CalSAWS | Quick Guide – Duplicate Persons

Purpose: The purpose of the CalSAWS Quick Guide is to provide the end-user with functional instructions on identifying and processing duplicate persons records in CalSAWS.

The CalSAWS Quick Guide can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The CalSAWS Quick Guide may include functional instructions, as well as screenshots from the CalSAWS System. It may highlight new functional processes, pages, page sections, fields, drop list values, etc.

Topic: Duplicate Persons

CalSAWS System Process:

In CalSAWS, users can identify duplicate person records and, with appropriate security rights, can also mark a person record as a duplicate. The record that is determined to be the correct record going forward is the Golden record and the other one is referred to as the Duplicate record. Once a person record is indicated to be a Duplicate record in CalSAWS, it no longer displays in person searches (so it is no longer available to select) and some of their data can be hidden within a case.

When duplicate person records exist across multiple Counties, the Duplicate Person Protocol should be followed to coordinate the correction of those records and minimize the impact to customers.

Note: The Duplicate Person Protocol is located on the CalSAWS Web Portal, follow your County process to access this document.

CalSAWS Web Portal path to the document:

███

What is a duplicate person record?

A duplicate person record is when the System has two or more records for the same person. These can be identified when conducting a person search and receiving multiple results. Searching for duplicate person records should be done as part of the person clearance process prior to creating new persons in the System.

When conducting a person search it is best practice to do minimum criteria search to get a wider range of results. For example, do a search with just a Social Security Number (SSN) or Client Index Number (CIN), but not both at the same time.

The steps below outline the process to conduct a person search:

1. On the **Homepage**, click the **Submit** button

2. On the **Person Search** page, enter search criteria to determine if the individual already exists in the System. The following four separate person searches are best practice to conduct:
   a. Last Name and First Name
   b. Last Name, First Name and Date of Birth
   c. Social Security Number
   d. Client Index Number (CIN)
3. Click the **Search** button

The Person Search page displays results for any potential matches to your search criteria. If there is more than one record listed, it means the person has a duplicate person record that needs to be corrected. You can click the **Name** hyperlink for each individual to access additional information about them.

Person Search

▶ Refine Your Search

▶ Advanced Search

☑Include Phonetic Search Results

Results per Page: [25 ▾] [Search]

Search Results Summary				Results 1 - 3 of 3
Name	**SSN**	**DOB**	**Address**	**CIN**
███████████		██████	██████████	█████
███████████	██████	██████	██████████	█████
Phonetic Search Results				
███████████	██████	██████	██████████	█████

If the person is associated with only one case, clicking the **Name** hyperlink navigates you to the Case Summary page for the case. If the person is associated to multiple cases, the **Select Case** page displays all the cases they are associated to, and you can click the **Case Number** hyperlink to navigate to the Case Summary page for those cases.

Select Case

The person you've selected is in more than one case.

Person Details

Name: ████	**SSN:** ████	**Date of Birth:** ████
Address: ████	**CIN Number:** ████	**Gender:** Male

Case Details

Case Number	County	Program	Status	Status Date	Worker ID
████	Merced	CalFresh	Active	02/01/2024	████
	San Bernardino	CalFresh	Pending	03/01/2024	

What is a Person ID?

A Person ID is a 10-digit unique identifier assigned by the System to each person record created. In the case of duplicate person records, each person record has a different Person ID even when all other data is the same (such as SSN or CIN). Person IDs cannot be altered or exchanged between person records. They are located on the Individual Demographics Detail page to view only.

In the image below we can see the Golden and the Duplicate records side by side and you can see that each of them has a different Person ID. This is another indication that this person has duplicate person records in the System.

