

Duplicate Person Records



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Address:

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Demographics:

5 years old, Female

Education Level:

Kindergarten

Materials Checklist

	Checklist
System Setup	
	For the Guided Walkthrough and Hands-on Activity in this session, you will need to make sure the users can access the Sandbox/training environment from the room in which you are facilitating. If the system is not available, please have screen shots/handouts ready for the activity. Also, make sure the users have or know the Sandbox/training URL.
Materials	
	CA_Duplicate Person PowerPoint
	CA_Duplicate Person_IN – this version has instructor notes enabled
	CA_Duplicate Person – copies for users
	JA_Cleaning Up an Ongoing Case – copies for users
Other Resources	
	Projector



Estimated Time:

60 mins.

Guided Walkthrough and Hands-on Activity

In the Guided Walkthrough on page 8, you will show how to verify a person's MiSACWIS history when there is a duplicate record in the search results. The takeaway here is to select the record with the most history. Allow 10-15 minutes for the Hands-on Activity on page 9 and make sure the users have the job aid (Cleaning Up a Case) to help them.

Support tool overview

Before beginning this Conceptual Activity, be sure you familiarize yourself with the task of searching for people from the **Person Search** tab as well as from within records, like adding people to an intake or investigation. Also, it is suggested that everyone complete the following advanced training material prior to this session:

- **IPA_IDs**

Overview

The purpose of this Conceptual Activity is for you to become more prepared for when you encounter duplicate person records in MiSACWIS. All duplicate person records that had been entered in SWSS will be converted over to MiSACWIS. When you open your cases, you may notice duplicate people; it is important to know how to clean up your cases by verifying and keeping the correct person records, and deactivating the incorrect ones until the person records can be merged.

Objectives

- **Review the effects of having duplicate people in the system.**
- **Discuss methods for selecting the correct duplicate record.**
- **Explain how to rid cases of duplicate people at go-live.**

PRESENTATION

Overview



> Objectives

- Review the effects of having duplicate people in the system.
- Discuss methods for selecting the correct duplicate record.
- Explain how to rid ongoing cases of duplicate people at go-live.

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> Two truths, one lie

- Approximately 1 million duplicate person records were created in SWSS and will be converted to MiSACWIS at go-live.
- A person's history is best captured in multiple person records.
- An accurate person history can benefit the child and family.

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Notes

[After reviewing these with the group, ask:]

Which statement is the lie?

[The second one. These are discussed more on future slides.]

PRESENTATION

Overview

> Truth #1

- Approximately 1 million duplicate person records were created in SWSS and will be converted to MiSACWIS at go-live.
 - “Duplicate” in this context means exact match of name, date of birth, and Recipient ID.
 - There is no way for a system to know which records to keep and which to ignore.
 - It will be up to you to do your due diligence and remove duplicate people from your cases, as well as refrain from creating duplicate person records.

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> Truth #2

- An accurate person history can benefit the child and family.
 - Inaccurate, duplicate, or conflicting histories could affect the family’s goals, needs, and services.
 - A child’s return home could be impacted if accurate historical data is not tied to the case via the correct person record.
 - You can make better decisions for the family if you know all the facts.

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> The lie

- A person’s history is NOT best captured in multiple person records.
 - Bits and pieces of a person’s history can be scattered across multiple records.
 - By doing your due diligence, and with the help of person merge, you can ensure a person’s history is whole and complete within one record.

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Notes

This number may sound astounding. These duplicate people were converted because there is no way for the system to know which Jane Doe is the correct Jane Doe.

MiSACWIS helps you from creating duplicate person records because it forces you to search for a person before you can add a new person record.

It is critical to capture a person’s history in one, complete record.

A child’s return home could be affected. For instance, if a parent has a duplicate record, and the wrong, incomplete one is being consulted on a case, something as simple as a messy home could be keeping a child from returning home. This information about the parent’s home could be missing from the parent’s record used on the case.

This is obviously the lie. Having a person’s history scattered across multiple records can be harmful to the child, family, and prove to be more work for you, which I’ll explain in a moment.

