



**MASTER PATIENT INDEX/PATIENT  
DEMOGRAPHICS (MPI/PD) VISTA  
USER MANUAL**

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Department of Veterans Affairs  
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Infrastructure and Security Services (ISS)



# Revision History

## Document History

The following table displays the revision history for this document. Revisions to the documentation are based on a continuous dialogue with the Infrastructure and Security Services (ISS) Technical Writers and evolving industry standards and styles.

| Date    | Revision | Description  | Author  |
|---------|----------|--|---|
| 4/1999  | 1.0      | Initial MPI/PD and MPI Vista User Manuals were created for release with the MPI/PD V.1.0 software in April 1999.   | Dianne Barker, Silver Spring OIFO; Susan Strack, Oakland OIFO   |
| 6/2003  | 2.0      | MPI/PD Vista Version 1.0 User Manual released in conjunction with patches DG*5.3*505, and MPIF*1.0*28 of the MPI Changes Iteration I project   | Lauren Hardeen, Bay Pines OIFO; Susan Strack, Oakland OIFO  |
| 12/2003 | 2.1      | Updates to documentation based on Patches RG*1*29 and DG*5.3*479.  | Susan Strack, Oakland OIFO; Lauren Hardeen, Bay Pines OIFO  |
| 5/27/04 | 3.0      | MPI/PD Vista Version 1.0 User Manual released in conjunction with patches MPIF*1.0*33, RG*1.0*35 and DG*5.3*589 to support the MPI Changes Iteration 2 project   | Susan Strack, Oakland OIFO; Christine Chesney, Oakland OIFO; Christine Link, Birmingham OIFO; Paulette Davis, Birmingham OIFO |
| 9/24/04 | 4.0      | Implemented new conventions for displaying TEST data: <ul style="list-style-type: none"><li>• The first three digits (prefix) of any Social Security Numbers (SSN) will be in the "900" or "800" range.</li><li>• Patient or user names will be formatted as follows:<br/>PATIENTn,[first name] or<br/>USERn,[first name] respectively, where the digit ("n") in the last name increments with each new entry.</li></ul> | Susan Strack, Oakland OIFO  |

## Patch History

For the current patch history related to this software, please refer to the Patch Module (i.e., Patch User Menu [A1AE USER]) on FORUM.

## Revision History

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# Orientation

This manual is a merge of the *Master Patient Index (MPI) VistA User Manual V 1.0* with the *Master Patient Index/Patient Demographics (MPI/PD) User Manual V. 1.0*. These packages were distributed and installed together and will be referred to in this manual as Master Patient Index/Patient Demographics (MPI/PD) VistA.

## How to Use this Manual

This manual is intended for use in conjunction with the Master Patient Index/Patient Demographics Version 1.0 package. It uses several methods to highlight different aspects of the material. The following symbols are used in the manual to alert the reader about special information:

- Various symbols are used throughout the documentation to alert the reader to special information. The following table gives a description of each of these symbols:

| Symbol   | Description  |
|--|--|
|   | Used to inform the reader of general information including references to additional reading material |
|  | <b>Used to caution the reader to take special notice of critical information</b>                     |

**Figure i: Documentation Symbol Descriptions**

- Descriptive text is presented in a proportional font (as represented by this font). "Snapshots" of computer online displays (i.e., character-based screen captures/dialogs) and computer source code are shown in a *non*-proportional font.
- All uppercase is reserved for the representation of M code, variable names, or the formal name of options, field and file names, and security keys (e.g., the XUPROGMODE key).
- The Enter or Return Key is illustrated as **<Enter>** and is included in examples only when it might be unclear that such a keystroke must be entered.
- Conventions for displaying TEST data in this document are as follows:
  - The first three digits (prefix) of any Social Security Numbers (SSN) will be in the "900" or "800" range.
  - Patient or user names will be formatted as follows: PATIENTn,[first name] or USERn,[first name] respectively, where the digit ("n") in the last name increments with each new entry.

## Who Should Read this Manual?

This manual has been written with many job functions in mind. Personnel responsible for registering patients, data integrity, Patient Information Management System (PIMS) Automated Data Processing Application Coordinators (ADPACs), and IRM personnel involved with using all aspects of the Master Patient Index (MPI) and implementing and making changes affecting Coordinating Master of Record (CMOR) sites should read this manual. If you need more information, it is suggested that you look at the various VA OI Health Systems Design & Development (HSD&D) home web pages for a general orientation to VistA at this address: <http://vaww.vista.med.va.gov>.

## Reference Materials

In order to competently operate this package you must be familiar with the operations of the VistA computer system in general. This information can be obtained on the following Web site:

<http://vaww.vista.med.va.gov> .

In addition to the information provided in this documentation, readers who wish to learn more about the Master Patient Index (MPI) software should consult the following Web sites:

- VistA Documentation Library (VDL) at the following address:  
<http://www.va.gov/vdl/Infrastructure.asp?appID=16>
- MPI Data Quality Management team's website at:  
[http://vista.med.va.gov/mpi\\_dqmt/](http://vista.med.va.gov/mpi_dqmt/)
- MPI/PD web site at:  
[http://vista.med.va.gov/mpi\\_pd/index.html](http://vista.med.va.gov/mpi_pd/index.html)

Readers who wish to learn more about Infrastructure and Security Services (ISS) documentation should consult the following:

- ISS Documentation Home Page at the following web address:  
<http://www.va.gov/vdl/>

This site provides documentation links and software downloads for all ISS documentation.

- Health Systems Design and Development (HSD&D) VistA Documentation Library (VDL) Home Page at the following web address:  
<http://vista.med.va.gov/vdl>

This site provides documentation links and software downloads for all VistA documentation.

The MPI/PD VistA product documentation, as found on the VDL, includes the following manuals:

- *Master Patient Index/Patient Demographics (MPI/PD) VistA HL7 Interface Specifications*
- *Master Patient Index/Patient Demographics (MPI/PD) VistA User Manual*
- *Master Patient Index (MPI) VistA Programmer Manual*
- *Master Patient Index/Patient Demographics (MPI/PD) VistA Technical Manual*

- *Master Patient Index/Patient Demographics VistA Exception Handling*
- *Master Patient Index (MPI) VistA Monograph*

The Master Patient Index VistA and Patient Demographics (PD) were distributed and installed together. All installation information and procedures involved with the MPI VistA is included in the following MPI/PD VistA document:

- *CIRN/PD and MPI Installation and Implementation Guide*

One of the major pre-implementation tasks is the merging of duplicate patient records at a site. The *Duplicate Record Merge: Patient Merge (Patch XT\*7.3\*23) User Manual* is required for this task.



Patches XT\*7.3\*49, RG\*1\*6, and RG\*1\*10 allow sites with MPI/PD to resolve duplicate records.

Because of the close interaction between MPI/PD VistA and other packages, you may also find it helpful to review the documentation for the following VistA software:

- *VistA Health Level 7 (HL7) V. 1.6*
- *PIMS V. 5.3 Admission, Discharge and Transfer (ADT)*

VistA documentation is made available online in Microsoft Word format and in Adobe Acrobat Portable Document Format (PDF). The PDF documents *must* be read using the Adobe Acrobat Reader (i.e., ACROREAD.EXE), which is freely distributed by Adobe Systems Incorporated at the following web address:

<http://www.adobe.com/>

VistA documentation can be downloaded from the National VistA Support (NVS) anonymous directories or from the Health Systems Design and Development (HSD&D) VistA Documentation Library (VDL) website:

<http://www.va.gov/vdl/>



For more information on the use of Adobe Acrobat Reader, please refer to the “Adobe Acrobat Quick Guide” at the following web address:  
<http://vista.med.va.gov/iis/acrobat/index.asp>



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## Orientation

# Chapter 1: Introduction

## Overview

Master Patient Index/Patient Demographics (MPI/PD) was developed to initialize active patients to the Master Patient Index (MPI) and to establish the framework for the sharing of patient information between sites. During the process of initialization to the Master Patient Index, each active patient receives an Integration Control Number (ICN), a Coordinating Master of Record (CMOR), and a Treating Facility List of the sites where the patient is receiving care. Your site becomes part of the network of sites that share key demographic data for patients via HL7 messaging. Master Patient Index VistA (MPI) and Patient Demographics (PD) were distributed and installed together. This manual covers the functionality in both packages.



Master Patient Index (MPI) VistA and Patient Demographics (PD) were distributed and installed together. This manual covers the functionality in these now merged packages and will be referred to throughout the document as MPI/PD VistA.

MPI/PD was originally part of the Clinical Information Resource Network (CIRN) project. CIRN was to be a three-phase project consisting of Phase 1: Pre Implementation (site clean up), Phase 2: Master Patient Index/Patient Demographics (Master patient Index seeding for VHA-wide patient identification and patient demographics synchronization), and Phase 3: CIRN Clinical Repository. Master Patient Index/Patient Demographics is now a separate, independent package. Due to its beginnings, you will still notice references to CIRN such as shared name and number spaces, file names, package terminology, etc. The clinical repository is now a separate, independent project called Health Data Repository.

The objectives of the MPI/PD VistA are to create an index that uniquely identifies each active patient treated by the Veterans Administration and to identify the sites where a patient is receiving care. This is crucial to the sharing of patient information across sites.



During the 1980s, the policy for creating patients in the PATIENT file (#2) that were also employees was to enter them as EEE, then their social security number (SSN). That policy was subsequently revoked but did not include any cleanup of the existing EEE patients. During the implementation phase of the Master Patient Index/Patient Demographics (MPI/PD) application, a report was generated to identify these patients. Some of them were changed to their correct names, but many still had not been resolved. It was possible for these EEE patients to be assigned an ICN, either local or national. Since this data does not assist in the identification or sharing of patient data, it was decided that these patients should not be assigned an ICN of any kind, nor should an exception be logged that they have been touched. Prior to Patch MPIF\*1.0\*33, patients who had both an “EEE” as the first three characters of their last name and an ICN (local or National) were inactivated (following the rules for inactivation) from the MPI during the post initialization for Patch MPIF\*1.0\*21. These EEE patients were included in the screen of patients *not* to be sent to the MPI.

This screen on EEE patients was reviewed again in the MPI Changes 2 project and removed in Patch MPIF\*1.0\*33. Patients with last names beginning with “EEE” will no longer be screened from getting a local or national ICN. And no exception message will be logged in the local VistA exception handler when these patient entries are touched.

## Distinguishing MPI (Austin) from MPI/PD (VistA)

MPI (Austin) refers to the actual index located at the Austin Automation Center (AAC). MPI/PD (VistA) refers to the software that resides in VistA and sends patient data to the MPI (Austin) and to sites where a patient has been seen. These terms [i.e., MPI (Austin) and MPI/PD (VistA)] are used throughout this manual only when it is not obvious which component of the MPI the documentation is referring to.

## Installation Information

The Master Patient Index VistA and Master Patient Index/Patient Demographics (MPI/PD) were distributed and installed together. All installation information and procedures involved with MPI have been referenced in the following MPI/PD documents:

- *CIRN Patient Demographics (CIRN-PD) Pre Installation and Implementation Guide V. 5*
- *Master Patient Index/Patient Demographics (MPI/PD) Installation and Implementation Guide V. 2.*

In October 2002, the three-phase release of patches for the MPI/PD VistA software enhancement began. Phase I consisting of three patches, contains the protocols and routines to execute a new messaging structure. The overall objective of the new messaging is to reduce the amount of facility-to-facility messaging by using the Master Patient Index (MPI), rather than the CMOR, as the source for update messages.

The second phase of patches updates the necessary routines to call the new trigger events using the updated messaging structure. The trigger events include the following:

- Add new patient to the MPI.
- Link to an existing patient on the MPI.
- Update to non-key fields on an existing MPI entry.

- Update to key fields on an existing MPI entry.
- Update to date last treated.
- Resolution of duplicates at the site where both entries exist on the MPI.
- Resolution of duplicates on the MPI.
- Identification and resolution of a mismatched patient.
- Inactivation of existing entry on the MPI.

This phase also includes a data synchronization process to populate new fields in the MPI FACILITY ASSOCIATION file (#985.5) on the MPI for each facility associated with a national integration control number (ICN). Before this is done though, all facilities must install the patches for the second phase.

The third phase of patches contains additional messaging functionality that cannot be implemented until the synchronization process has completed. This final group of patches will clean up obsolete routines, protocols, and options that are no longer used.

## Introduction

## Chapter 2: Product Description—What is the Master Patient Index Composed Of?

### Master Patient Index (Austin)

The MPI located at the Austin Automation Center (AAC) is the actual index. It is composed of a unique list of patients and a current list of VAMCs (Veterans Affairs Medical Centers) where each patient has been seen. This enables the sharing of patient data between operationally diverse systems. Each record (or index entry) on the MPI contains a small amount of patient data used to identify individual entries.

When a patient is first seen at a site for care (the site has not previously treated the patient) or the patient did not get an ICN during the initialization phase, a real-time query is generated to the MPI when using the REGISTER A PATIENT, LOAD/EDIT PATIENT DATA or 10-10T REGISTRATION options on the Patient Information Management Systems (PIMS) menu. If the patient is not known to the MPI, the patient's identifying information: name, SSN (unless pseudo or not available), date of birth, and mother's maiden name are passed to the MPI. The MPI then assigns an integration control number (ICN) and assigns the requesting site as the CMOR. If, during registration, the patient is already known to the MPI, a message appears on the screen that says, "*Found patient Xxx,Vvvv in MPI, updating ICN and CMOR. . .*" and the MPI then displays the patient's CMOR on the screen. The requesting site sends a message to be added as a treating facility and the Treating Facility Update is sent by the MPI to all associated facilities.

Each site will have a block of local ICNs assigned for automatic use in the event that the MPI cannot be reached. When local ICNs are assigned to patients, background processing ensures that they are processed against the MPI as soon as possible. It will also process any missing ICNs for new patients added to the PATIENT file (#2) by means other than REGISTER A PATIENT, LOAD/EDIT PATIENT DATA or 10-10T REGISTRATION options. If the patient is not known to the MPI (new patient), the MPI will assign a new ICN and the site will be the CMOR. If the patient is already known to the MPI (exact match), the MPI will return the ICN, CMOR, and list of treating facilities. If the MPI finds more than one potential match, a local ICN is assigned and an exception is logged for human resolution using the MPI/PD Exception Handling option. The locally assigned ICN will be stored as part of the patient record in the ICN History.

Once a CMOR has been assigned to a patient, the MPI will only accept changes and/or updates to that patient's demographic data from the CMOR site. However, the CMOR can be changed at any time.

## Master Patient Index/Patient Demographics (VistA)

This software resides in VistA and sends patient data to the MPI (Austin) and to sites where a patient has been seen. MPI/PD VistA enables sites to query the MPI (Austin) for known data, to request the assignment of an ICN, to inactivate an ICN, and to manage incoming and outgoing Change CMOR requests.

During the initialization of the MPI database in Austin, each VA Medical Center sent batch HL7 messages to the MPI (Austin) requesting ICNs for all of its patients whose records reflected activity in the past three fiscal years (i.e., patient records that contain CMOR Activity Scores). Patients were checked against the MPI and one of the following scenarios occurred:

- If a patient is introduced to the MPI for the first time, it is added directly to the index, an ICN is assigned to that patient, and the current (sending) site becomes the CMOR.
- If an exact match is found for that patient (i.e., the patient had already been initialized to the MPI from another site), the current (sending) site was added to the list of treating facilities where the patient has been seen. The CMOR remains the same.
- If multiple patient entries are found in the MPI that closely match the patient's identifying information:
  - A notation is made in the CIRN HL7 EXCEPTION LOG file (#991.1) indicating that a list of potential matches has been found. The HL7 message is sent back to the sending site and processed, instead of the ICN and CMOR normally returned.
  - An option, View Potential Match Patient, is available on the Message Exception Menu. It prints a list of patients who have been identified as having multiple potential matches on the MPI and who haven't yet been resolved using the option Single Patient Initialization to MPI. Patient entries are listed by NAME, SOCIAL SECURITY NUMBER (SSN), DATE OF BIRTH (DOB), and DFN. The status of the patient entry is current as of the date/time the report is generated. This data is pulled from the CIRN HL7 EXCEPTION LOG file (#991.1).
  - If the correct patient entry is located on the report, it must then be resolved using the option Single Patient Initialization to MPI.

Once the initialization was completed, the data at the MPI (Austin) was (and currently is) kept up-to-date through Master Patient Index/Patient Demographics (MPI/PD) VistA, and Patient Information Management System (PIMS) menu options.

If you are using any one of the following PIMS options:

- LOAD/EDIT PATIENT DATA,
- REGISTER A PATIENT,
- 10-10T REGISTRATION,
- or ELECTRONIC 10-10EZ PROCESSING

to add a new patient to your local PATIENT file (#2), or if you select a patient who did not receive an ICN during initialization, a real-time request for an ICN and CMOR is sent to the MPI (Austin). This ensures that the MPI (Austin) will be kept up-to-date with active patients.

## Coordinating Master of Record (CMOR)

The Coordinating Master of Record (CMOR) is the designated "owner" of the patient's descriptive data. A patient will have only one CMOR at a time. The designation as the CMOR for a patient does not provide "workload credit" or any other distinction.

Several new fields having to do with the CMOR were added to the PATIENT file (#2): COORDINATING MASTER OF RECORD (#991.03), CMOR ACTIVITY SCORE (#991.06), and SCORE CALCULATION DATE (#991.07). These fields are populated by the system.

During the Pre-Implementation phase, a CMOR score based on activity (Current FY, FY-1, FY-2) was calculated for the active patients in your PATIENT file (#2). The CMOR score indicates to the Master Patient Index (MPI), which patients in your PATIENT file (#2) are active. During initialization of your database with the MPI, the first site at which the MPI encounters a patient will be assigned as the CMOR. Following the initialization with the MPI, your site will run an option that identifies the shared patients for which you are **not** the CMOR, compares the CMOR scores, and reassigns the CMOR if that action is appropriate.

## Treating Facilities

A facility's relationship to the patient determines what information it receives and sends. MPI/PD VistA maintains this information to ensure proper routing of patient data.

Any facility where a patient registers for care (regardless of VISN) is placed on the Treating Facility List. This list is part of the patient descriptive data that is synchronized.

Changes to certain patient's descriptive data that are made at a treating facility trigger a message to the CMOR and are placed in a Patient Data Review. The CMOR manually accepts or rejects the changes and sends a message to the MPI. The MPI will then determine whether a Treating Facility Update should go out based on whether the data changed. If the message came from a non-CMOR site, the MPI will transmit the update(s) to the CMOR site. If the message came from the CMOR site, the MPI will transmit the update to all associated facilities.



**A series of patches were distributed to implement a new messaging structure for Master Patient Index/Patient Demographics (MPI/PD). Previously, the MPI/PD used the Coordinating Master of Record (CMOR) as the origination point for a number of update messages to other treating facilities. To reduce the amount of facility to facility messaging, the Master Patient Index (MPI) database is now the source for update messages. For those message types that require CMOR action, the CMOR will update the MPI, and the MPI will distribute updates to the appropriate treating facilities.**

Product Description—What is the Master Patient Index Composed Of?

# Chapter 3: Package Management

## Name and Number Spaces

The package namespace is RG; the file range is 990–995 and 997–999.99. This package also includes routines in the MPIF namespace; the file range is 994.

## Package Requirements

The following packages (fully patched) must be installed at the site:



**DO NOT INSTALL HL\*1.6\*39 IN ANY TEST ACCOUNT! If you install this patch in your test account, you will link your test account to all the other production accounts. Since there are similarities (e.g., patient names/data) in test and production, it would not be good for data from the test account to be transmitted to the production account at another site.**



**RG\* and MPIF\* patches should NOT be installed on legacy systems to avoid issues with the legacy systems ending up as Coordinating Master of Records (CMORs) or Treating Facilities.**

| Application  | Version # and Patches  |
|--|--|
| CIRN   | Version 0.5 fully patched  |
| Health Level 7 (HL7) VistA                         | Version 1.6 fully patched<br> Place HL*1.6*39 in Production account only. |
| Kernel   | Version 8 fully patched  |
| Kernel Toolkit                                     | Version 7.3 fully patched  |
| MailMan  | Version 7.1<br>XM*DBA*115  |
| Master Patient Index/Patient Demographics (MPI/PD) | Version 1.0 fully patched  |
| Pharmacy   | If running Computerized Patient Record System (CPRS), fully patched version of Outpatient Pharmacy V. 7.0, and Inpatient V. 5.0.                             |
| PIMS   | Version 5.3 fully patched  |
| Registration                                       | Version 5.3 fully patched  |
| Scheduling   | Version 5.3<br>SD*5.3*185  |

| Application | Version # and Patches    |
|-------------|--------------------------|
| VA FileMan  | Version 22 fully patched |

**Figure 3-1: Applications that need to be installed and fully patched for MPI/PD VistA**



If you are a Caché site and are planning to use a multi-threaded listener (which is recommended), you will need patch XU\*8.0\*78.

## Legal Requirements

This package does not impose any additional legal requirements on the user. All users are reminded that many of the reports generated by this package contain confidential patient information and should be treated accordingly.

