

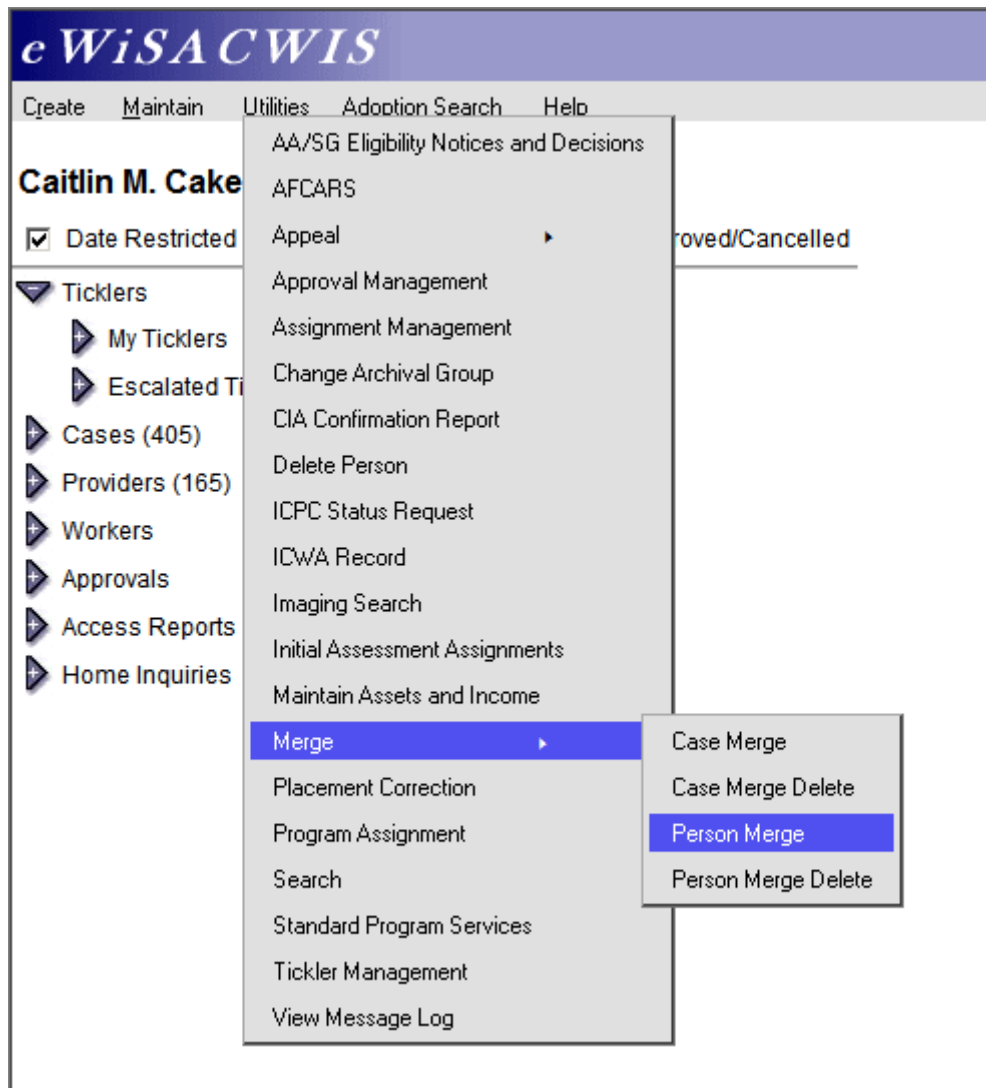
Person Merge

Note: In order to perform a person merge, an assignment to the case or provider is not needed.