When you do find duplicate people that can be merged, it’s important to note their Person IDs and use the ID of the correct person record in your future searches.

PRESENTATION

Overview

> Person search

- You will find instances of duplicate person records through the person search functionality.
 - Exact matches
 - Matches with slight differences
- Person search functionality is performed on the general Person Search tab or whenever you add a person to a work item (intake, case, or investigation, for example).
- MiSACWIS requires you to search for a person before you add a new person record.

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> Methods

- How do you choose the correct person record from a person search?
 - View the person's MiSACWIS History.
 - Pick the person with the most history.
 - When you find the correct record, use the Person ID to search instead of the name.

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> Cleaning up ongoing cases: Go-live task

- Try searching by SWSS Log No. to find the right person records for your case from SWSS.
- Deactivating duplicate people from cases is an easy way to clean up your case at go-live.
- If the wrong person record is on a case, you could:
 - Create a placement/payment for the wrong record.
 - Complete required work items for the wrong record, thus creating more work for yourself.
 - Negatively affect reporting.
 - Complete social work contacts for the wrong person record.

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Notes

From the person search results, there is a way to verify the correct person record before you even add the person to the record.

Beware of matches with slight differences. These include names that are misspelled or have letters transposed, or even have variations in spelling (Smith vs Smyth).

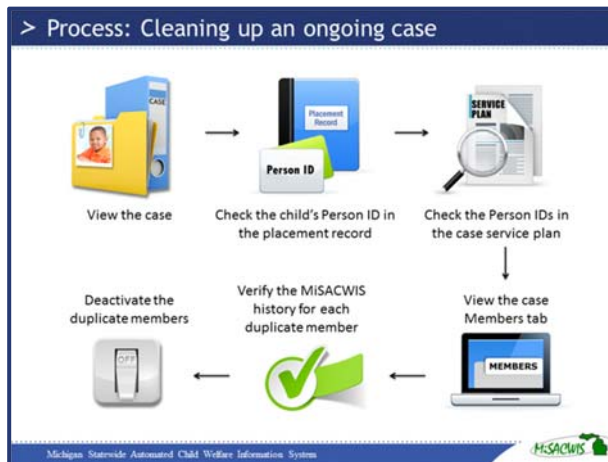
The Person ID used as the only search criteria will guarantee you an exact match in the search results.

At go-live, your converted ongoing cases from SWSS may contain duplicate case members. To eliminate any doubt on which person records are the correct ones, you can search for your converted ongoing cases by SWSS Log No. This number is converted as a case reference number.

How else could having a duplicate person record on a case affect the case, or your work on the case?

PRESENTATION

Overview



> Person merge

- Person merge is only performed by a Merge Administrator.
- Be sure you keep track of the person records you want to keep by Person ID.

The slide is part of the Michigan Statewide Automated Child Welfare Information System (MiSACWIS).

Notes

This is a process to help you clean up an ongoing case to rid it of duplicate case members. You will also get a chance to practice this process later in this session.

This clean up process is only needed for ongoing cases. It is not necessary to clean up a permanent ward case.

The process for notifying the Merge Administrator is still to be determined; however, when the process is decided upon, it will be communicated to you as soon as possible.

[This is the last slide of the presentation. Prepare for the guided walkthrough on the next page. Make sure you and all users can access the Sandbox/training environment.]

GUIDED WALKTHROUGH

Searching with duplicate records

First, let's perform a person search. This search will bring up duplicate records. You'll then learn a technique for deciding which record of the two to use.

Searching for a person

1. Login to the Sandbox environment.
2. Click search in the header. The Person Search screen appears.
3. Perform a person search for *Sara Fast###*. Don't forget to replace ### with your training number.

You will see two results for Sara Fast###.

4. You should notice that:
 - Both records have the same name, address, gender, and date of birth.
 - Each record has a different Person ID.

