

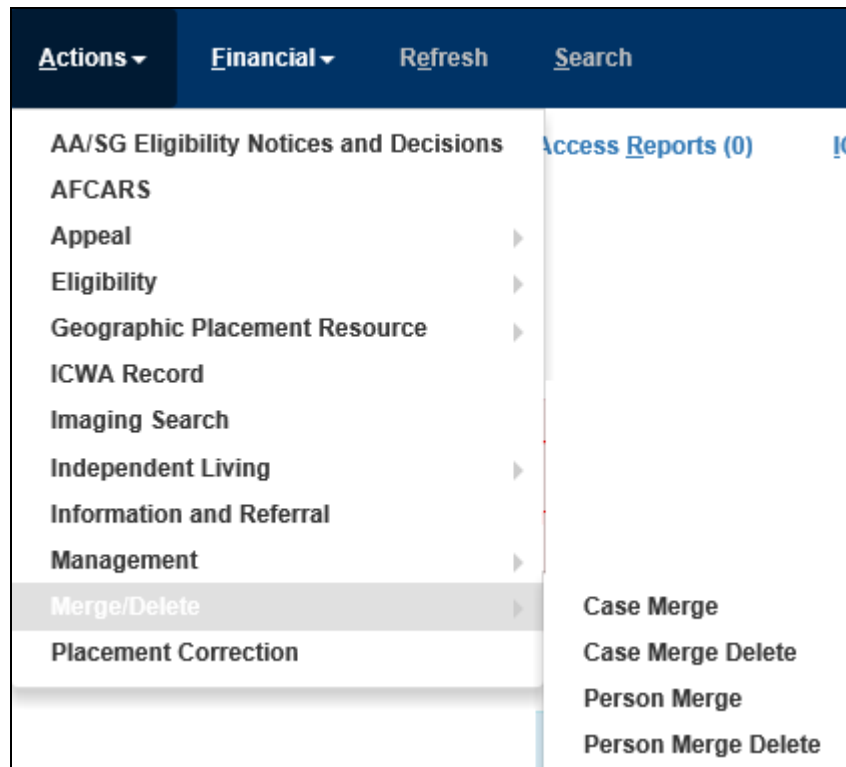
Person Merge

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.



2. 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.)
3. 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.
4. 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.

Potential Duplicate Person - Internet Explorer

eWiSACWIS Print Help

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

Potential Removal Person(s)

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

[Manual Search](#)

Save Close

100%

5. The duplicate person ID record will pre-fill into the Potential Removal Person(s) section. The Remove checkbox will become enabled and checked. Make sure the checkbox 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 the eWiSACWIS web application interface. The top navigation bar includes the eWiSACWIS logo, a 'Print' button, and a 'Help' button. The main content area is divided into two sections: 'Keep Person' and 'Potential Removal Person(s)'. The 'Keep Person' section displays personal information for Janet Cornflower, including her Person ID (9223584), SSN (799-93-3333), Name, Address (206 Court St., Shady Pines Apartment), City (Chilton), State (WI), Zip (53014), and Country (United States). The 'Potential Removal Person(s)' section contains a table with columns: Remove, Name, Person ID, Date Created, Match Criteria, Not a Potential Match, and an action link. A single record for Janet Cornflower is listed with a checked 'Remove' checkbox and a 'Keep' link. A 'Manual Search' link is located below the table. At the bottom right of the form, there are 'Save' and 'Close' buttons.

Remove	Name	Person ID	Date Created	Match Criteria	Not a Potential Match	
<input checked="" type="checkbox"/>	Janet Cornflower	9225170	10/13/2008		<input type="checkbox"/>	Keep

[Manual Search](#)

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

6. Click the Save button. A message will appear asking if you would like to merge the records. Click the Yes button to merge the records through overnight batch processing.



A confirmation dialog box titled 'Confirmation' is displayed. It contains the text 'Are you sure you want to merge/discard these people?' and three buttons at the bottom: 'Yes', 'No', and 'Cancel'.


