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U - External Updates and Automatic External Duplicate Processing

U.1 External Updates

When the system is configured to examine an external data store for external updates, the application will connect to the external system, present the external ID and receive the latest version of basic participant data from the external system. The participant data falls into two categories: data that if updated will not impact the participant's eligibility and data that could potentially impact participant eligibility if updated. Both updates require user interaction before the updates can be saved into the SPIRIT system.

Date of birth and gender determine eligibility and could potentially impact participant eligibility when updated from the external. Thus, user interaction is required before updates to this data can be applied in SPIRIT. The External Update Discrepancy dialog will display the data discrepancies and allow the user to accept, reject or cancel the updates from the external system. Without user interaction, when the Participant folder is accessed the system will connect to the external system and search for updates in the external database then display this information for the user. The user will determine whether updates are applied to the participant's record or not. This guarantees that whenever the Participant record is accessed it contains the latest updates from the external data store. .

The External Update Discrepancy Dialog allows the user to view and determine the correct value for data discrepancies between the system and an external data store. The dialog is automatically invoked by the system in response to the following user actions and when an external update discrepancy exists for the participant:

- [Opening](#) a Participant's Folder as defined in *Chapter 06 – Participant List*
- Indicating a participant is [On-site](#) on the Participant List window as defined in *Chapter 06 – Toggle Applicant / Participant On-site*.



Figure 1 – External Update Discrepancy Dialog

U.1.2 Controls

U.1.2.1 Participant State WIC ID

The participant state WIC ID for the participant will display.

U.1.2.2 Participant Name

The participant name will display.

U.1.2.3 Participant DCN

The external ID (DCN) will display.

U.1.2.4 Data in Question

A description of the field for the data in question is displayed.

U.1.2.5 Existing Value

The data value currently stored in the SPIRiT data store is displayed.

U.1.2.6 New Replacement Value

The data value currently stored in the external data store is displayed.

U.1.2.7 Accept Update Button

The Accept Update button will be enabled when the External Update Discrepancy Dialog is active. It has a mnemonic of “A”.

U.1.2.8 Reject Update Button

The Reject Update button will be enabled when the External Update Discrepancy Dialog is active. It has a mnemonic of “R”.

U.1.3 Processes

U.1.3.1 Initializing the Interface

Upon initial display the labels will be populated with the details about the discrepancy that was found between the SPiRiT data and the external system’s data.

U.1.3.2 Accept Update Button

Upon selection of the Accept Update button the system will save the New Replacement Value into the SPiRiT database.

It will also clear any previous rejection of the same value from the RejectedUpdate table as described in the following section.

U.1.3.3 Reject Update Button

Upon selection of the Reject Update button the system will discard the New Replacement Value and keep the existing SPiRiT value that is already stored in the database.

Because a rejection of the external update involves a data element that is important to the eligibility of the participant, a rejection of data will only be allowed to occur once. To handle this, the first rejection will be recorded into the RejectedUpdate table in the SPiRiT database. Any subsequent rejected update of the same data element will result in the halting of processing, the participant folder cannot be opened and the Participant cannot be toggled on-site. The RejectedUpdate table will be examined to determine if the update has been previously rejected.

The following data map details how the initial rejected updates will be saved. The first time rejection will populate the rejected date with the current data and time and leave the accepted date NULL indicating that it is currently rejected. If at any point in the future the update is accepted, then the Accepted Date is populated with the date and time of acceptance and the AcceptedUserID is populated with user ID of the staff who performed the acceptance.

