NextGen® Ambulatory EHR and PM Person Merge White Paper

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Overview

Beginning with NextGen Ambulatory EHR and Practice Management version 5.5, the Person Merge feature enables you to merge duplicate person and patient records to maintain an organized database. This feature merges the data between duplicate records, including patient, chart, history, and even all NextGen Ambulatory EHR Medical Records Templates information.

This document contains information regarding searching for and merging duplicate records, as well as other topics, including setting security rights.

Merging Duplicate Person and Patient Records

You can merge duplicate person and patient records. The merge process is based on one of several search scenarios that identify potential duplicate persons. After potential duplicates are identified, you can view the person and patient information details and which practice the records reside in.

What information is merged?

When duplicate patients are merged, all patient information, chart information, and history are pulled from the merged record and added into the retained record. All NextGen NextGen Ambulatory EHR Medical Records Templates for both patients are automatically merged along with all other applicable patient data. The retained record does not include demographic information from the merged patient record.

A Person Merge Scenario

The following scenario provides a summary of the template data that is merged. If the template only saves practice level data, the "retained" person's data is kept for that template.

The patients (persons) that need to be merged:

- Patient A (the retained person)
- Patient B (the merged – or dropped – person)

These patients have charts in different practices:

- Patient A has a chart in practices 1, 3 and 4
- Patient B has a chart in practices 1, 2, 3 and 5

The patients have templates saved in each practice:

- Patient A has a demographic template (we'll call it demo_1) in practices 1 and 3
- Patient B has the same demographic template (demo_1) in practice 1, 2, 3 and 5

Keeping Patient A and merging Patient B

When you assign templates and elect to keep Patient B's demo_1 template, you will see the following after the merge:

- All cross-reference fields (e.g. medications, allergies, etc.) have been merged so that it is a cumulative list of Patient A and Patient B.
- In practice 1, Patient A's demo_1 template will have the data previously saved in Patient B's demo_1 template
- Any common fields (e.g. name, address, etc.) have been overwritten with patient B's data.
- Patient A now has a chart created in Practice 2.
- The demo_1 template has the data previously saved in Patient B's demo_1 template.
- In practice 3, Patient A's demo_1 template has the data previously saved in Patient B's demo_1 template.
- Any common fields (e.g. name, address, etc.) have been overwritten with patient B's data.
- In practice 4, Patient A's demo_1 template has no data in the demo_1 template.
- Because Patient B never had any data in practice 4, when selecting Patient B's data, it overwrites the template with blank data.
- Patient A now has a chart created in practice 5.
- The demo_1 template has the data previously saved in Patient B's demo_1 template.

Security Rights for Merging Person and Patient Records

Security rights enable you to limit personnel access to the merge process at four levels:

- Association Level – Enables users to merge duplicate person and patient records within practices that are in the same association.
- Enterprise Level – Enables users to merge duplicate person and patient records within the enterprise.
- Practice Level – Enables users to merge duplicate person and patient records within the practice he or she is logged into.
- System Level – Enables users to merge duplicate person and patient records from within all practices within the system.

A user with enterprise-level Person Merge access rights can run a practice-level Person Merge from any of the practices within the enterprise. A user with only Practice Level Person Merge access rights cannot run an enterprise-level Person Merge.

To set Person Merge security rights:

1. Access the NextGen System Administrator application.
2. Select the applicable group
3. Select the Rights tab for the group.
4. Access the rights under Operations > Person Merge.

Searching For Duplicate Persons

The search for duplicate persons for person merge is database intensive. It requires a large amount of system resources and can affect all other users on the system. NextGen Healthcare recommends that you run perform Person Merge after business hours and that you are the only person logged onto the system.

To search for duplicate patient records:

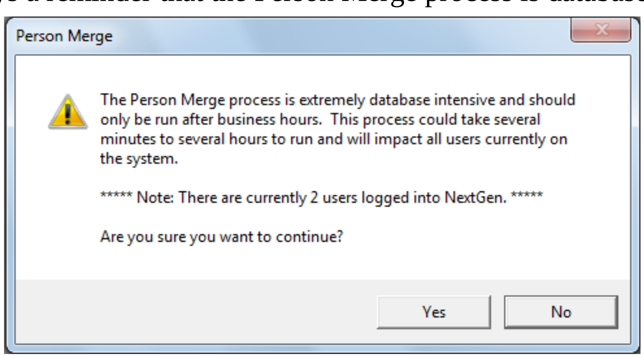
1. Do one of the following:

   In NextGen Practice Management, select the File menu > Processes > Patient Merge.

