

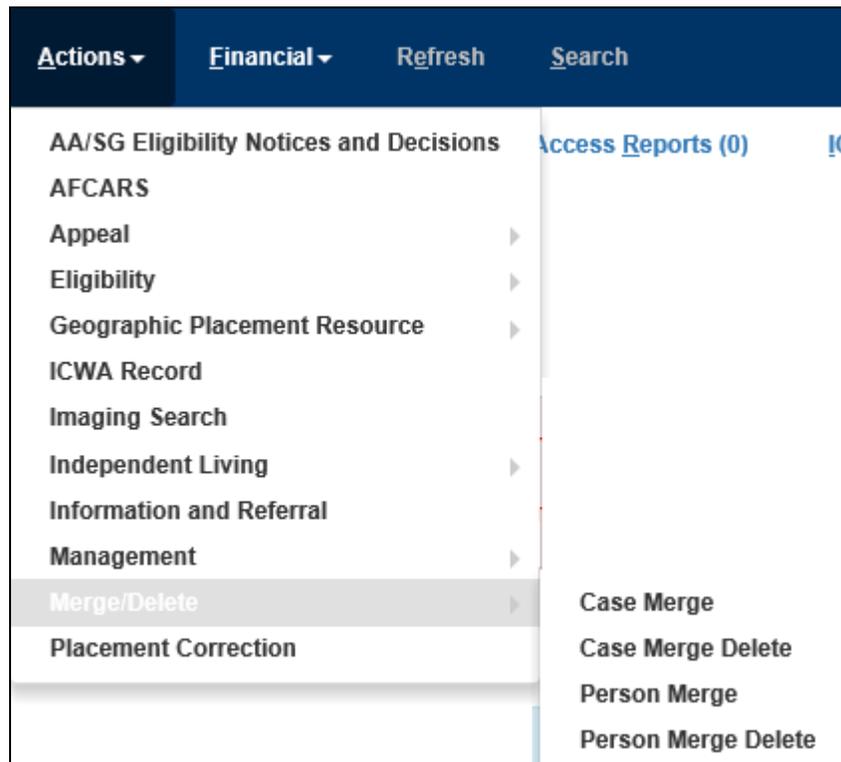
# Person Merge

**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, select Actions, Merge/Delete, and then Person Merge.



- The Potential Duplicate Person page will open. Use the [Search](#) hyperlink in the Keep Person section to identify the person record that is to be retained. (See the Search User Guide on proper techniques for searching.)
- The Keep Person section 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.
- If no potential duplicates are automatically retrieved in the Potential Removal Person(s) section or if the person record is not returned, select the [Manual Search](#) hyperlink to search out the person record that is to be merged and removed.

**Keep Person**

Person ID: 9223584      SSN: 799-93-3333

Name: Janet Cornflower [Search](#)      Gender:

Address: 206 Court St.      DOB: 08/12/1968  
 Shady Pines Apartment      Not Avail

City: Chilton      State: WI      Zip: 53014

Country: United States

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**Potential Removal Person(s)**

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input type="checkbox"/>	<a href="#">Gerri J. Cpsonea</a>	9221460	06/22/2004	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Mason Croft</a>	9223080	12/27/2005	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Ray Weiss</a>	9223083	12/27/2005	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Agnes J. Larsson</a>	9223094	01/13/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">britney J. spears</a>	9223429	03/29/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Kitty J. Pom</a>	9225651	10/06/2009	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">britney J. spears</a>	9223825	09/07/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">britney J. spears</a>	9223861	10/02/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Gerri J. O'Riley</a>	9224088	01/09/2007	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Sarah J. Cpstwoa1</a>	9224192	02/21/2007	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Bob J. unknown</a>	9223823	02/20/2008	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>

[Manual Search](#)

[Save](#) [Close](#)



## 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 within the icon 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: 9221892 - Internet Explorer

# eWiSACWIS

**Case: 9221892**

Name:

County:

CARES Case #:

Restricted      Designation: [Select Program](#)

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**Participants**      [Address](#)

