X3.1B Unmerge – Interim State Process Flow – Level 3.0

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Merge Specialist	Worker (s)
X3.1B.1 Confirm Merge was Performed in Error	• Look up the Client's Mobius record and review to confirm that the merge was indeed performed in error. • If the merge was performed in error, proceed to step **X3.1B.8 Identify Correct Person Record Data for each Person Record**. • If the merge was not performed in error, process ends. • If assistance is required to make the determination, proceed to step **X3.1B.3 Request Confirmation that Merge was Performed in Error.**	

X3.1B.3
Request Confirmation that Merge was Performed in Error
	• Look through the client's Mobius Records to identify worker(s) to contact for assistance.
	• Send a request to the worker(s) to 'investigate and confirm that the merge was performed in error'. See step **X3.1B.4 Review Merged Record**
	• If a response is not provided, escalate the request.
	Escalation Procedure
	   o If more than 10 days has passed since the request was sent to the worker(s), send a reminder to the worker(s).
	   o 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 the workers' supervisor.	

X3.1B Unmerge – Interim State Process Flow – Level 3.0

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Merge Specialist	Worker (s)
X3.1B.4 Review Merged Record		• Receive the request from the Merge Specialist. • Look up the client's Mobius record. • Determine if a merge was performed in error by reviewing the Mobius data and communicating with other workers as necessary. Determination is based on the expert knowledge and judgement of the worker(s). Proceed to step **X3.1B.5 Communicate Findings.**
X3.1B.5 Communicate Findings		• Send the determination and supporting findings back to the Merge Specialist. See step **X3.1B.6 Receive Findings.**
X3.1B.6 Receive Findings	• Receive and review the findings from the worker(s). • Follow-up on discrepancies and questions, as necessary, through emails and phone calls. • If the merge was confirmed to be in error, proceed to step **X3.1B.8 Identify Correct Person Record Data for each Person Record.** • If the merge was not performed in error, the process ends.	
X3.1B.8	• Review the Mobius Person record to identify the	

X3.1B Unmerge – Interim State Process Flow – Level 3.0

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Merge Specialist	Worker (s)
Identify Correct Person Record Data for each Person Record	correct data. • If assistance is required, proceed to step **X3.1B.10 Request Identification of Correct Data.** • If the correct Person Record data is known, proceed to step **X3.1B.14 Start Unmerge**.	

X3.1B.10
Request Identification of Correct Data
	• Look through the client's Mobius Records to identify worker(s) to contact for assistance.
	• Send a request to the worker(s) to 'identify the correct Person Record data'. See Step **X3.1B.11 Review Data.**
	• If a response is not provided, escalate the request.
	Escalation Procedure
	  o If more than 10 days has passed since the request was sent to the worker(s), send a reminder to the worker(s).
	  o 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 the workers' supervisor.	

X3.1B.11 Review Data		• Receive the request from the Merge Specialist. • Look up the Mobius record of the clients. • Determine the correct Person Record data by reviewing the Mobius records and communicating with other workers as necessary. Determination is based on the expert knowledge and judgement of the

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Merge Specialist	Worker (s)
		worker(s).
X3.1B.12 Communicate Results		• Send the determination and supporting findings back to the Merge Specialist. See Step **X3.1B.13 Receive Results.**
X3.1B.13 Receive Results	• Receive and review the findings from the worker(s). • Follow-up on discrepancies and questions as necessary through emails and phone calls. • Proceed to step **X3.1B.14 Start Unmerge**.	
X3.1B.14 Start Unmerge	• Select an "Unmerge Person Information" task from the list of merge tasks. • Mobius presents "Unmerge Task Details" screen. Proceed to step **X3.1B.15 Complete Unmerge**	
X3.1B.15 Complete Unmerge	• Follow the Mobius system procedures to complete the unmerge. Proceed to step **X3.1B.16 Inform worker(s) that Unmerge is complete.** • System will send unmerge message to CSS as necessary. See step **X3.1B.18 Pull message from Queue and action according to existing merge processes**	
X3.1B.16	• Determine who should be notified that the client files	

ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Merge Specialist	Worker (s)
Inform Worker(s) That Unmerge is Complete	have been un-merged. • Send an email to the worker(s) involved in the client's case informing them that which client files have been un-merged. See step **X3.1B.17 Re-create items as necessary.**	
X3.1B.17 Re-create Items as Necessary		• Receive the email from the Merge Specialist. • Re-create items as appropriate. Communicate with other workers as necessary. Determination is based on the expert knowledge and judgement of the worker(s). • Process ends.

PROCESS STEP	Merge Specialist	PDD (CSS) Administrator
X3.1A.18 Pull message from Queue and action according to existing merge processes		• Retrieve the Merge message from the CSS inbound message queue. • Action existing merge processes to ensure client duplicate record is merged. • Process ends.