   OR

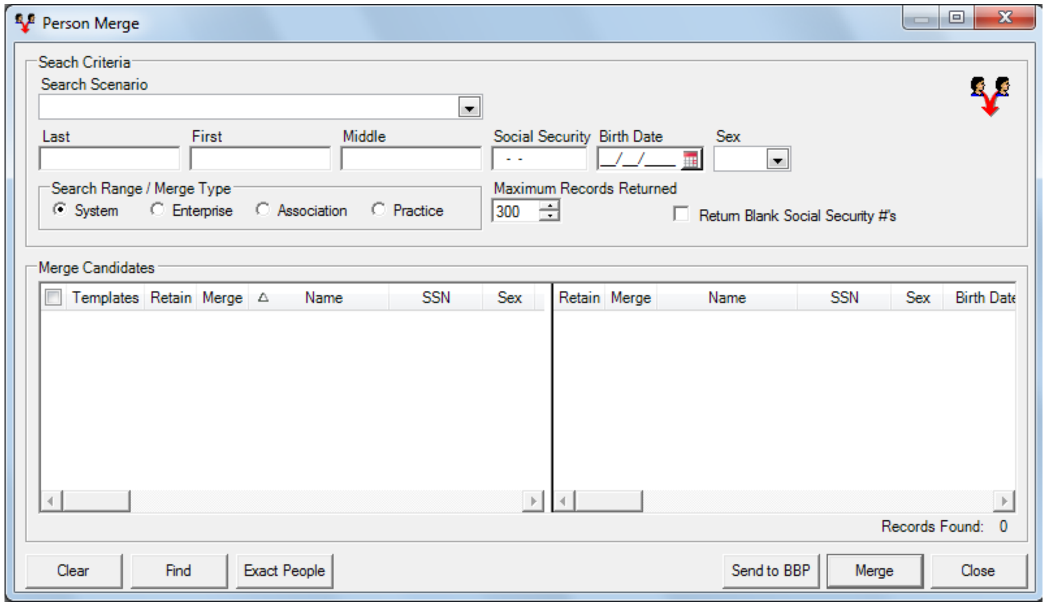
   In NextGen File Maintenance, select the File menu > Patient Merge.

   The application displays a reminder that the Person Merge process is database intensive.



2. Click Yes to continue with the search.

The *Person Merge* dialog box displays.



3 In the Search Scenario field, click and then select one of the following scenarios to use for your search:

Search Scenario	Retrieves people/patient records with
Same Last Name/First Name/DOB/Sex	The same last name, first name, date of birth, and sex.
Same Last Name/First Name/DOB/SSN/Sex	The same last name, fist name, date of birth, Social Security Number, and sex.
Same Last Name/First Name – Different Sex	The same last name and first name, but with a different sex.
Same Last Name/First Name – Different DOB/SSN	The same last name and first name, but with a different date of birth and Social Security number.
Same Last Name/First Name/SSN/Sex – Different DOB	The same last name, first name, Social Security Number, and sex, but with a different date of birth.
Same Last Name/SSN – Different First Name	The same last name and Social Security Number, but with a different first name.
Same Last Name/DOB/SSN/Sex – Different First Name	The same last name, date of birth, Social Security Number, and sex, but with a different first name.
Same First Name/DOB/SSN/Sex – Different Last Name	The same first name, date of birth, Social Security Number, and sex, but with a different last name.
Same SSN – Different Last Name/First Name	The same Social Security Number, but with a different last name and first name.

