



# CONNECTIONS Tip Sheet

## Multiple PIDs: Troubleshooting Merge Error Messages

December 2014

*Historical information about individuals in CONNECTIONS is stored by Person Identification Number (PID). If more than one PID exists for the same person, search results on one PID will bring back only a partial history. This gives only partial information from which risk ratings are calculated or with which to make a safety decision – a potentially dangerous situation for both workers and families. This tip sheet explores how multiple PIDs are created, details error messages that may occur when attempting to merge duplicate PIDs and offers troubleshooting suggestions.*

### How Do Duplicate PIDs Originate?

A duplicate PID may result when:

1. A report to the SCR does not contain sufficient information to identify whether a person is already in the database.  
  
Each “Unknown, Unknown” or “Unknown, Mary” on an incoming report, for example, is assigned a new PID. AKA-ing the incoming person to a person known to CONNECTIONS associates the two identities but does not eliminate the duplicate PID; the duplicate PIDs must also be merged.
2. A report to the SCR does not contain sufficient information to relate an incoming person to an existing person in the database (e.g., it’s John Smith, but is it the same John Smith?). In these situations, local district caseworkers may have greater knowledge of the family and/or can gather additional information to determine whether there is an existing identity in the database with which the new PID should be merged.
3. A new PID is created whenever a person is added to an INV, FAR, FAD, FSI or FSS stage. CONNECTIONS requires a search of the database as part of the adding process. If database results are viewed without a thorough consideration of possible matches (ages, dates of birth, stage composition, addresses, involvement in other counties), duplicate PIDs can result.

A match identified during the search process should be related – which automatically combines the newly created PID with the existing one. If there is insufficient information to relate individuals, additional information should be gathered and duplicates merged later if necessary.

**NOTE:** Each district has access to the Multiple Person Report (MPR) which displays persons who are similar enough to be *possible* database matches. It is essential that districts have a process to regularly review this report and merge those persons who have duplicate identities in the system.

### What is Merging and Splitting?

Merging is a corrective process by which two PIDs are combined. One PID (Person Forward) continues on and is available for future use. The other PID (Person Closed) is replaced by the Person Forward PID in all stages past and present and is no longer available for use in the future stages.

Splitting is a process which reactivates a PID that has been closed by a merge so it can be used again. It does not, however, reverse all the effects of the merge. The reactivated PID, along with roles and allegations, must be manually reentered in every closed FAR and INV stage in which it once appeared – a very time consuming and labor intensive process.

### Who Can Do a Merge?

Correcting instances of multiple PIDs requires careful, detailed analysis. Merging is a complicated process that should only be done by trained workers who are certain the records they are combining belong to the same person. **When in doubt, do not merge.**

Merges can only be done by local district workers who have been assigned the Person Merge/Split business function. Voluntary Agency workers who identify the existence of duplicate PIDs should contact the local district so that the proper corrections can be made.



**Reminder:** Generally, the PID with more history (typically the older one) is used as the Person Forward during a merge. However, FSS Health Services information from the Person Closed identity is not brought into the Person Forward's information during a merge. In situations where health information exists, the PID associated with the FSS should be designated the Person Forward. Otherwise, health information from the Person Closed must be manually reentered to avoid it being lost. The Child Health History Report in the Health module of the FSS can be printed to capture this information and aid in its reentry.

### Merge Error Messages

In order to avoid errors that could result in combining identities incorrectly, a number of edits are present in CONNECTIONS to terminate a flawed merge process. Workers may receive a warning message if they are attempting a merge that could be problematic.

In some cases, error messages reflect accurate complications with merging two PIDs, and users should discontinue the merging process. Examples of each are presented in the below table.

## COMMON MESSAGES AND RECOMMENDATIONS

WARNING MESSAGE		RECOMMENDATIONS
WARN: The age difference is greater than 5 years		Verify that these individuals are the same person and if so, merge with caution. Be particularly careful with father/son namesakes.
WARN: The persons may not have the same gender		Verify that these individuals are the same person and if so, merge with caution.
ERROR MESSAGE	STATUTE	RECOMMENDATIONS
ERR: The Social Security numbers do not match	If SSNs have been recorded for both individuals, they must be the same in order to complete a merge.	If these individuals are the same person, verify which number is correct by crosschecking WMS for discrepancies. Change the stage with the incorrect number in CONNECTIONS to match WMS. Retry merge. If WMS shows these Social Security numbers belong to two different persons, <i>do not merge</i> .
ERR: The Medicaid numbers do not match	If Medicaid numbers have been recorded for both individuals, they must be the same in order to complete a merge.	If these individuals are the same person, verify which number is correct by crosschecking WMS for discrepancies. Change the stage with the incorrect number in CONNECTIONS to match WMS. Retry merge. If WMS shows these Medicaid numbers belong to two different persons, <i>do not merge</i> .
ERR: Services CIN's must match	If services CINs exist for both individuals, they must match. This applies only to CINs that are checkbox valid and WMS date-validated.	Crosscheck WMS regarding the CINS of both persons. <i>Consider if a CIN Consolidation is appropriate</i> (upstate).