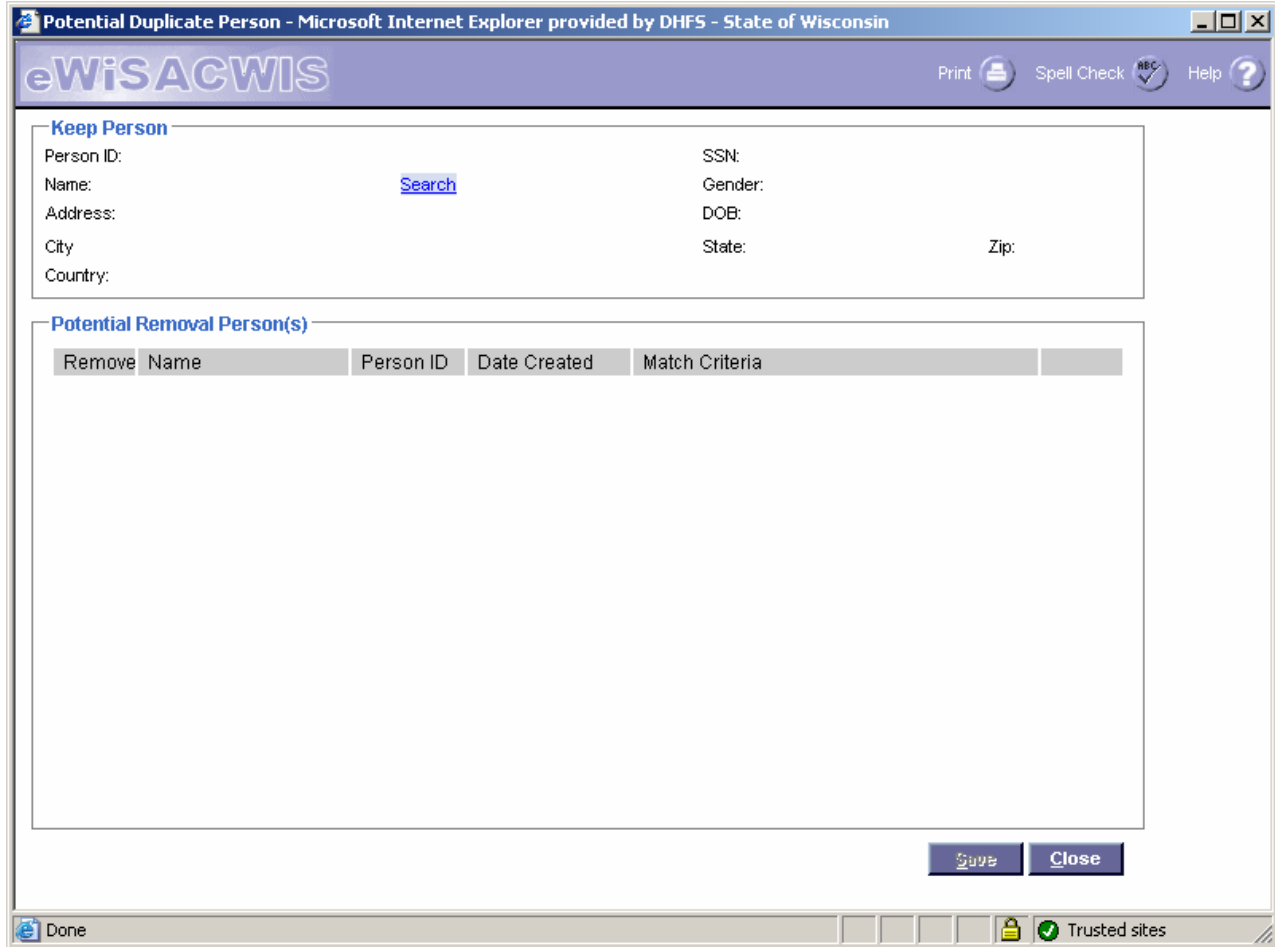
Person Merge will incorporate two distinct person merge features. The first feature is the Manual Merge process. This process will require the user to identify potential duplicates and merge them together manually. The second process, the system will identify potential matches via the Case Maintenance page. Potential duplicate people will be identified with a ‘?’ next to the participants name. The user will be directed to the merge page with possible potential duplicates identified.

