

THE INDIAN HEALTH SERVICE

Patient Merge



EHR & MU for HIM Professionals

Superior Health Information Management
Now and for the Future

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Training Objectives

- Recognize the necessary sequence and relationship of MPI, C32, and HIE.
- Delineate steps for printing a list of potential merges.
- Verify potential duplicates.
- Merge valid duplicates.
- Understand there is no UNMERGE!
- How and where to sign up for required user training.

Why Patient Merge?

- Combine patients who are enrolled multiple times.
- Providers will see all patient's data to allow for the best outcomes for patient care.
- Prepare for MPI implementation.

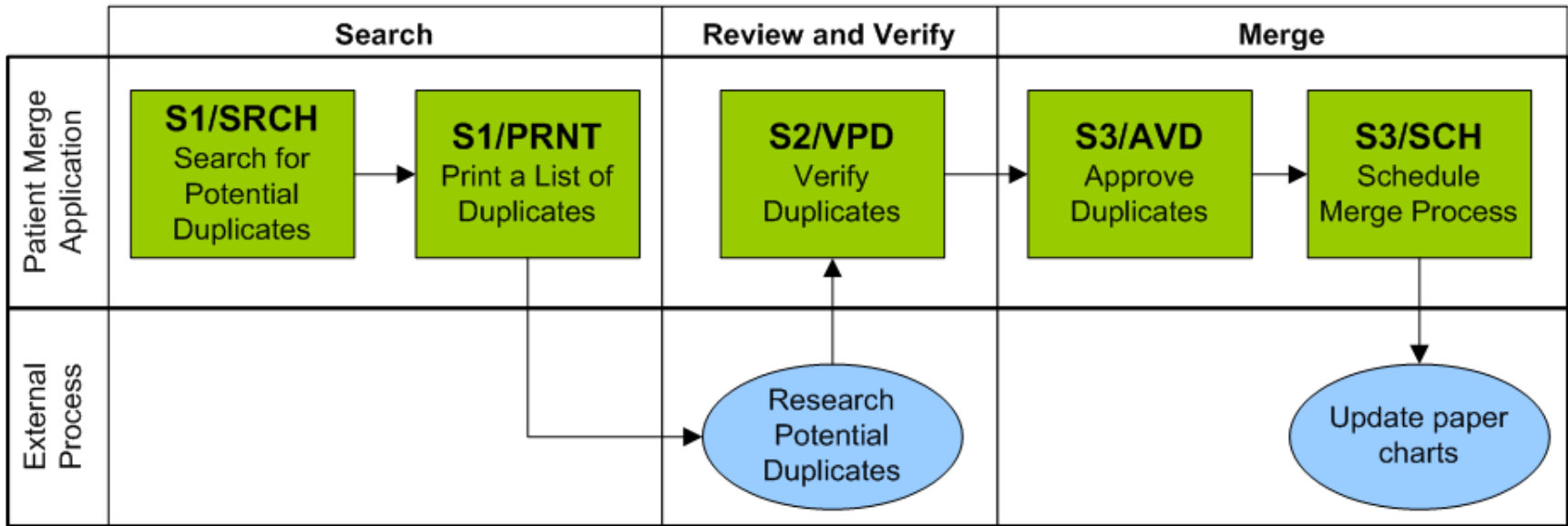
Warning!

- Patient Merge should be tested in a test environment to verify it will work with any COTS programs running at your facility.
- Send a list of COTS programs to OIT ABQ that do and don't work well with Patient Merge.

Basic Patient Merge Process

- Three major steps in the process:
 1. Search
 2. Review and Verify
 3. Approve and Merge
- At least two users to complete the process:
 - User 1 completes the search and review process.
 - User 2 completes the approve and merge process.
- There is NO UNMERGE!