ERR: The Person Closed is involved in an open intake	The <i>Person Closed</i> PID you are attempting to close cannot be part of an open intake (INT) stage.	You must wait until the CPS INT is stage progressed into an INV or FAR stage before merging. This is usually an Add Info or DUP stage that is not closed yet through Intake Priority Closure.
ERR: Merge will cause Prsn to be subj. & MA/AB child in the same Allegation.	If the persons being merged exist in the same allegation, one as the maltreated/abused child and the other as the alleged subject, the merge is not allowed.	<i>You cannot proceed.</i> This may be a father and son with the same name or the result of a previously bad merge which needs to be corrected Review the FAR or INV stage for any data entry issues, including prior closed cases and stages as well as demographic changes. If a data entry issue is involved, analyze further to determine the origin of the error and if it can be locally fixed. <i>This may require a data fix. Otherwise, the merge may not occur.</i>
ERR: Child with an active PPG, cannot be the Person Closed	A currently tracked child with an active Permanency Planning Goal (PPG) cannot be the Person Closed.	If these individuals are the same person, switch the Person Forward PID and the Person Closed PID and retry the merge.
ERR: Child with an active PC, cannot be the Person Closed	A currently tracked child with an active Program Choice (PC) cannot be the Person Closed.	If these individuals are the same person, switch the Person Forward PID and the Person Closed PID and retry the merge.
ERR: Both children are in open CCRs, close one CCR prior to child Merge.	A child is in open Child Case Record (CCR) cannot be merged with another child in another open CCR.	Close one of the CCR cases.

### ERRORS THAT PREVENT MERGING

ERR: The entered ID is not found. Verify IDs	Both persons need to be on the Person Table in the CONNECTIONS database.	<i>Cannot Merge.</i> You may have the wrong number due to a typographical error.
ERR: The Person ID entered has the status of Person Closed from a prior merge	The <i>Person Forward</i> PID cannot have been the <i>Person Closed</i> in any previous merges.	<i>Cannot Merge.</i> You may have the wrong number due to a typographical error
ERR: Pers Closed is Employee or fmr Employee. Merge is not allowed.	The <i>Person Closed</i> cannot be an employee or former employee.	<i>Cannot Merge.</i> Employee PIDs cannot be merged.

ERR: Pers Forward is Employee or fmr Employee. Merge is not allowed.	The <i>Person Forward</i> cannot be an employee or a former employee.	<i>Cannot Merge.</i> Employee PIDs cannot be merged.
ERR: Merge is disallowed for programmatic reasons	A pre-adoptive PID and a post-adoptive PID for the same child cannot be merged.	<i>Cannot Merge.</i>
ERR: Merge is disallowed for programmatic reasons	A child finalized for adoption cannot be merged with another child finalized for adoption.	<i>Cannot Merge.</i>
ERR: Merge is disallowed for programmatic reasons	A PID created when an adoption is finalized may be merged as long as it is the <i>Person Forward</i> . The <i>Person Closed</i> PID must have been created <u>after</u> the adoption finalized PID.	Verify the origin of both PIDs to be sure they are both post-adoptive. <i>Otherwise, cannot merge.</i>
ERR: A currently tracked child cannot be merged with any person over 21 years of age	A <i>tracked child</i> cannot be merged with any person over 21 years of age.	Review WMS for possible date of birth discrepancies or whether a date of birth is approximate. <i>Otherwise, cannot merge.</i>
ERR: The Closed Person cannot be enrolled in an open B2H waiver	The person cannot be current enrolled in the Bridges to Health (B2H) waiver program.	Crosscheck if person is still actively enrolled in the B2H waiver program. If yes, <i>cannot merge.</i>

**Reminder:** In all areas of CONNECTIONS, you can press F1 for help

## **Resources:**

CONNECTIONS Step-By-Step Guides:

<http://ocfs.ny.gov/connect/jobaides/>

NYS Customer Care Center #  
1-800-697-1323

CONNECTIONS Regional Implementation Staff:

<http://ocfs.ny.gov/connect/contact.asp>

CONNECTIONS Application questions:

[ocfs.sm.conn\\_app@ocfs.state.ny.us](mailto:ocfs.sm.conn_app@ocfs.state.ny.us) (NOTE: address contains an underline)

CONNECTIONS Communications

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