## Site Parameters Related to Patient Administration

### Site Parameters Edit for CMOR [MPIF SITE PARAMETER]

Your site can select whether requests for a change to a patient's CMOR will be processed automatically or placed in a review file for manual processing. If you select MANUAL, mail messages will be sent to the mail group entered in "New Request Mailgroup" whenever change requests are received. You do not get a message if you select AUTOMATIC.

```

Type of Processing: MANUAL// ??
  Based on this field setting, any CMOR change request received
  from another station can either be manually reviewed or automatically
  approved.
  Choose from:
    0      MANUAL
    1      AUTOMATIC
Type of Processing: MANUAL// <Enter>
New Request Mailgroup: MPIF CMOR REQUEST// ??
  If the CMOR Request Change parameter is set to manual, new CMOR change
  requests received will notify the mailgroup entered in this field. This
  gives a means of prompting someone to review the new request.
New Request Mailgroup: MPIF CMOR REQUEST // <Enter>
    
```

**Figure 3-2: Site Parameters Related to Patient Administration**



Other Site Parameters affecting MPI/PD are described in the *Master Patient Index/Patient Demographics (MPI/PD) Installation and Implementation Guide*.

## Bulletins

RG CIRN DEMOGRAPHIC ISSUES: This bulletin controls the sending of the following patient related and Master File update bulletins.

| Patient Related Bulletin     | Cause  | Action to take                      |
|------------------------------|--|-------------------------------------|
| REMOTE SENSITIVITY INDICATED | Patient is marked as sensitive at the sending site but not at receiving site.            | No action: message is informational |
| REMOTE DEATH INDICATED       | Patient has a date of death entered from the sending site but not at the receiving site. | No action: message is informational |

**Figure 3-3: Patient Related Bulletins**

The Master File Update bulletins going to MPI Austin differ from the patient related bulletins in that the data being passed is different.

## Exception Handling Messages

The exception handler generates messages to alert the user of problems that occur in generating or processing HL7 messages. See the Exception Handling document on the MPI/PD web site for examples of messages that may be received during the implementation phase and how to resolve the problems.

## MPI/PD Mail Groups

| Mailgroup               | Suggested Coordinator                       | Suggested Members                                 | Description  |
|-------------------------|---|---|--|
| HL7 SITE POC (ON FORUM) | Personnel who monitor MPI/PD HL7 problems.  | Personnel who monitor MPI/PD HL7 problems.        | This mail group is for personnel who monitor MPI/PD VistA HL7 problems.  |
| MPIF CMOR REQUEST       | Personnel who monitor CMOR Change Requests. | Personnel that will process CMOR Change Requests. | <p>Any requests to change the CMOR will be sent to this Mail Group. Requests will then be processed (i.e., accepted/rejected) via the CMOR options. The messages serve as a heads-up that there are CMOR requests to process. This is also the mail group where the notifications that a request has been processed at another site and the outcome.</p> <p> This Mail Group is added to the MAIL GROUP file (#3.8) during the Post-Init of the installation.</p> |

|                                   |   |   |   |
|-----------------------------------|---|---|---|
| <p>MPIF EXCEPTIONS</p>            | <p>Messages are sent to the MPI Exception Handler on the Austin MPI. There shouldn't be any local members in this mail group.</p> | <p>Messages are sent to the remote mail group G.CIRN EXCEPTION MGT@FORUM.VA.GOV, which is the Exception Handler on the MPI in Austin.</p> | <p>MPI Exception Messages to be addressed are sent to this mail group. These messages are all technical in nature, involving problems with HL7 messages or conflicts with CMORs or ICN not found. There normally isn't anything the site can do about these, so these messages are sent to a remote mail group. The remote mail group G.CIRN EXCEPTION MGT@FORUM.VA.GOV gets the messages instead of local members. If necessary, the remote mail group members will contact the site's personnel for assistance.</p> |
| <p>RG CIRN DEMOGRAPHIC ISSUES</p> | <p>Health Administration Service (HAS)/MPI/PD Coordinator</p>   | <p>Personnel that deal with patient data.</p>   | <p>This mail group should contain person(s) responsible for ensuring the integrity of the Patient Information Management Systems (PIMS) data. The members of this group will be notified upon login that there are patients awaiting review.</p>  |
| <p>RG CIRN HL7 PROBLEMS</p>       | <p>Personnel who monitor MPI/PD HL7 problems.</p>   | <p>Personnel who monitor MPI/PD HL7 problems.</p>   | <p>This mail group receives notification of problems that CIRN (MPI/PD) has when interacting with the VistA HL7 package.</p>  |

**Figure 3-4: MPI/PD Mail Groups**

# Preparation For Initial Implementation

Prior to your site installation, MAS and/or IRM will have cleaned up your database so that the package can work effectively.

## **1. Cleaned up Pseudo-SSNs**

Updating active veteran patients' missing or pseudo-SSN was necessary in order to interface optimally with the MPI. Having the correct SSN for active patients will also provide benefit for inpatient and outpatient workload transmissions to Austin.

## **2. Insured Test patients have "5 leading zero" SSNs**

Previous to Patch MPIF\*1.0\*33, "test" patients were screened out from being added to the MPI during the process of initializing your site's PATIENT file (#2) with the Master Patient Index. Patch MPIF\*1.0\*33 removes this screen. "Test" patients are now added to the MPI. However, it is still important that SSN fields in "test" patient records begin with 5 leading zeros.

## **3. Insured that all local Eligibility Codes were mapped to a National Eligibility Code**

This step reduces the probability that anomalous Eligibility information will be passed to other sites in which the patient receives care.

## **4. Merged Duplicate Records**

Merging duplicate patient records at each site allowed consolidation of patient information and lessened the effort needed when processing against the MPI.

## **5. Updated/Standardized the Marital Status & Religion files**

Part of the Pre-Implementation phase included the updating of the Marital Status and Religion files to (1) insure all National standard entries are present, (2) delete the non-standard entries.

## **6. Cleaned up Inconsistent Data**

Patient record inconsistencies were diagnosed and cleaned up prior to initializing against the MPI.

## CMOR Activity Score

Prior to initialization with the MPI, a CMOR Activity Score was calculated for each active patient in your file. Active is defined as having activity over the last three years (current FY-2) excluding test entries. The CMOR Activity Score flags the active patients to be processed against the MPI for assignment of an ICN, CMOR site, and a treating facility list.

The CMOR can be recalculated as needed. The scores are calculated based on the following:

| Patient Activity Indices             | Timeframe      | CMOR Points |
|--------------------------------------|----------------|-------------|
| Admissions                           | Current FY     | 50 points   |
|                                      | FY (-1)        | 40 points   |
|                                      | FY (-2)        | 30 points   |
| Current (active) / New Prescriptions |                | 20 points   |
| Lab Tests                            | Last 12 months | 10 points   |
| Outpatient Visits                    | Current FY     | 30 points   |
|                                      | FY (-1)        | 20 points   |
|                                      | FY (-2)        | 10 points   |
| X Rays                               | Last 12 months | 20 points   |

Figure 3-5: CMOR Activity Scores

## Fields Added to the PATIENT File (#2) to Support MPI/PD VistA

During start-up, the active patients in your PATIENT file (#2) were each given an Integration Control Number (ICN), a Coordinating Master of Record (CMOR), and a list of treating facilities at which the patient is known. This information was also stored in the Master Patient Index (Austin) and was synchronized across sites for a given patient.

Additional fields added to the PATIENT file (#2) to support MPI/PD VistA include the following:

- INTEGRATION CONTROL NUMBER (#991.01)
- ICN CHECKSUM (#991.02)
- COORDINATING MASTER OF RECORD (#991.03)
- LOCALLY ASSIGNED ICN (#991.04)
- CMOR ACTIVITY SCORE (#991.06)
- SCORE CALCULATION DATE (#991.07)
- SUBDD: 2.0992 ICN HISTORY SUB-FIELD
- SUBDD: 2.0993 CMOR HISTORY SUB FIELD
- MULTIPLE BIRTH INDICATOR (#994)

## Auditing

During the normal daily operations of MPI/PD VistA, it is possible that MPI/PD HL7 Messaging will update the fields listed below. MPI/PD VistA enables auditing for the following fields for monitoring. A post installation step turns auditing on for the NAME (#.01) field also. It is very important that the auditing of these fields (especially NAME) remains set to YES, ALWAYS.

|                          |                                 |
|--------------------------|---------------------------------|
| **Name                   | County                          |
| **Sex                    | Phone Number [Residence]        |
| **Date of Birth          | Phone Number [Work]             |
| Marital Status           | K-Name of Primary NOK           |
| Religious Preference     | K-Phone Number                  |
| **Social Security Number | **Mother's Maiden Name          |
| Street Address [Line 1]  | Service Connected?              |
| Zip+4                    | Employment Status               |
| Street Address [Line 2]  | Period of Service               |
| Street Address [Line 3]  | Type                            |
| City                     | Veteran (y/n)?                  |
| State                    | Multiple Birth Indicator (y/n)? |

 The double asterisks (\*\*) denote key fields (in addition to Name and the fields mentioned above) that will be synchronized across sites. This list of key fields is subject to change.

The DG SECURITY LOG file (#38.1), SECURITY LEVEL (#2) field, is also monitored for changes to patient sensitivity.

 The above fields are the minimal set of fields that should be turned on for auditing in the PATIENT file (#2), for MPI/PD VistA.

## Rules For Updating Data

The general rules for updating data elements are as follows:

- In some fields, the data must match an entry in another file (e.g., The user must enter a valid entry from the STATE file (#5) when filling in the State field of the PATIENT file (#2).)
- If data has been deleted from a key field, the delete will be applied to the patient record if the message came from the CMOR. When the message is from a non-CMOR, the delete will take place when the CMOR merges the patient data during the data review process.
- Those fields on the Patient Data Review that are “Display Only” (those pertaining to Eligibility) are not updated even when the message is coming from the CMOR.
- Changes to the other key fields will be sent to the CMOR, to be either accepted or rejected in a Patient Data Review. If accepted, the CMOR sends the changes to the MPI. The MPI then broadcasts the changes to all treating facilities for the patient. The changes are made

automatically. If the CMOR rejects the updates, a message is sent to the registering site automatically updating those fields in that PATIENT file (#2) with the CMOR information.

- Changes to certain non-key fields are also sent to the CMOR. The CMOR may accept or reject the changes for its own PATIENT file (#2) but does not notify or update other sites.
- Changes to the following data fields, used by the Master Patient Index (MPI), are broadcast to all treating facilities once the CMOR has processed the entry in the patient data review file and has sent the update message to the MPI. Whether or not the CMOR accepts a change to any of these fields, the most current CMOR data are broadcast. The four data fields are SEX (#.02), DATE OF BIRTH (#.03), SSN (#.09) and MOTHER'S MAIDEN NAME (#.2403).



The NAME (#.01) field is no longer automatically updated if it has been **changed** at a non-CMOR site. A user may notice Patient Data Reviews showing the name different from what their file contains. The remote site may have changed other patient data that triggered the Patient Data Review but not edited the Name field. The user may choose to accept this difference and it will broadcast to the other treating facilities through the MPI or the user may choose to reject it. This change was made in patch DG\*5.3\*474.

# Chapter 4: Menus and Options

This section describes in detail the menus and options comprising the MPI/PD VistA. They should be made accessible to authorized IRM, ADPAC (i.e., most likely PIMS ADPACs and/or Coordinators, etc.), and VAMC personnel who will be involved in working with the MPI/PD VistA.



Patches RG\*1.0\*19 and RG\*1.0\*20 have made extensive menu changes. Both patches have removed obsolete menus and options, moved some options to different menus, and added new options. Patch RG\*1.0\*19 changed user visible references from CIRN to MPI/PD except in file names and most field names where it appears. CIRN Master of Record (CMOR) is now Coordinating Master of Record.

## MPI/PD Master Menu

This is the primary menu that contains all Master Patient Index/ Patient Demographics (MPI/PD) menus. The sub-menus will be assigned to other users as appropriate.

```
Select OPTION NAME: MPI/PD Master Menu <Enter> RGMGR MPI/PD Master Menu

CORD MPI/PD Patient Admin Coordinator Menu ...
ADU MPI/PD Patient Admin User Menu ...
IRM MPI/PD IRM Menu ...

Select MPI/PD Master Menu Option:
```

**Figure 4-1: MPI/PD Master Menu**

## MPI/PD Patient Admin Coordinator Menu

The MPI/PD Patient Admin Coordinator Menu [RG ADMIN COORD MENU] options allow control and monitoring of CMOR and patient data activities.

```
Select MPI/PD Master Menu Option: cord <Enter> MPI/PD Patient Admin Coordinator
Menu

SP Site Parameters Edit for CMOR
ADU MPI/PD Patient Admin User Menu ...
LOG Patient Audit Log Reports ...
MPI Master Patient Index Menu ...
MSG Message Exception Menu ...
RPT Management Reports ...
POC Add/Edit Point of Contact

Select MPI/PD Patient Admin Coordinator Menu Option:
```

**Figure 4-2: MPI/PD Patient Admin Coordinator Menu**

|                                      |                              |
|--------------------------------------|------------------------------|
| <b>Site Parameters Edit for CMOR</b> | <b>[MPIF SITE PARAMETER]</b> |
|--------------------------------------|------------------------------|

This option allows editing of site parameters that affect the processing of CMOR requests. These parameters allow incoming CMOR requests to be processed manually or automatically and define a mail group that will receive a message when a new request is received. If you choose to have the messages processed automatically, you will not receive notification that a request has been received or processed.



Patch MPIF\*1.0\*11 introduces a background job named AUTO CHANGE CMOR NIGHT JOB [MPIF CMOR REQUEST AUTO JOB] that will automatically process a request as approved if there has been no action taken on that request for more than 14 days.

```
Select MPI/PD Patient Admin Coordinator Menu Option: SP <Enter> Site Parameters
Edit for CMOR

Type of Processing: MANUAL// <Enter>
New Request Mailgroup: MPIF CMOR REQUEST// <Enter>
```

**Figure 4-3: Site Parameters Edit for CMOR**

**MPI/PD Patient Admin User Menu****[RG ADMIN USER MENU]**

This option provides the user with the MPI/PD Patient Admin User Menu [RG ADMIN USER MENU]. This menu includes the Patient Data Review option and the menu for changing and managing CMORs. For more information on this menu, please refer to the section in this manual titled "MPI/PD Patient Admin User Menu".

```
Select MPI/PD Patient Admin Coordinator Menu Option: ADU <Enter> MPI/PD Patient
Admin User Menu

      Patient Data Review
      Purge Patient Data Reviews
      Coordinating Master of Record (CMOR) Request ...

Select MPI/PD Patient Admin User Menu Option:
```

**Figure 4-4: MPI/PD Patient Admin User Menu**

**Patient Data Review****[VAFC EXCEPTION HANDLER]**

This PIMS option resides only in this, the MPI/PD software. It is used by the CMOR to review and merge demographic data coming from other sites that have not been automatically updated in your PATIENT file (#2). When a message comes from a patient's CMOR via the MPI, data in the key fields (SEX (#.02), DATE OF BIRTH (#.03), SSN (#.09) and MOTHER'S MAIDEN NAME (#.2403)) will automatically update the data at the receiving facility.

The ordering of the demographic data messages as they arrive from a particular site is essential. In general, as newer data for the same patient from the same sending facility arrives, it will be retained and made available for the data review. Older data will be assigned a status of "Retired Data." The exception to this is that if the old data has a status of "DE" (Data Examined) the newer data does not replace it. Data for the same patient from other sites will all be available.

The general rules for updating data elements are as follows.

- In some fields, the data must match an entry in another file (e.g., The user must enter a valid entry from the STATE file (#5) when filling in the State field of the PATIENT file (#2).)
- If data has been deleted from a key field, the delete will be applied to the patient record if the message came from the CMOR. When the message is from a non-CMOR, the delete will take place when the CMOR merges the patient data during the data review process.
- Those fields on the Patient Data Review that are "Display Only" (those pertaining to Eligibility) are not updated even when the message is coming from the CMOR.



The Name field is no longer automatically updated if it has been **changed** at another site. You may notice Patient Data Reviews showing the name different from what your file contains. The remote site may have changed other patient data that triggered the Patient Data review but not edited the Name field. You may choose to accept this difference and it will be broadcast to the other treating facilities via the MPI or you may choose to reject it.

## Menus and Options

- Changes to the key fields will be sent to the CMOR. The CMOR will either accept or reject the changes. If accepted, the CMOR broadcasts the changes through the MPI to all treating facilities for the patient. The changes are made automatically. If the CMOR rejects the updates, a message is sent to the registering site automatically updating those fields in that PATIENT file (#2) with the CMOR information.
- Changes to certain non-key fields are also sent to the CMOR. The CMOR may accept or reject the changes for its own PATIENT file (#2) but does not notify or update other sites.
- Changes to the following data fields used by the Master Patient Index (MPI), are broadcast by the MPI to all treating facilities once the CMOR has processed the entry in the patient data review file. Whether or not the CMOR accepts a change to any of these fields, the most current CMOR data are broadcast. The four data fields are SEX (#.02), DATE OF BIRTH (#.03), SSN (#.09) and MOTHER'S MAIDEN NAME (.2403).

The goals of the CMOR site are to keep data current and accurate and to keep selected data moving so all treating facility sites and the MPI are sharing current and accurate patient data. Attention to the quality of data entry at every site will benefit the patient everywhere he or she receives care.

When the Patient Data Review option is selected, a list of patient updates awaiting review is displayed. This list is initially sorted in date order, beginning with the most recent event first. Each entry on the list contains the following information:

- Patient name
- SSN
- Date of birth
- Site this information came from
- Date the event took place at the sending site
- Current upload status

| PIMS Demographic Merge       |                    | Jul 31, 2002@14:17:19 |                 |      | Page: 1 of 2   |            |
|------------------------------|--------------------|-----------------------|-----------------|------|----------------|------------|
| Review(s) currently on file. |                    |                       |                 |      |                |            |
|                              | Patient            | SSN                   | DOB             | Stat | Evt. DT.       | From       |
| 1                            | PATIENT1,BONNY     | 999456789             | 10-02-1942      | AR   | 07-17-2002     | ALBANY     |
| 2                            | PATIENT2,EVAN      | 999345678             | 12-23-1923      | AR   | 04-25-2002     | DETROIT    |
| 3                            | PATIENT3,ONCE MORE | 999549808             | 11-28-1945      | DE   | 12-07-2001     | DETROIT    |
| 4                            | PATIENT4,RICH      | 999437773             | 09-02-1901      | AR   | 12-06-2001     | BPMARION   |
| 5                            | PATIENT5,HORACE    | 999900123             | 01-09-2000      | AR   | 11-29-2001     | BPMARION   |
| 6                            | PATIENT6,NED P     | 999169123             | 01-01-1969      | DE   | 11-07-2001     | DETROIT    |
| 7                            | PATIENT7,DAVE      | 999090999             | 09-09-1999      | AR   | 10-22-2001     | DETROIT    |
| 8                            | PATIENT8,AMAR BOB  | 999123007             | 01-01-1923      | AR   | 10-05-2001     | BPSAGINAW  |
| 9                            | PATIENT9,KATHY     | 999445566             | 09-09-1948      | AR   | 06-15-2001     | LOMA LINDA |
| 10                           | PATIENT10,TEST     | 999566572             | 12-02-1939      | AR   | 06-13-2001     | DETROIT    |
| 11                           | PATIENT11,ROBERT A | 999111111             | 06-23-1935      | AR   | 06-01-2001     | BAY PINES  |
| 12                           | PATIENT12,ANNA D   | 999666666             | 05-05-1955      | AR   | 05-21-2001     | ALBANY     |
| + Enter ?? for more actions  |                    |                       |                 |      |                |            |
| SP                           | Select Patient     | SS                    | Sort by Site    | SN   | Sort by Newest |            |
| SOL                          | Sort by Oldest     | P                     | Sort by Patient |      |                |            |
| Select Action:Quit// <Enter> |                    |                       |                 |      |                |            |

**Figure 4-5: Patient Data Review screen**

## Status Types

The fourth column of the Patient Data Review screen, labeled “Stat”, shows the current status of the review for that patient. Below, the five different status types are listed:

| This Status... |                 | Means:   |
|----------------|-----------------|--|
| <b>AR</b>      | Action Required | This entry has not been reviewed.  |
| <b>BR</b>      | Being Reviewed  | This entry is currently under review.                                      |
| <b>DE</b>      | Data Examined   | This entry has been reviewed, but is not yet complete.                     |
| <b>DR</b>      | Data Rejected   | Incoming data has been reviewed and rejected.                              |
| <b>MC</b>      | Merge Complete  | This entry has been reviewed and has been deemed complete.                 |
| <b>RD</b>      | Retired Data    | This entry has been replaced by newer data from the same sending facility. |

**Figure 4-6: Status Types for Patient Data Reviews**

## Action Functionality

The action choice gives the viewer flexibility in viewing the screen.

| This Action... |                 | Allows you to:  |
|----------------|-----------------|---|
| <b>P</b>       | Sort by Patient | Resort the list on the summary screen by the patient.   |
| <b>SS</b>      | Sort by Site    | Resort the list on the summary screen by the sending site.  |
| <b>SOL</b>     | Sort by Oldest  | Resort the list on the summary screen by the oldest event date.                                     |
| <b>SN</b>      | Sort by Newest  | Sort the list with the newest event dates first. This is the default sort upon entering the option. |
| <b>SP</b>      | Select Patient  | Review the data for possible merging. A one/many/all selection is available at this point.          |

**Figure 4-7: Action types for Patient Data Reviews**

When a user selects to review an entry from the summary screen action using SP, Figure 4-8, a complete list of all the transmitted data will be displayed. The data on file at your site is shown on the left and the data from the remote site is shown on the right. If a difference is noted by the system, two asterisks (\*\*) will appear on the left side of the number selection. An arrow (->), Figure 4-8, tells you that the data in this field was edited at the remote site.

