

# 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:**

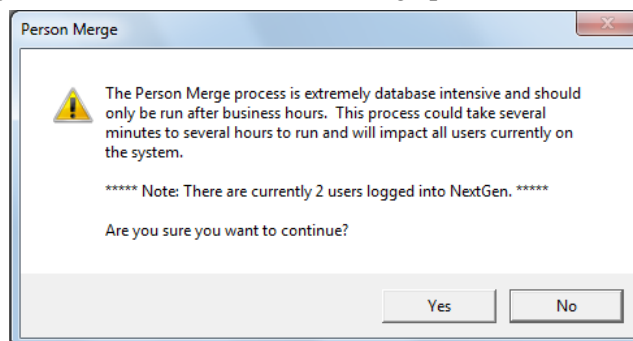
- 1 Access the NextGen System Administrator application.
- 2 Select the applicable group
- 3 Select the **Rights** tab for the group.
- 4 Access the rights under **Operations > Person Merge**.

## ***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
<b>Same Last Name/First Name/DOB/Sex</b>	The same last name, first name, date of birth, and sex.
<b>Same Last Name/First Name/DOB/SSN/Sex</b>	The same last name, first name, date of birth, Social Security Number, and sex.
<b>Same Last Name/First Name – Different Sex</b>	The same last name and first name, but with a different sex.
<b>Same Last Name/First Name – Different DOB/SSN</b>	The same last name and first name, but with a different date of birth and Social Security number.
<b>Same Last Name/First Name/SSN/Sex – Different DOB</b>	The same last name, first name, Social Security Number, and sex, but with a different date of birth.
<b>Same Last Name/SSN – Different First Name</b>	The same last name and Social Security Number, but with a different first name.
<b>Same Last Name/DOB/SSN/Sex – Different First Name</b>	The same last name, date of birth, Social Security Number, and sex, but with a different first name.
<b>Same First Name/DOB/SSN/Sex – Different Last Name</b>	The same first name, date of birth, Social Security Number, and sex, but with a different last name.
<b>Same SSN – Different Last Name/First Name</b>	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**.

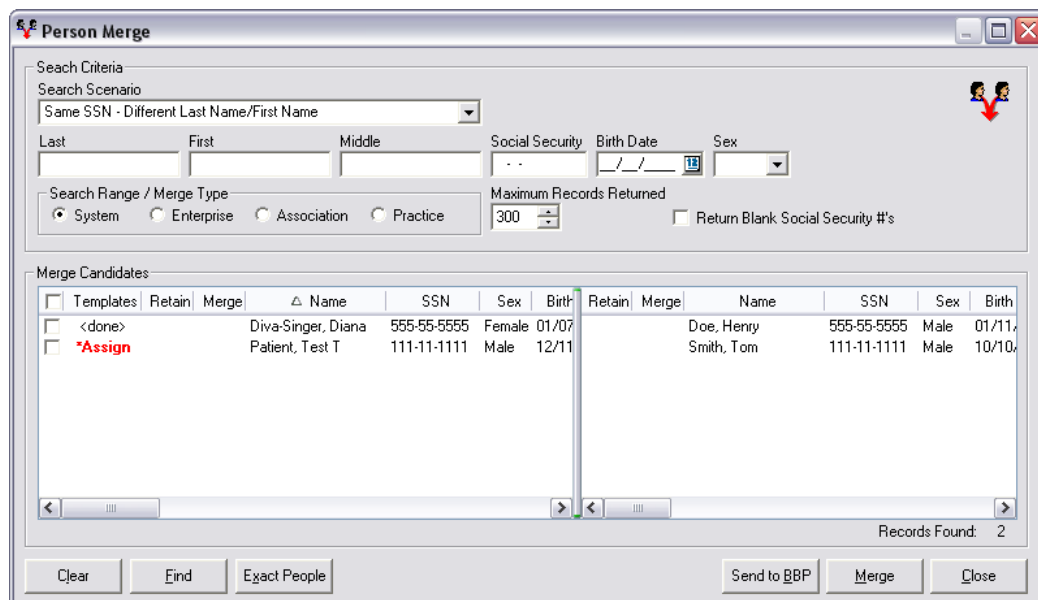
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**Note:** The ranges available to you depend on your Person Merge security rights (see "Security Rights for Merging Person and Patient Records" on page 4). If you select **Association**, the search results include only the patients that are part of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

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- 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).