U.1.3.4 Data Map

Control Label	Entity	Attribute
Participant State WIC ID	RejectedUpdate	StateWICID
Data In Question	RejectedUpdate	DataElement
Existing Value	RejectedUpdate	ExistingValue
New Replacement Value	RejectedUpdate	ReplacementValue
User Name that rejected	RejectedUpdate	RejectedUserID
Current date and time	RejectedUpdate	RejectedDate
NULL, indicating that it has not been accepted.	RejectedUpdate	AcceptedUserID
NULL, indicating that it has not been accepted.	RejectedUpdate	AcceptedDate

U.2 Real Time External Update

All other participant data shared between SPIRIT and the external database has less of an impact on participant eligibility and will require a different type of user interaction. The Real Time External Updates dialog will display the data discrepancies and allow the user to accept or cancel the updates from the external system. Without user interaction, when the Participant folder is accessed the system will connect to the external system and search for updates in the external database then display this information for the user. The user will determine whether updates are applied to the participant’s record or not. This guarantees that whenever the Participant record is accessed it contains the latest updates from the external data store.

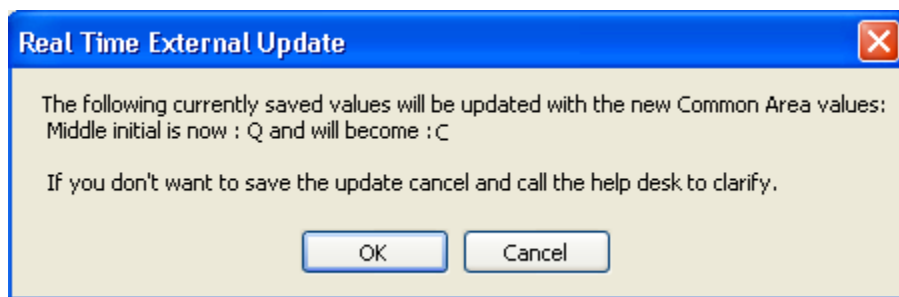


Figure 2 – Real Time External Update Dialog

U.2.2 Controls

U.2.2.1 Data in Question

A description of the field for the data in question is displayed.

U.2.2.2 Existing Value

The data value currently stored in the SPIRIT data store is displayed.

U.2.2.3 New Replacement Value

The data value currently stored in the external data store is displayed.

U.2.2.4 OK Button

The OK button will be enabled when the Real Time External Update dialog is active. (See *Edits* and *Saving the Data* in the Processing section below) Characteristics for the OK button are defined in [Consistencies](#).

U.2.2.5 Cancel Button

The Cancel button will be enabled when the Real Time External Update dialog is active. Characteristics for the Cancel button are defined in [Consistencies](#).

U.2.3 Processes

U.2.3.1 Initializing the Interface

Upon initial display the labels will be populated with the details about the discrepancy that was found between the SPIRIT data and the external system's data.

U.2.3.2 OK Button

Upon selection of the OK button the system will save the New Replacement Value into the SPIRIT database.

U.2.3.3 Cancel Button

Upon selection of the Cancel button the system will discard the New Replacement Value and keep the existing SPIRIT value that is already stored in the database. The system will not open the participant folder.

Keeping SPiRiT current with the most recent updates from the external database is important to the purpose of the external common database. Therefore, rejection of updates for data that will not impact eligibility will prevent the user from accessing the folder.

U.3 Automatic External Duplicate Processing

This automatic processing handles an interface to a state's common area, for the purpose of maintaining a statewide identifier for client records. When records in the common area are found to be duplicates, the common area will make this duplication information available to the SPiRiT system on demand. Alternately, when previously duplicated records in the common area are no longer considered duplicated (UnDup), the absence of duplicate information from the common area will be the indication to the SPiRiT system that the record has been unduplicated.

When the system is configured to do so, the application will connect to the external system and process the duplication changes automatically. This processing work occurs in response to the following user actions:

- [Opening](#) a Participant's Folder as defined in *Chapter 06 – Participant List*
- Indicating a participant is [On-site](#) on the Participant List window as defined in *Chapter 06 – Toggle Applicant / Participant On-site*.

When opening a Participant folder or toggling the Participant On-Site, the system requests the latest duplicate/un-duplicate status for the Participant in question from the external system. Then depending upon the status returned from the external system, the Spirit system will take automatic action. If the returned status indicates that the Participant record is a duplicate in the external system one of two possible actions is taken.