Overall Process



1

2

3

Security Keys

Key	Purpose
BPMZMENU	Grants access to the main Patient Merge menu.
XDR	Grants access to the VA Duplicate Resolution System. Must be given to the same users as BPMZMENU.
BPMZMERG	Grants access to the S3 menu.
XDRMGR	Grants access to the Duplicate Manager Utilities menu and allows entry of a verified pair even if the threshold has not been met.
DG Eligibility	Permits initiation of merge process and provides valid error checking.

User One Responsibilities

- Starts Basic search.
- Prints List of Duplicates:
 - Brief
 - Captioned
- Reviews List of Duplicates.
- Verifies true duplicates.
- States merge direction.
- Determines overwrite information (if any).

User Two Responsibilities

- Reviews and Verifies duplicates.
- **LAST CHANCE TO STOP A MERGE!!**
- Schedules a merge.
- Documents merge information.
- Combines paper charts.
- Notifies the patient, providers and other departments (Registration, Billing, Lab, etc.).

Criteria for Duplicates

- Name
- SSN
- Sex
- DOB
- DOD
- Mother's Maiden Name
- Tribe of Membership

The above must be met at a 60% threshold

Step 1: Search

- **Basic Search** takes place ONCE during the initial search.
- **New Search** will be all subsequent searches according to facility policy.
- Prints a List of Duplicates:
 - Brief report
 - Captioned report

List File Duplicates Brief Report

Unverified Potential Duplicates

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IEN: 27

RECORD 1: DEMO,CAROL [IEN: 3700] SSN: 200351234 HRCN: 846

RECORD 2: DEMO,CAROL A [IEN: 3501] SSN: HRCN:

STATUS: POTENTIAL DUPLICATE, UNVERIFIED

SCORE %: 100

IEN: 37

RECORD 1: DEMO,CAROL TWO [IEN: 4402] SSN: HRCN:

RECORD 2: DEMO,CAROLD TOO [IEN: 8093] SSN: 464646464 HRCN: 1271

STATUS: POTENTIAL DUPLICATE, UNVERIFIED

SCORE %: 100

IEN: 44

RECORD 1: DEMO,CAROL [IEN: 516] SSN: 888776666 HRCN: 865

RECORD 2: DEMO,CAROL JR [IEN: 236] SSN: HRCN: 865 (I)

STATUS: POTENTIAL DUPLICATE, UNVERIFIED

SCORE %: 100

List File Duplicates Captioned Report

Unverified Potential Duplicates

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RECORD1: DEMO,CAROL

RECORD2: DEMO,CAROL A

STATUS: POTENTIAL DUPLICATE, UNVERIFIED

DATE FOUND: DEC 28, 2006

WHO CREATED: USER,IHS

DC TOTAL POSSIBLE SCORE: 235

DC POTENTIAL DUPE THRESHOLD %: 60

DC DUPE MATCH SCORE: 235

DC DUPE MATCH PERCENTILE: 100

DUPLICATE TEST: NAME

DUPLICATE SCORE: 100

DUPLICATE TEST: SSN

DUPLICATE SCORE: 0

DUPLICATE TEST: TRIBE OF MEMBERSHIP

DUPLICATE SCORE: 5

DUPLICATE TEST: SEX

DUPLICATE SCORE: 20

DUPLICATE TEST: DATE OF BIRTH

DUPLICATE SCORE: 60

DUPLICATE TEST: DATE OF DEATH

DUPLICATE SCORE: 0

DUPLICATE TEST: MOTHER'S MAIDEN NAME

DUPLICATE SCORE: 50

DUPLICATE TEST: LAST SEPARATION DATE

DUPLICATE SCORE: 0

DUPLICATE TEST: CLAIM NUMBER

DUPLICATE SCORE: 0

Step 2: Review and Verify

- Review all data available for the potential duplicates (e.g. RPMS and Medical Charts).
- Request archived medical records.
- Contact provider, patient, other service units.
- Determine the Overwrites:
 - Correct information can be from the ***from patient*** to the ***to patient***.