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

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## ***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
<b>Assign Templates</b>	Opens the <i>Template Merge</i> dialog box.
<b>View Person</b>	Opens the <i>Modify Patient Information</i> dialog box

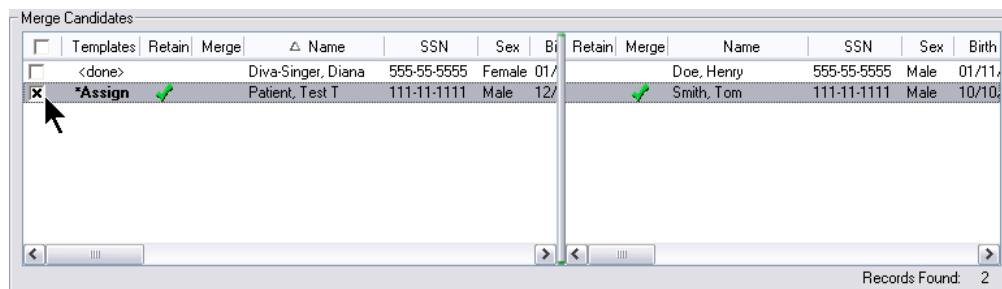
Option	Description
<b>View History</b>	Displays the name of the practice (below the selected row of merge candidates) where the patient records exist.
<b>Select All</b>	Selects all people listed in the Merge Candidates section.
<b>Deselect All</b>	Clears all selections in the Merge Candidates section.

- 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.

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

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- 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.

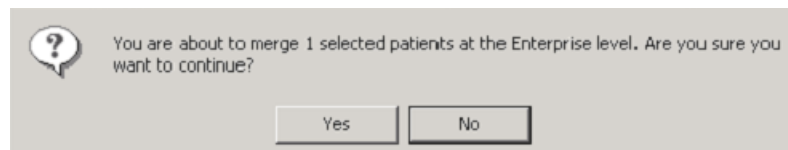
- 6 For any row that displays **Assign** in the **Templates** column, you must merge the NextGen Ambulatory EHR Demographic templates (see "Merging Templates" on page 10) associated with the patients' charts.

- 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.

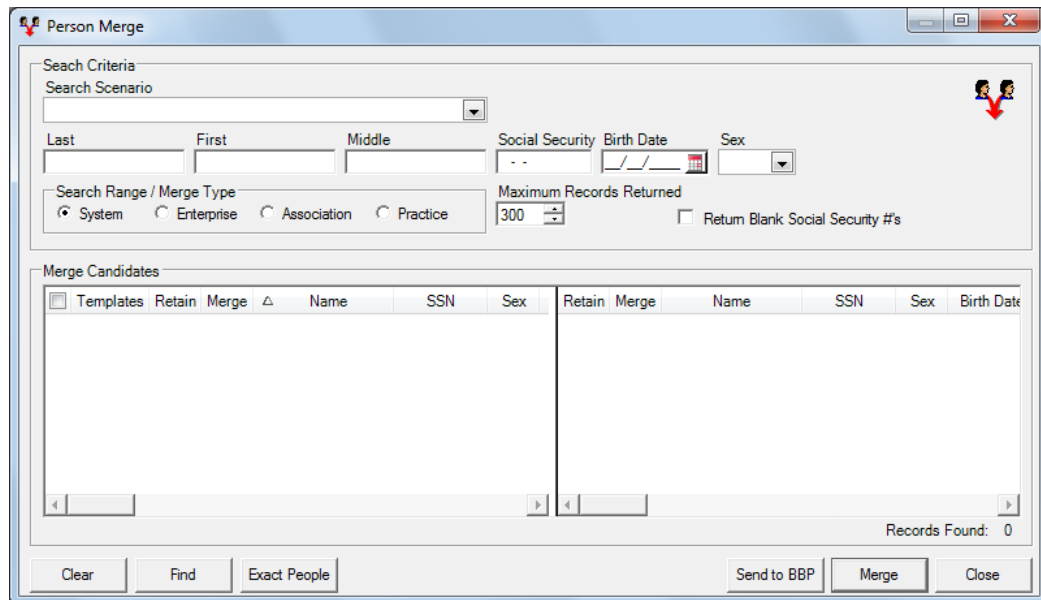
OR

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.

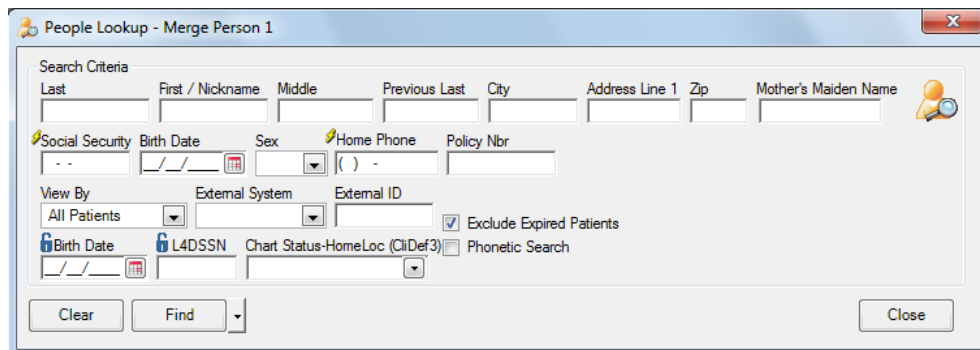
The *Person Merge* dialog box displays.