**Active Participants**

Name	Person Type	Rsp	Household	DOB
<a href="#">Badger, Mom (9226858)</a>	None	<input checked="" type="checkbox"/>	Y	
<a href="#">Cornflower, Anna J. (9223582)</a>	None	<input checked="" type="checkbox"/>	Y	01/30/1995
<a href="#">Cornflower, Bobby (9224448)</a>	CW	<input checked="" type="checkbox"/>	Y	05/17/2000
<a href="#">Cornflower, Daisy (9225169)</a>	None	<input checked="" type="checkbox"/>	Y	
 <a href="#">Cornflower, Janet (9223584)</a>	None	<input checked="" type="checkbox"/>	Y	08/12/1968
<a href="#">Cornflower, Janet (9225170)</a>	None	<input checked="" type="checkbox"/>	Y	
<a href="#">Cornflower, Jeff (9223583)</a>	None	<input checked="" type="checkbox"/>	Y	

- 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) section 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
Print Help

**Keep Person**

Person ID:	9223584	SSN:	799-93-3333
Name:	Janet Cornflower <a href="#">Search</a>	Gender:	Female
Address:	206 Court St. Shady Pines Apartment	DOB:	08/12/1968 Not Avail
City:	Chilton	State:	WI      Zip: 53014
Country:	United States		

**Potential Removal Person(s)**

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input type="checkbox"/>	<a href="#">Gerri J. Cpsonea</a>	9221460	06/22/2004	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Mason Croft</a>	9223080	12/27/2005	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Ray Weiss</a>	9223083	12/27/2005	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Agnes J. Larsson</a>	9223094	01/13/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">britney J. spears</a>	9223429	03/29/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Kitty J. Pom</a>	9225651	10/06/2009	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">britney J. spears</a>	9223825	09/07/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">britney J. spears</a>	9223861	10/02/2006	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Gerri J. O'Riley</a>	9224088	01/09/2007	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Sarah J. Cpstwoa1</a>	9224192	02/21/2007	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>
<input type="checkbox"/>	<a href="#">Bob J. unknown</a>	9223823	02/20/2008	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>

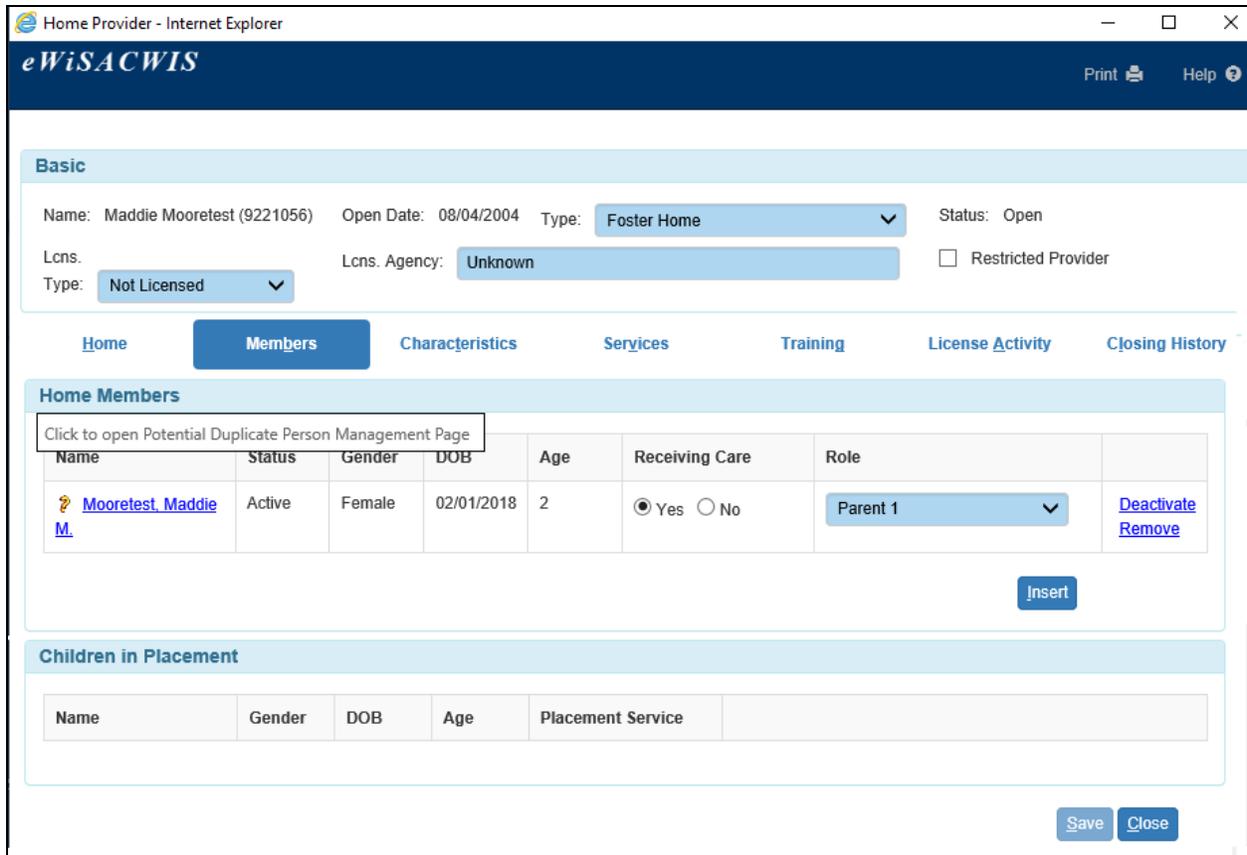
[Manual Search](#)