Manual Merge

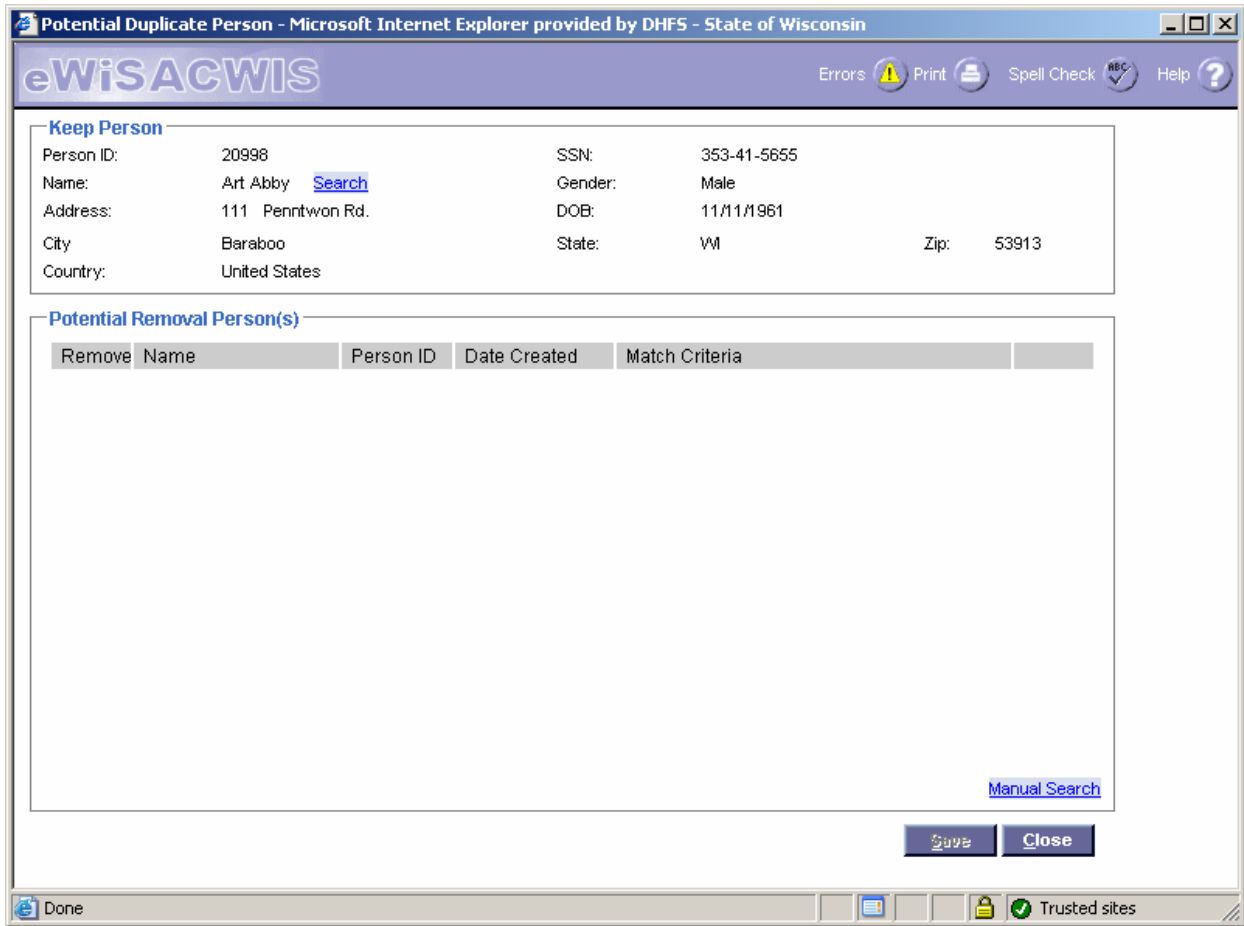
1. From the desktop, go to Utilities > Merge > and select Person Merge.