4 In the Search Range section, select the range of the search: System, Enterprise, Association, or Practice.

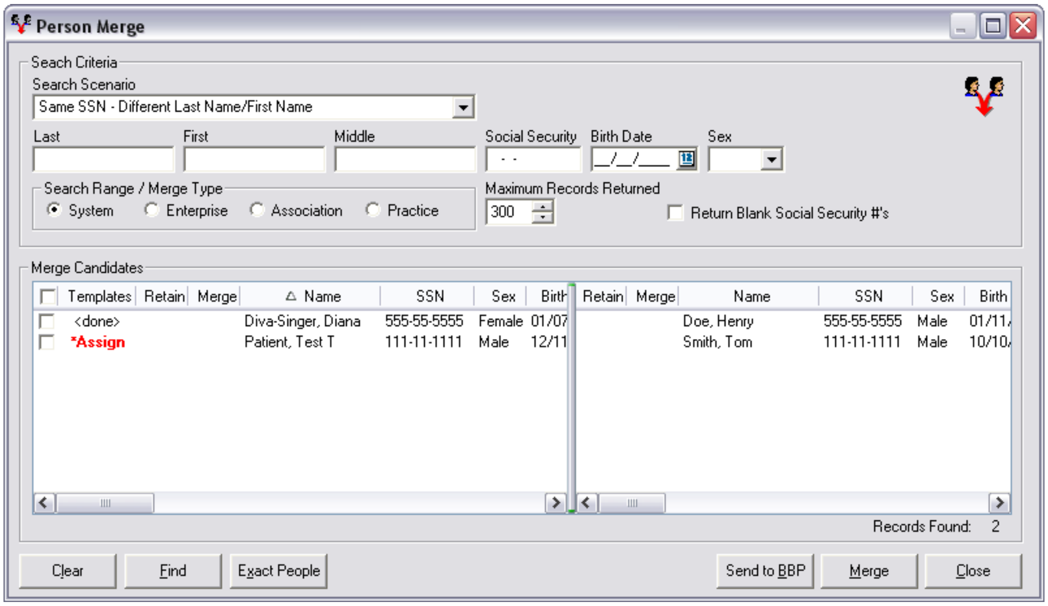
Note: The ranges available to you depend on your Person Merge security rights (see "Security Rights for Merging Person and Patient Records" on page 4). If you select Association, the search results include only the patients that are part of your practice's association.

5 On the **Maximum Records Returned** field, click the arrows to set the maximum number of records to display as a result of the search. You can enter a number ranging from 100 to 3,000. By setting a low number, you speed up the search process and can receive a more manageable set of results.

6 If you want the search results to include people and patients that do not have Social Security Numbers, select the **Return Blank Social Security #s** check box.

7 Click the **Find** button.

The results of the search display in the **Merge Candidates** section. For instructions on merging some or all of the found duplicate records, see Merging Duplicate Person/Patient Records (on page 6).



Note: If your search finds no duplicate records, the **No records were found!** message displays.

Merging Duplicate Person/Patient Records

The search results from the Duplicate Person search (see "Searching For Duplicate Persons" on page 4) display in two separate panes in the **Merge Candidates** section of the *Person Merge* dialog box. The matching records of possible duplicate patients display in rows with one patient record in the right pane and the other in the left pane. After you determine that one of the records is a duplicate, you then need to decide which of the pair should be the retained record and which one should be merged into the retained record.

To merge duplicate person records:

1 On the *Person Merge Search* dialog box, review the records to determine which, if any, should be merged.

2 If you want to view additional information for the merge candidates, right-click the patient record, and then click one of the following options:

Option	Description
Assign Templates	Opens the *Template Merge* dialog box.
View Person	Opens the *Modify Patient Information* dialog box

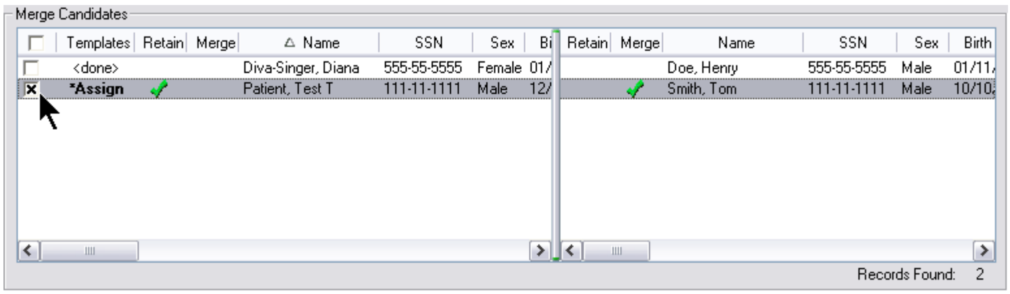
Option	Description
View History	Displays the name of the practice (below the selected row of merge candidates) where the patient records exist.
Select All	Selects all people listed in the Merge Candidates section.
Deselect All	Clears all selections in the Merge Candidates section.

