

X3.1A Merge (Person To Person) – Interim State Process Flow – Level 3.0

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Merge Specialist	Worker(s)
<p>X3.1A.1 Select Duplicate to Investigate</p>	<p><u>When duplicate is identified through:</u></p> <p>(a) A Worker:</p> <ul style="list-style-type: none"> • Select the next email identifying a duplicate record from the Mobius Support mailbox, <p>(b) Query:</p> <ul style="list-style-type: none"> • Work through the duplicate records listed in the query. 	
<p>X3.1A.2 Determine if Duplicate Exists</p>	<ul style="list-style-type: none"> • Look up the Mobius Records of the clients identified as potential duplicates. • Review the records to determine if a duplicate exists. • If assistance is required to determine if a duplicate exists, proceed to step X3.1A.4 – Request Confirmation of Duplicate. • If a duplicate is exists, proceed to step X3.1A.10 - Identify Keeper Record. • If a duplicate does not exist, proceed to step X3.1A.9 – Create Alert (to indicate that the two records are not duplicates). 	
<p>X3.1A.4 Request Confirmation of Duplicate</p>	<ul style="list-style-type: none"> • Look through the clients Mobius Records to identify worker(s) to contact for assistance. • Send a request to the worker(s) to ‘investigate and confirm the duplication’. See step X3.1A.5 Review Potential Duplicate). 	

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	<ul style="list-style-type: none"> • If a response is not provided, escalate the request. <u>Escalation Procedure</u> <ul style="list-style-type: none"> ○ If more than 10 days has passed since the request was sent to the worker(s), send a reminder to the worker(s) ○ If more than 30 days has passed since the request was sent to the worker(s), notify the Merge Specialist's supervisor to communicate to workers' supervisor. 	
X3.1A.5 Review Potential Duplicate		<ul style="list-style-type: none"> • Receive the request from the Merge Specialist. • Look up the Mobius Records of the clients. • Determine if a duplicate exists by reviewing the Mobius data and communicating with worker(s) as necessary. Determination is based on the expert knowledge and judgement of the worker(s). Proceed to step X3.1A.6 Communicate Findings.
X3.1A.6 Communicate Findings		<ul style="list-style-type: none"> • Send the determination and supporting findings back to the Merge Specialist. • See step X3.1A.7 Receive Findings.
X3.1A.7 Receive Findings	<ul style="list-style-type: none"> • Receive and review the findings from the worker(s). • Follow-up on discrepancies and questions, as necessary, through emails and phone calls. 	

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	<ul style="list-style-type: none"> • If the duplicate was confirmed, proceed to step X3.1A.10 Identify Keeper Record. • If a duplicate does not exist, proceed to step X3.1A.9 Create Alert (to indicate not a duplicate) 	
X3.1A.9 Create Alert (to indicate not a duplicate)	<ul style="list-style-type: none"> • Create a Mobius Information Alert on both client records with the following description: 'This person is not a duplicate of [<i>First Name, Last Name</i>] (Mobius record #)'. <ul style="list-style-type: none"> • Process ends. 	
X3.1A.10 Identify Keeper Record	<ul style="list-style-type: none"> • Determine the Keeper Record. <u>Considerations for determining a Keeper record</u> <ul style="list-style-type: none"> ○ If only one (1) of the Mobius Client records has open item(s), use the record with the open items as the Keeper record. ○ If two (2) of the Mobius Client records have open item(s), review the records to identify what makes the most sense to use as a Keeper record. Example: Is one record ready to be closed? What is the amount of data associated with the case? Which record was created first? • If assistance is required to determine the Keeper record, proceed to step X3.1A.12 Request Identification of Data for Keeper Record. • If the Keeper record is known, proceed to step X3.1A.16 Mark Duplicate Record. 	