Save Close



## Merge – Home Provider

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 question mark icon  on the Home Provider page (Members tab) next to the name of the home member who was identified as a potential duplicate person. Click the icon to open the Potential Duplicate Person page.



Home Provider - Internet Explorer

**eWiSACWIS** Print Help

**Basic**

Name: Maddie Mooretest (9221056) Open Date: 08/04/2004 Type: Foster Home Status: Open

Lcns. Type: Not Licensed Lcns. Agency: Unknown  Restricted Provider

Home **Members** Characteristics Services Training License Activity Closing History

**Home Members**

Click to open Potential Duplicate Person Management Page

Name	Status	Gender	DOB	Age	Receiving Care	Role	
 <a href="#">Mooretest, Maddie M.</a>	Active	Female	02/01/2018	2	<input checked="" type="radio"/> Yes <input type="radio"/> No	Parent 1	<a href="#">Deactivate</a> <a href="#">Remove</a>

Insert

**Children in Placement**

Name	Gender	DOB	Age	Placement Service
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Save Close

2. The Potential Duplicate Person page will display with the selected provider member identified as the Keep Person with the associated potential duplicate persons displayed in the Potential Removal Person(s) section to quickly proceed with the person merge request. If the Keep Person listed is not the correct participant, use the [Search](#) hyperlink next to the Keep Person name to search out the appropriate participant to keep.
3. The provider member will have the potential duplicate person icon display if he or 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.
4. 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 name is a hyperlink. Use the hyperlink to identify demographic information for this potential duplicate.

The [Keep](#) hyperlink on the same line moves the Potential Removal Person up to the Keep Person section.

The [Manual Search](#) hyperlink allows searching the system for other potential matches that have not been system identified.

5. When all Potential Removal Persons have been identified, click the Save button.

Potential Duplicate Person
Print Help

**Keep Person**

Person ID: 9222310	SSN: 987-65-4321	
Name: Bradley J. King <a href="#">Search</a>	Gender: Male	
Address: 100 Aubine Street	DOB: 01/01/2000	
City: Packwaukee	State: WI	Zip: 53953
Country: United States		

**Potential Removal Person(s)**

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input checked="" type="checkbox"/>	<a href="#">Spooner Boyfriend</a>	9221556	08/24/2004	Exact match on SSN	<input type="checkbox"/>	<a href="#">Keep</a>

[Manual Search](#)