Individual Demographics Detail

*- Indicates required fields

Name

Last Name: *   First Name: *
[redacted]   [redacted]

Maiden Name: Suffix:

SSN Status

Current Social Security Number:
[redacted]

SSN   **Verification Status**
[redacted]   Verified

A Number:

Sufficient Info for CIN: *
Yes

Marital Status:

Date of Birth:
[redacted]

Birth Country: *
United States

Is this person Hispanic or Latino?
*
No
ID/Driver License Available?
No

Person ID:
[redacted]

Individual Demographics Detail

*- Indicates required fields

Name

Last Name: *   First Name: *
[redacted]   [redacted]

Maiden Name: Suffix:

SSN Status

Current Social Security Number: Reason for no
No SSN

SSN   **Verification Status**
                  Pending

A Number:

Sufficient Info for CIN: *
Yes

Marital Status:

Date of Birth:
[redacted]

Birth Country: *
United States

Is this person Hispanic or Latino?
*
No
ID/Driver License Available?
No

Person ID:
[redacted]

How do duplicate person records get corrected?

Once duplicate person records are identified, users with the appropriate security rights can navigate to the Individual Demographics List page and indicate which person record is a duplicate. This process is outlined in the Job Aid Duplicate Persons – Identifying and Correcting located in the Learning Management System (LMS) or Online Help.

The process can be broken down into 3 parts:

1. Identifying duplicate person records by conducting a person search in CalSAWS
2. Determining which is the Golden record and which is the Duplicate record
3. Indicating in CalSAWS which record is the Golden record and which is the Duplicate record

What happens to person records once they are marked as duplicates?

Once a person record is marked as a duplicate, it no longer displays in CalSAWS when a person search is conducted. Due to the fact the person record no longer displays in person searches; it is a best practice that Golden records should be associated with any cases where the Duplicate records reside since it may impact any future benefit determination. Also, this allows users to see the cases that the Duplicate record may have been associated to in the event they needed to access that case for history or data.

When in the context of a case with a Duplicate record, that duplicate person information is still viewable in that case unless they are hidden. However, they are no longer selectable for adding case data for that incorrect record. After they are hidden the duplicate still displays on the Case Summary page under the All People Associated with the Case page section.

All People Associated with the Case							
Name	**DOB**	**Age**	**Gender**	**SSN**	**CIN**	**Person #**	**Household Status**
▮	▮	10	M	▮	▮	04	In the Home
		34	M			06	In the Home
		34	F			03	In the Home
		10	M			02	Permanently Out of the Home
		34	M			05	Permanently Out of the Home
		34	F			01	Permanently Out of the Home

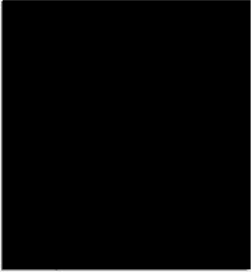Within the context of a case, users with the appropriate security rights can hide a person as follows:

1. Place the cursor over **Case Info** on the **Global** navigation bar
2. Select **Case Summary** from the **Local** navigator
3. Click the **Hide Person** link on the **Task** navigation bar
4. Click the **Person** checkbox(es) for the person(s) that need to be hidden
5. Click the **Save and Continue** button

Hide Person

	Save and Continue	Cancel

Select the individuals you wish to hide on the Data Collection pages:

	Person	Months Out of Home
☑	⬛	3
☐		0
☑		3
☐		0
☑		3
☐		0

Follow your County's policy and procedures for determining when to hide person records.

Why is it important to identify duplicate person records?

Duplicate person records can impact eligibility and benefit determinations for customers.

Scenario: Customer A applies for benefits in Sonoma County but is already receiving aid in Merced County. When the worker in Sonoma County runs EDBC, the System denies the individual for being aided on another case if the same person record is associated with both cases. However, if different person records are associated with each case, then the System does not deny the person and they may erroneously be granted aid on both cases.

Do all duplicate person records have the same CIN?

Not all duplicate person records have the same CIN. Sometimes different CINs are assigned to the same person in error. However, persons can be assigned two CINs due to the personal circumstances, such as Minor Consent. In that scenario, the person record for the Minor Consent is not considered a duplicate and should not be associated to the other record.

