

JERSEY HEALTH CONNECT POLICY MANUAL

Policy: Patient Record Merge Process

Number: 21

Effective: 12/1/2014

Definitions:

As used in this Policy, the following terms shall have the following corresponding meanings:

“Demographic Match” means multiple records in which the following fields are identical: First Name, Last Name, Date of Birth, Gender, and Zip Code.

“Duplicate Facility Records” means multiple Patient Records associated with a single patient, including Provisional Records, originating from a single member or first-level affiliate.

“Duplicate Network Records” means multiple Patient Records associated with a single patient, including Provisional Records, originating from multiple members or affiliates.

“Merge Resource” means any of the individuals identified in Procedure 1, below.

“Centralized Merge Resource” means the individual identified in Procedure 3, below.

“Patient Record” means a record stored in and accessible through Relay Health, listed separately using the Record Locator Search.

“Provisional Record” means either a patient record which has insufficient demographic data to create or match to an existing patient record, or a patient record which has not matched to an existing patient record due to pre-existing Duplicate Facility Records.

Policy:

Acknowledging that duplicate patient records in the Exchange are detrimental to efficient and effective patient care, Jersey Health Connect and its members and participants shall ensure that duplicate records are merged whenever reasonably possible.

Procedure:

1. Manual Merging

- 1.1. Each Member shall for itself and for any providers sponsored under its Membership Agreement, designate an individual or individuals who shall be responsible for merging patient records, and for the administrative authorization of the merging of patient records. Each Member shall notify Jersey Health Connect of the individuals so designated, and any subsequent changes in such designation. Each Member shall also designate appropriate individuals for error correction and duplicate elimination in source information systems, however Jersey Health Connect need not be notified of such individuals' designation.**
 - 1.1.1. Any user duly authorized by a Member may merge Duplicate Facility Records that are a Demographic Match.**
 - 1.1.2. Only the Merge Resources for a Member may merge patient records that are not a Demographic Match.**
- 1.2. Each Member shall cause those individuals identified in 1) collectively to dedicate such time and effort as is necessary to reduce the number of Duplicate Facility Records associated with such Member to a reasonable and appropriate level, but in no case:**
 - 1.2.1. If the Member has over 1000 Duplicate Facility Records, less than 20 hours per week;**
 - 1.2.2. If the Member has 100 or more, but 1000 or less Duplicate Facility Records, less than 5 hours per week; and**
 - 1.2.3. If the Member has less than 100 Duplicate Facility Records, 3 hours per week.**
- 1.3. Jersey Health Connect shall identify an individual responsible for merging Duplicate Network Records. That Centralized Merge Resource may summarily merge records for which there is a Demographic Match. The Centralized Merge Resource shall contact persons identified in 1) above, as necessary, to positively identify a patient to whom a record belongs within a particular member or provider so as to resolve duplicates which are not Demographic Matches.**
- 1.4. Failure to dedicate the necessary resources in accordance with this policy shall be addressed as follows:**
 - 1.4.1. Either the Executive Director or the Privacy and Security officer shall notify the institution not in compliance with this policy;**
 - 1.4.2. That institution shall have a reasonable time, not to exceed thirty days, to become compliant with this policy; and**
 - 1.4.3. Any failure to return to compliance with this policy, or any three instances of non-compliance within a calendar year, shall be referred to the Executive Committee or Board of Trustees for further action consistent with members' contractual obligation to adhere to policy.**

2. Automatic Merging

- 2.1. RelayHealth shall implement scripting or some other technical mechanism to automatically merge Duplicate Network Records (the "Automatic Merge").**
- 2.2. The Automatic Merge shall combine only those records which exactly match the following criteria:**
 - 2.2.1. First Name**
 - 2.2.2. Last Name**
 - 2.2.3. Date of Birth**

- 2.2.4. Gender
 - 2.2.5. Zip Code
 - 2.2.6. Street Address (but not City)
- 2.3. RelayHealth shall implement a flag which may be manually set in or with respect to a record such that any such flagged record shall be exempted from the Automatic Merge.
3. Any staff of JHC or of any Member shall immediately report to RelayHealth and JHC when it discovers a record which appears to have been improperly merged, such that RelayHealth can roll-back that merge and, if the subject of an Automatic Merge, the record(s) can be flagged so as to preclude future automatic merging.

Revision History:

15 November 2013, Approved by Board of Trustees
12/4/2014 Revised Effective 12/1/2014