Eligibility data from both sites is displayed on the screen; however, they are not updated or changed by the merge action.

|  |                        |                       |                 |               |                |
|--|------------------------|-----------------------|-----------------|---------------|----------------|
| PIMS Demographic Merge                                       |                        | Nov 13, 2003@13:41:13 |                 | Page: 1 of 2  |                |
| Review(s) currently on file.                                 |                        |                       |                 |               |                |
|  | Patient                | SSN                   | DOB             | Stat Evt. DT. | From           |
| 1  | PATIENT13,NEW JOHN     | 999389421             | 01-23-1989      | DE 10-28-2003 | ALBANY         |
| 2  | PATIENT14,PAT C        | 999321456             | 03-23-1921      | DE 10-03-2003 | ALBANY         |
| 3  | PATIENT15,BRUCE L      | 999761212             | 08-07-1967      | AR 09-29-2003 | ALBANY         |
| 4  | PATIENT16,FRIDAY       | 999367845             | 04-30-1954      | AR 09-26-2003 | ALBANY         |
| 5  | PATIENT17,DALE V       | 999450978             | 06-17-1936      | AR 09-16-2003 | ALBANY         |
| 6  | PATIENT18,FOUR         | 999322714             | 07-23-1922      | AR 09-09-2003 | BPMARION       |
| 7  | PATIENT19,CHRISTINE    | 999994344             | 03-03-1969      | AR 08-28-2003 | ALBANY         |
| 8  | PATIENT20,NOTONSITE    | 999121012             | 01-01-1921      | DE 06-26-2003 | ALBANY         |
| 9  | PATIENT21,WED MORNINGS | 999454321             | 01-01-1940      | DE 06-19-2003 | ALBANY         |
| 10   | PATIENT22,SHARED       | 999321632             | 09-03-1921      | DE 06-13-2003 | ALBANY         |
| 11   | PATIENT23,MATTHEW      | 999394857             | 05-05-1940      | AR 06-12-2003 | ALBANY         |
| 12   | PATIENT24,ATHIRTY      | 999888888             | 04-03-1950      | DE 03-24-2003 | ALBANY         |
| 13   | PATIENT21,WED MORNINGS | 999454321             | 01-01-1940      | AR 02-28-2003 | BPSAGINAW      |
| 14   | PATIENT21,WED MORNINGS | 999454321             | 01-01-1940      | DE 02-27-2003 | ALBANY         |
| 15   | PATIENT25,REGTENTEN    | 999082030             | 08-20-1930      | AR 10-30-2002 | ALBANY         |
| + Enter ?? for more actions                                  |                        |                       |                 |               |                |
| SP   | Select Patient         | SS                    | Sort by Site    | SN            | Sort by Newest |
| SOL  | Sort by Oldest         | P                     | Sort by Patient |               |                |
| Select Action:Next Screen// <b>SP</b> <Enter> Select Patient |                        |                       |                 |               |                |
| Select Patient(s): (1-15): <b>5</b>                          |                        |                       |                 |               |                |
| MC   | Merge Completed        | PI                    | Patient Inquiry |               |                |

|  |                                 |                               |                 |                 |                        |
|--|---------------------------------|-------------------------------|-----------------|-----------------|------------------------|
| Demographic Merge                                      |                                 | Nov 13, 2003@14:13:04         |                 | Page: 1 of 2    |                        |
| PATIENT17,DALE V (0978)                                |                                 | DOB: 06-17-1936               |                 | DOD: 11-24-1986 |                        |
| Last Local Edit: 5/2/01 9:13:43 am                     |                                 | ALBANY Event Date: 09-16-2003 |                 |                 |                        |
| Local Data   |                                 | ALBANY                        |                 |                 |                        |
| 1  | Name: PATIENT17,DALE V          | PATIENT17,DALE V              |                 |                 |                        |
| 2  | SSN: 999-45-0978                | 999-45-0978                   |                 |                 |                        |
| 3  | DOB: 06-17-1936                 | 06-17-1936                    |                 |                 |                        |
| -> 4   | DOD: 11-24-1986                 | 02-02-1999                    |                 |                 |                        |
| 5  | Home #: 555-2345                | 555-2345                      |                 |                 |                        |
| 6  | Work #: <No Data Found>         | <Data Deleted>                |                 |                 |                        |
| 7  | Sex: MALE                       | MALE                          |                 |                 |                        |
| 8  | Marital: DIVORCED               | DIVORCED                      |                 |                 |                        |
| 9  | Religion: PENTECOSTAL           | PENTECOSTAL                   |                 |                 |                        |
| **10   | Mom's Maiden: SMITH             | SMITH,                        |                 |                 |                        |
| 11   | Employ Stat: EMPLOYED FULL TIME | EMPLOYED FULL TIME            |                 |                 |                        |
| **12   | NOK Name: USER5 JONES           | JONES,USER5                   |                 |                 |                        |
| 13   | NOK Phone #: <No Data Found>    | <Data Deleted>                |                 |                 |                        |
| MC Merge Completed                                     |                                 | PI Patient Inquiry            |                 |                 |                        |
| Select Action: Next Screen// <Enter> NEXT SCREEN       |                                 |                               |                 |                 |                        |
| Demographic Merge                                      |                                 | Nov 13, 2003@13:41:34         |                 | Page: 2 of 2    |                        |
| PATIENT17,DALE V (0978)                                |                                 | DOB: 06-17-1936               |                 | DOD: 11-24-1986 |                        |
| Last Local Edit: 5/2/01 9:13:43 am                     |                                 | ALBANY Event Date: 09-16-2003 |                 |                 |                        |
| + Local Data   |                                 | ALBANY                        |                 |                 |                        |
| Veteran: YES   |                                 | YES                           |                 |                 |                        |
| SC: NO SC%: N/A  |                                 | NO <Data Deleted>             |                 |                 |                        |
| POS: POST-KOREAN                                       |                                 | POST-KOREAN                   |                 |                 |                        |
| Prim Elig Code: NSC                                    |                                 | NSC                           |                 |                 |                        |
| Date Verified: <No Data Found>                         |                                 | <Data Deleted>                |                 |                 |                        |
| Verification method:                                   |                                 | <Data Deleted>                |                 |                 |                        |
| <No Data Found>  |                                 | <Data Deleted>                |                 |                 |                        |
| Who verified: <No Data Found>                          |                                 | <Not Available>               |                 |                 |                        |
| ** = Different, -> = Edited, <UR> = Unresolved         |                                 |                               |                 |                 |                        |
| MS   | Selective Merge                 | UN                            | (Undo Merge)    | DO              | MPI Display Only Query |
| RJ   | Reject Merge                    | HI                            | Hinq Inquiry    | DI              | MPI/PD Data Inquiry    |
| MA   | Merge All Differences           | AUD                           | Patient Audit   | PC              | Push CMOR Request      |
| MC   | Merge Completed                 | PI                            | Patient Inquiry |                 |                        |
| Select Action: Quit// MA <Enter> Merge All Differences |                                 |                               |                 |                 |                        |
| MC Merge Completed                                     |                                 | PI Patient Inquiry            |                 |                 |                        |
| Demographic Merge                                      |                                 | Nov 13, 2003@13:43:27         |                 | Page: 2 of 2    |                        |
| PATIENT17,DALE V (0978)                                |                                 | DOB: 06-17-1936               |                 | DOD: 11-24-1986 |                        |
| Last Local Edit: 5/2/01 9:13:43 am                     |                                 | ALBANY Event Date: 09-16-2003 |                 |                 |                        |
| + Local Data   |                                 | ALBANY                        |                 |                 |                        |
| Veteran: YES   |                                 | YES                           |                 |                 |                        |
| SC: NO SC%: N/A  |                                 | NO <Data Deleted>             |                 |                 |                        |
| POS: POST-KOREAN                                       |                                 | POST-KOREAN                   |                 |                 |                        |
| Prim Elig Code: NSC                                    |                                 | NSC                           |                 |                 |                        |
| Date Verified: <No Data Found>                         |                                 | <Data Deleted>                |                 |                 |                        |
| Verification method:                                   |                                 | <Data Deleted>                |                 |                 |                        |
| <No Data Found>  |                                 | <Data Deleted>                |                 |                 |                        |
| Who verified: <No Data Found>                          |                                 | <Not Available>               |                 |                 |                        |
| ** No differences found **                             |                                 |                               |                 |                 |                        |
| MS   | Selective Merge                 | UN                            | Undo Merge      | DO              | MPI Display Only Query |
| RJ   | (Reject Merge)                  | HI                            | Hinq Inquiry    | DI              | MPI/PD Data Inquiry    |
| MA   | Merge All Differences           | AUD                           | Patient Audit   | PC              | Push CMOR Request      |
| MC   | Merge Completed                 | PI                            | Patient Inquiry |                 |                        |
| Select Action: Quit// MC <Enter> Merge Completed       |                                 |                               |                 |                 |                        |

Figure 4-8: Patient Data Review, Demographic Merge



Due to the potential of a Coordinating Master of Record (CMOR) site accepting an old address without review, with the release of Patch DG\*5.3\*479 the Patient Data Review [VAFC EXCEPTION HANDLER] option will discontinue sending address information due to duplication with the Health Eligibility Center (HEC) data updates.

The following fields can no longer be displayed or merged in Patient Data Review [VAFC EXCEPTION HANDLER]:

- STREET ADDRESS [LINE 1] (#.111)
- STREET ADDRESS [LINE 2] (#.112)
- STREET ADDRESS [LINE 3] (#.113)
- CITY (#.114)
- STATE (#.115)
- ZIP+4 (#.1112)
- COUNTY (#.117)

## Data Displays, Identification of Differences & Fields Edited

| This symbol... | Means:  |
|----------------|---|
| **             | There is a difference between the CMOR's record and the incoming update message, but the site that sent the update message did not edit the data.   |
| ->             | Data, which is different AND was edited by the site that sent the update message.   |
| UR             | If the Patient Review Screens cannot resolve data that has come from another site, the option displays what was sent (even though it could not be resolved). There will be no change to the patient database when any Merge patient action is completed for this field. |

**Figure 4-9: Symbols on Patient Data Review**

## Actions

| This action... |                           | Allows you to:   |
|----------------|---------------------------|--|
| <b>MS</b>      | Selective Merge           | Select only the fields you want to merge. Fields you choose not to merge will be rejected. Complete your selections on <b>all</b> screens. You must then use MC to merge the selected fields into your file.   |
| <b>MA</b>      | Merge All Differences     | Select all of the data elements that are different for this patient's demographics. You must then use MC to merge them into your file.   |
| <b>MC</b>      | Merge Completed           | Merge those fields chosen on <b>all</b> screens and mark that particular demographic entry as being completed or finished, no further evaluation is needed. It will also cause that entry to be removed from the summary screen. Merge Complete cannot be undone with the Undo Merge action.   |
| <b>RJ</b>      | Reject Merge              | Mark all demographic data as being rejected and does not allow the merging of this data. The entry will be removed from the summary screen. If an update to a key field is rejected, the CMOR's data is transmitted to the MPI and to all Treating Facility sites for the patient. Reject Merge cannot be undone with the Undo Merge action. |
| <b>UN</b>      | Undo Merge                | Undo certain data merges (MS & MA) that have been made while you are still working on the same entry. If you have moved on to another patient entry, previous merges cannot be undone. Note that "undo" does not work on the "reject merge" or "merge completed" actions.  |
| <b>AUD</b>     | Patient Audit             | Print information from the Audit file (#1.1) for a selected patient and date range. For the PATIENT file (#2) entry selected, the report displays the patient name and DFN, date/time the field was edited, the field edited, the user who made the change, the old value, and the new value.  |
| <b>HI</b>      | Hinq Inquiry              | Make a Hinq inquiry to verify information. (The user will need the appropriate security key and "5000 series" registration number in File 200.)  |
| <b>PI</b>      | Patient Inquiry           | Allows the user to do a Patient Inquiry without leaving the screen.  |
| <b>DO</b>      | MPI Display Only          | Allows the user to see what information the MPI has for this patient without leaving this screen.  |
| <b>TF</b>      | Treating Facility Inquiry | Displays the treating facility list for the patient being reviewed and includes the CMOR activity score, date last treated at each facility and the ICN history. The Treating Facility Inquiry action gives you the same report as the Patient MPI/PD Data Inquiry option on the Message Exception Handling Menu.                            |
| <b>Q</b>       | Quit                      | Returns the user to the summary screen.  |

**Figure 4-10: Actions on Patient Data Review**



See "Appendix C: Patient Data Review" for a list of the patient data elements to review when resolving a case (exception).

|                                   |                         |
|-----------------------------------|-------------------------|
| <b>Purge Patient Data Reviews</b> | <b>[VAFC PDR PURGE]</b> |
|-----------------------------------|-------------------------|

This option allows you to purge entries in the PATIENT DATA EXCEPTION (#391.98) and PATIENT DATA ELEMENT files (#391.99) over 30 days old.

```

Select MPI/PD Patient Admin User Menu Option: PURGE <Enter> Patient Data Reviews
Purge all Patient Data Reviews prior to OCT 14, 2003// ^
    
```

**Figure 4-11: Purge Patient Data Reviews**

|   |                        |
|---|------------------------|
| <b>Coordinating Master of Record (CMOR) Request</b> | <b>[MPIF CMOR MGR]</b> |
|---|------------------------|

This is the main menu that contains options for managing incoming and outgoing CMOR requests. Options provide the ability to display, review and process CMOR requests. The ability to change the CMOR to another site (pushing the CMOR) is also included along with a number of useful tracking reports.



For detailed information and screen captures of the Coordinating Master of Record (CMOR) Request Menu below, please refer to the section titled: Coordinating Master of Record (CMOR) Request in this documentation.

```

Create a New CMOR Change Request
Push CMOR Request
Edit Open CMOR Change Request
Review Pending Change of CMOR Requests
Batch Review of CMOR Change Requests
Display a CMOR Change Request
PEND Report - Pending Received Requests
SENT Report - Sent Requests Still Pending
DIS Report - CMOR Requests Disapproved
APP Report - CMOR Requests Approved

Select Coordinating Master of Record (CMOR) Request Option
    
```

**Figure 4-12: Coordinating Master of Record (CMOR) Request Menu**

|                                     |                              |
|-------------------------------------|------------------------------|
| <b>Patient Audit Log Reports...</b> | <b>[RG TRAN/AUD AUD REP]</b> |
|-------------------------------------|------------------------------|

This menu contains two options for reviewing information stored in the AUDIT file (#1.1) for fields being audited in the PATIENT file (#2). Options allow the user to (1) view all audited fields or selected fields for a date range or (2) all audited data on a single patient.

```

Select MPI/PD Patient Admin Coordinator Menu Option: LOG <Enter> Patient Audit Log
Reports

    Patient Audit File Print
    Single Patient Audit File Print

Select Patient Audit Log Reports Option:
    
```

**Figure 4-13: Patient Audit Log Reports Menu**

|                                 |                           |
|---------------------------------|---------------------------|
| <b>Patient Audit File Print</b> | <b>[RGMT AUDIT PRINT]</b> |
|---------------------------------|---------------------------|

This option prints a customized report of information stored in the AUDIT file (#1.1) for fields being audited in the PATIENT file (#2). You can view all audited fields or selected fields for a specified date range. You can also opt to print only edits that were done by a specific user.

If selected fields are viewed, you can choose to see data for all or selected patients. If you only enter one name and there is no audit data on the selected date range, you are told this on the printout. If multiple names are entered, it only prints those that have had an audit in the selected date range. The other names are not displayed on the report (i.e., there is no message indicating there was no audit data).

## Menus and Options

```
Select Patient Audit Log Reports Option: PATIENT <Enter> Audit File Print

Do you want to see (A)LL or (S)ELECTED audited fields? A// SELECTED

Select FIELD NUMBER of audited field (enter "?" for list): ??

Select a FIELD NUMBER from the audited field(s) in the PATIENT file:

.01          NAME
.02          SEX
.03          DATE OF BIRTH
.05          MARITAL STATUS
.08          RELIGIOUS PREFERENCE
.09          SOCIAL SECURITY NUMBER
.111         STREET ADDRESS [LINE 1]
.1112        ZIP+4
.112         STREET ADDRESS [LINE 2]
.113         STREET ADDRESS [LINE 3]
.114         CITY
.115         STATE
.117         COUNTY
.131         PHONE NUMBER [RESIDENCE]
.132         PHONE NUMBER [WORK]
.211         K-NAME OF PRIMARY NOK
.219         K-PHONE NUMBER
.2403        MOTHER'S MAIDEN NAME

Select a FIELD NUMBER from the audited field(s) in the PATIENT file:

.301         SERVICE CONNECTED?
.302         SERVICE CONNECTED PERCENTAGE
.31115       EMPLOYMENT STATUS
.351         DATE OF DEATH
991.01       INTEGRATION CONTROL NUMBER
991.02       ICN CHECKSUM
991.03       COORDINATING MASTER OF RECORD
1901         VETERAN (Y/N)?

Select FIELD NUMBER of audited field (enter "?" for list): .01
Select FIELD NUMBER of audited field (enter "?" for list): .02
Select FIELD NUMBER of audited field (enter "?" for list): .03
Select FIELD NUMBER of audited field (enter "?" for list): 991.01
Select FIELD NUMBER of audited field (enter "?" for list): 991.03
Select FIELD NUMBER of audited field (enter "?" for list):

Do you want to see audited data for (A)LL or (S)ELECTED patients? S// SELECTED

Select PATIENT: PATIENT28, RICK <Enter> PATIENT28,RICK          9-4-69      999555999
YES      SC VETERAN      *MULTIPLE BIRTH*
Select PATIENT: PATIENT29, BLUE <Enter> PATIENT29,BLUE          7-17-02    999071702P
NO
NON-VETERAN (OTHER)

Enter date range for data to be included in report.
Beginning Date: T-90 <Enter> (FEB 11, 2003)
Ending Date: T <Enter> (MAY 12, 2003)

Do you want to find only the edits made by a specific user? No// NO
```

```

The right margin for this report is 80.

DEVICE: <Enter>

PATIENT AUDIT LIST at ALBANY on May 12, 2003@08:10          Page: 1
Date Range: Feb 11, 2003 to May 12, 2003

Date/Time Edited      Field Edited              Edited By
      Old Value / New Value
Option/Protocol
-----
==> PATIENT28,RICK   (DFN #100000185)

Apr 28, 2003@12:21  NAME                      USER1,LAURA
                   <no previous value> / PATIENT28,RICK
                   DG REGISTER PATIENT

Apr 28, 2003@12:21  SEX                        USER1,LAURA
                   <no previous value> / MALE
                   DG REGISTER PATIENT

Apr 28, 2003@12:21  DATE OF BIRTH              USER1,LAURA
                   <no previous value> / 09/04/1969
                   DG REGISTER PATIENT

PATIENT AUDIT LIST at ALBANY on May 12, 2003@08:10          Page: 2
Date Range: Feb 11, 2003 to May 12, 2003

Date/Time Edited      Field Edited              Edited By
      Old Value / New Value
Option/Protocol
-----

Apr 28, 2003@12:22  INTEGRATION CONTROL NUMBER  USER1,LAURA
                   <no previous value> / 500000673
                   DG REGISTER PATIENT

Apr 28, 2003@12:22  COORDINATING MASTER OF RECORD  USER1,LAURA
                   <no previous value> / ALBANY
                   DG REGISTER PATIENT

Apr 28, 2003@13:47  INTEGRATION CONTROL NUMBER  USER2,DAVID
                   500000673 / 1001179076
                   HL TASK RESTART/MPIF ADT-A24 CLIENT

==> PATIENT29,BLUE   (DFN #100000035) has no audit data available for selected
parameters.
    
```