1. It is possible that the External ID will be updated automatically and the user notified of the change, before processing continues as normal..
2. Processing could be halted by a message box, the participant record will be closed and archived, and the user directed to access a different Participant.

If the returned status indicates that the Participant record previously marked as a duplicate at a prior point and now is not duplicated, one of two possible actions will be taken.

1. If the Participant record that was previously closed and archived would still be in a valid certification, then the record is fully reinstated.
2. If the Participant record would not be in a valid certification then it is only removed from the archive and put into the user's logged on clinic.

If the returned status indicates neither a duplicate nor an un-duplicate status then no action is required and processing continues as normal.

U.3.2 Duplicate Possibility #1

The possibility that the External ID is updated automatically and that processing continues after a message box alerts the user. This situation occurs when the duplicate status is returned for the Participant record in question but the record for which it was duplicated in the external system does not exist in the SPiRiT system. In this situation the SPiRiT system simply adopts the correct External ID going forward.

U.3.2.1 Detail Grid

Attribute	Value
Participant being served	Higher DCN
Record that should be deleted	Not in SPiRiT
Action	Update the DCN in Spirit to use the lower DCN

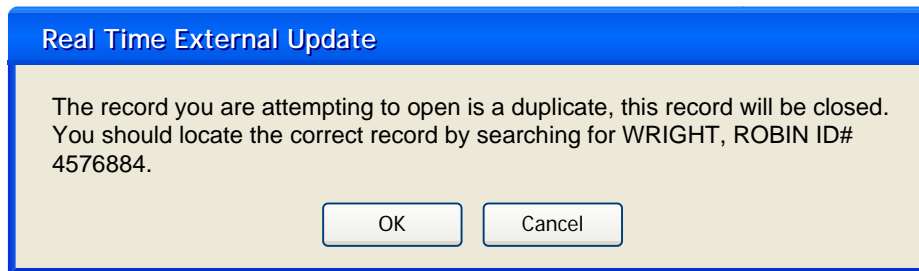


Figure 3 – External Update Notice – DCN Change

U.3.3 Duplicate Possibility #2

The possibility that processing could be halted by a message box, the participant record closed and archived, and the user directed to access a different Participant. This situation occurs when the duplicate status is returned for the Participant record in question, the response directs the application to close the Participant record and the correct record does exist in SPiRiT. In this situation the SPiRiT system terminates any valid certification, and archives the record. It then prompts the user to access the correct record going forward.

U.3.3.1 Detail Grid

Attribute	Value
Participant being served	Higher DCN

Record that should be deleted	Is in SPIRiT
Action	For the record with the higher DCN, save today's date as the CertTermDate and 'Y' as the CertTermReason in the CERTCONTACT table in Spirit, direct the user to locate the lower DCN, halt the executing action.

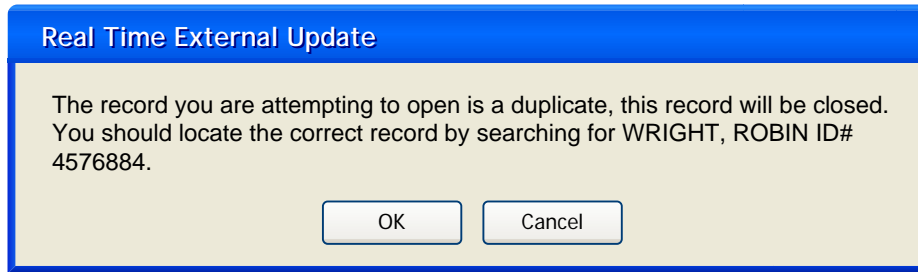


Figure 4 – External Update Notice – Re-Search

U.3.4 Un-Duplicate Possibility #1

The situation where the Participant record that was previously closed and archived would still be in a valid certification, so the record is fully reinstated. This situation occurs when the un-duplicate status is returned for the Participant record in question, the SPIRiT system previously closed and archived a Participant record tied to the record in question and that closed record would still be in a valid certification. In this situation the SPIRiT reinstates the certification status for the record and returns the client to the last clinic in which they received benefits. The system also alerts the user to what has occurred.

