


B8.2 Search and Register All Prospects in Application – Interim State Process Flow – Level 3.0

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Workers from; Common Service Access Queue Worker
<p>B8.2.1 Select a Prospect</p>	<ul style="list-style-type: none"> • Select a Prospect (all Applications will have prospects). • If this is a PDD application, check to see if a Public Guardian or Public Trustee authority has been specified. This is shown in the Application PDF in the Relationships section. • Make a note of the specified Public Guardian or Public Trustee, name info is needed when processing the Public Guardian/Trustee prospect record in next step.
<p>B8.2.2 Search Mobius for Matching Person record(s)</p>	<p><i>Normal Steps</i></p> <ul style="list-style-type: none"> • Select “Search and Register Prospect as Person” • Initiate search using pre-populated Prospect information (Last Name, First name, Birthdate) <p><i>PDD Public Guardian/Trustee Steps (recognized as noted from previous step)</i></p> <ul style="list-style-type: none"> • If PDD Public Guardian/Trustee is being processed, follow these steps;. <ul style="list-style-type: none"> ○ Select “Search and Register Prospect as Person” ○ If the last name and first name does not reflect “Office of the Public Guardian” and OPGT respectively, then overwrite the pre-populated Prospect Last Name, First Name information as follows, <ul style="list-style-type: none"> ▪ Last Name: Office of the Public Guardian and Trustee ▪ First Name: OPGT ○ Initiate search using overwritten fields (search will find the OPGT Golden record that is pre-created in MOBIUS), the next step merge will happen to this golden record.
<p>B8.2.3 Review Search results and determine if there is a match</p>	<ul style="list-style-type: none"> • Review the search results displayed from the search. • If duplicate records are noticed in the search result, then proceed to step B8.2.5 Notify Merge Specialist. • Use the toggle  to view the details of the individual records in search results to determine if there is a correct match. • Inspect the content of the details of the matching record(s) returned by the system. • Determine if the matching record(s) returned by the system is or is not the same person as the details in the Prospect record.

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	<ul style="list-style-type: none"> • Follow the following scenarios based on if a match is found either in Mobius or EDB or no match is found <p>Scenario 1: No Match Found</p> <ul style="list-style-type: none"> ○ If there zero records are returned or if it is determined that the person record from the system is not the same person as the Prospect record then proceed to step B8.2.7 Indicate intention to Register Prospect as Person. <p>Scenario 2: Match Found (from Mobius)</p> <ul style="list-style-type: none"> ○ Determine if the Person is currently registered in Mobius (“Registered?” column will say “Yes”) ○ If Person is currently registered in Mobius, proceed to step B8.2.10 Select matching Person record and indicate intention Merge <p>Scenario 3: Match Found (from EDB)</p> <ul style="list-style-type: none"> ○ Determine if Person is currently registered in EDB (“Registered?” column will say “No”), ○ If the Person is currently registered in EDB, proceed to step B8.2.12 Indicate intention to register EDB record as Person
B8.2.5 Notify Merge Specialist	<ul style="list-style-type: none"> • Send email to “Mobius.Requests@gov.ab.ca” • Include “Duplicate Notification” in Subject line and include following for the duplicate records <ul style="list-style-type: none"> ○ Keeper Name: ○ Keeper EIID: ○ Name: ○ EIID: ○ Name: -Repeat as necessary- ○ EIID: • Continue with Scenario 2 or 3 based on the keeper record <p>Scenario 2: Match Found (from Mobius)</p> <ul style="list-style-type: none"> ○ Determine if the Person is currently registered in Mobius (“Registered?” column will say “Yes”) ○ If Person is currently registered in Mobius, proceed to step B8.2.10 Select matching Person record and indicate intention Merge

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	<p>Scenario 3: Match Found (from EDB)</p> <ul style="list-style-type: none"> ○ Determine if Person is currently registered in EDB (“Registered?” column will say “No”), ○ If the Person is currently registered in EDB, proceed to step B8.2.12 Indicate intention to register EDB record as Person
<p>Scenario 1: No Match Found – Register Prospect</p>	
<p>B8.2.7 Indicate intention to Register Prospect as Person</p>	<ul style="list-style-type: none"> • Do not select any records from results list (no match found), select “Next”
<p>B8.2.8 Complete Register Prospect Process</p>	<ul style="list-style-type: none"> • Information from Prospect record will be prepopulated to Person record • Select “Save” to Register person • Proceed to step B8.2.16 Review Person record for address verified indicator and any obvious spelling errors
<p>Scenario 2: Match Found – Person in Mobius already- Merge Prospect</p>	
<p>B8.2.10 Select matching Person record and indicate intention to Merge Prospect with Person record</p>	<ul style="list-style-type: none"> • Select the Check Box beside the displayed matching Person record from Mobius indicated by where the “Registered?” column will say “Yes” • Select “Start Merge” to start the merge process • All information from Prospect record will be merged with Mobius Person record. <p><i>PDD Public Guardian/Trustee Steps</i></p> <ul style="list-style-type: none"> • When merging the Prospect with the OPGT Mobius Person record, ONLY merge the “Relationships” section