What if the Golden record and the Duplicate record have different CINs, does MEDS get updated once they are marked as a duplicate in CalSAWS?

Any MEDS corrections must be done in MEDS. CalSAWS does not make MEDS corrections, because of this, additional actions may be required in both CalSAWS and MEDS when there are CIN conflicts that need to be addressed after the duplicate person process has been completed.

For example, when the Golden record and Duplicate record have different CINs, the Golden record in CalSAWS and the primary record in MEDS must have the same CIN. In addition, CINs may also need to be merged in MEDS when appropriate to match the Golden record in CalSAWS.

To update a CIN, navigate to the Individual Demographics Detail page and click the **Search** button under **CIN**.

On the Client Index Number (CIN) Search Results page, results display based on the persons information. You can click the **Name** radio button for the appropriate record and then click the **Select** button to update the CIN.

Client Index Number (CIN) Search Results

Potential matches for:

Name:	SSN:	A Number:	Date of Birth:	Gender:
▮▮▮▮	▮▮▮▮		▮▮▮▮	Male

[Select] [Request New CIN] [Cancel]

Search Results Summary

	Name	CIN	SSN	A Number	DOB	Gender	Deceased	% Match
○	▮▮▮▮	▮▮▮▮	▮▮▮▮		▮▮▮▮	Male		100%
●	▮▮▮▮	▮▮▮▮	▮▮▮▮			Male		80%

Do I need to change the name of the duplicate person record and remove the social security number from CalSAWS?

The name of the duplicate person record should not be changed since it could impact other interfaces such as MEDS or Child Support. If the user must change the name of the duplicate to assist in correcting the duplicate person record, the name must be corrected back to its original entry before the end of day. Other person data, such as social security number, can be left as is for the duplicate person record.

For example, the user adds DUP to the person's last name while the duplicate person process is being completed in order to easily identify the Duplicate record. Prior to the end of the day, DUP needs to be removed from the last name so that MEDS is not impacted. Not making the correction by the end of the day updates the name in MEDS if the CIN is still associated to that CalSAWS person.

How do I know which person record is the Golden record and which one is the Duplicate record?

While many factors need to be considered when deciding which record to keep as the Golden record, here are 3 key factors to help you determine:

- Key Factor 1: Active status
  a. If one of the records is already active, keep the active record as the Golden one and mark any other records as duplicates
  b. If both records are active, proceed to the next key factor
  c. If neither record is active, proceed to the next key factor
- Key Factor 2: Most impactful to the customer/case
  a. Make the Golden record the one that is more likely to impact benefits for the customer
     Note: When choosing the Golden record, follow your County's policy and procedures to decide which record is most impactful (favor EBT or CalHEERS linked persons).
  b. If both records have the same amount of impact, proceed to the next key factor
- Key Factor 3: Most recent case history

a. Make the Golden record the one that has had the most recent case history since the data in CalSAWS is more current

Determining Golden vs Duplicate Person Records

Key Factor	Record 1	Record 2	Golden Record
1. Active in CalSAWS?	Yes	No	Record 1
	Yes	Yes	Go to Key Factor 2
	No	No	Go to Key Factor 2
2. Most Impactful to the Customer/Case?	Yes	No	Record 1
	No	Yes	Record 2
	Equal	Equal	Go to Key Factor 3
3. Most Recent History?	Yes	No	Record 1
	No	Yes	Record 2

Should other Counties be notified when a duplicate is identified?

Yes, remember to coordinate with other Counties when processing duplicates that are associated to cases in those Counties as it may impact any current or future cases the customer may have in that County. Even when the customer is not active in the other County, you should still follow your County's process to notify that County of the duplicate so they can determine the appropriate action to take.

Can there be duplicate person records on Inter-County Transfers (ICTs)?

