Memo

To: CONNECTIONS Implementation Coordinators and Directors of Services

From: CONNECTIONS Communications

Date: November 7, 2003

Re: Multiple Instances of the Same Person In CONNECTIONS

Requests have come from local districts asking for an easy to use report that identifies multiple instances of the same person within CONNECTIONS. This clean up effort provides much better information for person searches, the Individual Report Involvement report (IRI) and will make the system generated field on the Risk Assessment Profile (RAP) called "Total prior reports for adults and children in RAP family unit" more accurate. The Risk Assessment Profile or RAP will be implemented in Build 16, which is scheduled for release in early December 2003.

This memo provides you with information on the Multiple Person Data Clean Up Report such as: when it will be run, how to get the report, how to use the report, and how to fix the data. A sample report is attached to this document.

The report has been developed in Microsoft Excel as a spreadsheet and can be used like any other spreadsheet, e.g., it can be re-sorted, filters can be applied, rows and/or column can be added or hidden, it can be saved to another location, etc. It should be noted that the report will be issued on the first Monday of each month and will reside in the Public Folders. The path to the reports is: All public folders>*Statewide>CONNECTIONS>Multiple Person Report>Your District ID - Your District Name. Initial access to the report will be given to the Implementation Coordinator at your district. It should be noted that there is a form attached to this memo to be used to add other persons to receive this report. If you wish to add someone else who should have access to the folder you may notify your CONNECTIONS Regional Field Support staff person.

This report will be generated for each local district and will display all CONNECTIONS persons that appear to be candidates for the Person Merge process. For each district, the report displays people having more than one occurrence of the same: Full Name, Sex and Date of Birth. For each person, the report shows the address of the person, the number of cases involving that person, it indicates if another county is involved with cases that include that person, displays the PID, corresponding WMS CIN (if available), full name, sex, and date of birth of the person, the case status, a case ID and includes the ID of the worker on the case. It should be noted that all people with "UNKNOWN" in the name field have been filtered out of the report, as have people in sensitive cases.

Following are two sets of instructions identifying step-by-step procedures to complete Person Merges using the Multiple Person Data Clean Up Report.

Instructions for Person Merges Using the Multiple Person Data Clean Up Report

- Click on the PERS button on the CONNECTIONS toolbar.
- Perform a person search for duplicates listed on the report.
- Review the person search results to determine if more potential duplicates exist, perhaps in other counties. Another case may appear with the same name but with a date of birth of January 1st and the same or nearly the same year-of-birth. This person could also be determined to be the same person and should be evaluated for potential merge. If the case is found to impact another county, the worker in the second county should be contacted before any merges are completed.
- Select "Case List" for each person being evaluated, and look at the COMP (family Composition) for each case. If it appears that the COMP is the same or similar, you may be able to conclude that this is the same person.
- If the COMP is different, further evaluation may be warranted. It may be that the individual was a child in one case, and then a parent in another. In some cases it may be necessary to read the case notes or contact the former worker to verify that this is, in fact, the same person before a decision can be made.
- If you cannot make a decision that the people listed on the duplicate/multiple person list are the same person, no further action is required on the system. Make a notation on the spreadsheet that the people listed are "Different" or you are "Unable to Determine"
- If you make a decision that the people listed on he duplicate/multiple person list are the same person, determine which of the duplicates will be the one to keep (referred to in the documentation as the "Merge Forward Person"). The other person is referred to as the "Merge Closed Person", and she/he will be "retired" in CONNECTIONS. The CONNECTIONS Merge/Split must be performed for each person that is to be merged to the "Merge Forward Person". If a person has already been merged (has a red check mark in the M/S column), select that person as the Merged Forward Person.
- Go back to the Results of the Person Search window.
- Select the person that will be "retired" – the "Merge Closed Person" and click on the "Case List" button.
- Select a case; usually the newest one is best.
- Click on the "Summary" button (You can get the list of people by clicking on the COMP button, but you won't be able to do a merge – select the Summary button.).
- Select an INV stage; usually the newest one is best.
- From the Options Menu, Select "Person List".
- Select the Person to be "retired", the Merge Closed Person.
- From the Options Menu, Select "Person Merge/Split".
- The Person Merge/Split window will appear. Check that the Merged Persons, Closed Section, is accurate.
- Enter the Person ID of the Merge Forward Person (the one you are keeping) and click on the "Validate" pushbutton. This will retrieve the name associated with that ID.