2. The Potential Duplicate Person page will open. Use the Search hyperlink in the 'Keep Person' group box to identify the person record that is to be retained. (See the Search Quick Reference Guide on proper techniques for searching.)



3. The 'Keep Person' group box will pre-fill with the identified person's (keep person) demographic information. The Search hyperlink is still enabled in case the wrong person ID record was selected in error and a new person needs to be searched.
4. In the Potential Removal Person(s) group box, select the 'Manual Search' hyperlink to search out the person record that is to be merged and removed.



- The duplicate person ID record will pre-fill into the Potential Removal Person(s) group box. The 'Remove' check box will become enabled and checked. Mark sure the check box is checked in order to merge the records. The duplicate person's name will be a hyperlink to the person management record. The 'Keep' hyperlink will remove the current 'Keep Person' record and move the Potential Removal Person record up to the 'Keep Person' position. (This would be used if it was determined that the Potential Removed Person should be the Keep Person).

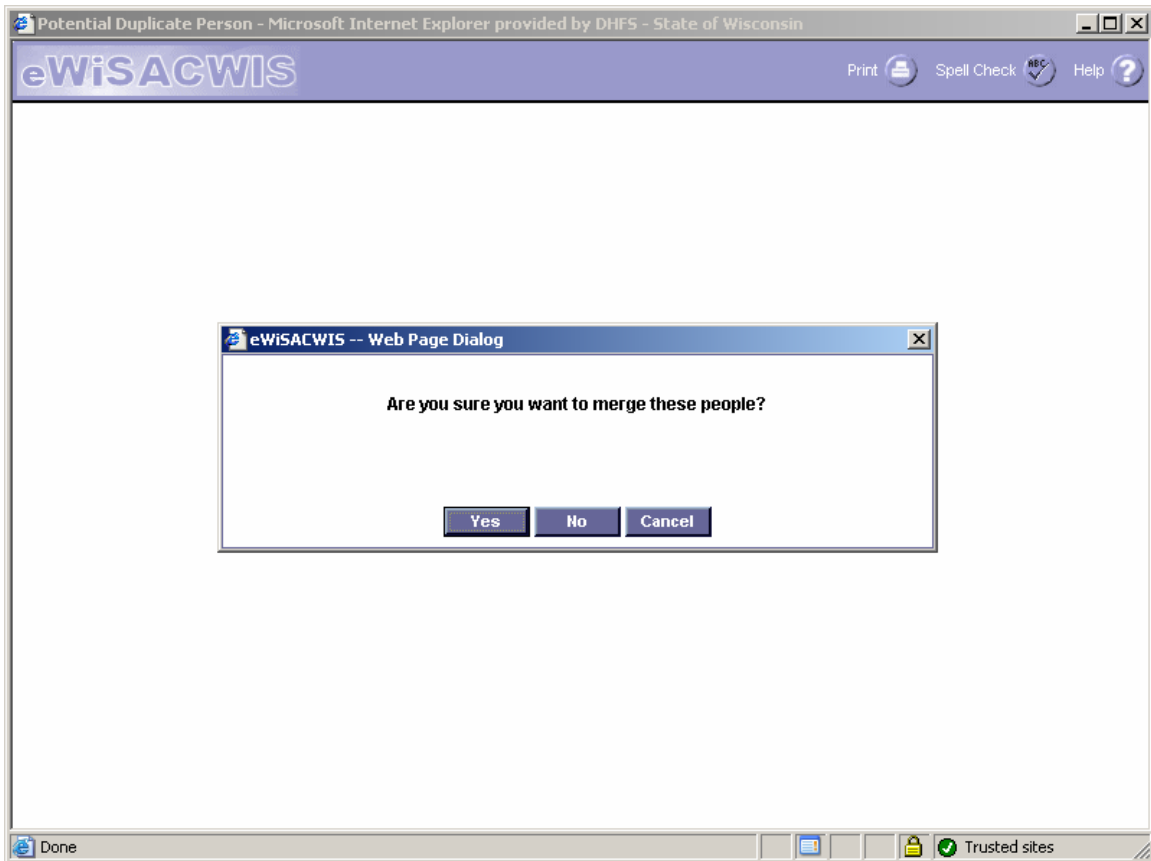
The screenshot shows a web browser window titled "Potential Duplicate Person - Microsoft Internet Explorer provided by DHFS - State of Wisconsin". The page header includes the "eWISACWIS" logo and navigation links for "Print", "Spell Check", and "Help".