Confirmation

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

[Yes](#) [No](#) [Cancel](#)

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:

Cornflower, Janet ▼

County:

Milwaukee ▼

CARES Case #:



☐ Restricted

Designation: [Select Program](#)

Participants

[Address](#)

Active Participants

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

Gender:

Female

Address:

206 Court St.

DOB:

08/12/1968

Shady Pines Apartment

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"/>	Gerri J. Cpsonea	9221460	06/22/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Mason Croft	9223080	12/27/2005	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Ray Weiss	9223083	12/27/2005	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Agnes J. Larsson	9223094	01/13/2006	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	britney J. spears	9223429	03/29/2006	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Kitty J. Pom	9225651	10/06/2009	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	britney J. spears	9223825	09/07/2006	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	britney J. spears	9223861	10/02/2006	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Gerri J. O'Riley	9224088	01/09/2007	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Sarah J. Cpstwoa1	9224192	02/21/2007	Exact match on SSN	<input type="checkbox"/>	Keep
<input type="checkbox"/>	Bob J. unknown	9223823	02/20/2008	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 or she matches with another person 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 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.

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

Keep Person

Person ID: 9223584 SSN: 799-93-3333
 Name: Janet Cornflower [Search](#) Gender: Female
 Address: 206 Court St. DOB: 08/12/1968
 Shady Pines Apartment 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 checked="" type="checkbox"/>	Gerri J. Cpsonea	9221460	06/22/2004	Exact match on SSN	<input type="checkbox"/>	Keep
<input checked="" type="checkbox"/>	Mason Croft	9223080	12/27/2005	Exact match on SSN	<input type="checkbox"/>	Keep
<input checked="" type="checkbox"/>	Ray Weiss	9223083	12/27/2005	Exact match on SSN	<input type="checkbox"/>	Keep

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

7. A message will appear asking if you would like to merge the records. Click the Yes button to merge.


Confirmation

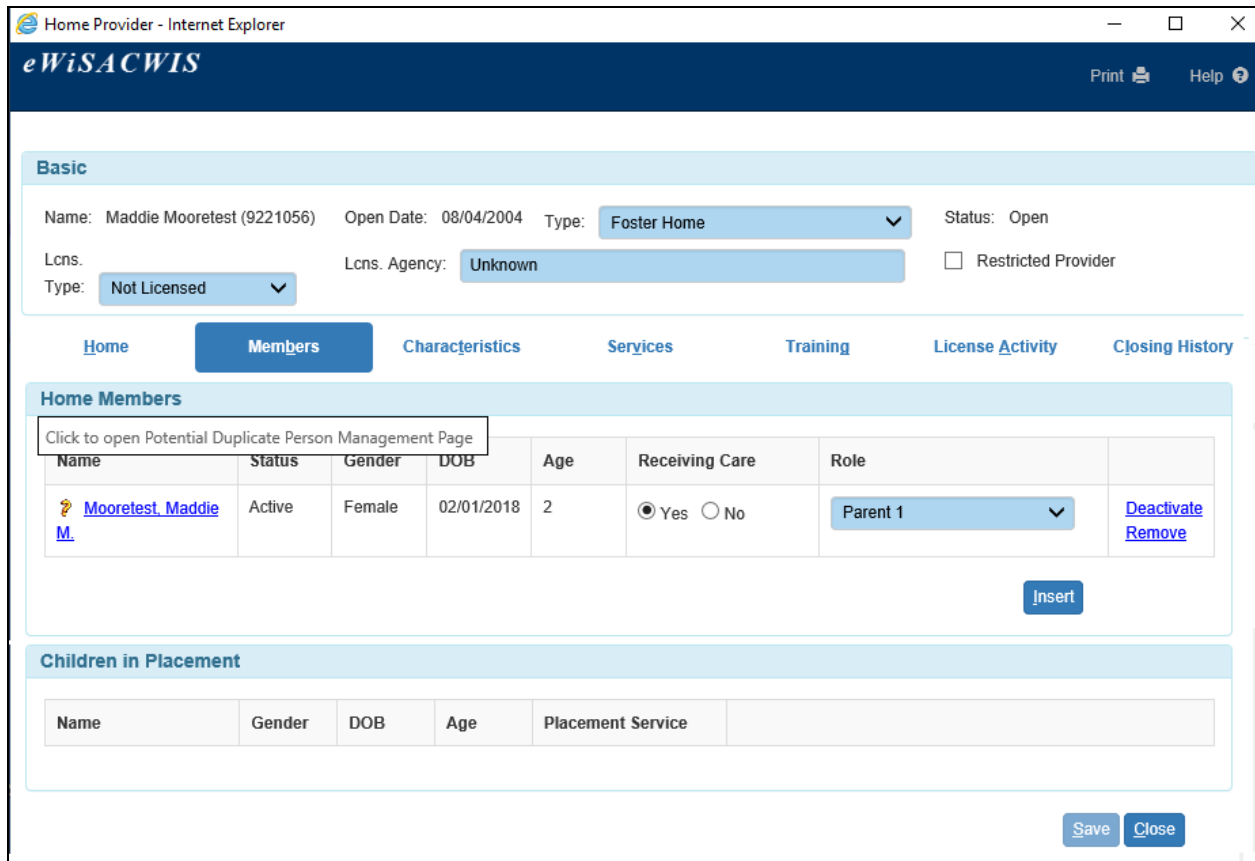
Are you sure you want to merge/discard these people?

