CONNECTIONS

July 13, 2006

Person Relate/Merge Procedural Update

*** (Never Relate/Merge an Employee with a person in any stage) ***

Although Client/Provider Person Identifiers (PID) and Employee Person Identifiers are stored together in the CONNECTIONS application, and are returned when performing a Person Search, they serve very separate and distinct purposes.

- A *Client/ Provider Person Identifier* is created for a person in receipt of services and/or for a person who provides a service such as being a foster parent.
- An *Employee Person Identifier* is established only to assign staff to a particular Agency/Office/Unit and to allow them to manage their workload if appropriate. Please note that just the list of Employees is returned when a user performs a staff search.

If a person is both a client and a provider of a service they should have only one Client/Provider Person Identifier and they should be related or merged in all stages. However, if an **employee** ever becomes a person receiving services or, a provider of services, a separate Client/Provider Person Identifier must be established. Their Employee Person Identifier and Client/Provider Identifier should never be related or merged together.

Having separate Person Identifiers for clients/service providers and staff also helps to maintain an employee's confidentiality related to their personal involvement in a stage.

When performing a Person Search to enter someone into a stage the common factors to determine if you are viewing an Employee Person Identifier are:

- there will be no D.O.B.
- the Sex column will contain a "U" for Unknown
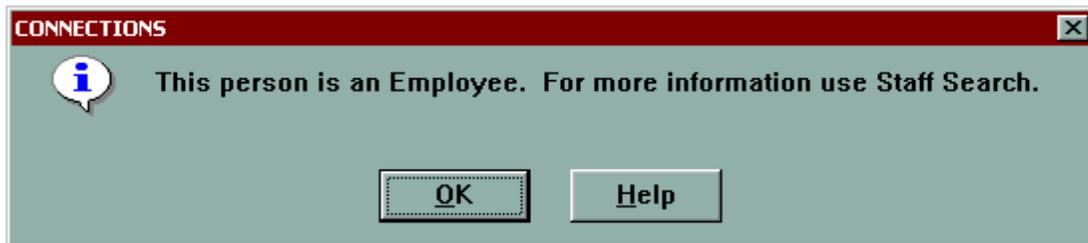- there will be no address information

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Depending on the type of stage you are adding a person to, you will also receive pop-up messages that will indicate the person selected is an employee. For instance if you are adding a person to a CPS Intake or a Family Services Intake, you will receive a pop-up stating:

If you are ever presented with this message you must **NOT** relate the selected Person Identifier to the stage.

If you attempt to relate an Employee PID to a Foster or Adoptive Home (FAD) stage, a Family Services Stage or a CPS Investigation stage or performing a Person Merge, you will receive a message stating, "Sex mismatch between individuals. Do you wish to Continue?" (Which is related to the employee's sex being listed as "Unknown".) If this occurs you should attempt to look at the Case List. If it is unavailable you should **NOT** relate the person selected.

Please remember that in general you should always view the Case List and Stage Composition, when determining whether to relate an individual to a stage. If you cannot verify that it is the same client or provider, you should not perform therelate.