The main content area is divided into two sections:



- Keep Person:** A form displaying personal information for a person with ID 20998. The name is "Art Abby" (with a "Search" link), address is "111 Penntwon Rd.", city is "Baraboo", state is "WI", and zip is "53913". Other fields include SSN (353-41-5655), Gender, and DOB (11/11/1961).
- Potential Removal Person(s):** A table with columns: "Remove", "Name", "Person ID", "Date Created", "Match Criteria", and an empty column. One entry is shown for "Art Abby" with Person ID 9222162. The "Remove" checkbox is checked, and a "Keep" link is present in the empty column.

At the bottom of the main content area, there is a "Manual Search" link and two buttons: "Save" and "Close". The browser status bar at the bottom shows "Done" and "Trusted sites".

6. Click the 'Save' button. A pop up message will appear asking if you would like to merge the records. Select Yes. This will merge the records through over night batch processing.



Merge – Maintain Case

1. There is a nightly batch that is run to identify potential duplicate person records in eWiSACWIS. When a potential duplicate is identified, eWiSACWIS will display a  on the Maintain Case page next to the name of the case participant who was identified as a potential duplicate person. Click the  icon to open the Potential Duplicate Person page.

Maintain Case - ID: 9221274 - Windows Internet Explorer

eWiSACWIS Print Spell Check ABC Help ?

Case: 9221274


Name: Ash, Jane Case Type: CPS Family - Ongoing Status: Open 11/16/2004

County Milwaukee Site/Region: Milwaukee-Admin W-2 Region:

CARES Case #: County Case #: Restricted

Participants Address Collaterals Closing/Merge History

Active Participants

Name	Hshld	DOB	Gender	Relationship	Legal	Prg		
Ash, Jane (9221874)	Y	02/15/1972	Female	Reference Person	N/A	N	DeActivate	Remove
 Ash, April (9221875)	Y	06/15/1998	Male	Biological Child	N/A	N	DeActivate	Remove
Click to open Potential Duplicate Person Management Page				Present Spouse	N/A	N	DeActivate	Remove
 Ash, William (9221876)	Y	08/19/1995	Male	Biological Child		N	DeActivate	Remove

County Custody- DCF Guardian

Number of Household Members: 4 [Insert](#)

Inactive Participants

Options: [Go](#) [Save](#) [Close](#)

Done Local intranet | Protected Mode: Off 100%

- The Potential Duplicate Person page will display with the selected case participant identified as the 'Keep Person' with the associated potential duplicate persons displayed in the Potential Removal Person(s) group box allowing the user to quickly proceed with the person merge request.
- If you decide that the 'Keep Person' is not the correct participant, use the 'Search' hyperlink, next to the 'Keep Person' name to search out the appropriate participant to keep.