Step 3: Approve and Merge

- Keep a log of the duplicates being merged, to identify potential errors.
- Schedule the merge process after hours, as this will slow down RPMS processes throughout the facility.
- Combine paper files for the merged patients (e.g. chart and patient index).
- Notify patients, providers and other departments (registration, billing, etc.).
- **REMINDER, THERE IS NO UNMERGE!**

Tasks outside of Merge Process

- Adding a Duplicate Pair
- Editing a Pair's Status
- Pause a Search
- Restart a Merge
- Manager functions

Manager Functionality

Select IHS Patient Merge Option: **DMU**

Duplicate Manager Utilities
(Your facility's name)

PDUP	Purge Duplicate Record File
PMRG	Purge Merge Process File
RLMP	Reset Lost Merge Process
SITE	Patient Merge Site Parameters

Select Duplicate Manager Utilities Option:

Set Site Parameters

Select Duplicate Manager Utilities Option: **SITE** Patient Merge
Site Parameters

Select DUPLICATE RESOLUTION FILE TO BE CHECKED: **?**

Answer with DUPLICATE RESOLUTION FILE TO BE CHECKED:

VA PATIENT

You may enter a new DUPLICATE RESOLUTION, if you wish
Please enter a file name or file number.

MUST BE VARIABLE POINTER FILE IN FIELD .01 OF FILE 15

Answer with FILE NUMBER, or NAME

Do you want the entire FILE List? **Y** (Yes) Choose from:

2 VA PATIENT

200 NEW PERSON

Select DUPLICATE RESOLUTION FILE TO BE CHECKED: **2** VA PATIENT

...OK? Yes// **Y** (Yes)

Patient Merge Reports

- View Reports using menu option PMR.
- Tally Status Report.
- List File Duplicates:
 - Brief
 - Captioned
- List Merge Patients.

Tally Status Report

Select Patient Merge Reports Option: **TSM**

TEST INDIAN HOSPITAL

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TALLY OF DUPLICATE RECORDS' STATUS/MERGE STATUS FIELDS
FILE: VA PATIENT

Total Number of Duplicate Records for File VA PATIENT: 222

STATUS field:	VERIFIED, NOT A DUPLICATE	1
	POTENTIAL DUPLICATE, UNVERIFIED	212
	REQUIRES RESOLUTION	0
	VERIFIED DUPLICATE	9
	VERIFICATION IN PROCESS	0

MERGE STATUS field:	NOT READY	2
	READY	1
	MERGED	2
	IN PROGRESS	4

End of Report. Press return to exit

List Merged Patients

Select Patient Merge Reports Option: **PLM** Print List of Merged Patients

DEVICE: HOME// <ENTER> VT

MERGED PATIENTS MAY 20, 2009 14:19 PAGE 1

DFN	PATIENT NAME	DOB	SSN	DATE MERG
FROM: 3835	DEMO, CAROL A	11/18/65	251413000	04/25/07
TO: 25238	DEMO, CAROL	11/18/65	251413000	
FROM: 25386	IHS, JOHN C	04/10/60		03/30/07
TO: 2845	IHS, JOHN C	04/10/60		
FROM: 1111	TRAINER, TOM JR	02/11/73	200665921	02/09/07
TO: 8317	TRAINEER, THOMAS JR.	02/11/73	200665921	

Enter RETURN to continue or '^' to exit:

Beta Site Experiences

- New duplicates:
 - T numbers cause new duplicates
 - Ensure Registration is scanning correctly
- Possible causes for errors:
 - COTS programs
 - Merging locally created files
 - Merging too many pairs and in the wrong direction
- Research time:
 - Depends on complexity of the pair
 - Depends on whether charts need to be requested from Federal Archives
 - Can range from 1 hour to 2+ weeks for a pair

Policy and Procedure

- Revise national HIM Policy to meet your facility's needs.
- Determine how often the “New” search is to be completed.
- Search frequency should be bimonthly or monthly according to local policy.
- Review policy with Business Office, HIM, Patient Registration.



Questions and Discussion