**Figure 4-14: Patient Audit File Print for selected fields**

Menus and Options

If ALL audited fields are viewed, you must choose patients to examine.

```
Select Patient Audit Log Reports Option: PATIENT <Enter> Audit File Print

Do you want to see (A)LL or (S)ELECTED audited fields? A// ALL

Select PATIENT: PATIENT31,MADDY <Enter> 3-4-50 999030450P YES SC VETERAN
Select PATIENT: PATIENT4,RICH <Enter> PATIENT4,RICH 9-2-01 999437773 YES
SC VETERAN
Select PATIENT:

Enter date range for data to be included in report.
Beginning Date: T-300 <Enter> (JAN 01, 2002)
Ending Date: T <Enter> (OCT 28, 2002)

Do you want to find only the edits made by a specific user? No// NO

The right margin for this report is 80.

DEVICE: <Enter>

PATIENT AUDIT LIST at ALBANY on Oct 28, 2002@10:15 Page: 1
Date Range: Jan 01, 2002 to Oct 28, 2002

Date/Time Edited Field Edited Edited By
Option/Protocol Old Value / New Value
-----
==> PATIENT31,MADDY (DFN #7169998)

Feb 20, 2002@14:19 NAME USER3,CHESSIE M
<no previous value> / USER5,MADDY
DG LOAD PATIENT DATA

Feb 20, 2002@14:19 SEX USER3,CHESSIE M
<no previous value> / FEMALE
DG LOAD PATIENT DATA

Feb 20, 2002@14:19 DATE OF BIRTH USER3,CHESSIE M
<no previous value> / 03/04/1950
DG LOAD PATIENT DATA

PATIENT AUDIT LIST at ALBANY on Oct 28, 2002@10:15 Page: 2
Date Range: Jan 01, 2002 to Oct 28, 2002

Date/Time Edited Field Edited Edited By
Option/Protocol Old Value / New Value
-----
Feb 20, 2002@14:19 SOCIAL SECURITY NUMBER USER3,CHESSIE M
<no previous value> / 999030450P
DG LOAD PATIENT DATA

Feb 20, 2002@14:19 SERVICE CONNECTED? USER3,CHESSIE M
<no previous value> / YES
```

|  |   |                 |
|--|---|-----------------|
| DG LOAD PATIENT DATA   |   |                 |
| Feb 20, 2002@14:19   | VETERAN (Y/N)?<br><no previous value> / YES                   | USER3,CHESSIE M |
| DG LOAD PATIENT DATA   |   |                 |
| Feb 20, 2002@14:19   | INTEGRATION CONTROL NUMBER<br><no previous value> / 500000444 | USER3,CHESSIE M |
| DG LOAD PATIENT DATA   |   |                 |
| PATIENT AUDIT LIST at ALBANY on Oct 28, 2002@10:15<br>Date Range: Jan 01, 2002 to Oct 28, 2002 |   | Page: 3         |
| Date/Time Edited   | Field Edited<br>Old Value / New Value                         | Edited By       |
| Option/Protocol  | -----   |                 |
| Feb 20, 2002@14:19   | ICN CHECKSUM<br><no previous value> / 903577                  | USER3,CHESSIE M |
| DG LOAD PATIENT DATA   |   |                 |
| Feb 20, 2002@14:19   | COORDINATING MASTER OF RECORD<br><no previous value> / ALBANY | USER3,CHESSIE M |
| DG LOAD PATIENT DATA   |   |                 |
| Feb 20, 2002@14:20   | INTEGRATION CONTROL NUMBER<br>500000444 / 1001169543          | USER3,CHESSIE M |
| MPIF IND MPI LOAD  |   |                 |
| Feb 20, 2002@14:20   | ICN CHECKSUM<br>903577 / 569799                               | USER3,CHESSIE M |
| MPIF IND MPI LOAD  |   |                 |
| PATIENT AUDIT LIST at ALBANY on Oct 28, 2002@10:15<br>Date Range: Jan 01, 2002 to Oct 28, 2002 |   | Page: 4         |
| Date/Time Edited   | Field Edited<br>Old Value / New Value                         | Edited By       |
| Option/Protocol  | -----   |                 |
| ==> PATIENT4,RICH (DFN #7169700)   |   |                 |
| Jul 16, 2002@13:01   | COORDINATING MASTER OF RECORD<br>ALBANY / ALBANY              | USER4,PARDY     |
| MPIF PUSH CMOR   |   |                 |
| Aug 06, 2002@09:25   | COORDINATING MASTER OF RECORD<br>ALBANY / SAN FRANCISCO       | USER4,PARDY     |
| MPIF PUSH CMOR   |   |                 |

**Figure 4-15: Patient Audit File Print for all fields**

|  |                             |
|--|-----------------------------|
| <b>Single Patient Audit File Print</b> | <b>[RGM T AUDIT SINGLE]</b> |
|--|-----------------------------|

This option prints information from the AUDIT file (#1.1) for a selected patient and date range.

For the PATIENT file (#2) entry selected, the report prints the patient name and DFN, date/time the field was edited, the user who made the change, the field edited, the old value, and the new value. The option or protocol (if available) will also be displayed.

```

Select PATIENT: PATIENT4,RICH <Enter> PATIENT4,RICH 9-2-01 999437773 YES SC
VETERAN

Enter date range for data to be included in report.
Beginning Date: T-45 <Enter> (JUN 01, 2002)
Ending Date: T <Enter> (JUL 16, 2002)

The right margin for this report is 80.

DEVICE: HOME// <Enter>

PATIENT AUDIT LIST at ALBANY on Jul 16, 2002@14:15                               Page: 1
Patient: PATIENT4,RICH (DFN #7169700)
Date Range: Jun 01, 2002 to Jul 16, 2002

Date/Time Edited      Field Edited              Edited By
      Old Value / New Value
Option/Protocol
-----
Jul 16, 2002@13:01  COORDINATING MASTER OF RECORD  USER4,PARDY
                   ALBANY / ALBANY
MPIF PUSH CMOR
    
```

**Figure 4-16: Single Patient Audit File Print report**

|                                  |                          |
|----------------------------------|--------------------------|
| <b>Master Patient Index Menu</b> | <b>[MPIF VISTA MENU]</b> |
|----------------------------------|--------------------------|

This is the main menu for Master Patient Index options. These options provide the ability to:

- initialize a single patient within the Master Patient Index, and
- query the MPI in Austin for patient data.

```

Select MPI/PD Patient Admin Coordinator Menu Option: MPI <Enter> Master Patient
Index Menu

      Single Patient Initialization to MPI
      Display Only Query

Select Master Patient Index Menu Option:
```

**Figure 4-17: Master Patient Index Menu**

|   |                            |
|---|----------------------------|
| <b>Single Patient Initialization to MPI</b> | <b>[MPIF IND MPI LOAD]</b> |
|---|----------------------------|

This option can be used to initialize an already existing patient with an ICN and CMOR via a TCP/IP direct connection with the MPI.

After selecting this option, the user is asked to select a patient name. Enter “??” for a list of names, if patient name is not known. If multiple patient entries are found that closely match a patient’s identifying information, the user is presented with a list of patients from which to choose the correct entry to add to the MPI. The user also has the option to quit and not get an ICN assigned to the patient. In this case, a local ICN is assigned if one doesn’t already exist.

Figure 4-18 through Figure 4-25 demonstrate the results from querying the MPI using the Single Patient Initialization to MPI option given the following scenarios:

**Patient Not found on MPI**

```

Select Master Patient Index Menu Option: SINGLE <Enter> Patient Initialization to
MPI
Select PATIENT NAME: PATIENT30,RICK <Enter> PATIENT30,RICK          6-2-45
887766123      NO      NSC VETERAN      *MULTIPLE BIRTH*
```

Attempting to connect to the Master Patient Index in Austin...  
If no SSN or inexact DOB or common name, this request  
may take some time, please be patient...

Patient was not found in the MPI...

Message sent to MPI requesting Patient to be added.

**Figure 4-18: Single Patient Initialization to MPI- Patient not found on the MPI**

**Patient Found-Exact Match**

```
Select Master Patient Index Menu Option: SINGLE <Enter> Patient Initialization to
MPI
Select PATIENT NAME: PATIENT32,JAKE P <Enter> 4-5-30    999234001P    YES    SC
VETERAN

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

Found Patient PATIENT32,JAKE P on MPI
Updating ICN to 10071148951 and CMOR to BPSAGINAW (999)- just a minute. . .
```

**Figure 4-19: Single Patient Initialization to MPI- Patient Found, Exact Match.**

**Potential Matches with Expanded MPI Data View**

```
Select Master Patient Index Menu Option: Single <Enter> Patient Initialization to
MPI
Select PATIENT NAME: PATIENT33,CHADWICK <Enter> 0-0-40    999000040P    YES    SC
VETERAN

There is more than one patient whose last name is 'PATIENT33' and
whose social security number ends with '0040'.
Are you sure you wish to continue (Y/N)? Y <Enter> (Yes)

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

MPI QUERY RESULTS                May 01, 2003@11:37:12                Page: 1 o 1
Possible MPI Matches for Patient: PATIENT33,CHADWICK
SSN: 999000040P
DOB: 0-0-1940
SEX: MALE

Patient                SSN                DOB                CMOR
1  PATIENT33,CHAD                0-0-1940                SAN FRANCISCO
2  PATIENT33,AL                0-0-1940                ALBANY
3  PATIENT33,TOM                999767890    4-3-1940                ALBANY

Enter ?? for more actions
SE Match with Existing Pt on List                NEW Create NEW National ICN
MPI MPI Data View                CMR CMOR's Data View
HLP HELP
Select Action:Quit// MPI <Enter> MPI Data View

MPI Data:

ICN: 1001179051                CMOR: ALBANY (500)
NAME: PATIENT33,CHADWICK
```

```

SSN: 999767890          SEX: M
DOB: APR 03, 1940      DOD: APR 30, 1988
Multiple Birth Indicator: Yes
MOTHER'S MAIDEN NAME: TIMER
CLAIM NUMBER: 999767890
POW STATUS: No
Open Data Management Case
CASE#: 0304-00001    NOIS#:
CASE WORKER: USER6,CHRIS
Alias(es):
    PATIENT33,CHAD LYNN
    PATIENT34,MAI
TREATING FACILITY LIST:
    Treating Facility: WILKES BARRE (693)
    Treating Facility: WASHINGTON (688)
    Treating Facility: WALLA WALLA (687)
    Treating Facility: SOUTHERN ARIZONA HCS (678)
    Treating Facility: TAMPA (673)
    Treating Facility: SHREVEPORT (667)
    Treating Facility: SHERIDAN (666)
    Treating Facility: PUGET SOUND HCS (663)
    Treating Facility: SAN FRANCISCO (662)
    Treating Facility: SALT LAKE CITY HCS (660)
    Treating Facility: VA HEARTLAND - EAST, VISN 15 (657)
    Treating Facility: ST. CLOUD (656)
    Treating Facility: SIERRA NEVADA HCS (654)
    Treating Facility: ROSEBURG (653)
    Treating Facility: PROVIDENCE (650)
    Treating Facility: PHOENIX (644)
    Treating Facility: OKLAHOMA CITY (635)
    Treating Facility: TENNESSEE VALLEY HCS (626)
    Treating Facility: MARTINSBURG (613)
    Treating Facility: NORTHERN CALIFORNIA HCS (612)
    Treating Facility: NORTHERN INDIANA HCS (610)
    Treating Facility: SOUTHERN COLORADO HCS (567)
    Treating Facility: COLUMBIA SC (544)
    Treating Facility: CLARKSBURG (540)
    Treating Facility: CHILLICOTHE (538)
    Treating Facility: BAY PINES (516)
    Treating Facility: MARYLAND HCS (512)
    Treating Facility: WILMINGTON VAMROC (460)
    Treating Facility: SAN JUAN (672)
    
```

**Figure 4-20: SPI to MPI with Potential Matches and MPI Data View**



There is no longer a 25-site limit display for the Treating Facilities list.

**Potential Matches with CMOR Query Data View—When Your Site is the CMOR**

```

Select Master Patient Index Menu Option: single <Enter> Patient Initialization to
MPI
Select PATIENT NAME: PATIENT32,JAKE P <Enter> 2-2-23 999234001 YES SC
VETERAN

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

MPI QUERY RESULTS Jul 17, 2002@10:26:47 Page: 1 of 1
Possible MPI Matches for Patient: PATIENT32,JAKE
SSN: 999234001
DOB: 2-2-1923
SEX: MALE

Patient SSN DOB CMOR
1 PATIENT32,JAKE 999234001 2-2-1923 ALBANY

Enter ?? for more actions
SE Match with Existing Pt on List NEW Create NEW National ICN
MPI MPI Data View CMR CMOR's Data View
HLP HELP
Select Action:Quit// CMR <Enter> CMOR's Data View
Select : (1-1): 1

CMOR is your site
    
```

**Figure 4-21: SPI with Potential Matches and CMOR Query Data View when your site is the CMOR**

**Potential Matches with CMOR Query Data View—When Your Site isn't the CMOR**

```

Select OPTION NAME: Single <Enter> Patient Initialization to MPI
Select PATIENT NAME: PATIENT35,TESTOR <Enter> 1-1-67 999203040 NO NON-VETERAN
(OTHER)

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

MPI QUERY RESULTS      Jul 22, 2002@08:14:36      Page:      1 of 1
Possible MPI Matches for Patient: PATIENT35,TESTOR
                        SSN: 999203040
                        DOB: 1-1-1967
                        SEX: MALE

Patient                SSN                DOB                CMOR
1  PATIENT35,TEST      999203040         1-1-1967          DETROIT

Enter ?? for more actions
SE Match with Existing Pt on List      NEW Create NEW National ICN
MPI MPI Data View                      CMR CMOR's Data View
HLP HELP
Select Action:Quit// CMR <Enter> CMOR's Data View
Select : (1-1): 1
Please be patient while the data is being retrieved from the CMOR.

MPI/PD Data for: PATIENT35,TESTOR (DFN #7171357)
Printed Jul 22, 2002@08:14 at DETROIT
=====
SSN      : 999203040                ICN : 1001169515
Sex      : MALE                    CMOR: DETROIT
Claim #: None                      CMOR Activity Score : None
Date of Birth: Jan 01, 1967        Subscription Control #: 53
Address:

Treating Facilities:  Station:  DT Last Treated      Event Reason
-----
ALBANY                500                none found          none found
AUSTIN                200                none found          none found
DETROIT              553                none found          none found

Additional DPT Data for: PATIENT35,TESTOR (DFN #7171357)
=====
PLACE OF BIRTH [CITY]      :
PLACE OF BIRTH [STATE]    :
FATHER'S NAME              :

MOTHER'S NAME              :
MOTHER'S MAIDEN NAME      :
NAME OF PRIMARY NEXT OF KIN :
NEXT OF KIN PHONE NUMBER  :
NAME OF DESIGNEE          :
EMERGENCY NAME            :
MARITAL STATUS            :
    
```

|                                |   |              |
|--------------------------------|---|--------------|
| RELIGIOUS PREFERENCE           | : |              |
| RACE                           | : |              |
| PRIMARY ELIGIBILITY CODE       | : |              |
| VETERAN (Y/N)?                 | : | NO           |
| SERVICE BRANCH [LAST]          | : |              |
| SERVICE NUMBER [LAST]          | : |              |
| SERVICE CONNECTED PERCENT      | : |              |
| SERVICE ENTRY DATE [LAST]      | : |              |
| SERVICE SEPARATION DATE [LAST] | : |              |
| PERIOD OF SERVICE              | : |              |
| DATE ENTERED IN PATIENT FILE   | : | FEB 11, 2002 |

**Figure 4-22: SPI with Potential Matches and CMOR Query Data View when your site isn't CMOR**

### Potential Matches, Matching Your Patient With an Existing One on the MPI

```

Select OPTION NAME: Single <Enter> Patient Initialization to MPI
Select PATIENT NAME: PATIENT35,TESTOR <Enter> 1-1-67 999203040 NO NON-
VETERAN (OTHER)

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

MPI QUERY RESULTS      Jul 22, 2002@08:14:36      Page: 1 of 1
Possible MPI Matches for Patient: PATIENT35,TESTOR
                               SSN: 999203040
                               DOB: 1-1-1967
                               SEX: MALE

Patient      SSN      DOB      CMOR
1 PATIENT35,TEST 999203040 1-1-1967  DETROIT

Enter ?? for more actions
SE Match with Existing Pt on List      NEW Create NEW National ICN
MPI MPI Data View                      CMR CMOR's Data View
HLP HELP
Select Action:Quit// SE

You have selected a patient from the list of potential matches
where the Name is different than what the MPI has.
Are you sure this is the correct patient?

Local SSN = 999203040      MPI SSN = 999203040
Local NAME = PATIENT35,TESTOR      MPI NAME = PATIENT35,TEST
Are you sure this is the correct patient? Enter YES or NO Yes

*** Data should be checked to be sure you have picked the correct patient from the
list. If SSN or Sex are different, you will not be allowed to match and will get a
message stating such.

ICN and CMOR updated

```

**Figure 4-23: SPI with Potential Matches and Matching Patient with Existing Patient on the list**

If you believe that the list of potential matches contains duplicate(s) of your patient, DO NOT match with any patients and DO NOT create a NEW entry on the MPI. Send a message to the MPIF EXCEPTIONS mail group with a capture of the data. The MPI Data Quality Management team will work with the sites involved to determine if these are all the same patient and get the patient under one ICN. For Remote Data Views (CPRS – RDVs) and Inter-Facility Consults to function completely all sites must have the patient under the SAME NATIONAL ICN.

**Potential Matches, Creating NEW National ICN When Patient Isn't on the List**

```

Select Master Patient Index Menu Option: SINGLE <Enter> Patient Initialization to
MPI
Select PATIENT NAME: PATIENT36,CHUCK JR <Enter> PATIENT36,CHUCK JR    5-25-55
999021955    YES    SC VETERAN

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

HLP HELP

SE Match with Existing Pt on List      NEW Create NEW National ICN
MPI MPI Data View                      CMR CMOR's Data View
MPI QUERY RESULTS                      Jun 18, 2003@09:27:39      Page: 1 of 1
Possible MPI Matches for Patient: PATIENT36,CHUCK JR
                                SSN: 999021955
                                DOB: 5-25-1956
                                SEX: MALE

Patient      SSN      DOB      CMOR
*1  PATIENT36,CHARLES JR  999021956  5-25-1955  DETROIT

Enter ?? for more actions

HLP HELP
Select Action:Quit// NEW <Enter> Create NEW National ICN

Message sent to MPI requesting Patient to be added.
    
```

**Figure 4-24: SPI with Potential Matches; Creating National ICN because Patient Isn't on List**

**SPI when exact match is found**

```

Select Master Patient Index Menu Option: SINGLE <Enter> Patient Initialization to
MPI
Select PATIENT NAME: PATIENT37,JUANITA <Enter> PATIENT37,JUANITA    2-23-30
423368010  NO    NON-VETERAN (OTHER)

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

Found Patient PATIENT37,JUANITA on MPI
Updating ICN to 1001169120 and CMOR to ALBANY (500) - just a minute...
    
```

**Figure 4-25: SPI when exact match is found on the MPI**



Patch MPIF\*1.0\*21 has added two actions to the list manager screen for the option Single Patient Initialization to MPI. These actions assist users in making an educated match when selecting their patient from a list of potential matches. MPI Data View (MPI), allows the user to expand one of the entries on the list to see all the fields that the MPI has populated for this patient. The second action, CMORs Data View (CMR), allows the user to query the CMOR for the Patient MPI/PD Data Inquiry option data.



Patch MPIF\*1.0\*23 has modified the Single Patient Initialization to MPI option in appearance only. Actions NEW (Create New National ICN), and SE (Match with Existing Pt on List) have replaced the actions ADD, Add Patient to MPI, and SP, Select Patient from List respectively.

**Display Only Query** [MPIF DISPLAY ONLY QUERY TO MPI]

This option allows the user to query the MPI in Austin for all known data about a patient. The patient may or may not be currently in the PATIENT file. The MPI will return: Patient Not Known at the MPI, a list of potential matches along with all known data, or an exact match along with all known data. This will be for display purposes only.

**Display Only Query—Patient Exists in Patient File**

```

Select Master Patient Index Menu Option: Display <Enter> Only Query
Is Patient in the PATIENT file ? YES// <Enter>
Patient Name: PATIENT33,CHADWICK <Enter> 0-0-40 999000040P YES SC
VETERAN

There is more than one patient whose last name is 'PATIENT33' and
whose social security number ends with '0040'.
Are you sure you wish to continue (Y/N)? Y (Yes)

Attempting to connect to the Master Patient Index in Austin...
If DOB is inexact or if SSN is not passed or if common name,
this could take some time - please be patient....

Found potential matches

ICN      : 1001169187          CMOR: SAN FRANCISCO (662)
Name     : PATIENT33,TOM
SSN      :
DOB      : 0-0-1940          Date of Death:
Sex      : M

Continue to next Patient? ? YES//

ICN      : 1001169929          CMOR: ALBANY (500)
Name     : PATIENT33, AL
SSN      :
DOB      : 0-0-1940          Date of Death:
Sex      : M

Continue to next Patient? ? YES// <Enter>
<<THIS ICN IS ACTIVELY BEING WORKED ON - CASE #0304-00001>>
Case Worker: USER6,CHRIS

ICN      : 1001179051          CMOR: ALBANY (500)
Name     : PATIENT33,CHADWICK
SSN      : 999767890
DOB      : 4-3-1940          Date of Death: 4-3-
Multiple Birth Indicator: Yes
Sex      : M
Claim #  : 999767890
Place of Birth: TROY, NY
Mother's Maiden Name: TIMER
POW Status: No

Alias(es):
PATIENT38,CHAD
    
```

**The MULTIPLE BIRTH INDICATOR field has been added to the DISPLAY ONLY QUERY.**

**The POW field has been added to the DISPLAY ONLY QUERY.**

**The ALIAS field has been added to the DISPLAY ONLY QUERY.**

```

PATIENT39,CHADWICK

    Treating Facility: WILKES BARRE (693)
    Treating Facility: WASHINGTON (688)
    Treating Facility: WALLA WALLA (687)
    Treating Facility: SOUTHERN ARIZONA HCS (678)
    Treating Facility: TAMPA (673)
    Treating Facility: SHREVEPORT (667)
    Treating Facility: SHERIDAN (666)
    Treating Facility: PUGET SOUND HCS (663)
    Treating Facility: SAN FRANCISCO (662)
    Treating Facility: SALT LAKE CITY HCS (660)
    Treating Facility: VA HEARTLAND - EAST, VISN 15 (657)
    Treating Facility: ST. CLOUD (656)
    Treating Facility: SIERRA NEVADA HCS (654)
    Treating Facility: ROSEBURG (653)
    Treating Facility: PROVIDENCE (650)
    Treating Facility: PHOENIX (644)
    Treating Facility: OKLAHOMA CITY (635)
    Treating Facility: TENNESSEE VALLEY HCS (626)
    Treating Facility: MARTINSBURG (613)
    Treating Facility: NORTHERN CALIFORNIA HCS (612)
    Treating Facility: NORTHERN INDIANA HCS (610)
    Treating Facility: SOUTHERN COLORADO HCS (567)
    Treating Facility: COLUMBIA SC (544)
    Treating Facility: CLARKSBURG (540)
    Treating Facility: CHILLICOTHE (538)
    Treating Facility: BAY PINES (516)
    Treating Facility: MARYLAND HCS (512)
    Treating Facility: WILMINGTON VAMROC (460)
    Treating Facility: SAN JUAN (672)
    
```

**Figure 4-26: Display Only Query when Patient exists in Patient File**

If the user answers “NO” at the prompt “Is Patient in the PATIENT file?”, then the patient’s SSN or Date of Birth must be entered.



