Duplicate Persons (CIN) – Identify and Document

Purpose

The purpose of this job aid is to assist users in documenting duplicate persons in the System.

Finding Duplicate Persons

Duplicate Persons occur when more than one record exists for an individual. The System allows you to indicate when two or more instances of the same person exist.

How to find potential duplicate person records:

Step	Action
1.	Place the cursor over **Case Info** on the **Global** navigation bar.
2.	Select **Case Summary** from the **Local** navigator.
3.	Click the **Person Search** link on the **Task** navigation bar.
4.	On the **Person Search** page: Search by using a combination of the following: • Last Name • First Name • Middle Name or Initial • Social Security Number • Date of Birth • Gender • Case Number **Note:** It is best practice to do a Social Security number search as well as a Name and DOB search without a Social Security Number.
5.	Click the **Search** button.
6.	Results will display identifying all person record(s) with the information searched for.

Once it has been determined that duplicate(s) exists, you must link the records by selecting all but one as the duplicate. The record(s) selected as the duplicate will not:

- Appear in the drop lists.
- Need to be related to everyone else on the case.

Duplicate Person Identification

Once it has been determined that more than one record exists of the same person, collaboration with other staff to determine which person record is correct and should be used moving forward may be needed. Once this is determined, all other person records need to be indicated as a duplicate person record. Additionally, the following two actions may be required:

- After identifying a record as a duplicate, other action may be needed to add the correct person to the case and/or program.
- If the duplicate person has program history, that information will need to be added to the person record that is being kept (e.g. SFIS, Time Limits, etc.).

Note: Prior to identifying an individual as a duplicate person, verify that the person is not:

- an absent parent, as it can impact the interface with Child Support, and/or
- considered to be a confidential record that should not be merged with a new record.

Duplicate Person List Page

The Duplicate Person List page allows you to indicate when a person's record is a duplicate of another person that may have resulted from User error, fraud, or data conversion. Clicking the Select button will navigate the User to the Select Person page where the duplicate record may be located and then selected.

Indicating a Person as a Duplicate

Once the correct person record has been determined, the incorrect person record needs to be indicated as a duplicate person record in the System.

The following steps will assume you are in the context of the case with the incorrect person record.

Step	Action
1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Click the **Customer Information** tab on the **Local** navigator.
3.	Click the **Ind. Demographics** link on the **Task** navigation bar.
4.	On the **Individual Demographics List** page:

	a) Click the **Edit** button associated with the incorrect (or duplicate) person.
5.	On the **Individual Demographics Detail** page: a) Click the **Duplicate List** button **Note**: If the **Individual Demographics Detail** page was not previously completed, you will need to complete all required fields before clicking the **Duplicate List** button.
6.	On the **Duplicate Person List** page: a) Click the **Select** button.
7.	On the **Select Person** page: a) Enter the information of the Person you want to keep as the correct person record in the search fields. b) Click the **Search** button. c) Click the radio button next to the correct person record to use going forward. d) Click the **Select** button. **Note:** The results will not list the person record you are currently indicating as a duplicate.
8.	On the **Duplicate Person List** page: a) Click the **Close** button.
9.	On the **Individual Demographics Detail** page: a) Click the **Save and Return** button

The person has now been identified as a duplicate.

Correcting the Case Record

If the correct person record is not on the case of the person just marked as a duplicate record, the User needs to add the **correct** person record to the case by completing the following steps.

Adding a Person Record to a Case:

The following steps assume you are in the context of the case to which you need to add the correct person record.

Step	Action
1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Click **Case Summary** from the **Local** navigator.
3.	Click the **New Person** link on the **Task** navigation bar.
4.	On the **New Person Search** page, at a minimum: a) Enter <**Last Name**> in the **Last Name** field. b) Enter <**First Name**> in the **First Name** field. c) Select <**Gender**> from the **Gender** drop list d) Click the **Search** button.
5.	In the **Search Results Summary** section:

	a) Confirm or select the radio button for the previously identified correct person record that you want to add. b) Click the **Select** button.
6.	On the **New Person Detail** page, click the **Continue** button. **Note**: If any information on the **New Person Detail** page needs to be updated, finish adding the person first and then make the update on the appropriate data collection page (e.g., **Address Detail**, etc.).
7.	On the **Case Member List** page: a) If there is more than one duplicate person record to be added, click the **Add Person** button and repeat Steps 4-6. b) If there are no more duplicates to add, click the **Save and Continue** button.

Once the correct person has been added to the case, the User may then add them to program(s) if needed.

Adding a Person to a Program

The following steps assume you are in the context of the case.

Step	Action
1.	On the **Case Summary** page: a) Click the **View Details** button in the <Program> block.
2.	On the **<Program Detail>** a) Click the **Edit** button. b) Click the **Add** button in the **Program Persons** page section.
3.	On the **<Program> Person Detail** page: a) Select <**Person's Name**> from the **Name** multi-select list. b) Enter <**Date**> in the **Application Date** field. c) Enter <**Date**> in the **Beginning Date of Aid** field. **Note**: User must add a Medi-Cal Program Type if they are on the Medi-Cal Person Detail page. d) Click the **Save and Return** button.
4.	On the **<Program> Detail** page: a) Click the **Save and Return** button.

Eligibility Information

Many of the data collection pages are associated with the person. Some pages are case specific. So, when an existing person is associated with a case, the person's existing information is now displayed on the data collection pages of that case. The correct person record(s) have been added to the case. Verify existing information and add new information or edit incorrect information on the data collection pages.

Adding Time Limits

Users should review the time limit information for the duplicate person and any other data collection records. Update time limit information for the newly added correct person record as appropriate. Only the correct person's time limit information will be sent to WDTIP. Instructions on how to add Time Limits can be found in the Time Limits job aid.

Running EDBC

After all the data collection information is entered for the new person(s), EDBC must be run. Run EDBC for all programs affected, beginning with the first month of potential eligibility and going through the come-up month.

Removing the Person as a Duplicate

If a person record was erroneously marked as a duplicate, follow these steps to take corrective action. The following steps assume you are in the context of the case.

Step	Action
1.	Place the cursor over **Eligibility** on the **Global** navigation bar.
2.	Click the **Customer Information** tab on the **Local** navigator.
3.	Click the **Ind. Demographics** link on the **Task** navigation bar.
4.	On the **Individual Demographics List** page: a) Click the **Edit** button associated with the duplicate person.
5.	On the **Individual Demographics Detail** page: a) Click the **Duplicate List** button.
6.	On the **Duplicate Person List** page: a) Click the check box next to the person you want to remove from duplication. b) Click the **Remove** button. c) Click the **Close** button.
7.	On the **Individual Demographics Detail** page: a) Click the **Save and Return** button.

The person is no longer designated as being a duplicate.

Note: If the person who is showing as a duplicate is connected to another person with the same CIN, the System will not allow the removal of the Duplicate Person from the Duplicate Person section unless the CIN has been changed from the other person. Once the CIN has been changed the System will allow the person to be removed from the Duplicate Person List.