The **Person Merge** dialog box is shown. It has a title bar with a red 'X' button. The main area is divided into two sections. The top section, **Search Criteria**, contains a **Search Scenario** dropdown, fields for **Last**, **First**, **Middle**, **Social Security**, **Birth Date**, and **Sex**. Below these are radio buttons for **Search Range / Merge Type**: **System** (selected), **Enterprise**, **Association**, and **Practice**. There is a **Maximum Records Returned** spinner set to 300 and a checkbox for **Return Blank Social Security #'s**. The bottom section, **Merge Candidates**, shows a table with columns: **Templates**, **Retain**, **Merge**, **Name**, **SSN**, **Sex**, **Birth Date**. The table is currently empty. At the bottom right, it says **Records Found: 0**. The bottom of the dialog has buttons: **Clear**, **Find**, **Exact People**, **Send to BBP**, **Merge**, and **Close**.

- 3 Click the **Exact People** button.

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



The **People Lookup - Merge Person 1** dialog box is shown. It has a title bar with a red 'X' button. The main area is divided into two sections. The top section, **Search Criteria**, contains fields for **Last**, **First / Nickname**, **Middle**, **Previous Last**, **City**, **Address Line 1**, **Zip**, and **Mother's Maiden Name**. Below these are fields for **Social Security**, **Birth Date**, **Sex**, **Home Phone**, and **Policy Nbr**. The bottom section, **View By**, has a dropdown set to **All Patients** and a checkbox for **Exclude Expired Patients**. There are also checkboxes for **Birth Date**, **L4DSSN**, **Chart Status-HomeLoc (CliDef3)**, and **Phonetic Search**. The bottom of the dialog has buttons: **Clear**, **Find**, and **Close**.

- 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**.

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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.

Retain	Merge	Name	SSN	Sex	Birth Date
<input type="checkbox"/>	<input type="checkbox"/>	<done>			
<input type="checkbox"/>	<input type="checkbox"/>	Doe, Susan		Fema	
			432-44-2423	Fema...	01/09/1970

- 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.

Select	Table Name	Created/Last Modified
<input checked="" type="checkbox"/>	Chart_Summary_	02/11/2005 4:35 P
<input checked="" type="checkbox"/>	DoctorPrivateNote_	02/11/2005 4:36 P
<input checked="" type="checkbox"/>	HIPPA_RR_	02/11/2005 4:20 P
<input checked="" type="checkbox"/>	LastPhysicalExam_	02/11/2005 4:36 P

Select	Table Name	Created/Last Modified
	Chart_Summary_	<N/A>
	DoctorPrivateNote_	<N/A>
	HIPPA_RR_	<N/A>
	LastPhysicalExam_	<N/A>

Records Found: 4

OK Cancel

- 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.

Select	Table Name	Created/Last Modified
<input checked="" type="checkbox"/>	Chart_Summary_	02/11/2005 4:35 P
<input checked="" type="checkbox"/>	DoctorPrivateNote_	02/11/2005 4:36 P
<input type="checkbox"/>	HIPPA_RR_	02/11/2005 4:20 P
<input type="checkbox"/>	LastPhysicalExam_	02/11/2005 4:36 P

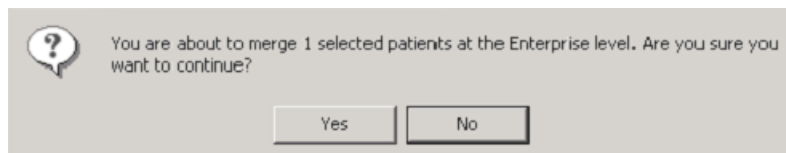
**Note:** You *must* select one template from each row.

- 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.

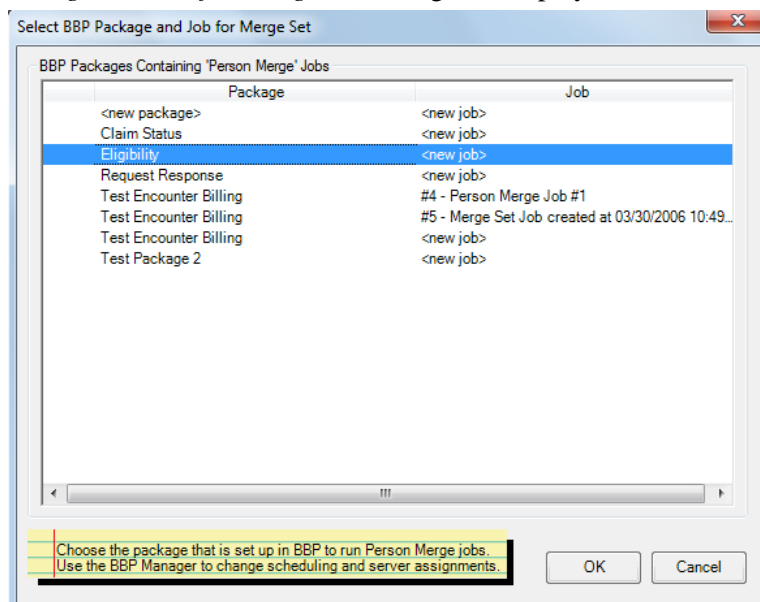
## ***Merging Records with the Background Business Processor (BBP)***

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*

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