Cont. Instructions for Person Merges Using the Multiple Person Data Clean Up Report

- If the Forward and Closed information looks correct, click on the “Merge” pushbutton and answer, “Yes” to the pop-up question “The person is in open stages. Merge with extreme caution. Continue?” and/or “Merge PID # to PID # ?” confirming your merge.
- A screen will appear which will allow you to select which demographics to keep for the Merge Forward Person. You can select some demographics from the Merge Forward Person and some from the Merge Closed Person. Generally, the person with the highest Person ID would have the most current demographics.
- Click on the “OK” button and then Click on “Save”.
- Mark the spreadsheet with which person was Merged Forward and which was Merged Closed.

Instructions for Person Merges Using the Multiple Person Data Clean Up Report If You Are Familiar With CONNECTIONS

The person you are keeping is known as the “Merge Forward Person”. The person to be “retired” from CONNECTIONS is known as the “Merge Closed Person”.

- **Do the Research** – do a person search using a name from the Multiple Person list. View the Case Lists for each person that might be a duplicate. Press COMP to look at the case composition for each case and evaluate whether the people listed are in fact the same person.
- **Decide which person will be the Merge Forward Person (the PID which will be current in the system from this point on).** If a person has already been merged (has a red check mark in the M/S column), select that person as the Merged Forward Person.

The CONNECTIONS Merge

- **Go back to the Person Search results window and select a person to be retired (Merge Closed Person).** Always start the merge process with a person to be retired.
- **Select “Case List” and select a case;** usually the newest is best.
- **Select the “Summary” button from the Case List window.**
- **Select an INV stage;** usually the newest is best.
- **From the Options Menu, select “Person List…”**
- **Select the Person to be “retired”**
- **From the Options Menu, select “Person Merge/Split…”** The person to be “retired” will be listed in the Merge Closed Section.
- **Enter the Person ID of the Merge Forward Person**, validate and Select the Merge pushbutton.
- **Choose those demographics that are most accurate.**
- **Click ok and then save**.

- **Mark the Spreadsheet** with which Person was Merged Forward and which was Merge Closed.

As a reminder, attached to this memo are two documents; the first is a sample Multiple Person Data Clean Up Report, the second is the form that districts should complete to identify who should receive this report.

If you have any questions regarding the content of this memo you may contact your CONNECTIONS Regional Implementation Field Staff person or, Suzanne Frizzell at (518) 473-4342.

Attachment

SAMPLE

Multiple Person Data Clean Up Report

County "X"

CONNX CIN	PID	Full Name	Date of birth	SEX	ADDR	City	Case ID	Other Counties?	Case Status*	# of Cases	Worker ID
AG74753W	20290949	Smith, Betty	10/05/53	F	1 Anywhere Ct.	Albany	20200802	041,042,053		9	5555
	20610052	Smith, Betty	10/05/53	F	1A Anywhere Ct.	Albany	40000000		Open Investigation	3	6363
	40909090	Allan, Roger	4/6/87	M	10 Public Way	Albany	56666666	041	Active FAD	1	9999
	56565656	Allan, Roger	4/6/87	M	10 Public Way	Albany	88888888			1	2222
XV2324A	99999999	Baker, Kathy	7/1/69	F	44 Golden Oaks	Albany	10101010	26	Open for services	3	XXXX
		Baker, Kathy	7/1/69	F	44 Golden Oaks	Albany	99999999			1	SSSS

***Blank in Case Status = Closed**

Attachment

Additional Contact Person for the Multiple Person Data Clean Up Report Form for Districts

Name:

Phone Number:

NT Logon ID:

Submitted by:

Name:

Date: