Duplicate Individuals in Crossroads

Clinic staff must make every effort to avoid creating duplicate individuals and families. Whether working with an existing family or a new family, always start by performing a search on the Family Search screen using a Search Location of “State-Wide” and a Search Type of both “Family” and “Participant,” as shown below. This is especially helpful in locating existing families who are active in another site or new individuals whose application was started over the phone.

In HSIS, the guidance about duplicate records was to call the Nutrition Services Branch (NSB) Help Desk (now NSB Customer Service Desk) for deletion. In Crossroads, duplicate records will either EXPIRE (in the case of applicants), or local users will be able to LINK duplicate individuals together. The guidance below will help local users identify and process duplicate records. Seven scenarios are outlined.

Duplicate Individuals: Facts

When a duplicate individual record has been identified, NSB recommends putting an alert on both family records. It may be helpful for the alert on the INCORRECT record to state:

- The individual’s record is a duplicate,
- not to use it, and
- the Family ID of the correct family to use.

It may be helpful for the alert on the CORRECT record to state:

- The individual’s record is a duplicate, and
- this is the correct record to use.

Many local users are concerned about choosing the “correct” record when faced with a duplicate. While each duplicate should be evaluated on a case-by-case basis, the following may be helpful:

1. Only infants and children can be transferred between families. If the Parent/Guardian 1 (mother) is also a WIC participant, evaluate the mother’s record(s) first, and then transfer infants and children into her family as needed.
2. When possible:
   a. certify the participant who has food benefit issuance associated with the record.
   b. certify the participant who has an active (valid) CNDS IDs number.
3. For best results, always select a Search Type of Family AND Participant on the Family Search screen. In most cases, choose the correct CNDS ID, not the temporary ID (which starts with NC). In the screenshot below, all 4 results are the same participant (2 rows are families and 2 are individuals). Select the pencil icon next to the participant with the valid CNDS ID.
Duplicate Individuals in Crossroads

Duplicate Individuals: Scenarios

In Scenarios 1-4, a duplicate has been created, but the certification is not finished and Food Instruments (FIs) are not issued.

**Scenario 1:** I accidentally added an existing participant as an applicant. How do I delete the applicant?

**Answer:** See below

**Scenario 2:** I accidentally added an applicant twice. How do I get rid of the second applicant?

**Answer:** See below

**Scenario 3:** I searched for a participant and could not find him. I started a new family. Now I am on the Participant Demographics screen. When I tried to link the participant to his CNDS number, the computer says that it is already assigned to someone else. I did a Search using the CNDS number, and now I have found the participant I was searching for originally. What do I do now?

**Answer:** See below

**Scenario 4:** I have a participant with two last names, but only one part of the name came over from HSIS. I couldn’t find her record because it was under the second half of the last name, so I entered a new participant record. Then I found the “right” record, with the “wrong” name. How do I merge the two records to be under one family ID?

**Answer (Scenarios 1 – 4):** Since the certification is not finished and FIs are not issued, pull up the correct participant and complete the certification. The duplicate participant’s application will EXPIRE.

If participants are added in accidentally, but have not been certified, add a Participant Alert stating:

1. the record is a duplicate
2. not to use it
3. Family and/or Participant ID of the correct record.

If the name, gender or date of birth is incorrect on the record with the correct CNDS ID, refer to the CNDS Guidance reference in your Crossroads Training Manual for steps to take to correct the information.
Duplicate Individuals in Crossroads

Duplicate Individuals: Scenarios (continued)

In Scenarios 5-7, a duplicate has been created, the certification is completed and FIs have been issued.

**Scenario 5:** I started a new family and completed the certification and issuance. Now I have found another participant, who turns out to be the one I was searching for originally. What do I do now?

**Answer:** Put an alert on both records, as described on page 1. Since there is issuance associated with both participants, they need to be LINKED. However, this functionality is not currently available. NSB will inform you when this functionality becomes available. Please keep a list of known duplicates with issuance in both records so that when guidance is sent they can be linked. Helpful data on the list of duplicates may include:

- Family ID
- Participant ID
- Correct information
- Incorrect information

**Scenario 6:** Two participants with the same name and similar birthdates existed in our clinic in HSIS (for example Ann Smith and Anne Smith). Ann Smith was accidentally entered as a prenatal participant in Anne Smith’s record in HSIS, and this incorrect record (with HSIS issuance) converted to Crossroads. Ann returned to WIC with her new baby and I couldn’t find her in Crossroads. I looked her up in HSIS and discovered the mistake. I created a new record for the family in Crossroads. What should I do with the incorrect record?

**Answer:** Terminate the prenatal record (Anne Smith) in Crossroads and proceed with the certification under the new family ID established that has the correct information for the woman participant (Ann Smith). Because the incorrect record contains the family’s HSIS issuance, the two records must be linked together for documentation in Crossroads.

Put an alert on both records, as described on page 1. Since there is issuance associated with both participants, they need to be LINKED. However, this functionality is not currently available. NSB will inform you when this functionality becomes available. Please keep a list of known duplicates with issuance in both records so that when guidance is sent they can be linked. Helpful data on the list of duplicates may include:

- Family ID
- Participant ID
- Correct information
- Incorrect information
Duplicate Individuals in Crossroads

Duplicate Individuals: Scenarios (continued)

Scenario 7: Mom came in to add her new baby. Mom already had FIs from HSIS. I couldn’t find the family in Crossroads, so I entered a new family in and certified and issued to the infant. Now I have found the mom in Crossroads. Mom is active and there is an infant in her family with status of “Applicant.” What do I do?

Answer: This is a scenario where two families exist, one with an active mom, and the other with an active infant. Both have been certified, and both have been issued FIs. Since only infants and children can be transferred, the correct action to take is to transfer the active infant into the active mom’s family. Take the following steps:

1. Note (write down) the Family ID of the active mom.
2. Find the active infant using the Family Search screen. If there appear to be duplicates, choose the participant with the active (correct) CNDS ID, not the temporary ID (which starts with NC).
3. Open the infant’s family by selecting the pencil icon.
5. The Transfer Between Families screen opens. Search for the Receiving Family in the Receiving Family Search container, using the active mom’s Family ID.

6. Search Results container populates. Select the Transfer button.
7. In State Individual to Family Transfer Confirmation appears. Confirm transfer details and select OK.
Duplicate Individuals: Scenarios (continued)

Scenario 7 (continued)

8. If needed, update or correct Family Demographics.
9. Put an alert on all records, as described on page 1.
10. If any MFIs have been issued to participants, match MFIs to participants.

NOTE! Transferring an infant into a family may create a secondary issue: the local user can’t certify the mom because the “Number of Fetuses this Pregnancy” field doesn’t match the number of infants in the family. If this happens, on the mother’s Health Information screen, CAREFULLY and with intention identify the inactive/extra infant(s) and select Unlink Child. The “Number of Fetuses this Pregnancy” field will automatically update.