Yes, ICTs are impacted by duplicate person records, especially when they are electronic ICTs (eICTs). When duplicate person records are identified, the person records from the incoming ICT are the Golden records, since they are active, and the existing person records in the receiving County are the Duplicate records, since they are inactive. If the existing case in the receiving County does not contain the Golden records from the incoming ICT then the Link to Case process does not work correctly and you may end up creating a new case instead of linking the ICT to the existing case.

To prevent this from happening, when a duplicate person record is identified through person clearance, ensure that the Golden record is associated to your County case prior to starting the eICT Link to Case process. The steps to associate a new person to a case can be located on Job Aid Add a Person to an Existing Case and Existing Program, section Add a Person Who Exists in the System.

For example, if an eICT is received in your County and the current County case only contains the duplicate person records, you must add the Golden records to your case before starting the eICT Link to Case process. If you attempt to link the eICT before adding the Golden record to your case, the case does not display as a selectable option, and the System creates a new case instead.

When an eICT is received, best practice is to complete the following steps:

1. Follow your County process to conduct person clearance to identify any duplicate person records in both MEDS and CalSAWS
2. If duplicates are identified, determine which is the Golden record and which is the Duplicate record
   Note: As a reminder, since the scenario is an incoming ICT, the person record that is already active should most likely be the Golden record
3. Add the Golden record to your County case if the Duplicate record is the only one associated to the case
4. Start the Link to Case process for the incoming ICT
5. Complete the duplicate person process to indicate which record is a duplicate
   Note: The duplicate person process does not need to be completed by the staff linking the eICT. Follow your County's policy and procedures on who completes this process.

Scenario 1: Customer B used to live in Alpine and had a case in the past that is currently inactive. They moved to Sacramento and are currently receiving Medi-Cal benefits. In Sacramento, a different person record was created for customer B than the one that was used in Alpine. Customer B then decides to move back to Alpine. When the eICT is received, during the person clearance process, the duplicate person records are identified. Since the person record in Alpine is not currently active, the person record from Sacramento is determined to be the Golden record and must be added to the Alpine case prior to linking the eICT to prevent a new case from being created. The original Alpine record is marked as a duplicate.

Scenario 2: Customer C is active CalFresh in Fresno County. They move to Madera County and apply for CalWORKs. Customer C used to live in Madera County and has an inactive case. The case is reopened, and customer C is granted CalWORKs. The worker requests the CalFresh ICT from Fresno County and when it is received, the duplicate person record is identified during the person clearance process. Now customer C is active in two Counties with two different person records. The Counties must coordinate with one another to determine which record is going to be marked as a duplicate. Once that is established and the duplicate person process is complete, the Golden record must be added to the case with the Duplicate record and pended to the active program. EDBC must be ran to activate the Golden record and close the Duplicate record. Once the duplicate person record is corrected, and the Golden record is active in both Counties, the eICT can be sent and linked properly in Madera County.

Other than data collection pages, what other pages should be updated once a person record is marked as a duplicate?

Once a person record is marked as a duplicate, you need to update case data to transfer all pertinent information to the Golden record. This includes Primary Applicant/Recipient, Payee and program person statuses.

Scenario: Customer Reggie Apple has an active CalFresh case where he is the Primary Applicant/Recipient, Payee, and program person. After review of the case, it is determined that this record needs to be marked as a duplicate. The duplicate person process has already been completed and the duplicate person record has been renamed Reggie Apple DUP (renamed for scenario purposes only). However, additional non-data collection pages need to be updated to transfer the information over to the Golden record.