U.3.4.1 Detail Grid

Attribute	Value
Record that was S-duped	Is in SPIRiT
Certification is still valid	TRUE
Action	Reinstate and un-archive the record, alert the user.

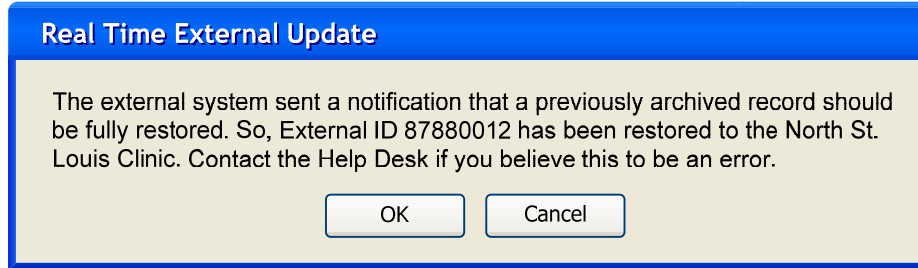


Figure 5 – External Update Notice – Full Restore

U.3.5 Un-Duplicate Possibility #2

The situation where the Participant record would not be in a valid certification so the record is only removed from the archive. This situation occurs when the un-duplicate status is returned for the Participant record in question, the SPIRiT system previously closed and archived a Participant record tied to the record in question but the closed record would no longer be in a valid certification. In this situation the SPIRiT system just returns the client to the last clinic in which they received benefits. The system alerts the user to what has occurred.

U.3.5.1 Detail Grid

Attribute	Value
Record that was S-duped	Is in SPIRiT
Certification is still valid	FALSE
Action	Un-archive the record, alert the user.

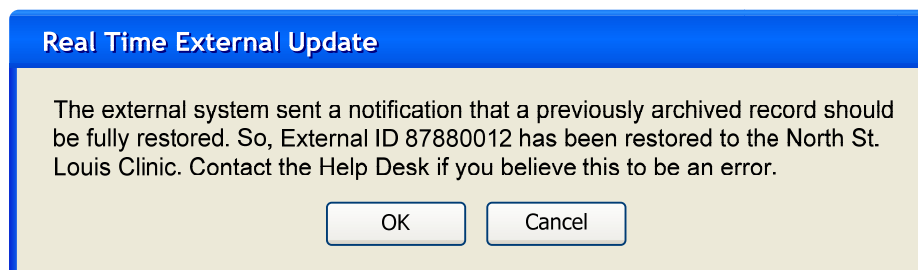


Figure 6 – External Update Notice – Restore

U.3.6 No Duplicate or Un-Duplicate Status is Returned

If the duplicate search indicates neither a duplicate nor an un-duplicate status then no action is required and processing continues as normal. Processing continues without interruption and no message is given to the user. Besides the obvious cases when the external system has no duplicate or un-duplicate information about the Participant, there are 2 situations where the external system does have a duplicate or un-duplicate status but no action is required in SPiRiT, when the SPiRiT system does not contain the duplicate record.

U.3.6.1 Detail Grid

Attribute	Value
Participant being served	Lower DCN
Record that should be deleted	NOT in SPiRiT
Action	No action is required or taken.

Attribute	Value
Record that was S-duped	Is in SPiRiT
Certification is still valid	Either TRUE or FALSE
Action	No action is required or taken.

In summary, the duplicate and un-duplicate processing occurs in real time, with minimal user action and whenever the Participant record is accessed. If any action is taken on a record the user is shown a message box indicating exactly what occurred. The user accepts the changes or may cancel the changes in cases where they think an error may have occurred in the external system. When the user accepts the changes, the details of the record manipulation are handled automatically and can be reversed should the external system determine a mistake was made at a later time.