[Yes](#) [No](#) [Cancel](#)

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

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	
 Mooretest, Maddie M.	Active	Female	02/01/2018	2	<input checked="" type="radio"/> Yes <input type="radio"/> No	Parent 1	Deactivate Remove

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 [Search](#)

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"/>	Spooner Boyfriend	9221556	08/24/2004	Exact match on SSN	<input type="checkbox"/>	Keep

[Manual Search](#)

Save Close

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

Confirmation

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

Yes

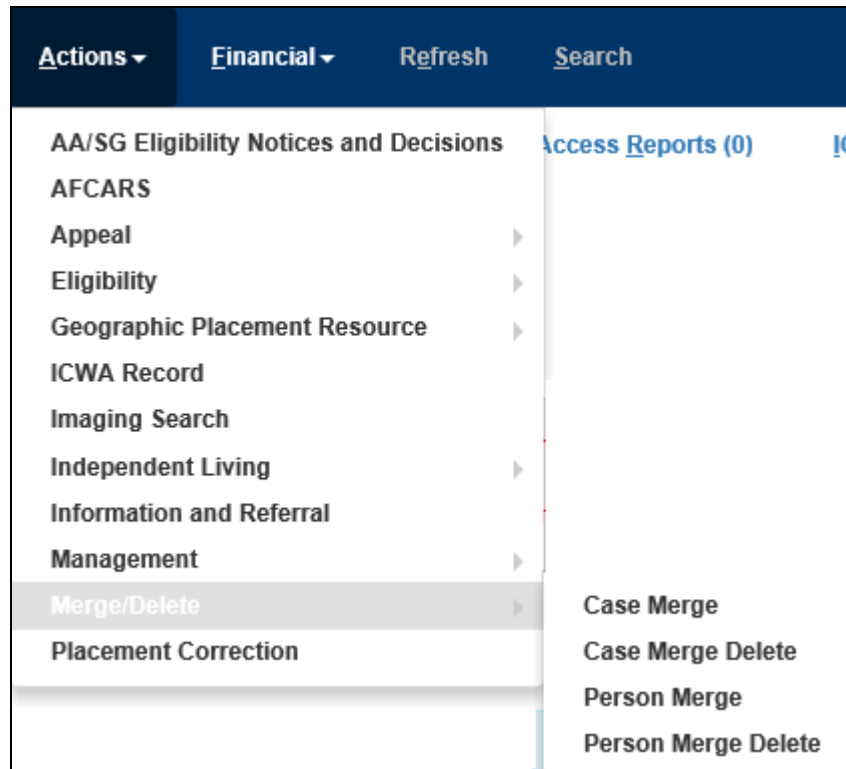
No

Cancel

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 screenshot shows a web browser window titled "Person Merge Delete - Internet Explorer". The page header is "eWiSACWIS" with "Print" and "Help" links. The main section is titled "Pending Merge" and contains a table with the following data:

Delete	Submitted By	Date Requested	Remove Person	Keep Person
<input type="checkbox"/>	Cake, Caitlin, M.	09/11/2018	Larry Bird (9221086)	Larry Bird (9226091)
<input type="checkbox"/>	Cake, Caitlin, M.	10/15/2018	Four Child (9225224)	Five Child (9225225)
<input type="checkbox"/>	Cake, Caitlin, M.	09/11/2018	Mommy M. badger (9227902)	Larry Bird (9226091)

At the bottom right of the table area are "Save" and "Close" buttons. The browser status bar shows "100%" zoom.

- 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.

The screenshot shows the same web browser window, but the "Pending Merge" section is empty. Below it is a section titled "Failed Merge" with a table containing one row of failed data:

Delete	Submitted By	Date Requested	Remove Person	Keep Person
<input type="checkbox"/>	Cake, Caitlin	03/03/2014	Charly Mia (9221073)	Mia Mia (9222021)

Below the table, a message reads: "MERGE REQUEST IGNORED - OPEN EPISODE FOUND". At the bottom right are "Save" and "Close" buttons. The browser status bar shows "100%" zoom.