Several new fields are being stored on the MPI as a result of the MPI Changes project. Therefore, the ALIAS (multiple), MULTIPLE BIRTH INDICATOR, and POW STATUS INDICATED? fields are returned in the DISPLAY ONLY QUERY option.

### Display Only Query—Patient Doesn't Exist in Patient File

```

Select Master Patient Index Menu Option: DISPLAY <Enter> Only Query
Is Patient in the PATIENT file ? YES// NO
PATIENT NAME (last,first middle): PATIENT39, REG
Date of Birth: 5/12/1967 <Enter> (MAY 12, 1967)
9 Digit SSN (No Dashes): 999456001

Attempting to connect to the Master Patient Index in Austin...
If DOB is inexact or if SSN is not passed or if common name,
this could take some time - please be patient....

Found One Match

ICN      : 1001170515          CMOR: DETROIT (553)
Name     : PATIENT39,REG REGINALD JR
SSN      : 999456001
DOB      : 5-12-1967
Sex      : M

                Treating Facility: DETROIT (553)
    
```

**Figure 4-27: Display Only Query when Patient does not exist in Patient File**

### Display Only Query—Patient with an Open Data Management Case

```

Select Master Patient Index Menu Option: Display <Enter> Only Query
Is Patient in the PATIENT file ? YES// <Enter>
Patient Name: DOE,JOHN
  1  PATIENT40,JOHN      1-1-11      999122334      NO      NSC VETERAN
  2  PATIENT40,JOHN      11-3-48     999345678      NO      NON-VETERAN (OTHER)
CHOOSE 1-2: 2 <Enter> PATIENT40,JOHN      11-3-48     999345678      NO      NON-
VETERAN (OTHER)

Attempting to connect to the Master Patient Index in Austin...
If DOB is inexact or if SSN is not passed or if common name,
this could take some time - please be patient....

Found One Match

<<THIS ICN IS ACTIVELY BEING WORKED ON - CASE #0906-00001>>
  Caseworker: USER8,MINNIE

ICN      : 100111111          CMOR: ALBANY (500)
Name     : PATIENT40,JOHN
SSN      : 999345678
DOB      : 10-18-1977      Date of Death:
Sex      : M
Mother's Maiden Name: DEER
    
```

**Figure 4-28: Display Only Query with an Open Data Management Case**



Patch MPIF\*1.0\*21 added several fields to the Display Only Query option. They are: claim number, station number of the treating facility; and if there is an Open Data Management case, the case number, caseworker, telephone number, and NOIS number (if there is one).

**Message Exception Menu****[RG EXCEPTION MENU]**

Members of the RG CIRN DEMOGRAPHIC ISSUES mail group are automatically notified of problems relating to data. It is recommended that Patient Administration personnel (i.e., Automated Data Processing Application Coordinator (ADPAC) and/or Coordinators, etc.) be made members of this mail group.

The options on this menu are used to:

- Resolve exceptions that occur when user's data does not match data provided to the MPI by another facility.
- Provide reports on MPI/PD Data for a selected patient.
- Query any facility at which a selected patient has been seen, check the query, and display the remote patient data that is returned from that site.
- Provide the ability to purge duplicate entries, resolve entries over 30 days old from the CIRN HL7 EXCEPTION LOG file (#991.1). Regular purging provides you with the most up-to-date information on the List Manager screen. If waiting for the purge to complete is too time consuming, the Information Resource Management (IRM) service can be asked to schedule the background job MPI/PD Exception Purge [RG EXCEPTION PURGE] via TaskMan to run once a week at an off-hours time that does not conflict with backups.

```
Select MPI/PD Patient Admin Coordinator Menu Option: MSG <Enter> Message Exception
Menu

      View Potential Match Patient
      MPI/PD Exception Handling
      Patient MPI/PD Data Inquiry
      Remote Patient Data Query Menu ...

Select Message Exception Menu Option:
```

**Figure 4-29: Message Exception Menu**

|                                     |                                       |
|-------------------------------------|---------------------------------------|
| <b>View Potential Match Patient</b> | <b>[RG EXCEPTION POTENTIAL MATCH]</b> |
|-------------------------------------|---------------------------------------|

This option prints a list of patients who have been identified as having multiple Potential Matches on the Master Patient Index (MPI) and who haven't yet been resolved using the option "Single Patient Initialization to MPI". Status is current as of the date/time the report is generated. None of these patients will have been assigned an ICN or a CMOR.

This data is pulled from the CIRN HL7 EXCEPTION LOG file (#991.1). Prior to producing the report, duplicate POTENTIAL MATCH patients will be purged from the file.

```

Select Message Exception Menu Option: View <Enter> Potential Match Patient

...one moment please..

3 duplicate patient entries for POTENTIAL MATCH exceptions were identified and
deleted from the CIRN HL7 EXCEPTION LOG file (#991.1).

The right margin for this report is 80.

DEVICE: HOME// <Enter>
PATIENT LIST of Potential Matches to be Resolved                               Page: 1
Printed at ALBANY on Jul 23, 2002@09:07

Patient Name                               SSN           DOB           DFN
-----
PATIENT42,JAMES D                          999234579     AUG 20,1945   100000025
PATIENT43,MACY                             999010145P    JAN 1,1945    7169946
PATIENT44,TESTING TEST I                   999457457P    FEB 10,1940   100000013
PATIENT45,ACKS                             999456456     FEB 2,1923    100000028

TOTAL: 4
    
```

**Figure 4-30: View Potential Match Patient**

|                                  |                                |
|----------------------------------|--------------------------------|
| <b>MPI/PD Exception Handling</b> | <b>[RG EXCEPTION HANDLING]</b> |
|----------------------------------|--------------------------------|

This option provides utilities for processing MPI/PD Exceptions in the CIRN HL7 EXCEPTION LOG file (#991.1). This list manager based option displays exceptions and allows the user to choose an exception case for review and resolution.

Upon entering the option, you will be told when the last purge took place and will be asked if you would like to run the purge now. If you choose to purge, you will have to wait a few minutes before using the MPI/PD Exception Handling option.



For more detailed information on exception messages, their resolution, and the MPI/PD Exception Handling option [RG EXCEPTION HANDLING] introduced in Patch RG\*1.0\*3, see the Master Patient Index/Patient Demographics (MPI/PD) VistA Exception Handling manual at the following web site:

<http://www.va.gov/vdl/Infrastructure.asp?appID=16>

This document gives Master Patient Index/Patient Demographics (MPI/PD) sites information and assistance in dealing with exception messages.

```
Select Message Exception Menu Option: MPI/PD <Enter> Exception Handling

The MPI/PD Exception Purge process last ran Oct 31, 2001@12:09:10.
Do you want to run the MPI/PD Exception Purge process now? NO// YES

The MPI/PD Exception Purge process will now run.
Please come back to this option in ten minutes.
```

**Figure 4-31: Initiating MPI/PD Exception Handling option**

Once the option is done running, you can go back to the Message Exception Menu and choose MPI/PD Exception Handling to view the results of the purge process. There are several actions to sort by, they are:

- SD—Sort Exceptions by Date
- VT—View Selected Exception Type
- SN—Sort by Patient Name
- SE—Selection Exception
- ST—Sort by Exception Type

```
Select Message Exception Menu Option: MPI/PD <Enter> Exception Handling

The MPI/PD Exception Purge process last ran Jul 23, 2002@09:59:56.
Do you want to run the MPI/PD Exception Purge process now? NO// <Enter>
...EXCUSE ME, JUST A MOMENT PLEASE...

ST Sort by Exception Type

MPI/PD EXCEPTION HANDLING      Jul 24, 2002@09:37:53      Page: 1 of 1
MPI/PD Exception Handling

      Patient          SSN          Dt Rec'd  Exception Type
1  PATIENT46,MICHAEL  999471102  10/22/01  Death Entry on MPI not in VISTA
2  PATIENT47,DAVID   999455455  12/11/01  Death Entry on Vista not in MPI
3  PATIENT44,TESTING  999457457P 4/29/02   Potential Matches Returned
4  PATIENT48,ZEETTIE  999936785  5/15/02   SSN Match Failed
5  PATIENT72,JAMES D  999223333  6/11/02   Potential Matches Returned
6  PATIENT45,ACKS    999456456  7/3/02    Potential Matches Returned

Enter ?? for more actions
SD Sort Exceptions by Date          VT View Selected Exception Type
SN Sort by Patient Name             SE Select Exception
ST Sort by Exception Type
Select Action:Quit// ??
The following actions are also available:
+  Next Screen          FS First Screen          SL Search List
-  Previous Screen      LS Last Screen          ADPL Auto Display(On/Off)
UP Up a Line           GO Go to Page           QU Quit
DN Down a Line         RD Re Display Screen
>  Shift View to Right PS Print Screen
<  Shift View to Left  PL Print List
```

**Figure 4-32: Results of MPI/PD Exception Handling option**

**Sort Exceptions by Date**

```

Select Action:Quit// SD <Enter> Sort Exceptions by Date

ST Sort by Exception Type
MPI/PD EXCEPTION HANDLING      Jul 24, 2002@09:42:15      Page: 1 of 1
MPI/PD Exception Handling

      Patient          SSN          Dt Rec'd  Exception Type
1  PATIENT46,MICHAEL  999102102  10/22/01  Death Entry on MPI not in VISTA
2  PATIENT47,DAVID   999455455  12/11/01  Death Entry on Vista not in MPI
3  PATIENT44,TESTING  999457457P 4/29/02   Potential Matches Returned
4  PATIENT48,ZEETTIE  999936785  5/15/02   SSN Match Failed
5  PATIENT72,JAMES D  999223333  6/11/02   Potential Matches Returned
6  PATIENT45,ACKS    999456456  7/3/02    Potential Matches Returned
-----
      Enter ?? for more actions
SD  Sort Exceptions by Date          VT  View Selected Exception Type
SN  Sort by Patient Name             SE  Select Exception
ST  Sort by Exception Type
Select Action:Quit// <Enter>
    
```

**Figure 4-33: MPI/PD Exception Handling Report sorted by date**

**View Selected Exception Type, SSN Match Failed**

```

Select Action:Quit// VT <Enter> View Selected Exception Type
Enter an exception type to view: ??

    Select one of the following:
    209      Required field(s) DOB or Name Missing
    213      SSN Match Failed
    214      Name Doesn't Match
    215      Death Entry on MPI not VISTA
    216      Death Entry on Vista not MPI
    217      Death Entries on MPI and Vista DON'T MATCH
    218      Potential Matches Returned

Enter an exception type to view: 2

MPI/PD EXCEPTION HANDLING      Jul 24, 2002@09:52:40      Page: 1 of 2
MPI/PD Exception Handling

    Patient      SSN      Dt Rec'd      Exception Type
1    PATIENT48,ZEETTIE      999936785      5/15/02      SSN Match Failed
2    PATIENT49,JOHN      999125589      SSN Match Failed
3    PATIENT50,LIZ      999321444      SSN Match Failed
4    PATIENT52,SIDNEY      999315315      SSN Match Failed
5    PATIENT51,NEW      999747848      SSN Match Failed
6    PATIENT53.RICARDO      999435435      SSN Match Failed
7    PATIENT54,ROHDA      999323323      SSN Match Failed
8    PATIENT55,ACOUSTIC      999678888      SSN Match Failed
9    PATIENT56,TANDY      999136666      SSN Match Failed
10   PATIENT57,COUPLER      999465555      SSN Match Failed
11   PATIENT58,ISSIDORE      999497777      SSN Match Failed
12   PATIENT59,DAVE      999919191      SSN Match Failed
13   PATIENT60,JIMMY D      999387533      SSN Match Failed
14   PATIENT61,SIDNEY      999090090      SSN Match Failed
+    Enter ?? for more actions
SD  Sort Exceptions by Date      VT  View Selected Exception Type
SN  Sort by Patient Name      SE  Select Exception
ST  Sort by Exception Type
Select Action:Next Screen// <Enter> NEXT SCREEN
MPI/PD EXCEPTION HANDLING      Jul 24, 2002@09:53:10      Page: 2 of 2
MPI/PD Exception Handling

+    Patient      SSN      Dt Rec'd      Exception Type
15   PATIENT62,CHARLES P      999122333      SSN Match Failed
16   PATIENT63,RAVEN      999223333      SSN Match Failed
17   PATIENT64,NEAL      999433454      SSN Match Failed
18   PATIENT65,GREG      999444141      SSN Match Failed
19   PATIENT66,LANA      999897123      SSN Match Failed
20   PATIENT67,LOLA      999786231      SSN Match Failed
21   PATIENT68,GEORGE      999148742      SSN Match Failed
22   PATIENT69,HENRY      999411417      SSN Match Failed
23   PATIENT70,ENOCH      999165863      SSN Match Failed
24   PATIENT71,DANIEL      999887009      SSN Match Failed
+    Enter ?? for more actions
SD  Sort Exceptions by Date      VT  View Selected Exception Type
SN  Sort by Patient Name      SE  Select Exception
ST  Sort by Exception Type
Select Action:Quit// <Enter>
    
```

**Figure 4-34: View Selected Exception Type by SSN Match Failed**

**Sort by Patient Name**

```
Select Action:Quit// SN <Enter> Sort by Patient Name

SN Sort by Patient Name
MPI/PD EXCEPTION HANDLING      Jul 24, 2002@10:25:10      Page: 1 of 1
MPI/PD Exception Handling

      Patient          SSN          Dt Rec'd  Exception Type
1  PATIENT48,ZEETTIE  999936785  5/15/02  SSN Match Failed
2  PATIENT72,JAMES D  999223333  6/11/02  Potential Matches Returned
3  PATIENT47,DAVID    999455455  12/11/01  Death Entry on Vista not in MPI
4  PATIENT46,MICHAEL  999102102  10/22/01  Death Entry on MPI not in VISTA
5  PATIENT44,TESTING  999457457P 4/29/02  Potential Matches Returned
6  PATIENT45,ACKS    999456456  7/3/02   Potential Matches Returned
-----
Enter ?? for more actions
SD Sort Exceptions by Date          VT View Selected Exception Type
SN Sort by Patient Name             SE Select Exception
ST Sort by Exception Type
Select Action:Quit// <Enter>
```

**Figure 4-35: MPI/PD Exception Handling, Sort by Patient Name**

**Select Exception, 1 PATIENT48, ZEETTIE**

```
MPI/PD EXCEPTION HANDLING      Jul 24, 2002@10:25:10      Page: 1 of 1
MPI/PD Exception Handling

      Patient          SSN          Dt Rec'd  Exception Type
1  PATIENT48,ZEETTIE  999936785  5/15/02  SSN Match Failed
2  PATIENT72,JAMES D  999223333  6/11/02  Potential Matches Returned
3  PATIENT47,DAVID    999455455  12/11/01  Death Entry on Vista not in MPI
4  PATIENT46,MICHAEL  999102102  10/22/01  Death Entry on MPI not in VISTA
5  PATIENT44,TESTING  999457457P 4/29/02  Potential Matches Returned
6  PATIENT45,ACKS    999456456  7/3/02   Potential Matches Returned
-----
Enter ?? for more actions
SD Sort Exceptions by Date          VT View Selected Exception Type
SN Sort by Patient Name             SE Select Exception
ST Sort by Exception Type
Select Action:Quit// SE <Enter> Select Exception
Select : (1-14): 1
HI Hinq Inquiry                    ED Edit Patient Data      NT Edit Note

MPI/PD EXCEPTION ACTIONS          Jul 24, 2002@10:28:50      Page: 1 of 1
MPI/PD EXCEPTION HANDLING ACTIONS.

Exception Data
Name:  PATIENT48,ZEETTIE
SSN:   999936785
DOB:   OCT 10,1910
DFN:   7169377
ICN:   500000073
Date of Death:
Exception Type:  SSN Match Failed
Exception Date:  May 15, 2002
Exception Status: NOT PROCESSED
```

| Exception Notes:          |                         |                         |  |
|---------------------------|-------------------------|-------------------------|--|
| Enter ?? for more actions |                         |                         |  |
| AUD Patient Audit         | DO MPI Display Only Qry | UPD Update to Processed |  |
| PI Patient Inquiry        | SPI Single Patient Init | DI MPI/PD Data Inquiry  |  |
| HI Hinq Inquiry           | ED Edit Patient Data    | NT Edit Note            |  |
| Select Action:Quit//      |                         |                         |  |

**Figure 4-36: MPI/PD Exception Handling, Select Exception action**

**Sort by Exception Type**

| Select Action:Quit// ST <Enter> Sort by Exception Type |                         |                       |              |                                 |
|--|-------------------------|-----------------------|--------------|---------------------------------|
| MPI/PD EXCEPTION HANDLING                              |                         | Jul 24, 2002@10:48:47 | Page: 1 of 1 |                                 |
| MPI/PD Exception Handling                              |                         |                       |              |                                 |
|  | Patient                 | SSN                   | Dt Rec'd     | Exception Type                  |
| 1  | PATIENT48,ZEETTIE       | 999936785             | 5/15/02      | SSN Match Failed                |
| 2  | PATIENT46,MICHAEL       | 999102102             | 10/22/01     | Death Entry on MPI not in VISTA |
| 3  | PATIENT47,DAVID         | 999455455             | 12/11/01     | Death Entry on Vista not in MPI |
| 4  | PATIENT44,TESTING       | 999457457P            | 4/29/02      | Potential Matches Returned      |
| 5  | PATIENT72,JAMES D       | 999223333             | 6/11/02      | Potential Matches Returned      |
| 6  | PATIENT45,ACKS          | 999456456             | 7/3/02       | Potential Matches Returned      |
| Enter ?? for more actions                              |                         |                       |              |                                 |
| SD   | Sort Exceptions by Date |                       | VT           | View Selected Exception Type    |
| SN   | Sort by Patient Name    |                       | SE           | Select Exception                |
| ST   | Sort by Exception Type  |                       |              |                                 |
| Select Action:Quit// <Enter>                           |                         |                       |              |                                 |

**Figure 4-37: MPI/PD Exception Handling, Sort by Exception Type**



For an up-to-date list of the MPI/PD Exception Type Numbers and Messages see “Appendix F: MPI/PD Exception Messages” in this document.



**Exceptions Deleted for Patient Records Removed Because of a Merge**

When records were merged using the Toolkit Duplicate Resolution System [XDR MAIN MENU], there have been cases where exceptions existed for some of these records that were removed. When a facility attempted to resolve these exceptions using the MPI/PD Exception Handling option [RG EXCEPTION HANDLING], these exceptions were sent to the MPI.

MPI/PD Patch RG\*1\*29 corrects this pattern by deleting any existing exceptions on file for a patient being removed because of a merge. Also, users will no longer be restricted from merging records when both records in a duplicate pair have a national ICN. A call to the API A40^MPIFA40 was added to send HL7 messages to the MPI to remove the "FROM" record and send messages to the "FROM" record's Treating Facilities to change ICNs to the "TO" record ICN. These changes address NOIS PUG-0902-51018.

|                                    |                                  |
|------------------------------------|----------------------------------|
| <b>Patient MPI/PD Data Inquiry</b> | <b>[RG EXCEPTION TF INQUIRY]</b> |
|------------------------------------|----------------------------------|

This report prints MPI/PD Data for a selected patient. Information displayed includes the following data:

- Integration Control Number (ICN)
- Coordinating Master of Record (CMOR) site
- MPI/PD Activity Score
- Subscription Control Number
- Treating Facility list
- CMOR History
- CMOR Change Request History

The information is pulled from the PATIENT file (#2), TREATING FACILITY LIST file (#391.91) and MPIF CMOR REQUEST file (#984.9). Patient lookup can be done by Patient Name/SSN or by ICN.



