

Duplicate Persons – County Duplicate Impact Notifications

[Purpose](#)

[Defining Duplicate Person Records](#)

[County Notifications](#)

[County Duplicate Impact List Page](#)

[Understanding the County Duplicate Impact Detail Record](#)

[Updating the County Duplicate Impact Detail Record](#)

Purpose

The purpose of this job aid is to assist Counties in monitoring and processing any duplicate person records identified as having a case in their County through the System.

Defining Duplicate Person Records

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

Term	Definition
Golden Record	Prevailing person record used in CalSAWS by all Counties moving forward.
Duplicate Record	Person records considered as duplicate of the Golden record and are no longer available for use on active programs moving forward. Usually, they contain historical information that may be transferred to the Golden record.

For information on correcting Duplicate Person Records, County staff may refer to the Duplicate Persons – Identifying and Correcting job aid. County staff may also refer to the CalSAWS Quick Guide – Duplicate Persons for detailed steps for case correction.

County Notifications

Any County can mark an individual person record as a duplicate. Counties are made aware if a person record marked as a duplicate is associated to their County case through automated County notifications.

The System automatically generates this notification for any impacted Counties when another County identifies a person's record as a duplicate. These notifications display County Duplicate Impact Detail records on the County

Duplicate Impact List page. Counties should continue to follow the CalSAWS Duplicate Person Protocol when Assistance from another County is needed.

County Duplicate Impact List Page

The County Duplicate Impact List page can be accessed by selecting Case Info from the Global navigation bar and then e-Tools from the Local navigator. Once in e-Tools, click the County Duplicate Impact link under the County Communications section of the Task navigation bar.

Users with the appropriate security rights may access the County Duplicate Impact List page to review any notifications auto generated from other Counties. County Duplicate Impact Detail records in a New status display by default upon accessing the list page. Counties can search for any detail records in an In-Process or Completed status as needed.

Understanding the County Duplicate Impact Detail Record

The County Duplicate Impact Detail page displays key information associated with the person record marked as a duplicate. The County may need to take actions to retain case data associated with the duplicate. County may also need to add the Golden Record to these identified cases to ensure their case remains associated with the person to retain historical application data.

Counties have the option of updating the status on any Duplicate Impact Detail records for tracking. They may also individually track specific sections within the detail record should a person record require multiple updates.

General Duplicate Information Page Section

This section displays demographic and case information for the duplicate record. The Case Number hyperlink navigates the user to the Case Summary page to review the case record being impacted and determine what fixes are necessary.

Program(s) as of Created Date Page Section

This section displays any programs associated to the duplicate record within the case identified, program status and the duplicates' role within that program. This section does not display if there are no programs associated to the duplicate within the case.

Golden Record Page Section

This section displays the individual demographic data of the Golden Record to be used by all Counties moving forward. This demographic data should be utilized if adding the Golden Record to any case where a duplicate has been identified.

Identified Detail Records Sections

Any open records for the duplicate record from the following areas trigger a section to display on the County Duplicate Impact Detail page.

- EBT Accounts
- Recovery Accounts
- Time Limits
- Permanency Plan Court Orders
- Absent/Unmarried Parent Records
- Linked Self Service Portal Accounts

This is intended as information for County use to determine if a record needs to be copied over to the Golden Record to retain that information.

The Name hyperlinks for any identified records navigate the user to the appropriate page for ease of reviewing and returning to the County Duplicate Impact Detail page. Counties can track any research completed for these records directly on the County Duplicate Impact Detail page as well as update the record to a complete status to easily identify the information relayed has been looked at and any steps needed (if any) have been taken. These sections only display if an associated detail record is identified.

Updating the County Duplicate Impact Detail Record

County Duplicate Impact Detail records are auto generated through CalSAWS and cannot be manually created. County staff can track and manage any notifications received by their County by updating the detail record.

This step-action table begins when a County Duplicate Impact Detail record has been received by your County.

Step	Action
1.	Place the cursor over Case Info on the Global navigation bar.
2.	Select e-Tools from the Local navigator.
3.	Click the County Duplicate Impact link on the County Communications section of the Task navigation bar.
4.	On the County Duplicate Impact List page: a) Enter the appropriate search criteria. b) Click the Search button. Note: If clearing records in a New status skip to Step 5.
5.	On the County Duplicate Impact List page: a) Click the Name hyperlink for the appropriate person record.
6.	On the County Duplicate Impact Detail page: a) Click on Edit .

	<ul style="list-style-type: none">b) Review the person record information.c) Select the appropriate <Record Status> from the Status drop list.d) Click the Reviewed checkbox for any sections that have been reviewed, and no further action or follow-up is needed.e) Enter <Comments> of any updates made in the Comments field.f) If review of the County Duplicate Impact Detail record has not been completed skip to next step. Select the Completed from the Status drop list.g) Click the Save button.h) Click the Close button.
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------