Potential Duplicate Person -- Webpage Dialog

eWiSACWIS Print Spell Check Help

Keep Person

Person ID: 9221875 SSN: 123-45-6789
 Name: April Ash [Search](#) Gender: Male
 Address: 17 S Fairchild DOB: 06/15/1998
 City: Madison State: WI Zip: 53703
 Country:

Potential Removal Person(s)

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input type="checkbox"/>	April Ash	20839	07/28/2000	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Maddie M. Mooretest	9221584	09/09/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Child Pepper	9221536	08/16/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Girl Miatest	9221506	08/06/2004	Exact match on SSN	<input type="checkbox"/>	Keep

[Manual Search](#)

Save Close

4. The case participant will have the potential duplicate person icon display if he/she matches with another person (Potential Removal Persons) in the system on one of the following criteria:
 - Exact match on social security number
 - Exact match on date of birth and last name, and the sounds like matches the first name.
 - Exact match on last name and first name, and exact match on any two of the three numbers of the birthday, month day and year.
 - Exact match on one last name to another person's first name and first name to last and exact match on any two of the three numbers of the birthday, month day, and year.
5. The 'Remove' checkbox to the left of the potential removal person should be checked if this is identified as a duplicate to the 'Keep Person.' The Potential Removal Person is a hyperlink. Use the hyperlink to identify demographic information for this potential duplicate.

The 'Keep' hyperlink on the same line will move the Potential Removal Person up to the 'Keep Person' group box.

The 'Manual Search' hyperlink will allow you to search the system for other potential matches that have not been system identified.

6. When all Potential Removal Persons have been identified, click 'Save.'

Potential Duplicate Person -- Webpage Dialog

eWiSACWIS Print Spell Check Help

Keep Person

Person ID: 9221875 SSN: 123-45-6789
 Name: April Ash [Search](#) Gender: Male
 Address: 17 S Fairchild DOB: 06/15/1998
 City: Madison State: WI Zip: 53703
 Country:

Potential Removal Person(s)

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input checked="" type="checkbox"/>	April Ash	20839	07/28/2000	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Maddie M. Mooretest	9221584	09/09/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input checked="" type="checkbox"/>	Child Pepper	9221536	08/16/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Girl Miatest	9221506	08/06/2004	Exact match on SSN	<input type="checkbox"/>	Keep

[Manual Search](#)

