## **Duplicate Provider Link**

## **Key Features:**

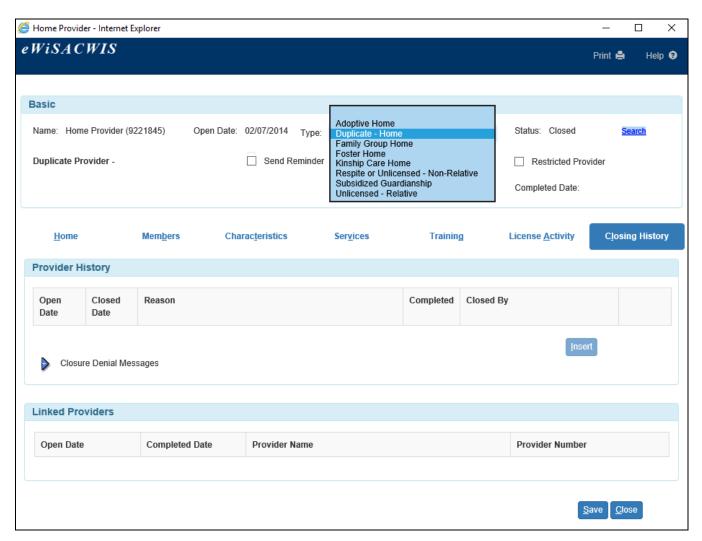
- Provider Link functionality is designed to cleanup duplicate provider records in the system by linking duplicate provider records to one retained provider record.
- In order to link a duplicate provider record to a retained provider, the duplicate provider must have the Type of Duplicate and will no longer be editable.
- A key icon (4) is associated with a duplicate provider record once it has been identified as duplicate.
- When workers search for a duplicate provider record, the search results will redirect the worker to the retained provider record.
- Only workers in the designated county with Link Providers security and an assignment to that provider will be able to link foster home provider records.
- Placement history on the Permanency Plan will reflect one continuous placement once the providers have been linked and the placement dates are consecutive.
- Home Providers can be linked to Private Providers and vice versa. However, only certain non-adoption state employees will have the appropriate security to link duplicate Private Provider records to a retained provider record.
- Placements recorded with the duplicate provider will automatically be ended. Notifications are emailed to all workers with open assignments to the case informing them about the duplicate provider cleanup effort and the specific placements that are affected. The worker will then have a 14 day window of opportunity to manually close the placement with the duplicate provider and re-open it with the retained provider record. At the end of 14 days, the placement with the duplicate provider record will automatically be closed and another e-mail will be sent to the workers notifying them that the new placement must be re-opened with the retained provider record. This e-mail will provide specific instructions on what dates should be used for the re-opened placement.
- Foster Care Rates for all re-opened placements with the retained provider record will need to be recreated.

## Linking a Provider:

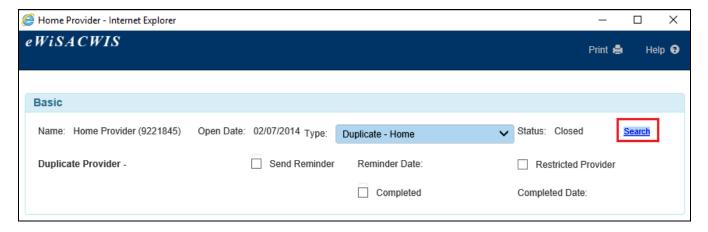
1. Identify which provider record is a duplicate - this is the record you will link to the Retained Provider record. Open the record by clicking the provider name hyperlink on your desktop.



2. For the duplicate provider record, select the Type value of 'Duplicate – Home.'

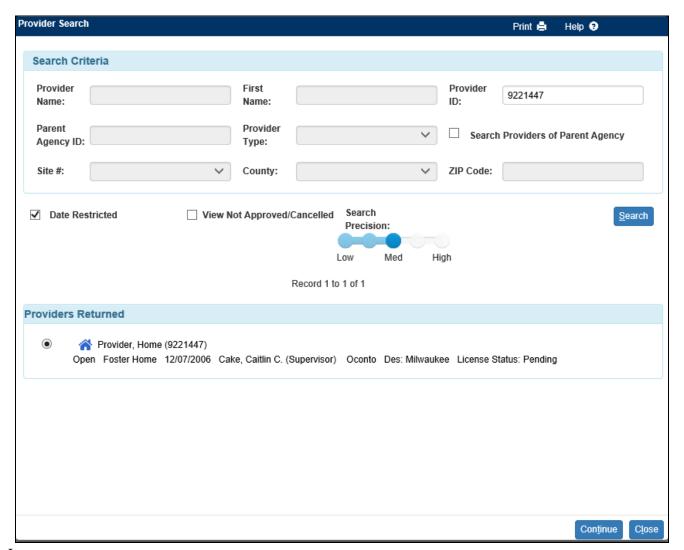


Selecting the Type field as 'Duplicate - Home' will display a <u>Search</u> hyperlink next to the Status field. Click <u>Search</u> to search for the retained provider record you want to link the duplicate provider record to.