Enhancements were added to this option in Patch DG\*5.3\*505 to display the MULTIPLE BIRTH INDICATOR (#994), POW STATUS INDICATED? (#.525), RACE INFORMATION (#2) sub field 2.02, and ETHNICITY INFORMATION (#6) sub field 2.06 fields. These fields have been added in support of the MPI Austin; the MPI/PD Data Quality Management team needs facility information to improve data quality and to resolve differences on the MPI.

```

Select Message Exception Menu Option: PATIENT <Enter> MPI/PD Data Inquiry

Select PATIENT: PATIENT28,RICK <Enter> PATIENT28,RICK      9-4-69      999555999      YES
SC VETERAN      *MULTIPLE BIRTH*
DEVICE: HOME// <Enter>

MPI/PD Data for: PATIENT28,RICK (DFN #100000185)
Printed May 12, 2003@07:24 at ALBANY
=====
SSN      : 999555999                      ICN : 1001179076
Sex      : MALE                          CMOR: ALBANY
Claim #: None                            CMOR Activity Score   : None
Date of Birth: Sep 04, 1969              Subscription Control #: None
Multiple Birth Indicator: YES
Address: 555 LAFAYETTE AVE
        NEW YORK, NEW YORK 10019
Phone #: 555-555-1212

Treating Facilities:  Station:  DT Last Treated      Event Reason
-----
ALBANY                500          none found          none found

ICN History:
-----
500000673 - changed APR 28, 2003@13:47:37
Additional DPT Data for: PATIENT28,RICK (DFN #100000185)
=====
PLACE OF BIRTH [CITY]      : NEW HYDE PARK
PLACE OF BIRTH [STATE]    : NEW YORK
FATHER'S NAME              :
MOTHER'S NAME              :
MOTHER'S MAIDEN NAME      : SPONGE
NAME OF PRIMARY NEXT OF KIN :
NEXT OF KIN PHONE NUMBER  :
NAME OF DESIGNEE          :
EMERGENCY NAME             :
MARITAL STATUS             : SEPARATED
RELIGIOUS PREFERENCE      : UNKNOWN/NO PREFERENCE
PRIMARY ELIGIBILITY CODE   :
VETERAN (Y/N)?            : YES
SERVICE BRANCH [LAST]    :
SERVICE NUMBER [LAST]    :
SERVICE CONNECTED PERCENT :
SERVICE ENTRY DATE [LAST] :
SERVICE SEPARATION DATE [LAST] :
PERIOD OF SERVICE         :
POW STATUS INDICATED?     : UNKNOWN
DATE ENTERED IN PATIENT FILE : APR 28, 2003
ETHNICITY INFORMATION     : DECLINED TO ANSWER
RACE INFORMATION (multiple):
    DECLINED TO ANSWER
ALIAS (multiple):
    THE,RULER
Enter RETURN to continue or '^' to exit:

```

**Figure 4-38: Patient MPI/PD Data Inquiry**

|                                       |                              |
|---------------------------------------|------------------------------|
| <b>Remote Patient Data Query Menu</b> | <b>[RG REMOTE PDAT MENU]</b> |
|---------------------------------------|------------------------------|

This menu provides options to query any facility at which a selected patient has been seen, check the query, and display the remote patient data that is returned from that site. The remote data fields retrieved include the Integration Control Number (ICN), the Coordinating Master of Record (CMOR) site, MPI/PD Activity Score, Subscription Control Number, Treating Facility list, CMOR History and CMOR Change Request History.

```

Select Message Exception Menu Option: Remote <Enter> Patient Data Query Menu

      Send Remote Patient Data Query
      Check Remote Patient Data Query
      Display Remote Patient Data Query

Select Remote Patient Data Query Menu Option:
    
```

**Figure 4-39: Remote Patient Data Query Menu**

|                                       |                              |
|---------------------------------------|------------------------------|
| <b>Send Remote Patient Data Query</b> | <b>[RG REMOTE PDAT SEND]</b> |
|---------------------------------------|------------------------------|

This option allows you to send remote patient data queries from your facility to any facility at which a selected patient has been seen. The remote data fields retrieved are the same as those that are available for local data using the Patient MPI/PD Data Inquiry [RG EXCEPTION TF INQUIRY] option.

```

Select Remote Patient Data Query Menu Option: SEND <Enter> Remote Patient Data Query

This option sends a remote query to selected treating facility site(s) for MPI/PD data for a patient.

Patient lookup can be done by Patient Name, SSN or by ICN.

Select PATIENT: PATIENT4,RICH <Enter> 9-2-01    999437773    YES    SC VETERAN

Remote patient data queries will be sent to:
1. (662) SAN FRANCISCO

Do you want to continue? Yes// YES
  Sending Remote Query to: 662 <Enter> SAN FRANCISCO

Patient lookup can be done by Patient Name, SSN or by ICN
    
```

**Figure 4-40: Send Remote Patient Data Query**

|  |                               |
|--|-------------------------------|
| <b>Check Remote Patient Data Query</b> | <b>[RG REMOTE PDAT CHECK]</b> |
|--|-------------------------------|

This option allows you to check the status of a remote patient data query previously sent using the Send Remote Patient Data Query [RG REMOTE PDAT SEND] option.

```

Select Remote Patient Data Query Menu Option: Check Remote Patient Data Query

This option checks the status of an existing remote patient data query.
Patient lookup can be done by Patient Name, SSN or by ICN.

Select PATIENT: PATIENT74,DANIEL
-> For ICN 1099999999

Select one or more of the following:
1. (515) BATTLE CREEK
2. (526) BRONX
3. (537) CHICAGO HCS
4. (553) DETROIT
5. (677) EASTERN KANSAS HCS
6. (437) FARGO VAMROC
7. (564) FAYETTEVILLE AR
8. (578) HINES
9. (ALL)
Select site(s) 1-8 or 9 for all: 9
    BATTLE CREEK status: (Response Received)
    BRONX status: (Response Received)
    CHICAGO HCS status: (Response Received)
    DETROIT status: (Response Received)
    EASTERN KANSAS HCS status: (Response Received)
    FARGO VAMROC status: (Response Received)
    FAYETTEVILLE AR status: (Response Received)
    HINES status: (Response Received)

Patient lookup can be done by Patient Name, SSN or by ICN.
Select PATIENT: <Enter>
    
```

**Figure 4-41: Check Remote Patient Data Query**

| <b>Status</b>     | <b>Description</b>   |
|-------------------|--|
| Error in Process  | There is a problem with link setup or XTMP global, please log a NOIS.                  |
| Request Sent      | The remote query request has been sent.  |
| Awaiting Response | HL7 indicates that the message is being processed.                                     |
| Response Received | The remote procedure call has completed and the data has returned to the local server. |

|  |                                 |
|--|---------------------------------|
| <b>Display Remote Patient Data Query</b> | <b>[RG REMOTE PDAT DISPLAY]</b> |
|--|---------------------------------|

This option allows you the user to display a patient data query previously sent using the Send Remote Patient Data Query [RG REMOTE PDAT SEND] option. This option will display the status of the query and the data returned or an error message.

```

Select Remote Patient Data Query Menu Option: Display Remote Patient Data Query

Patient lookup can be done by Patient Name, SSN or by ICN.

Select PATIENT: PATIENT74,DANIEL
-> For ICN 1099999999

Select one or more of the following:
1. (515) BATTLE CREEK
2. (526) BRONX
3. (537) CHICAGO HCS
4. (553) DETROIT
5. (677) EASTERN KANSAS HCS
6. (437) FARGO VAMROC
7. (564) FAYETTEVILLE AR
8. (578) HINES
9. (ALL)
Select site(s) 1-8 or 9 for all: 1
      BATTLE CREEK  status: (Response Received)

Printed Dec 11, 2001@07:39 at BATTLE CREEK
=====
SSN      : 999337777          ICN : 1099999999
Sex      : MALE              CMOR: BATTLE CREEK
Claim #: 999337777          CMOR Activity Score   : None
Date of Birth: April 04, 1904      Subscription Control #: 63713
Address: 123 COLLEGE TOWN DR
          SACRAMENTO, CALIFORNIA 95826
Phone #: 555-555-1515

Treating Facilities:  Station:  DT Last Treated  Event Reason
-----
BATTLE CREEK        515      Jun 10, 1999@13:20  PATIENT DISCHARGE
BRONX                526      Aug 13, 1998@9:45   PATIENT DISCHARGE
CHICAGO HCS          537      Sept 11, 1999@13:00 PATIENT DISCHARGE
DETROIT              553      Jun 2, 1999@11:30   PATIENT DISCHARGE
EASTERN KANSAS HCS  677      Jul 12, 1997@16:00  PATIENT DISCHARGE
FARGO VAMROC         437      Nov 17, 1998@14:00  PATIENT DISCHARGE
FAYETTEVILLE AR   564      Dec 11, 2000@12:30  PATIENT DISCHARGE
HINES                578      Dec 12, 2001@13:40  PATIENT DISCHARGE

Additional DPT Data for: PATIENT74,DANIEL N (DFN #700000)
=====
PLACE OF BIRTH [CITY]      :
PLACE OF BIRTH [STATE]    :
FATHER'S NAME              :
MOTHER'S NAME              :
MOTHER'S MAIDEN NAME      :
NAME OF PRIMARY NEXT OF KIN : USER9,RICHARD
NEXT OF KIN PHONE NUMBER  : 555-555-1212
NAME OF DESIGNEE          :
EMERGENCY NAME            : USER10,EMERGENCY
    
```

```

MARITAL STATUS           :    DIVORCED
RELIGIOUS PREFERENCE    :    NO PREFERENCE
RACE                    :
PRIMARY ELIGIBILITY CODE :    NSC
VETERAN (Y/N)?         :    YES
SERVICE BRANCH [LAST]  :    AIR FORCE
SERVICE NUMBER [LAST]  :    999337777
SERVICE CONNECTED PERCENT :
SERVICE ENTRY DATE [LAST] :
SERVICE SEPARATION DATE [LAST] :    JAN 24, 1987
PERIOD OF SERVICE       :    VIETNAM ERA
DATE ENTERED IN PATIENT FILE :    DEC 19, 2000

Select PATIENT (Use ICN or SSN): <Enter>
    
```

**Figure 4-42: Display Remote Patient Data Query**

|                                |                         |
|--------------------------------|-------------------------|
| <b>Management Reports. . .</b> | <b>[RG MGT REPORTS]</b> |
|--------------------------------|-------------------------|

```

Select MPI/PD Patient Admin Coordinator Menu Option: RPT <Enter> Management Reports

      Pseudo-SSN Report
      Link and Process Status Display
      Unresolved Exception Summary
      National ICN Statistics

Select Management Reports Option:
    
```

**Figure 4-43: Management Reports Menu on MPI/PD Vista**

|                          |                                  |
|--------------------------|----------------------------------|
| <b>Pseudo-SSN Report</b> | <b>[RGPR PRE-IMP SSN REPORT]</b> |
|--------------------------|----------------------------------|

The Pseudo SSN Report identifies patients with questionable SSNs. The completed report sort patients by Patient Activity and then by the patient's Primary Eligibility Code. The report identifies ALL patients in the database with a missing, pseudo, or potentially false SSN and further identifies patients with inpatient and/or outpatient activity over the past 3 years. The report also identifies entries in the PATIENT file (#2) with a "B" cross-reference and no zero node entry and displays the patient record IEN (Internal Entry Number) within the first section of the report. This first section should be provided to your station's IRM service for their information. The following example shows the output from the report.

```

Select Management Reports Option: Pseudo <Enter> -SSN Report
This report will provide a list of:
(1) any B Cross-references (there is no 'zero' node but a B x-ref)
    on the patient file,
(2) patients with Pseudo SSNs who have not had activity within the past 3
years,
(3) patients with Pseudo SSNs who have had activity within the past 3 years.

The Reports are sorted by Primary Eligibility Code. The report can
be queued if desired.

For MPI/PD purposes, general advice is to concentrate first on
getting correct SSNs for the patients who HAVE had activity within
the past 3 years.

DEVICE: HOME// <Enter>           Right Margin: 80// <Enter>

MPI/PD Report of Pseudo, missing & potentially false SSNs JUL 30, 2002@11:08:23

Bad B Cross References Report
Please contact IRM for assistance with bad B Cross references.
-----
B Cross Reference with no 0 Node in DPT: DFN= 7169186
B Cross Reference with no 0 Node in DPT: DFN= 7169107

MPI/PD Report of Pseudo, missing & potentially false SSNs JUL 30, 2002@11:08:46
      Patient activity within past 3 years = NO

Primary
Elig Code
  Elig.      Name              SSN              Home Phone
    
```

```

-----
SERVICE CONNECTED 50% to 100%
  1      PATIENT75,EGBERT E 999101097P      555-555-5555

AID & ATTENDANCE
  2      PATIENT76,ROGER P  999102357P      555-222-1234
  2      PATIENT77,BING R   999102357P      555-222-1234
  2      PATIENT78,JASON   999020201P      555-222-7890

NSC
  5      PATIENT79,HARDY L  999010805P

OTHER FEDERAL AGENCY
  6      PATIENT80,JAKE    999032384P

MPI/PD Report of Pseudo, missing & potentially false SSNs JUL 30, 2002@11:09:02

                Patient activity within past 3 years = YES
Primary
Elig Code
Elig.      Name                SSN                Home Phone
-----
SC LESS THAN 50%
  3      PATIENT81,SETH     999456799         555-555-9396
  3      PATIENT82,ELMER   999010101P

NSC
  5      PATIENT83,BOB     999081440P
  5      PATIENT84,JOHN    999041232P
  5      PATIENT85,ANNA    999000999P      555-555-5555
  5      PATIENT86,JOEL    999000053P      555-555-7890
  5      PATIENT87,DONALD  999101011P

HOUSEBOUND
  15     PATIENT88,BILLY   999101010P

MPI/PD Report of Pseudo, missing & potentially false SSNs JUL 30, 2002@11:11:32

                Patient activity within past 3 years = YES
Primary
Elig Code
Elig.      Name                SSN                Home Phone
-----
HOUSEBOUND
None
          PATIENT89,CHARLIE 999000040P
          PATIENT90,LONNIE  999000041P
          PATIENT91,VICTOR  999030252P      555-555-2093
          PATIENT92,JED     999090708P
          PATIENT93,TIM     999050324P
  
```

**Figure 4-44: Pseudo-SSN Report**

This report should be printed and provided to personnel assigned to update the Social Security numbers. These users would contact the patient and use the Load/Edit Patient Data option in the Admission, Discharge, Transfer (ADT) Registration menu to update the SSN. It is suggested that sites first clean up those with activity = YES and prioritize the clean up for patients with veteran Primary Eligibility Codes.

|  |                                       |
|--|---------------------------------------|
| <b>Link and Process Status Display</b> | <b>[RG LINKS AND PROCESS DISPLAY]</b> |
|--|---------------------------------------|

This option is used to monitor the status of MPI/PD related functions and messaging. The monitor displays the following information.

- HL links that currently have messages to be processed on either the inbound or outbound queues and the current STATE of the link
- Status of MPI/PD background jobs.
- Current audit status on the NAME (#.01) field in the PATIENT file (#2)
- Current status of the SEND parameters for HL7 messaging
- Local link management information
- Any Logical Links used for MPI/PD Messaging that don't have an INSTITUTION defined
- Any Logical Links used for MPI/PD messaging that have an incorrect INSTITUTION defined
- Any Non-MPI/PD Links that have an INSTITUTION definition of the local sites

```

Select MPI/PD IRM Menu Option: Link <Enter> and Process Status Display

Logical Link Monitor:
=====

<<Run - Oct 28, 2002@13:39:56>>
Outgoing messages:

Incoming messages:

MPI/PD Process Monitor:
=====

Checking VAFC BATCH UPDATE background job...
  (Total DATA UPDATES waiting to be processed = 0)
  (Total TREATING FACILITY UPDATES waiting to be processed = 0)
=> VAFC BATCH UPDATE scheduled to run OCT 28, 2002@13:21.

Checking MPIF LOC/MIS ICN RES background job... (Total Local ICNs = 195)
=> MPIF LOC/MIS ICN RES is not currently scheduled to run.

=> Audit on NAME (#.01) field of PATIENT (#2) file set to <<YES, ALWAYS>>

Checking SEND Parameters for HL7 messaging...
=> SEND PIMS HL7 V2.3 MESSAGES currently set to << SEND MESSAGES >>.
=> STOP MPI/PD MESSAGING currently set to << SEND MESSAGES >>.

Checking SHUTDOWN LLP? field and TCP/IP SERVICE TYPE for VADCRN...
=> SHUTDOWN LLP? currently set to << NO >>.
=> TCP/IP SERVICE TYPE currently set to << SINGLE LISTENER >>.
=> Logical Link MPIVA currently set to << TCP >>.
=> HL LINK MANAGER is currently << RUNNING >>.

```

**Figure 4-45: Link and Process Status Display option**



Patch RG\*1.0\*20 has added the Class I option, Link and Process Status Display, to both the MPI/PD IRM Menu and the MPI/PD Patient Admin Coordinator Menu. Once a Class III utility, Link and Process Status Display is used to monitor the status of MPI/PD related functions and messaging. The data provided by this option can also be generated from the Master Patient Index (MPI), via a remote procedure call, for use by the MPI Data Quality Management team.

|                                     |                            |
|-------------------------------------|----------------------------|
| <b>Unresolved Exception Summary</b> | <b>[RG STATUS DISPLAY]</b> |
|-------------------------------------|----------------------------|

The Unresolved Exception Summary calculates and presents the following data:

- the number of unresolved exceptions in the CIRN HL7 EXCEPTION LOG file (#991.1) for the MPI/PD related entries (e.g., internal entry numbers 209, 213-218, 227) in the CIRN HL7 EXCEPTION TYPE file (#991.11),
- the number of unique patients with exceptions,
- the number of unresolved exceptions in the PATIENT DATA EXCEPTION file (#391.98) with an EXCEPTION STATUS file (#391.984) value of ACTION REQUIRED, DATA EXAMINED or BEING REVIEWED,
- the number of entries in the MPIF CMOR REQUEST file (#984.9) with a STATUS (#.06) field value of OPEN, REQUESTED, PENDING APPROVAL, APPROVED or DISAPPROVED,

The Exception Handler and Patient Data Review numbers indicate how up-to-date a site is in exception resolution. The CMOR request numbers specify how many requests for change of CMOR have been sent and their resulting status. This data can be useful in reducing the number of exceptions.

```

Select MPI/PD IRM Menu Option: UNRESOLVED <Enter> Exception Summary

Exception Handler Entries:
-----
SSN Match Failed                23
Name Doesn't Match              1
Death Entry on MPI not in VISTA  1
Death Entry on Vista not in MPI  1
Potential Matches Returned      3
Multiple ICNs                   2

Total number of exceptions:      31
Total unique patient exceptions: 0

The MPI/PD Exception Purge process last ran Oct 21, 2002@10:03:27.

Patient Data Review Entries:
-----
ACTION REQUIRED                   10
DATA EXAMINED                   13

CMOR Requests Status:
-----
REQUESTED                        3
APPROVED                         25

Current total number of National ICNs = 357
Current total number of Local ICNs = 195
    
```

**Figure 4-46: Unresolved Exception Summary**



Patch RG\*1.0\*20 has revised the MPI/PD Status Display [RG STATUS DISPLAY] option. The link and processes information has been removed from this display, as that data is now available on the new Link and Process Status Display [RG LINKS & PROCESS DISPLAY] option. The menu text for this option has been changed from MPI/PD Status Display to Unresolved Exception Summary.

|                                |                                     |
|--------------------------------|-------------------------------------|
| <b>National ICN Statistics</b> | <b>[RG NATIONAL ICN STATISTICS]</b> |
|--------------------------------|-------------------------------------|

This option provides the following statistics available for facility review:

- Total number of patients assigned to each unique Coordinating Master of Record (CMOR).
- Total number of patients shared with each unique entry in the TREATING FACILITY LIST file (#391.91).
- Totals for national ICNs, local ICNs, and patients with no ICN.

This data is compiled by a remote process, initiated by the MPI in Austin on a regular basis for reporting purposes. The local site does not compile it; however, that same site can view the last report that was compiled.



Patch RG\*1.0\*20 has removed the Treating Facility List Statistics [RGMT AUDIT TF STATISTICS] option from the Management Reports [RG MGT REPORTS] menu. This information is now available on the new National ICN Statistics [RG NATIONAL ICN STATISTICS] option.

```

Select Management Reports Option: National <Enter> ICN Statistics

This option provides the following statistics:
  1. Total patients assigned to each unique COORDINATING MASTER OF
     RECORD (CMOR).
  2. Total patients shared with each unique entry in the TREATING
     FACILITY LIST (#391.91) file.
  3. Totals for national ICNs, local ICNs, and patients with no ICN.
===> NOTE <===
This data was last compiled on Aug 08, 2002@15:30:23

Right Margin for this report is 80.
DEVICE: HOME// <Enter>

MPI/PD Statistics - ALBANY                               Printed Oct 29, 2002@10:08
Compiled Aug 08, 2002@15:30 (Compile Time: 0.00 hrs)
-----
=>CMOR TOTALS:
ALBANY                =          230
BATTLE CREEK          =           1
BPMARION              =           1
BPSAGINAW             =           2
BRONX                 =           1
CENTRAL IOWA HCS     =           1
DETROIT               =          16
MIAMI                 =           1
N. FLORIDA/S. GEORGIA HCS =           1
SAN FRANCISCO         =           3
TENNESSEE VALLEY HCS =           0
                                                                TOTAL:          257

=>TREATING FACILITY TOTALS:
ALBANY                =          259
AUSTIN                =           3
BATTLE CREEK          =           1
BPMARION              =           6
BPSAGINAW             =           8
BRONX                 =           2
CENTRAL IOWA HCS     =           2
DES MOINES-RO        =           1
DETROIT               =          37
HOUSTON               =           1
LAS VEGAS             =           1
MIAMI                 =           2
MINNEAPOLIS          =           1
MURFREESBORO         =           1
N. FLORIDA/S. GEORGIA HCS =           1
NEW MEXICO HCS       =           1
NORTHAMPTON          =           1
OFFICE OF INFORMATION SRV CNTR =           1
SAN FRANCISCO         =          13
SOUTH TEXAS HCS      =           2
TENNESSEE VALLEY HCS =           1
WEST PALM BEACH      =           1
WILKES BARRE         =           2

Total patients with a national ICN    =          258
Total patients with a local ICN       =          200
Total patients with no ICN            =          349

```

**Figure 4-47: National ICN Statistics Option**

|                                  |                                     |
|----------------------------------|-------------------------------------|
| <b>Add/Edit Point of Contact</b> | <b>[RG UPDATE POINT OF CONTACT]</b> |
|----------------------------------|-------------------------------------|

This option allows a facility to update their point of contact information for Master Patient Index/Patient Demographics (MPI/PD). Names and phone numbers can be edited for administrative, IRM, HL7, and alternate contacts. Phone numbers should include the entire number, to include the area code, seven digit number and extension (e.g., AAA NNN NNNN XXXX). At the conclusion of the edit process, the information is transmitted to a remote mail group on the Austin MPI system. The MPI Data Quality Management staff will use this information to update the website.

