MEMORANDUM

To: CONNECTIONS Implementation Coordinators and Directors of Services

From: CONNECTIONS Communications Team

Date: July 6, 2004

Re: Multiple Instances of the Same Person In CONNECTIONS-Report Revision

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Last fall, the CONNECTIONS team published the availability of this report for Districts to use to clean up persons in the CONNECTIONS database that may have been duplicated. A great deal of progress has been made on this project. We have changed the report slightly to provide better information. The purpose of this memo is to document those changes and to expand the instructions on correcting the CONNECTIONS database.

The report is currently issued 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.

The report is issued on the first Monday of the month and you must map a drive to \\fnpcfs0a1ac\groups\connections. You will then find a subdirectory called BUILD 18. Open that and you will find two directories Conversion and MPR. You will locate your Multiple Person Report by (MPR) by "Your District ID - Your District Name". The report will be password protected. Initial access and the password will be given to the Implementation Coordinator at your district by the assigned Field Support staff for your county. If you wish to add someone for access to the folder, please notify your CONNECTIONS Regional Field Support person via email or letter and we will set that person up as well.

The 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, 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 (active or inactive), a case ID and includes the ID of the worker on the case. If the potential duplicates are in one or more stages, those stages are noted. All people with "UNKNOWN" in the name field have been filtered out of the report. In addition, all people involved in sensitive cases have been filtered out of the report.

The Conversion Planning Report, which demonstrates the actual conversion of WMS services cases to CONNECTIONS, is in process of being documented and tested now. We will send a memo similar to this memo when it is available for your use.

Person Merges using the Duplicate/Multiple Persons Report - Step-by-Step

A) Research: Before merging individuals, it's necessary to perform a person search to confirm the merge decision, identify other possible merge candidates, and to determine which case/stage to access for the merge.

1. Click on the PERS button on the CONNECTIONS toolbar.
2. Perform a person search for duplicates listed on the report. Enter name and date of birth.
3. Review the person search results to determine if more potential duplicates exist, perhaps in other counties. Be sure you scroll all the way over on the window so that you compare the match name to the primary names.
4. Another result 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
5. 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. When analyzing more than one case, ensure that the cases have at least one other person in common. . If the case is found to impact another county, the worker in the second county should be contacted before any merges are completed.
6. 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. There are also instances of 'bad relates" when, for instance, a son and Father share the same name. Please ensure that you compare all demographic data before merging.
7. If the people to be merged exist in the same stage, special instructions for merging are needed. (***See below for Special Instructions when merging people within the same stage***.)
8. Please also ensure that the county (query on Address List Detail) is entered on all merges.
9. 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"
10. If you make a decision that the people listed on the 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.

B. Performing the Merge

1. Go back to the Results of the Person Search window.

2. Select the person that will be "retired" – the "Merge Closed Person" and click on the "Case List" button.
3. Select a case; usually the newest one is best.
4. 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.).
5. Select an INV stage; usually the newest one is best. (Note, if the people to be merged exist in the same stage, special instructions for merging are needed. (***See below for Special Instructions when merging people within the same stage***.)
6. From the Options Menu, Select "Person List".
7. Select the Person to be "retired", the Merge Closed Person.
8. From the Options Menu, Select "Person Merge/Split".
9. The Person Merge/Split window will appear. Check that the Merged Persons, Closed Section, is accurate.
10. 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.
11. 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.
12. 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. However, most Districts consistently update the demographics to the "oldest" or lowest number PID and then retire the "newest" or highest number.
13. Click on the "OK" button and then Click on "Save".
14. Mark the spreadsheet with which person was Merged Forward and which was Merged Closed.

Special Instructions when merging people within the same stage. In addition, please check other stages that contain these same potential duplicates. Consistency among all stages the two or more records appear in is necessary prior to merging.

- For every case identified as having duplicate person ID's, print the person list of each INV stage to see if the two PID's are in the same stage(s).
- If there are two or more INV stages and each PID is found in a stage but no INV stage has both PIDS, then follow general merge instructions.
- If only one stage has both PIDS, you must select that stage to complete the merge. Merge the two person IDS from within the stage containing both PIDS, and CONNECTIONS will recalculate the roles.
- When 2 PIDS have two or more stages in common, there is the potential that the merge could create a role conflict in those stages. From the stages with both PIDS, chose the stage in which you want to perform the merge. All the other shared stages with these PIDS must meet one of the following conditions in order to avoid creating a role conflict:
    - If the same person (PID) within all the other shared stages has a role of UK, NO or XE, then merge. (Keep the PID with the role other than these roles.)

- If both persons (PIDS) within all the other shared stages have the same role in each stage, merge.
- If both persons (PIDS) within all the other shared stages have different roles within the same stage but the roles are in the same 'series' (see below), AND, one PID always has a lower role in all the shared stages, then merge
- ROLES Hierarchy (highest to lowest): Child -- CA-CM-AB-MA-NA-NM-UK-NO-XE; Subject – CS-AS-NS-UK-NO-XE
- If these conditions are not met in any of the other shared stages, additional data maintenance is required to complete the merge. You must correct the data so that the conditions listed above are met.

If you have any questions regarding this notice, please contact the CONNECTIONS Implementation Staff in your region or, Suzanne Frizzell at 518-473-4342.

Additional Contact Person for the Multiple Person Data Clean-up Report: District

Name:

Phone Number:

NT Logon ID:

Submitted by:

Name:

Date: