merge Information and Troubleshooting, continued

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 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, 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 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 in order 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