The COMMERCIAL PHONE (#.135) field can also be edited by IRM using the Edit an Existing User [XUSEREDIT] option, but this doesn't send a message to the MPI Data Quality Management team. The message is sent only through the use of the Add/Edit Point of Contact [RG UPDATE POINT OF CONTACT] option. It may be advisable to periodically (e.g., quarterly) compare what is in your local system with the information on the website and update if needed. If the number on the website doesn't match what is currently in your system, you would need to delete the POC and re-enter the name, because only a change causes a message to be sent. The MPI Data Quality Management team will use this information to update their website.

```

Select MPI/PD Patient Admin Coordinator Menu Option: ADD/EDIT <Enter> Point of
Contact

This option allows you to transmit information to the MPI/PD Data
Management team so that the Point of Contact website can be updated.

To obtain a list of MPI/PD Points of Contact for each facility,
look for the POC web link on the MPI/PD Home Page.

The COMMERCIAL PHONE (#.135) field in the NEW PERSON (#200) file
will only accept numbers and punctuation, 4-20 characters.

Please include the entire phone number:
area code, 7 digit number and extension (e.g., AAA NNN NNNN XXXX)

A contact name without a phone number will NOT be transmitted.
===
Select one or more of the following:
(A list or range of numbers can be entered, e.g., 1,3 or 2-4,6.)

    1 - Admin POC      2 - Alt Admin POC    3 - IRM POC      4 - Alt IRM POC
    5 - HL7 POC       6 - Alt HL7 POC     7 - ALL POCs

Which Point of Contact information do you wish to update? 7// 7 <Enter> ALL POCs

ADMIN POINT OF CONTACT: ADMIN,ADELE <Enter> ADMIN,ADELE      AA
OFFICE PHONE: 555-5555 5555 <Enter>

ALT ADMIN POINT OF CONTACT: <Enter>
No ALT ADMIN Point of Contact identified.
IRM POINT OF CONTACT: IRM,IRMA <Enter> IRM,IRMA      II
OFFICE PHONE: 555-5555 5556

ALT IRM POINT OF CONTACT: <Enter>
No ALT IRM Point of Contact identified.

HL7 POINT OF CONTACT: HLSEVEN,HENRY <Enter> HLSEVEN,HENRY      HH
OFFICE PHONE: 555-5555 5557 <Enter>

ALT HL7 POINT OF CONTACT: <Enter>
No ALT HL7 Point of Contact identified.

The following data will be transmitted to the MPI/PD Data Management team.

Admin Point of Contact Name: ADMIN,ADELE
Admin Point of Contact Phone #: 555 5555 5555

IRM Point of Contact Name: IRM,IRMA
IRM Point of Contact Phone #: 555 5555 5556

HL7 Point of Contact Name: HLSEVEN,HENRY
HL7 Point of Contact Phone #: 555 5555 5557

Sending information to the MPI/PD Data Management team now.

Do you want to add/edit another contact? NO// <Enter>

```

**Figure 4-48: Add/Edit Point of Contact**

## MPI/PD Patient Admin User Menu

This menu, also listed as an option on the MPI/PD Patient Admin Coordinator Menu, can be assigned to those personnel only involved with Patient Data Reviews and CMOR Change Requests; access to the MPI/PD Patient Admin Coordinator Menu is not necessary. The options on this menu were highlighted earlier in the document under the MPI/PD Patient Admin Coordinator Menu section, however in this section they will be more closely examined to provide the user with a better understanding of their functions.

```
Select MPI/PD Master Menu Option: ADU <Enter> MPI/PD Patient Admin User Menu

    Patient Data Review
    Purge Patient Data Reviews
    Coordinating Master of Record (CMOR) Request ...

Select MPI/PD Patient Admin User Menu Option:
```

**Figure 4-49: MPI/PD Patient Admin User Menu**

|                            |                                 |
|----------------------------|---------------------------------|
| <b>Patient Data Review</b> | <b>[VAFC EXCEPTION HANDLER]</b> |
|----------------------------|---------------------------------|

This option is used to review demographic data that is logged into the PATIENT DATA EXCEPTION file (#391.98) from other sites. It allows a user to upload or merge the data into the receiving site's database. Reviewing and resolving these cases is an important step in maintaining the accuracy and integrity of the patient's data.

The purpose of a patient data review is to resolve any differences in demographic data (Name, SSN, Mothers Maiden Name, Sex, etc.) for any one particular patient from one site to another. If the patient already exists and has been established at the MPI, if there is a difference in any one of the demographic fields, but all the other demographic data is the same between those sites, this would generate an exception on the MPI, thereby automatically logging the record differences for review in the Patient Data Review option.

| PIMS Demographic Merge              |                   | Jul 16, 2002@11:39:48 |      | Page: 1 of 2 |               |
|-------------------------------------|-------------------|-----------------------|------|--------------|---------------|
| Review(s) currently on file.        |                   |                       |      |              |               |
| Patient                             | SSN               | DOB                   | Stat | Evt. DT.     | From          |
| 1 PATIENT41,JOHN                    | 999900456         | 04-02-1942            | AR   | 07-15-2002   | ALBANY        |
| 2 PATIENT41,JOHN                    | 999900456         | 04-02-1942            | DE   | 05-23-2002   | DETROIT       |
| 3 PATIENT41,JOHN                    | 999900456         | 04-02-1942            | DE   | 05-09-2002   | DETROIT       |
| 4 PATIENT94,IZZY                    | 999222233         | 12-23-1923            | AR   | 04-25-2002   | DETROIT       |
| 5 PATIENT95,JOEY                    | 999434343         | 11-28-1945            | DE   | 12-07-2001   | DETROIT       |
| 6 PATIENT4,RICH                     | 999000000         | 09-02-1901            | AR   | 12-06-2001   | SAN FRANCISCO |
| Enter ?? for more actions           |                   |                       |      |              |               |
| SP Select Patient                   | SS Sort by Site   | SN Sort by Newest     |      |              |               |
| SOL Sort by Oldest                  | P Sort by Patient |                       |      |              |               |
| Select Action:Next Screen// <Enter> |                   |                       |      |              |               |

**Figure 4-50: PIMS Demographic Merge**



See "Appendix C: Patient Data Review" for a list of the patient data elements to review when resolving a case (exception).



For more information on this option, see the previously documented topic section titled "Patient Data Review."

|   |                        |
|---|------------------------|
| <b>Coordinating Master of Record (CMOR) Request</b> | <b>[MPIF CMOR MGR]</b> |
|---|------------------------|

The Coordinating Master of Record (CMOR) Request menu is part of the MPI application and resides in MPI/PD. Its purpose is to give sites the tools needed to request and approve changes to a patient's CMOR.

The Coordinating Master of Record (CMOR) is the designated "owner" of the patient's descriptive data and plays a major role in the distribution of it. A patient will have only one CMOR at a time. Typically, the CMOR for a particular patient should be that site where the patient has the most activity/receives the most care. The designation as the CMOR for a patient does not provide "workload credit" or any other distinction.

A patient's CMOR may change for many reasons: the patient moved to a new location, VISN organization of services, changes in the patient's care needs, etc. The CMOR should move with the patient when there is a change in the site where the patient will be receiving care for an extended period of time i.e.,(specialized care, seasonal migration, etc). A comparison of CMOR scores can be used as an indication of the appropriate CMOR; however, it should not override such indications as patient request or future appointments. A request to change a patient's CMOR may be initiated by either the patient's new care site or the patient's current CMOR. Changing the CMOR requires agreement between the two sites involved.

```

Select MPI/PD Patient Admin User Menu Option: COORDINATING <Enter> Master of Record
(CMOR) Request

      Create a New CMOR Change Request
      Push CMOR Request
      Edit Open CMOR Change Request
      Review Pending Change of CMOR Requests
      Batch Review of CMOR Change Requests
      Display a CMOR Change Request
PEND  Report - Pending Received Requests
SENT  Report - Sent Requests Still Pending
DIS   Report - CMOR Requests Disapproved
APP   Report - CMOR Requests Approved

Select Coordinating Master of Record (CMOR) Request Option
    
```

**Figure 4-51: Coordinating Master of Record (CMOR) Request Menu**

|   |                           |
|---|---------------------------|
| <b>Create a New CMOR Change Request</b> | <b>[MPIF NEW REQUEST]</b> |
|---|---------------------------|

This option is used to request a change of CMOR from the current CMOR facility to the facility making the request. Enter the Patient ID, name of requestor, requestor's phone number, date/time stamp, requesting site, patient, and reason or justification why you are making the request, Figure 4-52. The CMOR has 14 days in which to respond to the request. After 14 days, the change will be automatic.

```

Select Coordinating Master of Record (CMOR) Request Option: CREATE <Enter> a New
CMOR Change Request

Select PATIENT: PATIENT4,RICH <Enter> PATIENT4,RICH      9-2-01      999037773      YES
SC VETERAN
REQUEST NUMBER: 500-8
*** Current CMOR: SAN FRANCISCO (662) ***
Reason for Request: Patient moved.
Requestor's Name:: USER7,LADY// LH
Requestor Phone:: 555-555-5555// <Enter>
Select Request Action (SEND/EDIT/DELETE)? SEND// SEND
... Request will be sent
    
```

Enter your reason, justification, or comment for transfer.

**Figure 4-52: Create a New CMOR Change Request option**



In order to request that your site become the CMOR for a patient, your site must already be one of the treating facilities for that patient.

|                          |                         |
|--------------------------|-------------------------|
| <b>Push CMOR Request</b> | <b>[MPIF PUSH CMOR]</b> |
|--------------------------|-------------------------|

This option allows the current CMOR for a patient to be transferred to another site. This request does not need to be approved. The change is automatic.

```

Select Coordinating Master of Record (CMOR) Request Option: PUSH <Enter> CMOR
Request
Select PATIENT: PATIENT4,RICH <Enter> PATIENT4,RICH      9-2-01      999037773      YES
SC VETERAN
REQUEST NUMBER: 500-7
Reason for Request: ??

Answer must be 3-60 characters in length.

Reason for Request: Patient moved.
Requestor's Name: USER7,LADY// LH
Requestor's Phone: // 555-555-5555
Select Site to Be CMOR: SAN FRANCISCO <Enter> CA VAMC 662
Select Request Action (SEND/EDIT/DELETE)? SEND// SEND
... Request will be sent
    
```

**Figure 4-53: Push CMOR Request option**



The site where the CMOR is being transferred to must be in the treating facility list for this patient.

|                                      |                            |
|--------------------------------------|----------------------------|
| <b>Edit Open CMOR Change Request</b> | <b>[MPIF EDIT REQUEST]</b> |
|--------------------------------------|----------------------------|

This option allows the user to edit existing CMOR change requests that have a status of Open.

If the New CMOR Change Request option is interrupted abnormally (your computer connection fails) prior to sending the request, the request has a status of Open and can be edited and sent using this option. Once you have sent the request, it cannot be edited.



A status of Open indicates that a computer connection failure has prevented the user from completing the CMOR change request and stopped the software from deleting the incomplete CMOR change request.

|  |                              |
|--|------------------------------|
| <b>Review Pending Change of CMOR Request</b> | <b>[MPIF REVIEW REQUEST]</b> |
|--|------------------------------|

Use the Review Pending Change of CMOR Requests or the Batch Review of CMOR Change Requests options to review requests from other sites and approve or disapprove them. You may process CMOR change requests by site or by patient. If by site, all requests for the site are shown by patient. If processing by patient, it will list all requests for a given patient. The CMOR has 14 days in which to respond to a CMOR Change Request. After that, the change will be automatic.

**Disapproved request** - Marks the request in the CMOR's outstanding request file as rejected and notifies the original requester of the disapproval.

**Approved request** - Updates CMOR field to new CMOR. If you are the new CMOR look for the request in your outstanding request file and mark it complete. If you are the relinquishing CMOR, check the outstanding request file and mark the request processed.

```

Select Coordinating Master of Record (CMOR) Request Option: Review <Enter> Pending
Change of CMOR Requests
Select CMOR request to review: 553-10 <Enter> 08-02-02  PATIENT102,CHARLES

OCT 2,2001          View of CMOR Request {RECEIVED}          553-10
-----
Requested by: USER11,MERRY          Date: AUG 2,2001
Phone (req): 555-555-5555
Patient: PATIENT102,CHARLES (4444)  Type: REQUEST RECEIVED FROM
Status: PENDING APPROVAL           DETROIT (553)
Reviewed by: Date:
Phone (rev):
-----
Requestor Comments:
Moved here

Reviewer Comments:
Happy to oblige.

Select Review Action (APPROVE/DISAPPROVE, OR '^' to Exit)? a <Enter> APPROVE
REVIEWER PHONE NUMBER: 555-555-5556
REVIEWER COMMENTS: <Enter>

Processing.....
... Done!
    
```

**Figure 4-54: Review Pending Change of CMOR Request**

|  |                            |
|--|----------------------------|
| <b>Batch Review of CMOR Change Request</b> | <b>[MPIF BATCH REVIEW]</b> |
|--|----------------------------|

This option allows the processing of pending CMOR requests by station rather than having to enter individual CMOR request numbers.

```

Select Coordinating Master of Record (CMOR) Request Option: Batch <Enter> Review of
CMOR Change Requests
Do you want to approve by SITE? n <Enter> NO

AUG 2,2001          View of CMOR Request {RECEIVED}          553-10
-----
Requested by: USER11,MERRY          Date: AUG 2,2001
Phone (req): 555-555-5555
Patient: PATIENT102,CHARLES (4444)  Type: REQUEST RECEIVED FROM
Status: PENDING APPROVAL          DETROIT (553)
Reviewed by:          Date:
Phone (rev):
-----
Requestor Comments:
  Moved here

Reviewer Comments:
  Happy to oblige.

Select Review Action (APPROVE/DISAPPROVE, OR '^' to Exit)? a <Enter> APPROVE
REVIEWER PHONE NUMBER: 555-555-5556
REVIEWER COMMENTS: Happy to oblige.
Processing.....
... Done!
    
```

**Figure 4-55: Batch Review of CMOR Change Requests option**

|                                      |                            |
|--------------------------------------|----------------------------|
| <b>Display a CMOR Change Request</b> | <b>[MPIF VIEW REQUEST]</b> |
|--------------------------------------|----------------------------|

This option allows the user to view all information for a particular CMOR request without approving or disapproving it.

```

Select Coordinating Master of Record (CMOR) Request Option: Display <Enter> a CMOR
Change Request

Select Request #: 500-8 <Enter> 08-06-02          PATIENT4,RICH
DEVICE: <Enter>          Right Margin: 80// <Enter>
AUG 6,2002          View of CMOR Request {SENT}          500-8
-----
Requested by: USER7,LADY          Date: AUG 6,2002
Phone (req): 727-320-1804
Patient: PATIENT4,RICH (7773)      Type: REQUEST SENT TO
Status: REQUESTED          SAN FRANCISCO (662)
Reviewed by:          Date:
Phone (rev):
-----
Requestor Comments:
  TEST

Reviewer Comments:
    
```

**Figure 4-56: Display a CMOR Change Request**

|  |                                 |
|--|---------------------------------|
| <b>Report- Pending Received Requests</b> | <b>[MPIF RECEIVED REQUESTS]</b> |
|--|---------------------------------|

This report lists all outstanding CMOR requests that need to be reviewed and processed. Once you have approved or disapproved a request it will not appear on this report.

```

Select Coordinating Master of Record (CMOR) Request Option: pend <Enter> Report -
Pending Received Requests
DEVICE: <Enter>           Right Margin: 80// <Enter>
Pending CMOR Requests           OCT 2,2001 12:14           PAGE 1
Request Number           Requested By           Patient           Date Requested
-----
Request From: DETROIT
553-10           USER11,MERRY           PATIENT102,CHARLES (4444) OCT 2,2001
Reason: moved here
    
```

**Figure 4-57: Report-Pending Received Requests**

|  |                             |
|--|-----------------------------|
| <b>Report- Sent Requests Still Pending</b> | <b>[MPIF SENT REQUESTS]</b> |
|--|-----------------------------|

This report lists all CMOR requests entered that are still outstanding (requests you have made but have not received a response on). The report sorts by station number and date requested.

```

Select Coordinating Master of Record (CMOR) Request Option: SENT <Enter> Report -
Sent Requests Still Pending
Do you only want to list your requests? YES// n <Enter> NO
Display requests entered on or before date: TODAY// <Enter> (SEP 27,2001)
DEVICE: <Enter>           Right Margin: 80// <Enter>
Pending CMOR Requests           SEP 27,2001           16:44           PAGE 1
Request Number           Requested By           Patient           Date Requested
-----
STATION: ALBANY TESTING (501A)
500-3           USER12,TOMMY           PATIENT103,MARY           SEP 24,2001
Reason: Patient request
STATION: ALBANY, NY (500)
500-21           PATIENT89,CHARLES           PATIENT104,PETER (0101)           SEP 3,2001
Reason: moving
STATION: ALTOONA, PA (503)
500-22           ADPA,ARTHUR           PATIENT105,ANDREW (5555)           SEP 6,2001
Reason: TEST
STATION: ANN ARBOR (506)
500-28           USER14,DREW           PATIENT106,RICKY (5678)           SEP 8,2001
Reason: Patient request
STATION: BAY PINES, FL (516)
500-27           SUPPORR,SALLY           PATIENT107,LUCY (2345)           AUG 25,2001
Reason: CHANGE OF ADDRESS
STATION: DETROIT, MI (553)
500-5           MASCLERT,MARGARET           PATIENT108,TIMOTHY (2222)           SEP 28,2001
Reason: Patient request
    
```

**Figure 4-58: Report- Sent Requests Still Pending**

|  |                                 |
|--|---------------------------------|
| <b>Report- CMOR Requests Disapproved</b> | <b>[MPIF DISAPPROVE REPORT]</b> |
|--|---------------------------------|

This report prints the CMOR requests that have a disapproved status starting with the date selected by the user.

```

Select Coordinating Master of Record (CMOR) Request Option: Dis <Enter> Report -
CMOR Request Disapproved
Display requests DISAPPROVED on or SINCE (date): T-10// <Enter> (SEP 27, 2000)
DEVICE: <Enter>      Right Margin: 80// <Enter>
MPIF CMOR REQUEST LIST                SEP 27,2001  16:46    PAGE 1
                                     DATE
STATUS          REQUEST NUMBER      SITE          DATE
PATIENT
REASON FOR REQUEST
REVIEWER COMMENTS
-----
DISAPPROVED      500-4                SEP 24,2001
PATIENT109,ROGER TF1                ALBANY
T18 AUTO DISAPPROVE                SEP 24,2001
Multiple Request to Change CMOR, Other Request received 1st
DISAPPROVED      553-4                SEP 24,2001
PATIENT109,ROGER TF1                BPSAGINAW
T18 AUTO DISAPPROVE 1 OF 2                SEP 24,2001
Multiple Request to Change CMOR, Other Request received 1st
    
```

**Figure 4-59: Report- CMOR Requests Disapproved**

|                                       |                               |
|---------------------------------------|-------------------------------|
| <b>Report- CMOR Requests Approved</b> | <b>[MPIF APPROVED REPORT]</b> |
|---------------------------------------|-------------------------------|

This report prints the CMOR requests that have an approved status starting with the date selected by the user.

```

Select Coordinating Master of Record (CMOR) Request Option: app <Enter> Report -
CMOR Requests Approved
Display requests APPROVED on or SINCE (date): T-10// T-366 <Enter> (SEP 26, 2000)
DEVICE: <Enter>      Right Margin: 80// <Enter>
MPIF CMOR REQUEST LIST          SEP 27,2001 16:47          PAGE 1
                                DATE
STATUS      REQUEST NUMBER    DATE
PATIENT                                REVIEWED
                                SITE
                                DATE
REASON FOR REQUEST                    REQUESTED
-----
APPROVED      553-1          SEP 24,2001
PATIENT110,SAMUEL TF1          BPSAGINAW
T18 1 OF 2                                SEP 24,2001
APPROVED      999-5          SEP 24,2001
PATIENT111,HARRY TF1          BPSAGINAW
T18 1 OF 2                                SEP 24,2001
APPROVED      553-5          SEP 25,2001
PATIENT112,WILLIAM TF1        ALBANY
CHECKING HL7 PURGE
    
```

**Figure 4-60: Report- CMOR Requests Approved option**



The background job AUTO CHANGE CMOR NIGHT JOB will look at all pending CMOR requests that have been received and if they are older than 14 days, then they will be processed as if the auto-accept parameter was enabled.