Save **Close**

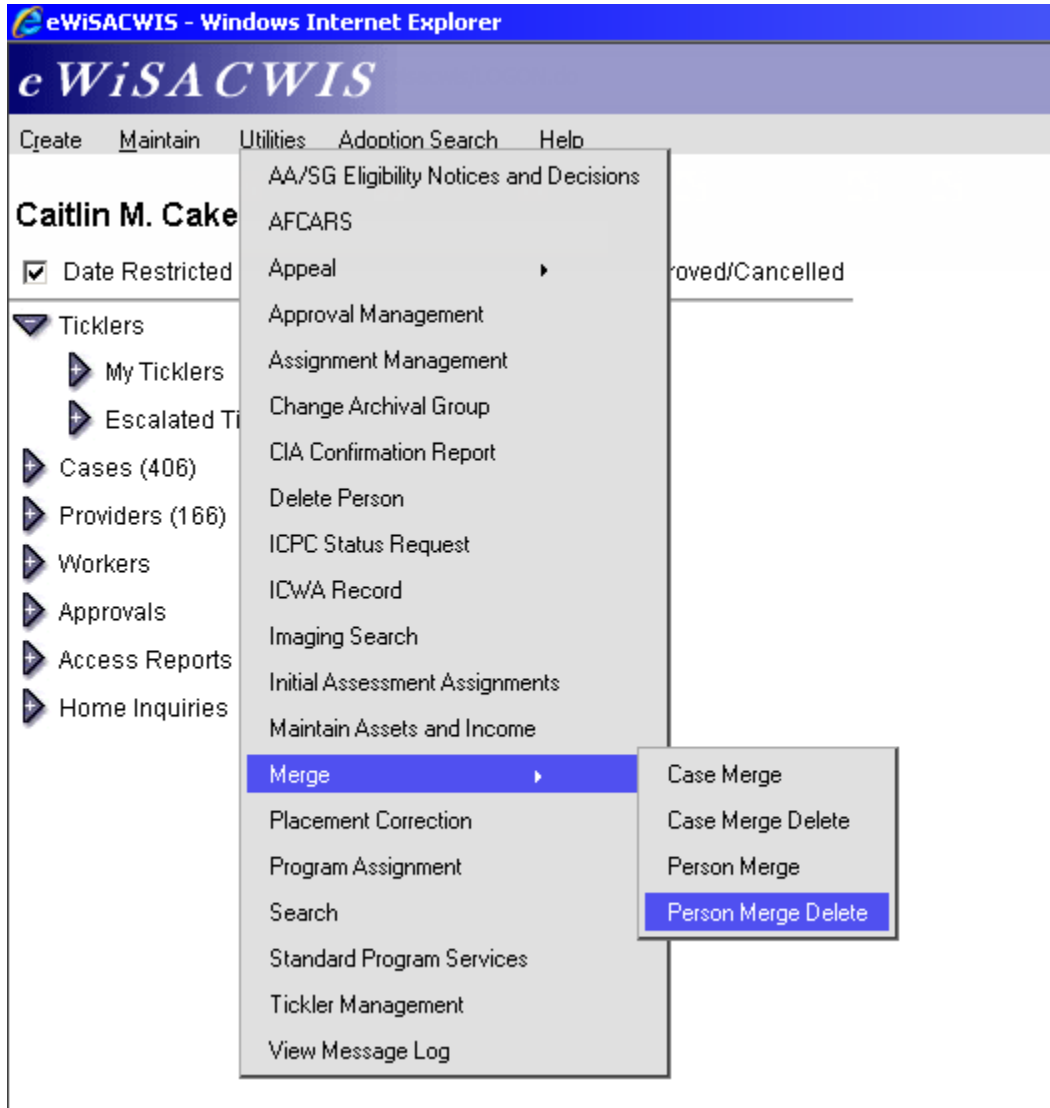
7. The following message will appear. Select 'Yes' to merge.



8. Click the Close button on the 'Potential Duplicate Person' page to return to the 'Maintain Case' page.

Person Merge Delete

1. The person merge process can be stopped prior to overnight batch processing. From the desktop, select Utilities > Merge > Person Merge Delete.



- The Person Merge Delete page will identify all participants to be subject to the overnight batch Merge process and all participants who have had a merge request that failed due to system edits. People can be removed from this nightly batch by selecting the 'Delete' checkbox next to the appropriate participant line and selecting 'Save.'

Delete	Submitted By	Date Requested	Remove Person	Keep Person
<input type="checkbox"/>	Cake, Caitlin	12/27/2005	Brenda Brokennose (750096)	April Ash (20839)
<input type="checkbox"/>	Cake, Caitlin	11/10/2004	Charly Mia (9221073)	Mia Mia (9222021)
<input type="checkbox"/>	Cake, Caitlin	12/21/2005	June Stevens (21023)	April Ash (20839)

- The 'Date Requested' column will identify potential problems with a merge. If the date of the requested is older than the current date, the merge did not take place due to a potential problem with the 'Keep' or 'Removed' person. The potential person merge line will stay in the 'Person Merge Delete' group box until the user corrects the problem on line and allows the merge to run through the nightly batch processing – merge.

Person Merge Delete - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWisACWIS Print Spell Check Help

Pending Merge

Delete	Submitted By	Date Requested	Remove Person	Keep Person

Failed Merge

<input type="checkbox"/>	Cake, Caitlin	11/10/2004	Charly Mia (9221073)	Mia Mia (9222021)
MERGE REQUEST IGNORED - OPEN EPISODE FOUND				
<input type="checkbox"/>	Cake, Caitlin	03/08/2006	Two Allen (9221607)	Two Birthday (9221516)
MERGE REQUEST IGNORED - OPEN EPISODE FOUND				

Save Close

Done Trusted sites