3 To select one or more rows, click the check box to the left of each row that contains patient records that you want to merge.

OR

To select all patient rows, right-click in the Merge Candidates list, and then click Select All.

By default, a check mark displays in the Retain column for the patient on the left and in the Merge column for the patient on the right.



4 To change the default retain/merge selection, click in the Retain column next to the patient record that you want to keep.

A check mark automatically displays in the Retain column. Another check mark automatically displays in the Merge column next to the other patient record to indicate it should be merged into the retained record.

Note: You must select to retain or merge. You cannot select both options.

5 Continue to make your selections for each row (pair) of potential duplicate records until you have selected all the records that you want to merge.

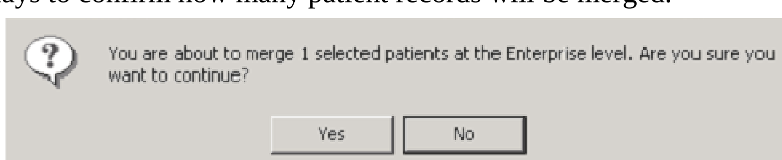
6 For any row that displays Assign in the Templates column, you must merge the NextGen Ambulatory EHR Demographic templates (see "Merging Templates" on page 10) associated with the patients' charts.

7 Click the Merge button.

The informational message displays again to remind you that this process is database intensive and should only be run after business hours.

8 Click Yes to continue.

A message displays to confirm how many patient records will be merged.



9 Click Yes.

A message displays to inform you that the merge was successfully completed.

Merging Specific Duplicate Person/Patient Records

If the available search scenarios do not meet the criteria you need to find particular person and patient records, you can perform a lookup to find the specific records. The lookup ignores the search scenario criteria. A merge based on a lookup merges persons and patients regardless of whether they have a chart.

To merge a specific person/patient record:

1 Do one of the following:

In NextGen PM, select the File menu > Processes > Patient Merge.

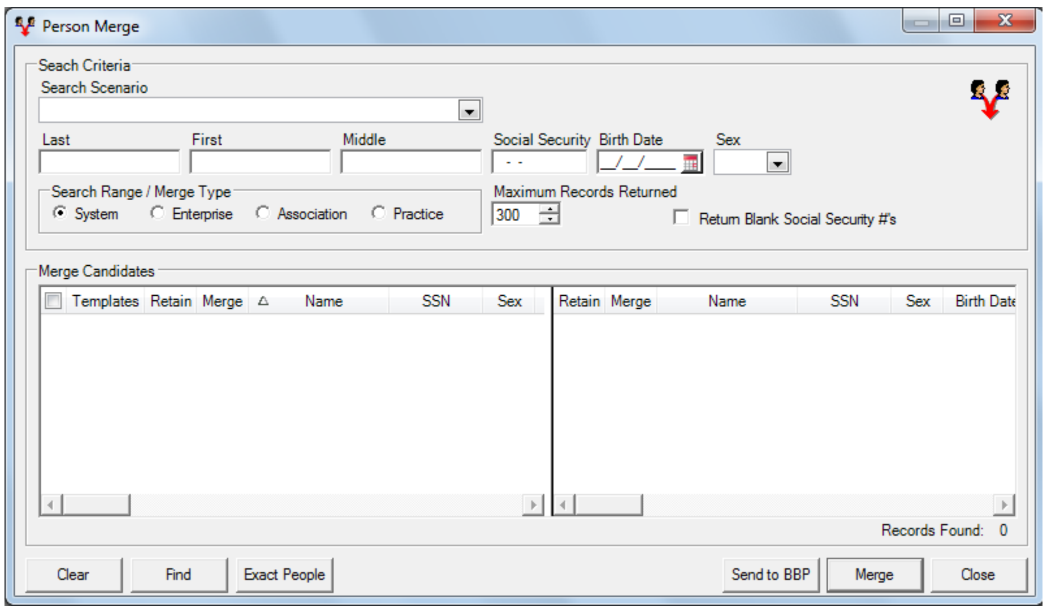
OR

In NextGen File Maintenance, select the File menu > Patient Merge.

The application displays a reminder that the Person Merge process is database intensive.

