Resolving Enrollment Issues

Various issues can arise during enrollment, most stemming from user errors of one form or another. This document provides guidance for how to handle these situations, though you may wish to adapt these recommendations to your own needs.

- Duplicate Enrollments
  - Option 1: Deny Petition
  - Option 2: Flag as Duplicate
  - Option 3: Expunge
  - Option 4: Merge
- Error Messages
  - Could not automatically relink Org Identity due to another existing CO Person record
- Mislinked Enrollments
  - Scenario 1: Petitioner meant to add an additional Organizational Identity to an existing CO Person, but instead created a new CO Person.
  - Scenario 2: Petitioner meant to add an additional CO Person Role to an existing CO Person, but instead created a new CO Person.

Duplicate Enrollments

Duplicate Enrollments occur when a petitioner initiates the same enrollment flow more than once, perhaps because the enrollee never received an email confirmation or because the petitioner didn't realize a record already existed. This results in a duplicate CO Person and Organizational Identity.

(Note that an email confirmation can be resent by clicking the envelope icon next to the petition in the list of petitions, or by clicking 'Resend Invitation' when viewing the petition.)

Option 1: Deny Petition

A petition in *Pending Confirmation* or *Pending Approval* status can be denied.

You may wish to add a comment to the Petition indicating the reason for the denial. To do so:

1. Pull up the petition
2. Click *Add Comment*
3. Enter a comment, such as *"This appears to be a duplicate enrollment"*

Option 2: Flag as Duplicate

A petition in *Pending Confirmation* or *Pending Approval* status can be flagged as a duplicate.

You may wish to add a comment to the Petition, such as a note about the original record. To do so:

1. Pull up the petition
2. Click *Add Comment*
3. Enter a comment, such as *"This appears to be a duplicate enrollment"*

To flag as a duplicate, pull up the petition and click "Flag Petition as Duplicate". This will also flag the associated role record as a duplicate, as well as the CO Person (if it is in Pending status). As such, petitions should only be flagged as duplicates once the original petition is approved.

Note that Organizational Identities cannot be flagged as duplicates as there is not currently a status attached to an Organizational Identity.

Option 3: Expunge

An expunge can **not** be undone.

This option completely obliterates the duplicate enrollment, including the Petition, CO Person, CO Person Role, Organizational Identity, and History Records. Ordinarily, this option is not recommended, as it unrecoverably eliminates historical data (ie: the duplicate petition). This option can only be performed by a CO Administrator (not a COU Administrator).

To expunge the record:

1. Pull up the duplicate CO Person record (*CO* > People > My Population, then click the pencil icon for the record)
2. Click *Expunge*
3. Review the records presented
4. Check the box to confirm
5. Click *Expunge*

You may wish to to add a comment to the existing CO Person's history record for historical purposes. To do so:

1. Pull up the original CO Person record (*CO* > People > My Population, then click the pencil icon for the record)

2. Click *View History*
3. Click *Add*
4. Enter a comment, such as *"Expunged duplicate enrollment"*

Option 4: Merge

If both identities have been used, it may be necessary to merge them.

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Error Messages

Could not automatically relink Org Identity due to another existing CO Person record

If a Petition is created and an authenticated identifier is collected (via *Require Authentication*) that matches an identifier attached to an existing Org Identity, Registry will attempt to merge the new Petition identities with the already existing Identity. However, if the new Org Identity (created as part of the Enrollment) is already attached to a CO Person record (other than the one in the Petition), an error will be thrown.

Manual intervention is required to determine what happened. Examine the Petition and associated person records. Most likely, somebody performed a manual operation on the identities before the Petition was Finalized and the enrollment completed.

Mislinked Enrollments

Mislinked Enrollments occur when a new Organizational Identity, CO Person, or CO Person Role is incorrectly attached to (or does not correctly attach to) an existing CO Person or Organizational Identity.

Scenario 1: Petitioner meant to add an additional Organizational Identity to an existing CO Person, but instead created a new CO Person.

1. Relink the new Organizational Identity to the correct (existing) CO Person.
2. To maintain the duplicate record for archival purposes, invalidate the duplicate (new) CO Person.
    a. Set the CO Person status to *Duplicate*.
    b. Set the CO Person Role status to *Duplicate*.
3. Alternately, to completely remove the duplicate record, expunge the duplicate CO Person.

Scenario 2: Petitioner meant to add an additional CO Person Role to an existing CO Person, but instead created a new CO Person.

1. Relink the new CO Person Role to the correct (existing) CO Person.
2. To maintain the duplicate record for archival purposes, invalidate the duplicate (new) CO Person.
    a. Set the CO Person status to *Duplicate*.
    b. Set the CO Person Role status to *Duplicate*.
3. Alternately, to completely remove the duplicate record, expunge the duplicate CO Person.