This is the current information on the Case Summary page:

CalFresh

Worker:	▮▮▮▮▮▮	**Primary Applicant/Recipient:**	▮▮▮▮▮▮
Worker ID:	▮▮▮▮		
Program Status:	Active	**Language:**	English
RE Due Month:	01/2025 [Re-Evaluate]	**Phone Number:**	
Reporting Type:	Semi-Annual Reporting	**Email:**	
SAR Due Month:	07/2024	**Payee:**	▮▮▮▮
Aid Code:	09 - CalFresh		
Meets ESAP Criteria:	No	**Application Date:**	02/01/2024
Household Category:	NACF		
FBU:	1		

Name	Role	Role Reason	Status	Status Reason
▮▮▮▮	MEM		Active	

[View Details]

All People Associated with the Case

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
▮▮▮▮	▮▮▮▮	34	M	▮▮▮▮	▮▮▮▮	02	In the Home
		34	M			01	Permanently Out of the Home

As you can see, the Primary Applicant/Recipient, Payee and program person all still have ▮▮▮▮ ▮▮▮▮ listed even though the duplicate person process has been completed.

To update this information:

1. Click the **View Details** button on the **Case Summary** page for the applicable program
2. Click the **Edit** button on the **<Program Detail>** page
3. In the **Administrative Roles** page section, click the **Add** button
4. On the **Administrative Role Detail** page, select **Primary Applicant/Recipient** from the **Administrative Role** drop list
5. Select **<Golden Record>** from the **Name** drop list
6. Enter **<Month>** in the **Begin Month** field
7. Click the **Save and Return** button
8. In the **Administrative Roles** page section, click the **Add** button
9. On the **Administrative Role Detail** page, select **Payee** from the **Administrative Role** drop list
10. Select **<Type>** from the **Payee Sub-Type** drop list
11. Select **<Golden Record>** from the **Name** drop list
12. Enter **<Month>** in the **Begin Month** field

13. Click the **Save and Return** button
14. On the **<Program> Detail** page, enter the appropriate **<Beginning Date of Aid>** in the **Date** field
15. Click the **View Date** button
16. On the **Program Persons** page section, click the **Add** button
17. On the **<Program> Person Detail** page, select **<Golden Record>** from the **Name** multi-select list
18. Enter **<Date>** in the **Application Date** field
19. Enter **<Date>** in the **Beginning Date of Aid** field
20. Click the **Save and Return** button

Once the updates are complete, the Case Summary page displays as follows:

After all data collection pages are updated for the Golden record, EDBC needs to be run to close out the Duplicate record and activate the Golden record.

How do we avoid issues with EBT accounts and how do we fix EBT accounts once we have marked the person as a duplicate?

EBT account information needs to be updated for the Golden record if the Duplicate record was the original EBT card holder. In the previous scenario, the program's Primary Applicant/Recipient, Payee and program person have been updated. However, that does not update the EBT card holder.

The EBT Account List page still displays as follows:

EBT Account List

Account Number	Primary Cardholder	Cash Status	CalFresh Status	Begin Date	End Date
███████	██████	Active	Active	04/10/2024	

To update the EBT Account information:

1. From the **Case Summary** page, click the **EBT Account List** link on the **Task** navigation bar
2. On the **EBT Account List** page, click the **Add** button
3. On the **EBT Account Detail** page, select **<Golden Record>** from the **Card Holder** drop list
4. Select **<Type>** from the **Card Access Type** drop list (typically Cash & CalFresh)
5. Select **<Method>** from the **Card Delivery Method** drop list
6. Click the **Activate** button
7. Click the **Close** button

The EBT Account List page updates to show the prior EBT account and the new one for the Golden record.

EBT Account List

Account Number	Primary Cardholder	Cash Status	CalFresh Status	Begin Date	End Date
███████	██████	Active	Active	04/10/2024	
		Active	Active	04/10/2024	04/10/2024

Once the EBT account holder has been updated, the old card for the Duplicate record continues to carry any benefits that were previously issued. The customer should be informed to use any remaining benefits on that card. Any future benefits are issued to the new EBT card account.

How does the Child Support interface get impacted when a person is marked as a duplicate? How to fix and what to do in those scenarios?