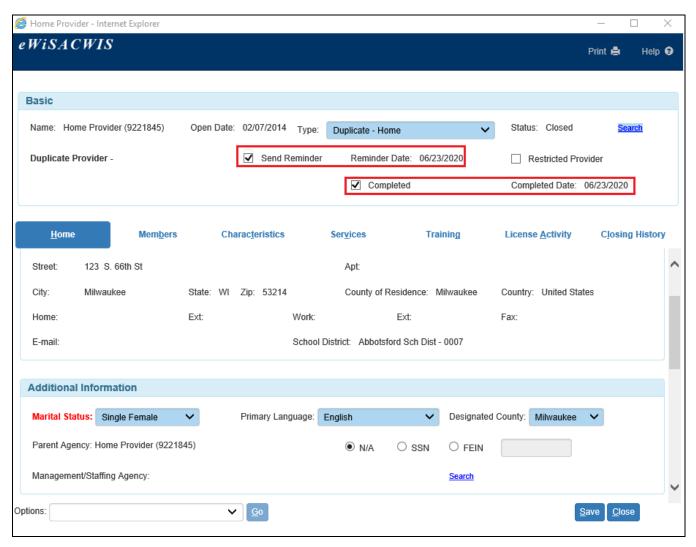


3. On the Search page, enter the name or provider ID of the provider that this record should be linked to. Select the appropriate provider record by clicking the radio button. This should be the Retained Home Provider record. Click Continue.

**Note:** A provider cannot be linked to itself.



- 4. The Home Provider page now indicates that this is a duplicate record and refers you to the retained provider name and ID. Also in the Basic group box are 'Send Reminder' and 'Completed' check boxes and dates.
  - a) The 'Send Reminder' check box will add the current date to the 'Reminder Date' field and on save, will set a 'Provider Link' tickler that will notify the worker completing the linking process 14 days prior to the ending of the placements. The 'Send Reminder' check box will notify all workers with open assignments to the case of the changes to create new placements as a result of the 'Provider Link' process. Upon notification the workers can either manually end the placements recorded with the duplicate provider or the system will automatically end the placements with the appropriate end dates upon clicking the Completed checkbox and saving the duplicate provider record.



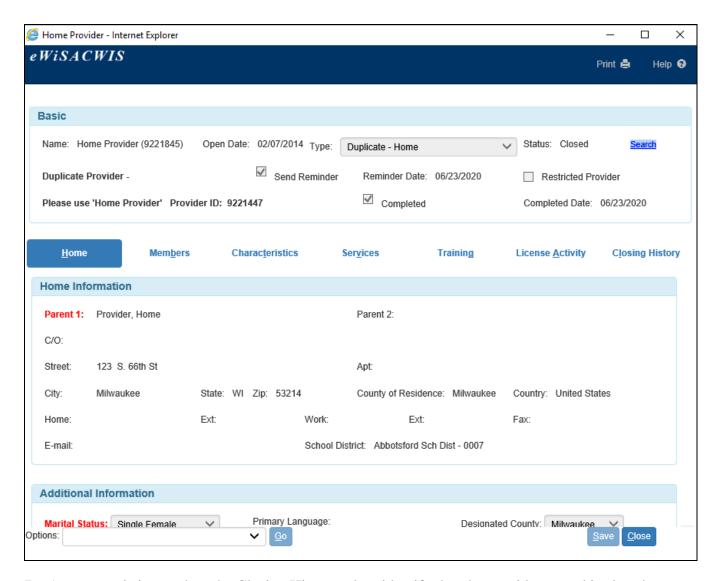
- b) The 'Completed' check box adds the current date to the 'Completed' date field and on save will:
  - The active licensed and unlicensed service types will be set to Inactive
  - If approved Out of Home Placements exist, end the placements; if pending Out of Home Placement/Services exist 'Not Approve' the record with the person inactivating the duplicate provider
  - If pending Service Endings for Out of Home Placements/Services exist approve the ending with the name of the person inactivating the duplicate provider
  - If an approved active license exists, end the license on the Additional Licensing Actions page

- with the name of the person who is inactivating the duplicate provider; if a pending license exists, 'not approve' the license on the License Approval page with the name of the person who is inactivating the duplicate provider
- If an approved Foster Care Rate exists, end the FCR with the name of the person who is inactivating the duplicate provider; if a pending Foster Care Rate exists, 'not approve' the license with the name of the person who is inactivating the duplicate provider
- If an approved FCR exists with a pending FCR Ending approve the ending FCR with the name of the person who is inactivating the duplicate provider; f an approved FCR exists with an approved FCR ending approve the ending FCR with the name of the person who is inactivating the duplicate provider

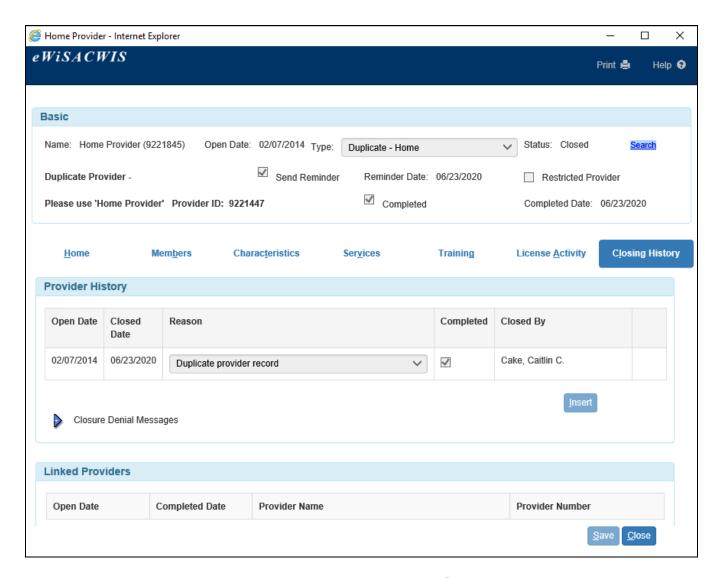
5. After clicking 'Save' the following message will appear:



6. Select 'Yes.' This will freeze the record.



7. A new row is inserted on the Closing History tab to identify that the provider record is closed.



8. When you search for the provider, you will see the key icon (4) is associated with the duplicate provider record.

