

AGD: Avoiding and Handling Duplicate Consumers in SAMS

As you may know the creation of duplicate consumer records in the SAMS database can cause unnecessary delays for an AFC/GAFC submission. Please also note that SAMS is a large database serving a variety of organizations, and duplicate consumer records can cause confusion and more work. There are important steps providers can take to minimize the possibility of a duplicate. And, if a duplicate has been created, following a standard process for addressing the problem will help keep your submission moving forward.

First, to clarify the type of duplicates we are discussing: this message pertains to *consumer record* duplicates, not any specific part of a consumer record such as activity, assessment, etc.

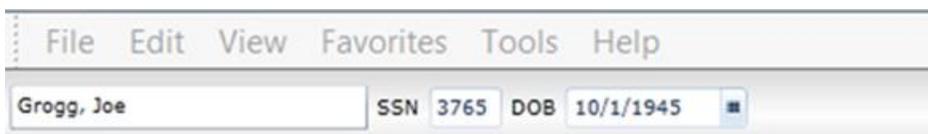
Here's a common way that a duplicate consumer record is created: AFC provider *Community AFC Corporation* has a new submission for *Joan Smith*. They search for the consumer in SAMS and do not find an existing record for Joan Smith with the same DOB and SSN. They create a new consumer record, and follow the rest of the steps in the AGD process to complete their submission. Soon after they discover that the Activity has been placed in **waiting** status, and a note from Coastline in the Activity comments field indicates that they have created a duplicate record.

Tips to Avoid the Creation of Duplicate Consumer Records

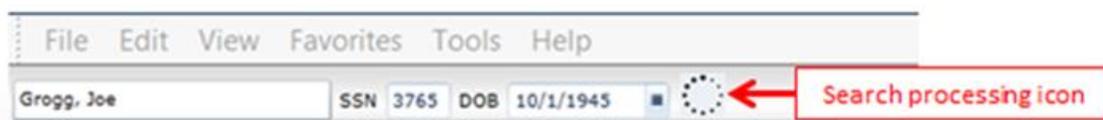
The key to avoiding duplicate records is to pay careful attention at the very beginning of the process. In training we have emphasized that this is a *Locate* or *Create* step in the process.

When doing your initial search, enter all 3 required search items and **double check name spelling, SSN (last 4 digits), and DOB** to ensure they are accurate. Note that SAMS will not return a matching record (if it exists) until all 3 items have been entered.

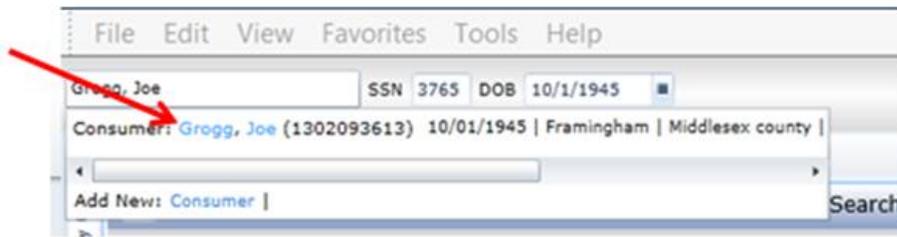
We assume that your information is accurate, since you have just checked the MassHealth Provider Online Service Center (POSC) to verify the consumer's eligibility. Your accuracy at this point will locate a matching record, if it exists, and no duplicate record is created.



After you enter the information, **give SAMS a moment to search for and find the matching consumer record**. For some users, the record will appear immediately- but for some there will be a slight delay. To engage the SAMS search, sometimes it is necessary to **click your cursor into the name field** as a final step. You will notice that SAMS is engaged in a search when you see a *search processing icon* appear temporarily to the right of the DOB field.

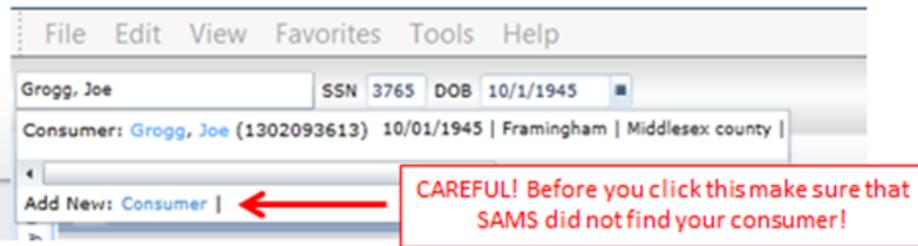


If SAMS locates the record it will appear directly beneath the search fields



We believe some mistakes are occurring during this part of the process. Note the *Add New: Consumer* link just below the located consumer record. In the example shown, the consumer has been found – so you would click directly on the located consumer record and begin processing your submission.

Do not click *Add New: Consumer* unless you are certain that you entered accurate search information, and that you have given SAMS a moment to engage in a search and locate an existing record!



What to do if a Duplicate has been Created

If despite your best efforts a duplicate has been created, these are the required steps for fixing the problem:

1. Coastline will change the status of the Activity to *Waiting*. Make sure that one of your dashboard widgets is tracking Activities of this type.
2. Coastline will enter a note in the Activity comments section that a duplicate has been created. The message will be similar to this:

Attention: Duplicate Consumer Record. You must email AGD Support (agd.support@massmail.state.ma.us) stating that you are: *Requesting a merge of SAMS consumer ID#27652983740 and existing consumer SAMS ID# 2384098933*. Please copy and paste the italicized text into your email message to AGD support with both consumer ID#s.

The Activity status has been changed to **Waiting**. Once AGD Support informs you that the merge is complete, you may change the status of the Activity to **Not Started**. Thank you.

3. Follow the instructions described in Coastline's Activity comment, and send the information via secure email to AGD.support@massmail.state.ma.us. Make sure that the consumer ID numbers are included.
4. AGD Support will notify you when the records have been successfully merged.

5. Change the status of the Activity back to *Not Started*
6. Coastline will resume processing your submission

Thank you. We hope this clarification will help to avoid unnecessary delays.