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<p>X3.1A.12 Request Identification of the Keeper Record</p>	<ul style="list-style-type: none"> • Look through the clients Mobius Records to identify worker(s) to contact for assistance. • Send a request to the worker(s) to identify the Keeper record. See step X3.1A.13 Review Data. • If a response is not provided, then escalate. <p><u>Escalation Procedure</u></p> <ul style="list-style-type: none"> ○ If more than 10 days has passed since the request was sent to the worker(s), send a reminder to the worker(s) ○ If more than 30 days has passed since the request was sent to the worker(s), notify the Merge Specialist's supervisor to communicate to workers' supervisor. 	
<p>X3.1A.13 Review Data</p>		<ul style="list-style-type: none"> • Receive the request from the Merge Specialist. • Determine the Keeper record by reviewing the Mobius data. Communicate with other worker(s) s as necessary. This decision is based on the expert knowledge and judgement of the worker(s). Proceed to step X3.1A.14 Communicate Results
<p>X3.1A.14 Communicate Results</p>		<ul style="list-style-type: none"> • Send a response to the Merge Specialist identifying the Keeper record. See step X3.1A.15 Receive Results

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X3.1A.15 Receive Results	<ul style="list-style-type: none"> Receive the response(s) from the worker(s) and review for discrepancies. Follow up as necessary through emails and phone calls. Proceed to step X3.1A.16 Mark Duplicate Record. 	
X3.1A.16 Mark Duplicate Record	<ul style="list-style-type: none"> Follow the Mobius system procedures to Mark the Duplicate record. Proceed to step X3.1A.17 Determine if “Open Items” exist on the Duplicate Record. 	
X3.1A.17 Determine if Open Items Exist on the Duplicate Record	<ul style="list-style-type: none"> Review the duplicate record for open items. Example: plan items, service plans or cases. If open items exists, proceed to step X3.1A.19 Request Closure of Open Items. 	
X3.1A.19 Request Closure of Open Items	<ul style="list-style-type: none"> Send a request to worker(s) to close all open items on the duplicate record. See step X3.1A.20 Close “Open Items” 	
X3.1A.20 Close ‘Open Items’		<ul style="list-style-type: none"> Receive the request and close all open items. <u>Considerations when closing items:</u> <ul style="list-style-type: none"> Update the Keeper record with service plans and plan items as necessary Ensure relationships in the duplicated

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		<p>person record are set up on the Keeper record.</p> <ul style="list-style-type: none"> • Proceed to step X3.1A.21 Communicate Closure Completed.
<p>X3.1A.21 Communicate Closure Completed</p>		<ul style="list-style-type: none"> • Send a response back to the Merge Specialist informing them that the open items have been closed. • See step X3.1A.22 Receive Confirmation of Closure Completed.
<p>X3.1A.22 Receive Confirmation of Closure Completed</p>	<ul style="list-style-type: none"> • Receive the response and review the records to ensure all data has been copied over appropriately. • Proceed to step X3.1A.23 Start Merge • If a response is not provided, then escalate. <u>Escalation Procedure</u> <ul style="list-style-type: none"> ○ If more than 10 days has passed since the request was sent to the worker(s), send a reminder to the worker(s). ○ If more than 30 days has passed since the request was sent to the worker(s), notify the Merge Specialist's supervisor to communicate to workers' supervisor. 	
<p>X3.1A.23 Start Merge</p>	<ul style="list-style-type: none"> • Follow the Mobius system procedures to Start the Merge. • If items are still open, continue to work with the 	

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	<p>worker(s) to have them closed.</p> <ul style="list-style-type: none"> Proceed to step X3.1A.24 Merge the Duplicate Record 	
<p>X3.1A.24 Merge the Duplicate Record</p>	<ul style="list-style-type: none"> Follow the Mobius system procedures to append the data from the duplicate record to the Keeper record as appropriate. System will send Merge message to CSS which the PDD (CSS) Administrator will pick up to act on (see step X3.1A.25 Pull Message from Queue and action according to existing merge process). 	

PROCESS STEP	Merge Specialist	PDD (CSS) Administrator
<p>X3.1A.25 Pull message from Queue and action according to existing merge processes</p>		<ul style="list-style-type: none"> Retrieve the Merge message from the CSS inbound message queue. Action existing merge processes to ensure client duplicate record is merged.