Processing a Potential Duplicate

Step 1

Manage Persons -> Search -> Manage Task

- If a 750 Potential Duplicate task already identified, **skip to Step 2**
- Within the **'Manage Task'** view in the Identity Management Toolkit (IdM TK), select **'Search'** -> **'Task Type'**: **'Potential Duplicate Task - Add Patient'**
- The **'Task Search Results'** screen will display; new tasks will be at the beginning of list and assigned tasks will be at the end of the list
- Select the appropriate task from this list
- For date specific exceptions, you can complete the Date Reported fields

Step 2

Task Details Tab

- See if there are '**Requests**' or '**Tasks**' assigned to a different Caseworker
  - If so, contact that Caseworker before you continue
- Check for any **PCE flags**. PCE Flags show up as red triangles with an exclamation mark next to key traits.
  - If you **DO** find flags for PCE, stop your work and report it to your trainers
  - If you **DO NOT** find flags for PCE, continue to the next step

Step 3

Task Notes Tab

- Select your name from the '**Caseworker**' drop down, or click **your name** right above the drop down to automatically populate the '**Caseworker**' field with your name
- Click '**Save**'
- In the Task Notes field an auto note will appear showing the assignment A request may need to be created or you may need to assign yourself as a Caseworker to an existing request

Step 4

Manage Requests -> Create a Request (EHRM Cleanup Caseworkers ONLY)

- In the '**Create a Request**' tab, select '**Create a DOD Correlation**' in the drop down box
- Fill out information for request, including the site code (you can also search it through the drop down box)
- Associate the **'Task'** and the '**Request**'
  - Select the '**Request Tasks**' tab within the Request
  - Find your task
  - Select the '**Save the Request**' option
- Search for the second ICN and associate it with your request by repeating the steps above.

Step 5

Manage Duplicate IDs & Correlations

- In '**Primary View**', select the hyperlinked ICN
- Select the '**Correlations**' tab, then select the box that says '**All Correlations**', then scroll down through the correlations listed and click '**View Correlation Audit**'
- Repeat these actions for every ICN listed on the Manage Duplicate IDs tab

Step 6

Verify Person Data

- Check the data for each ICN using various verification tools (**SHARE (SSA, VBA BIRLS/CORP, Accurint, VBMS**)
- Review data to ensure it has not been overwritten
- **At a minimum**, search **SSA** and **BIRLS** for records before you link them

Step 7

Add findings to TK Template

- Note assessment/findings from research in the '**TK Template Details & Instructions'** document
- Fill out everything up to the **'Assessment'**
- Send completed TK Template Details & Instructions document to your assigned Trainer for review
- Encrypt the email
- Add '**Review Task #**' to the email subject line
- Verify duplicates then return to the '**Potential Duplicate Task'**
- Copy and paste the approved template in the '**Task Notes'** tab

Step 8

Potential Duplicate Task

- Select the '**Manage Duplicate IDs**' tab within the '**Potential Duplicate Task'**. Select '**Set as Permanent**' for the record that is to be retained
- Link box(es) to deactivate ICN(s)/record(s) and link to the Permanent (retained) record
- Select '**Submit to MPI'** then '**OK**' to accept Task Actions or '**Cancel**' to reject changes
- Make note of the Permanent ICN Discrepancies (they will be highlighted in yellow).
- The '**Link**' icon will appear at the top of the linked records and will be grayed out
- After selecting '**OK**' the deactivated record(s) will be grayed out

Step 9

Search on Permanent (retained) ICN

- Select '**Manage Persons**' then '**Search**' from the IdM TK Navigation. Click the '**Correlations**' tab. Select '**All Correlations**' and then '**Compare Correlations**'
- Verify that all correlations have updated in TK, then check the MPI/ADI Compare tab to ensure both MPI and ADR(TK) data are synced
- Select '**DoD Correlation**' and then the hyperlink. Make sure the ICN listed is the same as the Permanent ICN
- Verify all updates completed and the Treating Facility list is complete in the MPI

Step 10

Assign Authority Scores (AS)

- See the '**OVR Guidelines**' document for scores and apply the appropriate score(s) to the retained identity traits
- Once scores are determined, send your assigned trainer the OVR Scores assigned to identity trait(s) for their approval before linking records

Step 11

Add final PDAT to record

- Once the trainer has informed the Authority Scores have been added, confirm the scores are correct
- **Add assessment to Task Notes and paste final PDAT**
- Go to **'Manage Task'** on the Navigation and search using ICN or SSN. Go to the '**Task Notes' tab** and copy and past assessment in the '**Add Task Notes**' box
- Paste the final PDAT and under '**New Status**' select '**Resolved**'

Step 12

Add note to Request Notes taken to resolve the record

- If you have a Request assigned, go to the '**Task Details' tab** to see the associated Request
- On the '**Request Notes'** tab, place a note stating the actions completed
  - Ex: "Duplicate has been resolved"
- Select '**Resolved**' for the '**Request Status**'