The Child Support interface may be impacted when a person record gets marked as a duplicate since that person is essentially no longer available in CalSAWS. Updates to the Absent/Unmarried Parent List page may be needed as follows:

- Duplicate record is the applicant:
  - Add a new record for all absent/unmarried parents, listing the Golden record as the applicant

- Edit the existing Support Questionnaire records where the duplicate was listed as the applicant to change the Parentage Status for the child(ren) to Not Applicable
Note: If your County policy is to hide Duplicate records after they have been marked as duplicate, make sure this step is completed prior to hiding the record.

Support Questionnaire

❋- Indicates required fields   [Images] [Save] [Cancel]

APPLICANT

███████████

CHILDREN (IN YOUR HOME) OF NONCUSTODIAL OR UNMARRIED PARENT

Are you pregnant with the noncustodial or unmarried parent's child?

[⌄]

Child Name	Gender	SSN	DOB	Birth City	Birth State	Parentage Status ❋
███	Male		███			Yes-Court/Other ⌄
						Disproven
						Not Applicable
						Pending

- Duplicate record is the child:
  - Edit the existing Support Questionnaire record to update the Parentage Status for both the Golden and Duplicate records, selecting Not Applicable for the duplicate

Support Questionnaire

❋- Indicates required fields   [Images] [Save] [Cancel]

APPLICANT

███████████

CHILDREN (IN YOUR HOME) OF NONCUSTODIAL OR UNMARRIED PARENT

Are you pregnant with the noncustodial or unmarried parent's child?

[⌄]

Child Name	Gender	SSN	DOB	Birth City	Birth State	Parentage Status ❋
███	Male		███			Not Applicable ⌄
	Male	███	███			Yes-Court/Other ⌄

- Duplicate record is the unmarried/absent parent associated to the case:
  - Add a new record listing the Golden record as the absent/unmarried parent

Note: if the Golden record is not going to be associated to the case, just select Other from the Parent Name drop list and type in the absent/unmarried parent's name

- o Edit the existing Support Questionnaire records where the duplicate was listed as the absent/unmarried parent to change the Parentage Status for the child(ren) to Not Applicable

In addition to CalSAWS updates, you may also need to contact your Local Child Support agency to inform them of the changes as it might affect their case. Follow your County's policy and procedures for additional contact as needed.

Note: As a reminder, if the name of the Duplicate record was altered in any way to assist with completing the duplicate person process it must be changed back before the end of the day to avoid sending incorrect information to the Child Support interface.

Can person numbers (PNs) be impacted by duplicate person records?

Yes, PNs may need to be adjusted for the Golden and duplicate person records when causing conflicts with MEDS. The PN for the Golden record must match the PN in MEDS for that case/person.

```
EW15          ** REPORT IMMEDIATE NEED ELIGIBILITY **      XXX - 08/23/18

CASE-NAME                  DISTRICT                EW-CODE

COUNTY-ID-PER-MEDS __ __ _____ __ ___
MEDS-ID _____           BIRTHDATE _____     NEW-BIRTHDATE
VALID-MMYY _____          CARD-ISSUE-SITE __      CARD-REQUEST-REASON __
CLIENT-INDEX-NUMBER

NAME:  LAST                FIRST                   INITIAL

NEW-COUNTY-ID:  AID-CODE   SERIAL          FBU     PERSON-NO
SEX                        CA-DL/ID-NO             HIC-NO
ESAC                       NEG-ACTION *            %-OBLIG
SOC-AMOUNT                 LTC-IND                 SOC-FBU
MEDS-OHC                   RESTRICTION             ORIG-AID
NEW-OHC                    REF/ALIEN-IND           ENTRY-GRANT-DT
ALIEN-NO                   ALIEN-ELIG              ALIEN-SPONSOR-STATUS
EXPECTED-DELIVERY-DT       ETHNIC                  LANGUAGE
RESIDENCE-COUNTY
```

Users with the appropriate security rights can edit PNs on the All People Associated with the Case page section of the Case Summary page by clicking on the Person # hyperlink.