Choosing the right person record

1. In the search results, click select beside the Sara Fast### record with the Person ID ending in 811. The Person Overview screen appears.
2. Click MiSACWIS History. You should see numbers indicating the following:
 - **Case History (2)**
 - **Intake History (1)**
 - **Placement History (1)**
 - **Title IV-E Eligibility History (1)**
3. Click **Close** until you return to the search results.
4. Now, click select beside the Sara Fast### record with the Person ID ending in 810 and view her MiSACWIS history.
5. You'll notice that the **Case History** category has a **2** beside it. Beside all other categories, you'll see zeros.
6. Click **Close** until you return to the search results.

Since the first Sara Fast### record you viewed had the most history, you will want to use that record going forward.



Note

Intake workers would check the person's MiSACWIS history and the Central Registry for the parents' Person ID.

Notes

[Step 3: Point out the **Reference Type** drop-down. This is where **DHS Recipient ID** is located. **Reference Value** is where they would enter the Recipient ID.

For training purposes, we are using the main person search; however, this walkthrough applies to instances when you are adding people to an intake, case, investigation, or other work item.

Hands on Activity

This activity lets you practice how to rid a converted ongoing case of duplicate people after go-live. Going through this case cleaning activity will help prepare you for the work ahead. Just by taking a few moments to compare the duplicate members on your case could save you hours of work in the long run.

Task: Cleaning an ongoing case

Open the ongoing case for **Fast###, Rebecca**. Click **View Case Information >Members** tab to view the members on the case. You'll notice there are two Sara Fast### records on this case. You'll need to decide which Sara Fast### record to keep and which to deactivate.

You can confirm which Sara Fast### is the right one for the case by checking some other work items. Using the Cleaning Up an Ongoing Case job aid as a guide, peruse the other areas of the case to ensure which Sara Fast### record is the correct one for the case.

1. Check the placement record for the Fast### case. What is the Person ID of the child in the placement record? Where did you find her Person ID?

2. Next, navigate to the case service plan for the Fast### case. In the Identifying Information, locate the Person IDs of the child and parent in the case service plan. What are the Person IDs for Sara and Rebecca Fast###? How did you find their Person IDs?

From the findings above, you know which Sara Fast### and Rebecca Fast### records are correct for the case.

3. Return to the **Members** tab of the case.
4. Next, you would verify the MiSACWIS history of each duplicate record by clicking on each member name hyperlink, and then clicking MiSACWIS History.

Since you have already verified the history of both Fast### records, you know that the record with Person ID ending in 811 has the most history.

5. On the **Members** tab, click select beside the Sara Fast### record with the Person ID ending in 810. The Case Member Status Dates screen appears.
6. Enter the following data to deactivate this person record from the case:

Field	Value	Notes
Status End Date	Today's date	
If Deactivation Enter Reason	Other	
Additional Details for Deactivation	Duplicate person	

7. Click **Save**. You return to the **Members** tab and the duplicate record has been removed from the case member list.

**Wrap-Up**

Again, it's important to do your due diligence to remove any duplicate people from your cases. Refer to the job aid "Cleaning Up Your Case" when you are back at your desk to help you at go-live.

REVIEW AND DISCUSSION

Duplicate Person Records

Use the information in this module to answer the questions below.

1. How is a person's history best captured?
[Within one whole, accurate person record.]
2. Where could you find duplicate person records?
[In a person search; in an ongoing case converted from SWSS.]
3. Where do you go to verify a person's history in the system?
[The person's MiSACWIS history.]
4. What can you do to quickly "remove" a duplicate case member from a case?
[You can deactivate the member.]

Notes

Summary

After completing this Conceptual Activity session, you should now know how to rid your converted ongoing cases of duplicate case members. You should also know the tips and tricks for deciding which duplicate person record is the correct one to select from a person search.

For more information on searching, please refer to these other resource materials:

Further Assistance
Getting Started Guide
Chapter 2 – Central Tasks
Online Help Topics
About search screens
Find records in MiSACWIS
WBT
Course 1 – Introduction to MiSACWIS