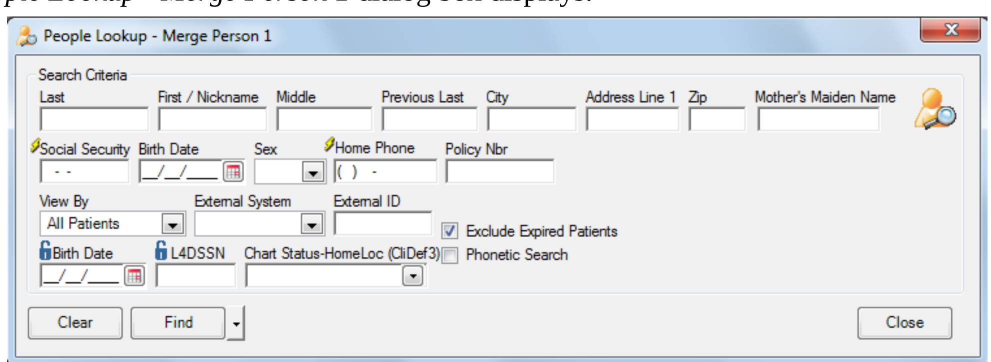
2 Click Yes to continue with the search.

The *Person Merge* dialog box displays.



3 Click the Exact People button.

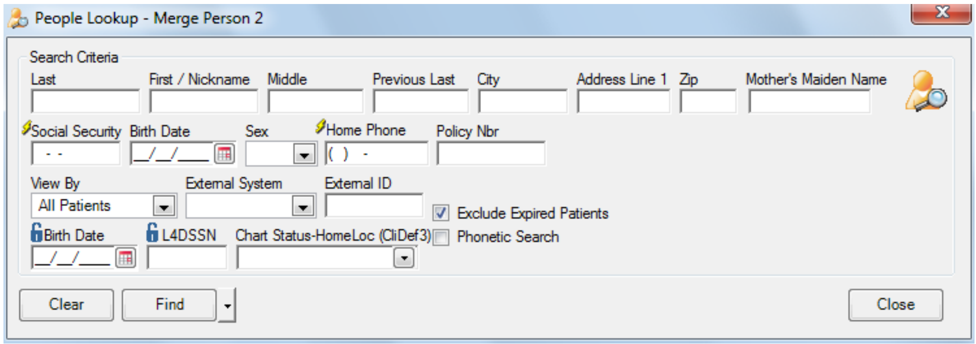
The *People Lookup - Merge Person 1* dialog box displays.



4 Enter the search criteria for the first person or patient to use in the merge, and then click Find.

5 When the results display, select a record, and then click Open.

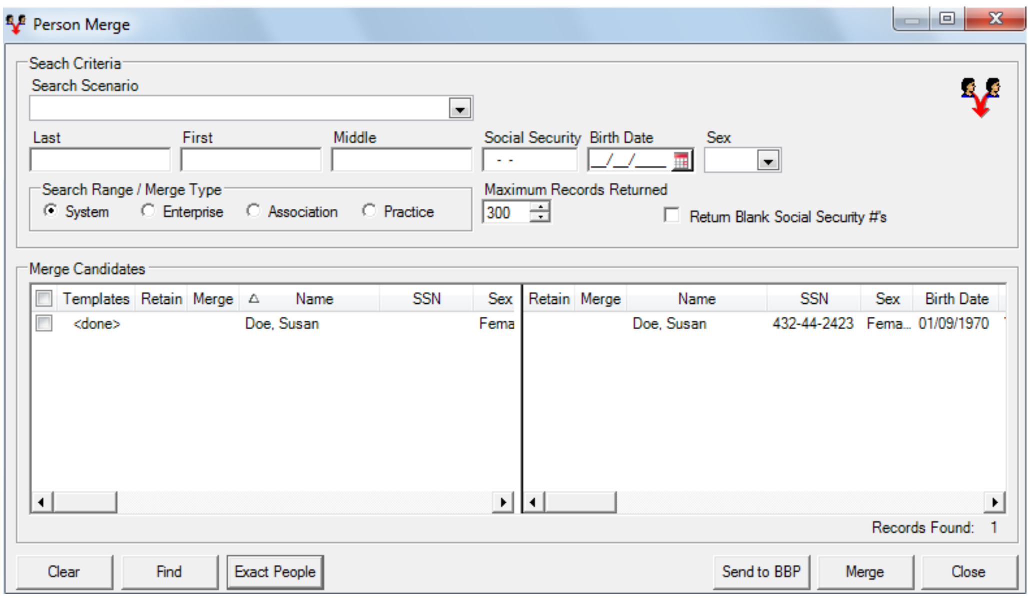
The *People Lookup - Merge Person 2* dialog box displays.