All People Associated with the Case							
Name	**DOB**	**Age**	**Gender**	**SSN**	**CIN**	**Person #**	**Household Status**
███	███	34	M	███	███	02	In the Home
		34	M			01	Permanently Out of the Home

After clicking the hyperlink, the user is navigated to the Edit Person Number page where the Person Number field can be updated as appropriate.

Edit Person Number

*- Indicates required fields   [Save and Return] [Cancel]

Person Number: *

`02`

DHCS should have guidance on how to update PNs. Typically, you would use any PN not already in use on the INXC - County-ID Cross Reference Report or INQW - Whole Case Inquiry screen, if it is a new person being added. If it is an existing person being re-added, use the prior PN that was reported to MEDS (INXC screen) or any new PN not already in use on the INQW screen if needed.

Can CalHEERS person numbers be affected by duplicate person records?

In addition to MEDS PNs, CalHEERS PNs may also need to be reassociated for individuals. You may get Business Validation (BV) errors on your disposition when you request MAGI if PNs need to be updated.

Some common BV errors that could be caused due to a duplicate persons include:

BV Number & Title	Message	What to Fix
85 – Non-existent CalHEERS Case Person Number	CalHEERS Case Person Number provided does not exist in CalHEERS: XX	Disposition contains a nonexistent CalHEERS Case Person Number. No such person number exists based on case linkage.
111 – Duplicate SAWS Case Person Number	Saws Case Person Number must be unique for each person. Cannot process the Disposition	SAWS Case Person Number must be unique for each person. Cannot process the Disposition.
112 – Conflicting CalHEERS & SAWS Case Person Numbers	CalHEERS Case Person Number XX and SAWS Case Person Number XX do not match or conflicts with existing person linkages in case	Disposition contains CalHEERS Case Person Number and SAWS Case Person Number which doesn't match or conflicts with existing person linkages in the case.

Additional information on CalHEERS dispositions can be found on Job Aid Medi-Cal CalHEERS Dispositions.

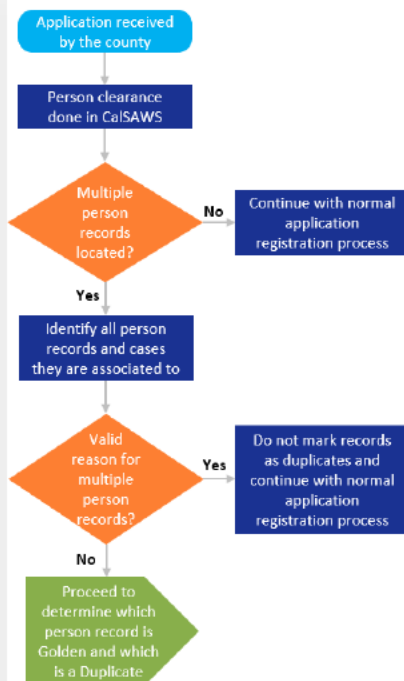You can update the PNs prior to requesting MAGI by navigating to the Select CalHEERS Person Number page. There are also situations when the Bypass Primary Applicant is needed to update information for the primary applicant.