Save
Close

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

Confirmation

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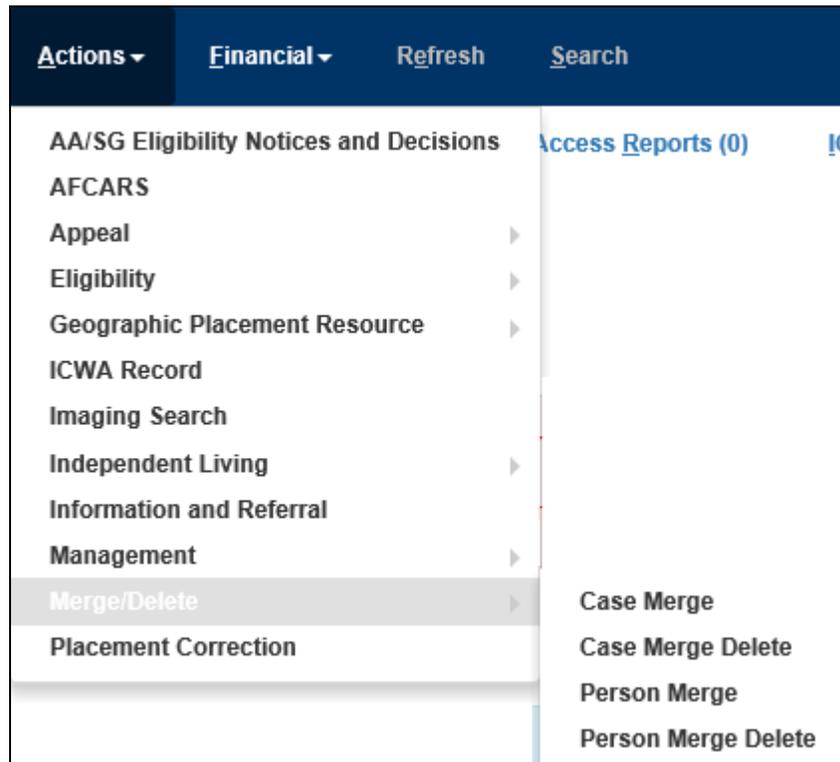
Are you sure you want to merge/discard these people?

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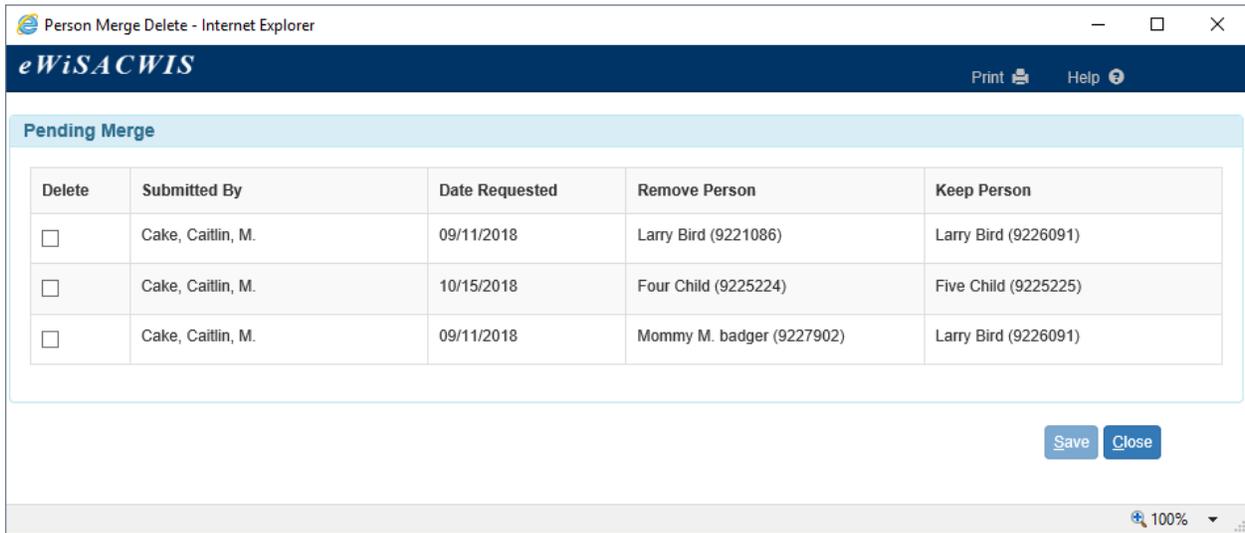
7. Click the Close button on the Potential Duplicate Person page to return to the Home Provider page.

## Person Merge Delete

1. The person merge process can be stopped prior to overnight batch processing. From the desktop, select Actions, Merge/Delete, and then 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 checking the Delete checkbox next to the appropriate participant line and clicking the Save button.



- The Date Requested column will identify potential problems with a merge. If the date of the request 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 section until the problem is corrected to allow the merge to run through the nightly batch processing.