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	<ul style="list-style-type: none"> All other sections from the Prospect record should not be merged with the Golden OPGT Person Record.
B8.2.11 Complete Merge Process	<ul style="list-style-type: none"> Select “Complete Merge” to save to merged Person record. The merge process will add and save all Prospect information into Mobius Person record Proceed to step B8.2.16 Review Person record for address verified indicator and any obvious spelling errors If the following error message, "This person has been partially merged. To merge/register this prospect person they must be unmarked as a duplicate first. Please send an email to Mobius.Requests@gov.ab.ca to unmark this prospect person as a duplicate." is encountered Send an email with “Unmark Accidental Duplicate” in Subject line and following details in the email. <ul style="list-style-type: none"> Name of the Prospect Person EIID of the Person record that the Prospect is being merged with
Scenario 3: Match Found – Person in EDB only; Register Person first from EDB then Merge Prospect with Person registered from EDB	
B8.2.12 Indicate intention to Register EDB record as Person Record	<ul style="list-style-type: none"> Select the Check Box beside the displayed matching Person record from Mobius indicated by where the “Registered?” column will say “No” Select “Next”
B8.2.13 Complete Registration of EDB record as Person in Mobius	<ul style="list-style-type: none"> Information from EDB record will be prepopulated to the Mobius Person record Select “Save” to Register person
B8.2.14 Indicate intention to Merge	<ul style="list-style-type: none"> Select “Start Merge” to start the merge process All information from Prospect record will be merged with newly Registered Mobius Person record from EDB

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Prospect with newly created Person record	
B8.2.15 Complete Merge Process	<ul style="list-style-type: none"> • Select “Complete Merge” to save to merged Person record • The merge process will add and save all Prospect information into Mobius Person record • Proceed to step B8.2.16 Review Person record for address verified indicator and any obvious spelling errors to continue with rest of registration process • If the following error message, "This person has been partially merged. To merge/register this prospect person they must be unmarked as a duplicate first. Please send an email to Mobius.Requests@gov.ab.ca to unmark this prospect person as a duplicate." is encountered • Send an email with “Unmark Accidental Duplicate” in Subject line and following details in the email. <ul style="list-style-type: none"> ○ Name of the Prospect Person ○ EIID of the Person record that the Prospect is being merged with
Review for Address Verification and Spelling Errors	
B8.2.16 Review Person record for address verified indicator and any obvious spelling errors	<p><i>NOTE: Only address corrections and/or any spelling mistakes may be corrected within the next couple of steps. Any other changes such as relationships or personal information, etc., should not be done at this point in time, since it will no longer match information provided in the application.</i></p> <ul style="list-style-type: none"> • Review Person record address details and check if the Address is Verified using Canada Post address verification utility. • If address is Unverified, Proceed to step B8.2.18 Correct Address using Canada Post site (if possible) • If address is Verified, continue to check if there are any spelling errors <ul style="list-style-type: none"> ○ Review the entire address fields to identify any obvious spelling mistakes, i.e. Edmonton, St Albet, etc. ○ Verify these are genuine spelling mistakes by inspecting different elements of the address (Address fields, City, etc.) ○ If there are spelling errors proceed to step B8.2.20 Correct any spelling errors and enter related

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	<p>notes</p> <ul style="list-style-type: none"> ○ If there are no spelling errors proceed to step B8.2.21 Determine if all Prospects in application(s) are processed
<p>B8.2.18 Correct Address using Canada Post site (if possible)</p>	<ul style="list-style-type: none"> • Attempt to correct Postal Code and/or City name after researching with Canada Post website for most up-to-date address information (City name &/or Postal Code) • Update the address with correct information (City Name &/or Postal Code) • Review the entire address fields to identify any obvious spelling mistakes, i.e. Edmonton, St Albet, etc. • Verify these are genuine spelling mistakes by inspecting different elements of the address (Address fields, City, etc.) • If there are spelling errors proceed to step B8.2.20 Correct any spelling errors and enter related notes • If there are no spelling errors proceed to step B8.2.21 Determine if all Prospects in application(s) are processed
<p>B8.2.20 Correct any spelling errors and Enter related notes, Save record</p>	<ul style="list-style-type: none"> • Correct the spelling mistakes • Enter what was corrected into the Notes for traceability and later reference by program workers. Notes will also trigger the program workers to verify these errors with the applicant later during next steps and also have them initial any changes in the original Application. • Save record
<p>B8.2.21 Determine if all Prospects in application(s) are processed.</p>	<ul style="list-style-type: none"> • Check and determine if all prospects associated with the application have been Registered • If all prospects have been Registered proceed to steps in B8.3 Set Application Case to Ready For Determination • If some prospects still remain to be registered proceed to step B8.2.1 Select a Prospect