6 Enter the search criteria for the *second* person or patient to use in the merge, and then click Find.

7 When the results display, select the record you want to merge and then click Open.

The *Person Merge* dialog box displays the two selected merge candidates in the Merge Candidates section. You can repeat steps 3 through 6 for each individual record set that you want to merge.



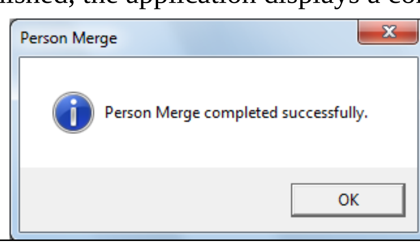
8 Choose which of the pair should be the retained record and which one should be merged into the retained record by clicking in either the Retain or Merge column for each row of merge candidate records that you want to process.

9 Click the check box for each row of merge candidate records in the Merge Candidate section that you want to merge and then click the Merge button.

The application again displays a reminder that the Person Merge process is database intensive.

10 Click Yes to continue.

11 When the merge process has finished, the application displays a completion message.



12 Click **OK**.

Merging Templates

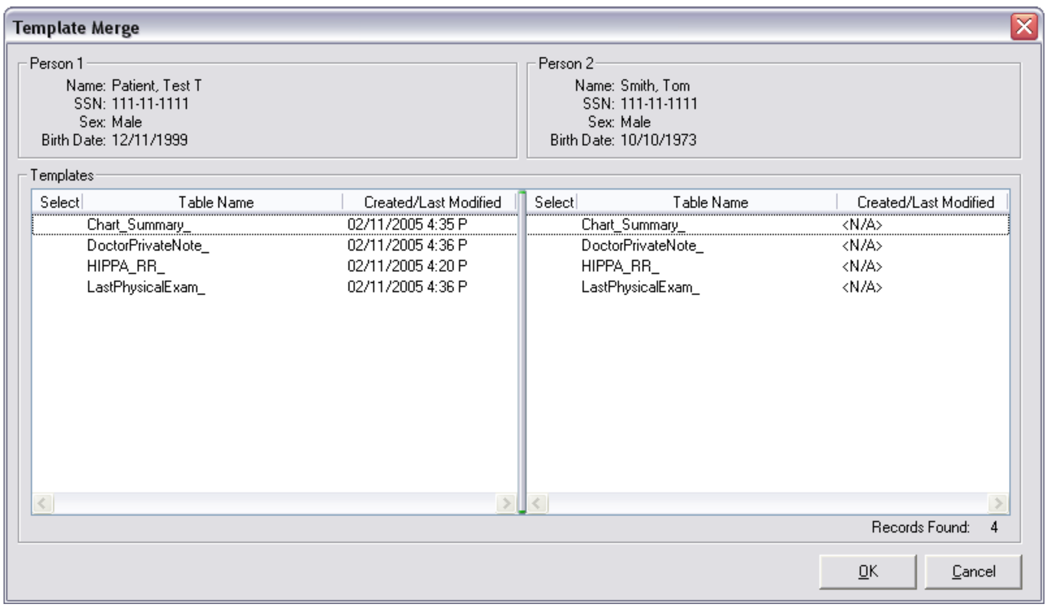
If your facility uses both NextGen Practice Management and NextGen Ambulatory EHR, you are required to select which specific NextGen Ambulatory EHR Demographic Templates from the patients' charts to keep during the merge process. When duplicate patients are merged, all NextGen Ambulatory EHR Medical Records Templates for both patients are automatically merged along with all other applicable patient data. The retained record does not include demographic information from the merged patient record.