Instructions for both processes can be found on JA Medi-Cal - MAGI Referrals and Eligibility Determinations sections:
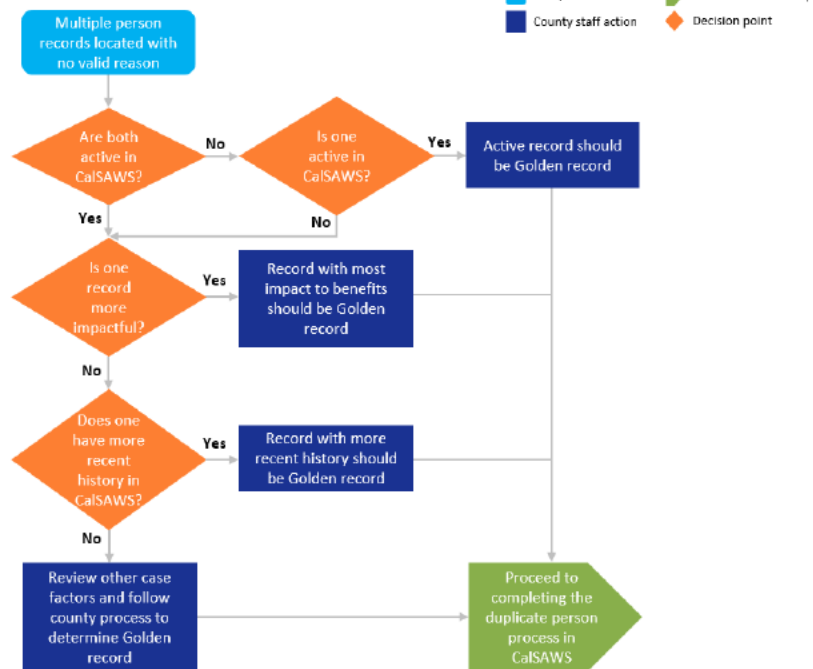
- CalHEERS Person Association
- Bypass Primary Contact Matching Criteria

Duplicate Person Record Process Flow Charts

1. Identifying Duplicate Persons

```
Application received by the county
        │
        ▼
Person clearance done in CalSAWS
        │
        ▼
Multiple person records located? ──No──▶ Continue with normal application registration process
        │
       Yes
        │
        ▼
Identify all person records and cases they are associated to
        │
        ▼
Valid reason for multiple person records? ──Yes──▶ Do not mark records as duplicates and continue with normal application registration process
        │
        No
        │
        ▼
Proceed to determine which person record is Golden and which is a Duplicate
```

2. Golden Record vs Duplicate Record

Legend
- Start/End (light blue)
- County staff action (dark blue)
- Continue to next step (green)
- Decision point (orange)

```
Multiple person records located with no valid reason
        │
        ▼
Are both active in CalSAWS? ──No──▶ Is one active in CalSAWS? ──Yes──▶ Active record should be Golden record
        │                                 │
       Yes                               No
        │                                 │
        ▼◀────────────────────────────────┘
Is one record more impactful? ──Yes──▶ Record with most impact to benefits should be Golden record
        │
        No
        │
        ▼
Does one have more recent history in CalSAWS? ──Yes──▶ Record with more recent history should be Golden record
        │
        No
        │
        ▼
Review other case factors and follow county process to determine Golden record
        │
        ▼
Proceed to completing the duplicate person process in CalSAWS
```

3. Indicating a Person Record is a Duplicate

```
Golden & Duplicate records identified
        │
        ▼
Golden record already on case? ──Yes──▶ Duplicate record active or pending? ──No──▶ Duplicate record primary applicant or payee? ──No──▶ Duplicate record EBT card holder? ──No──▶ Transfer any time limit information and other data collection to Golden record from Duplicate record
        │                                     │                                           │                                          │
        No                                   Yes                                         Yes                                        Yes
        │                                     │                                           │                                          │
        ▼                                     ▼                                           ▼                                          ▼
Add Golden record to case with duplicate record    Pend Golden record to any programs where the duplicate is active or pending    Update administrative roles to make Golden record primary applicant or payee    Update EBT Account Detail to make Golden record card and/or account holder

        Transfer any time limit information... ──▶ Edit Individual Demographics for Duplicate record to make them a duplicate of Golden record ──▶ Other Counties affected? ──No──▶ Run EDBC for any program(s) the Duplicate record is active or pending and hide Duplicate if appropriate
                                                                                                │
                                                                                               Yes
                                                                                                │
                                                                                                ▼
                                                                            Follow the Duplicate Person Protocol to notify other counties of updates needed to person records
```