To merge Demographic Templates:

1 Follow Steps 1 to 5 for merging person data.

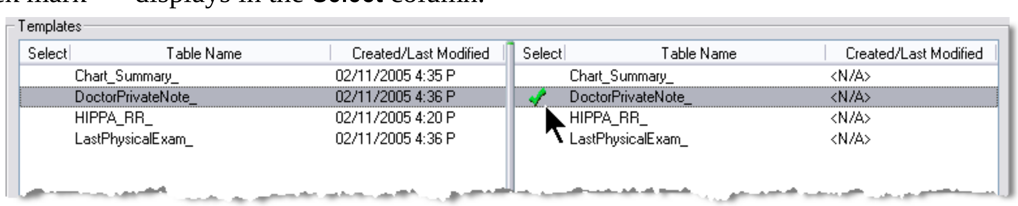
2 In the **Merge Candidates** list, right-click the patient record, and then click **Assign Templates**.

The *Template Merge* dialog box displays all duplicate Demographic Templates.



3 For each row, click in the **Select** column in the pane to select which Demographic Templates to keep during the merge process.

A check mark displays in the **Select** column.



Note: You *must* select one template from each row.

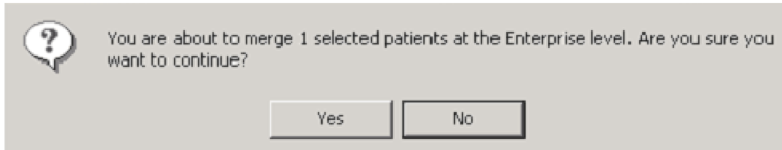
4 Click **OK**.

5 Click the **Merge** button.

The informational message displays again to remind you that this process is database intensive and should only be run after business hours.

6 Click Yes to continue.

A message displays to confirm how many patient records will be merged.



7 Click Yes.

A message displays to inform you that the merge was successfully completed.

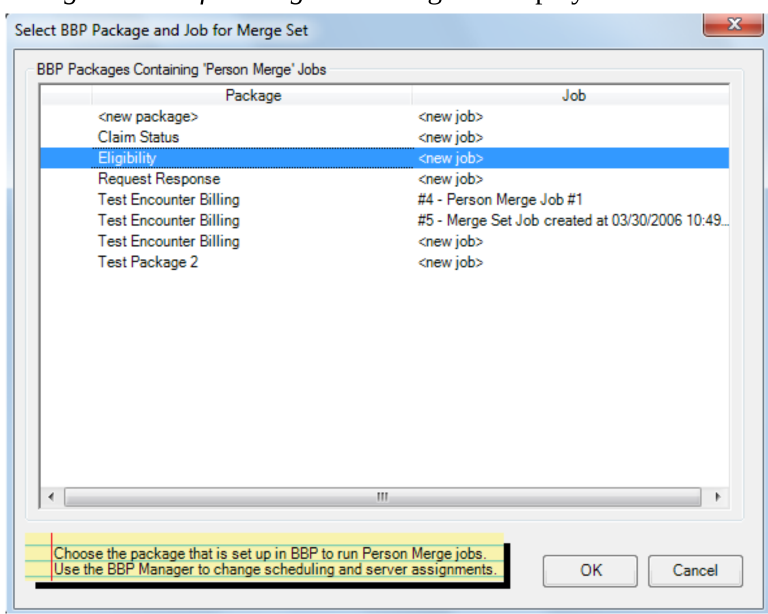
Merging Records with the Background Business Processor (BBP)

You can designate the NextGen BBP application to merge selected person/patient record pairs through an automated process. To do this, you can send the person/patient record pairs to a package in the NextGen BBP application that contains a Person Merge job.

To merge duplicate records with NextGen BBP:

1 Follow the steps outlined in the Merging Duplicate Person/Patient Records topic, but click the Send to BBP button instead of the Merge button.

The *Select BBP Package and Job for Merge Set* dialog box displays.



2 Select the BBP package that contains the Person Merge job to which you want to send the select merge pair candidates.

3 Click OK.

The selected merge pairs will be merged when the BBP package you selected is scheduled to run.

Patient Merge Significant Events

When a patient record is merged, a significant event is created at the practice level. You can view the event on the Clinical History/Notes tab of the retained patient's chart. If a merged patient did not have a chart or any encounters, a significant event is not created. You can memorize the Significant Events report. See Memorizing Reports for instructions on memorizing reports.

The chart level event contains the following merged patient data:

- Name
- Medical record number
- Social Security number
- Birth date
- Sex
- Address
- Home phone number

Document Revision History

App Version	Build Number	Author	Date	Document Version	Summary of Changes
5.x	5.7.3.10	G. Gilbert	03/28/2013	1.0	Initial Release