For more information on the Coordinating Master of Record (CMOR) Request Menu, please refer to Chapter 8 titled, “Managing Incoming and Outgoing CMOR Requests.”

## MPI/PD IRM Menu

This menu provides Information Resource Management (IRM) personnel with the options needed to maintain the Master Patient Index/Patient Demographics (MPI/PD) software.

```

Select MPI/PD Master Menu Option: IRM <Enter> MPI/PD IRM Menu

      Link and Process Status Display
      Unresolved Exception Summary

Select MPI/PD IRM Menu Option:
  
```

**Figure 4-61: MPI/PD IRM Menu**

|  |                                       |
|--|---------------------------------------|
| <b>Link and Process Status Display</b> | <b>[RG LINKS AND PROCESS DISPLAY]</b> |
|--|---------------------------------------|

This option is used to monitor the status of MPI/PD related functions and messaging. The monitor displays the following information:

- HL links that currently have messages to be processed on either the inbound or outbound queues and the current STATE of the link.
- Status of MPI/PD background jobs.
- Current audit status on the NAME (#.01) field in the PATIENT file (#2).
- Current status of the SEND parameters for HL7 messaging.
- Local link management information.

```

Select MPI/PD IRM Menu Option: Link <Enter> and Process Status Display

Logical Link Monitor:
=====

<<Run - Oct 28, 2002@13:39:56>>
Outgoing messages:

Incoming messages:

MPI/PD Process Monitor:
=====

Checking VAFC BATCH UPDATE background job...
  (Total DATA UPDATES waiting to be processed = 0)
  (Total TREATING FACILITY UPDATES waiting to be processed = 0)
=> VAFC BATCH UPDATE scheduled to run OCT 28, 2002@13:21.

Checking MPIF LOC/MIS ICN RES background job... (Total Local ICNs = 195)
=> MPIF LOC/MIS ICN RES is scheduled to run JUL 24, 2004@11:50.
=> MPIF LOC/MIS ICN RES was last run May 11, 2004@14:11:19.

=> Audit on NAME (#.01) field of PATIENT (#2) file set to <<YES, ALWAYS>>

Checking SEND Parameters for HL7 messaging...
=> SEND PIMS HL7 V2.3 MESSAGES currently set to << SEND MESSAGES >>.
=> STOP MPI/PD MESSAGING currently set to << SEND MESSAGES >>.

Checking SHUTDOWN LLP? field and TCP/IP SERVICE TYPE for VADCRN...
=> SHUTDOWN LLP? currently set to << NO >>.
=> TCP/IP SERVICE TYPE currently set to << SINGLE LISTENER >>.
=> Logical Link MPIVA currently set to << TCP >>.
=> HL LINK MANAGER is currently << RUNNING >>.
    
```

**Figure 4-62: Link and Process Status Display**



Patch RG\*1.0\*20 has added the Class I option, Link and Process Status Display, to both the MPI/PD IRM Menu and the MPI/PD Patient Admin Coordinator Menu. Once a Class III utility, Link and Process Status Display is used to monitor the status of MPI/PD related functions and messaging. The data provided by this option can also be generated from the Master Patient Index (MPI), via a remote procedure call, for use by the MPI Data Quality Management team.

|                                     |                            |
|-------------------------------------|----------------------------|
| <b>Unresolved Exception Summary</b> | <b>[RG STATUS DISPLAY]</b> |
|-------------------------------------|----------------------------|

The Unresolved Exception Summary calculates and presents totals for the following data:

- unresolved exceptions in the CIRN HL7 EXCEPTION LOG file (#991.1) for the MPI/PD related entries (e.g., internal entry numbers 209, 213-218, 227) in the CIRN HL7 EXCEPTION TYPE file (#991.11).
- unique patients with exceptions.
- unresolved exceptions in the PATIENT DATA EXCEPTION file (#391.98) with an EXCEPTION STATUS file (#391.984) value of ACTION REQUIRED, DATA EXAMINED or BEING REVIEWED.
- Entries in the MPIF CMOR REQUEST file (#984.9) with a STATUS (#.06) field value of OPEN, REQUESTED, PENDING APPROVAL, APPROVED or DISAPPROVED.

The Exception Handler and Patient Data Review numbers indicate how up-to-date a site is in exception resolution. The CMOR request numbers specify how many requests for change of CMOR have been sent and their resulting status. This data can be useful in reducing the number of exceptions.

```

Select MPI/PD IRM Menu Option: UNRESOLVED <Enter> Exception Summary

Exception Handler Entries:
-----
SSN Match Failed                23
Name Doesn't Match              1
Death Entry on MPI not in VISTA 1
Death Entry on Vista not in MPI 1
Potential Matches Returned      3
Multiple ICNs                   2

Total number of exceptions:     31
Total unique patient exceptions: 0

The MPI/PD Exception Purge process last ran Oct 21, 2002@10:03:27.

Patient Data Review Entries:
-----
ACTION REQUIRED                   10
DATA EXAMINED                   13

CMOR Requests Status:
-----
REQUESTED                       3
APPROVED                        25

Current total number of National ICNs = 357
Current total number of Local ICNs = 195
    
```

**Figure 4-63: Unresolved Exception Summary**



Patch RG\*1.0\*20 has revised the MPI/PD Status Display [RG STATUS DISPLAY] option. The link and processes information has been removed from this display, as that data is now available on the new Link and Process Status Display [RG LINKS & PROCESS DISPLAY] option. The menu text for this option has been changed from MPI/PD Status Display to Unresolved Exception Summary.

## Standalone Options

|                                      |                                |
|--------------------------------------|--------------------------------|
| <b>MPI/PD HL7 EXCEPTION NOTIFIER</b> | <b>[RG EXCEPTION NOTIFIER]</b> |
|--------------------------------------|--------------------------------|

This option is used to notify members of the RG CIRN DEMOGRAPHIC ISSUES Mail Group that there are exceptions to review. It is not a user option and should not be added to user menus.

|                               |                             |
|-------------------------------|-----------------------------|
| <b>MPI/PD EXCEPTION PURGE</b> | <b>[RG EXCEPTION PURGE]</b> |
|-------------------------------|-----------------------------|

This option purges duplicate entries, resolved entries over 30 days old from the CIRN HL7 EXCEPTION LOG (#991.1) file. IRM staff can schedule the background job via TaskMan to run once a week during off-hours at a time that will not conflict with backups. It should not be placed on user menus. Users are offered the opportunity to purge these exceptions when using the MPI/PD Exception Handling [RG EXCEPTION HANDLING] option.

|                                     |                               |
|-------------------------------------|-------------------------------|
| <b>LOCAL/MISSING ICN RESOLUTION</b> | <b>[MPIF LOC/MIS ICN RES]</b> |
|-------------------------------------|-------------------------------|

This option will start the background job of resolving local and missing ICNs against the MPI. It is recommended that this option be scheduled to run via TaskMan every 600 seconds (Patch MPIF\*1.0\*35).



A new field, LOCAL/MISSING DATE LAST RAN (#.04), was created in the CIRN SITE PARAMETER (#991.8) file in patch RG\*1.0\*23 to hold the last date the Local/Missing ICN Resolution Background job ran. The field will be populated by the routine ^MPIFRES.

|                                   |                        |
|-----------------------------------|------------------------|
| <b>MPI/PD HL7 DIAGNOSTIC MENU</b> | <b>[RGMT DIAG MGR]</b> |
|-----------------------------------|------------------------|

This standalone menu contains a diagnostic tool and reports to assist with problem resolution for MPI/PD VistA HL7 messaging. It should not be attached to any menu. This diagnostic tool will be used primarily by the MPI/PD VistA development team and NVS.

```

Select MPI/PD HL7 Diagnostic Menu Option:

  CMP      Compile MPI/PD HL7 Data
  RPT      MPI/PD HL7 Message Status Report
  SNG      MPI/PD HL7 Activity by Patient/Single Protocol
  ALL      MPI/PD HL7 Activity by Patient/All Protocols

Select MPI/PD HL7 Diagnostic Menu Option:
    
```

**Figure 4-64: MPI/PD HL7 Diagnostic Menu options**

|                                |                                     |
|--------------------------------|-------------------------------------|
| <b>COMPILE MPI/PD HL7 DATA</b> | <b>[RGMT DIAG COMPILE HL7 DATA]</b> |
|--------------------------------|-------------------------------------|

This utility searches the HL7 MESSAGE TEXT (#772) file for a selected date range. Each HL7 message in the date range is examined. If the RELATED EVENT PROTOCOL field contains the MPI/PD protocols (e.g., "VAF", "RG", or "MPI") data is compiled into the ^XTMP("RGMT", "HL" array.

A cross-reference is built on patient ICN and DFN for faster data retrieval for the associated reports.

|   |                                  |
|---|----------------------------------|
| <b>MPI/PD HL7 MESSAGE STATUS REPORT</b> | <b>[RGMT DIAG STATUS REPORT]</b> |
|---|----------------------------------|

This option prints information found during the COMPILE MPI/PD HL7 DATA option. The MPI/PD HL7 MESSAGE STATUS REPORT is generated from the ^XTMP("RGMT", "HL" array. The report is sorted by RELATED EVENT PROTOCOL, date, transmission type, and status.

Either a detailed or summary report can be printed for a selected date range. The summary report displays the total number of messages for each date, transmission type, and status. The right margin for this report is 80.

The detailed report can be printed for a single or all protocols and includes information from each HL7 message. The detailed report displays the related event protocol date, transmission type, status, message header date, date processed, internal entry number (IEN) from the HL7 MESSAGE TEXT (#772) file, message identification number, and whether or not the message has been purged. The right margin for this report is 132.

|   |                                    |
|---|------------------------------------|
| <b>MPI/PD HL7 ACTIVITY BY PATIENT/SINGLE PROTOCOL</b> | <b>[RGMT DIAG SINGLE PROTOCOL]</b> |
|---|------------------------------------|

This option prints information found during the COMPILE MPI/PD HL7 DATA compilation for activity related to a specific protocol. The ^XTMP("RGMT", "HL" array is searched for a user selected protocol, date range, transmission type and patient.

The report prints the patient's name, protocol, date range, transmission type, internal entry number (IEN) from the HL7 MESSAGE TEXT (#772) file, the date and status. The HL7 message data found in the MESSAGE TEXT field is displayed. The right margin for this report is 80.

|   |                                  |
|---|----------------------------------|
| <b>MPI/PD HL7 ACTIVITY BY PATIENT/ALL PROTOCOLS</b> | <b>[RGMT DIAG ALL PROTOCOLS]</b> |
|---|----------------------------------|

This option prints information found during the COMPILE MPI/PD HL7 DATA compilation for activity related to ALL protocols. The ^XTMP("RGMT", "HL" array is searched for a user selected patient and date range.

The report prints the patient's name, date range, protocol, transmission type, internal entry number (IEN) from the HL7 MESSAGE TEXT (#772) file, the date and status. The HL7 message data found in the MESSAGE TEXT field is displayed. The right margin for this report is 80.



## Chapter 5: Background Jobs

The following three jobs need to be tasked to run in the background in support of MPI/PD.

### **AUTO CHANGE CMOR NIGHT JOB**

[MPIF CMOR REQUEST AUTO JOB]

This job will look at all pending CMOR requests that have been received and if they are older than 14 days, they will be processed as if the auto-accept parameter was enabled.

### **LOCAL/MISSING ICN RESOLUTION**

[MPIF LOC/MIS ICN RES]

This option will start the background job of resolving local and missing ICNs against the MPI.

It is recommended that this option be scheduled to run via TaskMan every 600 seconds (Patch MPIF\*1.0\*35).



A new field, LOCAL/MISSING DATE LAST RAN (#.04), was created in the CIRN SITE PARAMETER file (#991.8) to hold the last date the Local/Missing ICN Resolution Background job ran. The field will be populated by the routine ^MPIFRES.

#### **Local ICNs**

ICNs are created for new patients locally at the site when the MPI is unavailable to assign an ICN in real-time (e.g., the Direct Connect could not be established). Local ICNs contain the same number of digits as a national ICN. The only difference is that the first three digits are the VAMCs station number.



It is not recommended that Local ICNs be sent to remote databases as they will only be known at the local facility that assigned them.

#### **Missing ICNs**

Patient records get an ICN assignment from the MPI in real time if they are added to the PATIENT file (#2) using any one of the PIMS options Load/Edit Patient Data, 10-10T Registration, Register a Patient, and Electronic 10-10EZ Processing.

Missing ICNs result from patient records that are added to the PATIENT file (#2) via means other than through these PIMS options. These records will not get an ICN assignment from the MPI in real time and they will be flagged internally for resolution.

## Resolution of Local/Missing ICNs

The Local/Missing ICN Resolution background job should be scheduled via TaskMan to run every 600 seconds (Patch MPIF\*1.0\*35). The Local/Missing ICN Resolution job will find all patients in the local PATIENT file (#2) with a local ICN or that have been flagged as missing an ICN and send these patients to the MPI for a national ICN assignment. These patients are sent to the MPI requesting an ICN and CMOR, in batch HL7 messages (maximum of 100 patient entries each).



MPIF\*1.0\*10 has placed a screen on this job to not send patients that have a potential match exception, as they need manual intervention to be resolved. MPIF\*1.0\*15 has added a date/time stamp to the “AICNL” cross-reference so that the Local ICNs will only be sent to the MPI once for resolution.

Through this background job, the MPI performs the following actions based on these possible scenarios:

1. If the patient is not already on the MPI:
  - a. The patient is added to the index.
  - b. The patient is assigned an ICN.
  - c. The site sending the message becomes the CMOR.
  - d. ICN and CMOR are returned to the site and corresponding fields are updated.
2. If an exact match is found for the patient on the MPI:
  - a. ICN and CMOR are returned to the site.
  - b. The site is added to the list of treating facilities where the patient has been seen.
  - c. Messages are sent to the list of treating facilities to add the new site.
3. If multiple patient entries are found on the MPI that closely match the patient’s identifying information:
  - a. The HL7 message is sent back to the sending site and processed, instead of the ICN and CMOR normally returned. A new entry is made in the CIRN HL7 EXCEPTION LOG file (#991.1) indicating that a list of potential matches has been found for this patient.
  - b. The View Potential Match Patient option is available on the Message Exception Menu. It prints a list of patients, as shown in Figure 5-1. It lists patient who have been identified as having multiple potential matches on the MPI and who haven’t yet been resolved using the option Single Patient Initialization to MPI. Patient entries are listed by Name, Social Security Number, Date of Birth and DFN. The status of the patient is current as of the date/time the report is generated. This data is pulled from the CIRN HL7 EXCEPTION LOG file (#991.1). Prior to producing the report, duplicate POTENTIAL MATCH patients will be purged from the file.
  - c. These patients must then be resolved using the Single Patient Initialization to MPI option. The Single Patient Initialization to MPI option also establishes the TCP/IP direct connection with the MPI. It can also be used to initialize a patient record to the MPI that currently exists in the PATIENT file (#2) but that has no ICN and CMOR designation. (This option is documented in the previous section “Menus and Options” under the options on the Master

Patient Index Menu of the MPI/PD Patient Admin Coordinator Menu). It is recommended that this option be used when potential duplicate records have been found during the initialization phase or the Missing/Local ICN resolution job.

```
Select Message Exception Menu Option: View <Enter> Potential Match Patient

...one moment please..

0 duplicate patient entries for POTENTIAL MATCH exceptions were identified and
deleted from the CIRN HL7 EXCEPTION LOG file (#991.1).

The right margin for this report is 80.

DEVICE: HOME// <Enter>      Right Margin: 80// <Enter>

PATIENT LIST of Potential Matches to be Resolved          Page: 1
Printed at ALBANY, NY on Aug 08, 2000@17:09

Patient Name                SSN                DOB                DFN
-----
PATIENT96,JOHN R           999456789        1940                279
PATIENT99,DEBBIE          999123123        1955                337
PATIENT100,HARRY P        999126126P       1952                381
PATIENT101,TILLIE         999546546        1952                320
PATIENT112,FREDDY        999222222P       1952                319
TOTAL: 5
```

**Figure 5-1: Report listing patients identified as having multiple potential matches on the MPI**



The MPI/PD Exception Handling option can also be used to produce a report with a list of exceptions that have not yet been processed. The list can be sorted by date (default), patient or exception type.

## UPDATE BATCH JOB FOR HL7 V. 2.3

[VAFC BATCH UPDATE]

The event of updating patient information can take place from several different options within VistA, including VA FileMan. Changes to any of the fields listed below are recorded and an entry is created in the ADT/HL7 PIVOT file (#391.71). The entry is then marked as pending to be transmitted. Direct sets to the globals cannot be collected. This background job will periodically collect (via a scheduled job) these marked events and broadcast an ADT-A08 Update Patient Information message. Because it is not possible to determine if the editing of the field is complete, this background job will periodically collect these marked events and broadcast an ADT A08 message (i.e., Update Patient Information). This is a PIMS-generated HL7 message.

| Field Number | Field Name                               |
|--------------|--|
| .01          | NAME                                     |
| .02          | SEX                                      |
| .03          | DATE OF BIRTH                            |
| .05          | MARITAL STATUS                           |
| .08          | RELIGIOUS PREFERENCE                     |
| .09          | SOCIAL SECURITY NUMBER                   |
| .111         | STREET ADDRESS [LINE 1]                  |
| .1112        | ZIP+4                                    |
| .112         | STREET ADDRESS [LINE 2]                  |
| .113         | STREET ADDRESS [LINE 3]                  |
| .114         | CITY                                     |
| .115         | STATE                                    |
| .116         | ZIP CODE                                 |
| .117         | COUNTY                                   |
| .131         | PHONE NUMBER [RESIDENCE]                 |
| .132         | PHONE NUMBER [WORK]                      |
| .211         | K-NAME OF PRIMARY NOK                    |
| .219         | K-PHONE NUMBER                           |
| .2403        | MOTHER'S MAIDEN NAME                     |
| .301         | SERVICE CONNECTED?                       |
| .302         | SERVICE CONNECTED PERCENTAGE             |
| .31115       | EMPLOYMENT STATUS                        |
| .313         | CLAIM NUMBER                             |
| .323         | PERIOD OF SERVICE                        |
| .351         | DATE OF DEATH                            |
| .361         | PRIMARY ELIGIBILITY CODE                 |
| 1            | ALIAS (Patch DG*5.3*575)                 |
| 2            | RACE INFORMATION (Patch DG*5.3*575)      |
| 6            | ETHNICITY INFORMATION (Patch DG*5.3*575) |
| 391          | TYPE                                     |
| 991.01       | INTEGRATION CONTROL NUMBER               |
| 991.02       | ICN CHECKSUM                             |
| 991.03       | COORDINATING MASTER OF RECORD            |
| 994          | MULTIPLE BIRTH INDICATOR                 |
| 1901         | VETERAN (Y/N)?                           |

**Figure 5-2: Data elements monitored in the PATIENT file (#2) for changes**

This background job also sends out Treating Facility “add me” messages and Treating Facility Update messages.

(For more information on the ADT A08 Message- Update Patient Information, see the *Master Patient Index (MPI) VistA HL7 Interface Specifications*.)



This background job was originally exported in patch DG\*5.3\*91.

## Background Jobs

## Chapter 6: PIMS Options

This chapter documents in detail the daily interaction between the Master Patient Index (MPI) and the following Patient Information Management System (PIMS) options:

1. Load/Edit Patient Data [DG LOAD PATIENT DATA]
2. Register a Patient [DG REGISTER PATIENT]
3. 10-10T Registration [DGRPT 10-10T REGISTRATION]
4. Electronic 10-10EZ Processing [EAS EZ 1010EZ PROCESSING]

Two other PIMS options that don't interact with, but are impacted by the MPI are listed below. The computer dialogue resulting from these options show the Coordinating Master of Record (CMOR) only.

1. Patient Inquiry [DG PATIENT INQUIRY]
2. Preregister a Patient [DGPRE PRE-REGISTER OPTION]

### **Overview of PIMS Interaction with the MPI**

During the daily operations of the MPI, a real-time TCP/IP connection (Direct Connect) to the index is established via the PIMS options Load/Edit Patient Data, Register a Patient, 10-10T Registration, and Electronic 10-10EZ Processing . This takes place when using these PIMS option to add patients to the PATIENT file (#2), or when selecting patients that already exist in the PATIENT file (#2), but do not have an Integration Control Number (ICN) – local ICN or national ICN. This direct connection to the MPI makes it possible for the immediate return of an ICN and Coordinating Master of Record (CMOR) designation for a patient that does not currently have one assigned in your site's PATIENT file (#2).

Each time a patient is checked against the MPI via any one of these four PIMS options, one of the following three scenarios will occur:

## 1. Patient is Not Already on the MPI:

- a. The patient is added to the index.
- b. The patient is assigned an ICN.
- c. The site sending the message becomes the CMOR.

Figure 6-1 shows the process for adding a new patient to the MPI and getting an ICN assignment. This process is the same for each of the four PIMS options listed in this chapter. In this example we are using the PIMS option Register a Patient.

```

Select Registration Menu Option: REGISTER <Enter> a Patient

Select PATIENT NAME: ALPHONSE, LAWRENCE
  ARE YOU ADDING 'ALPHONSE,LAWRENCE' AS A NEW PATIENT (THE 995TH)? No// Y <Enter>
(Yes)
  PATIENT SEX: M <Enter> MALE
  PATIENT DATE OF BIRTH: 2/2/1952 <Enter> (FEB 02, 1952)
  PATIENT SOCIAL SECURITY NUMBER: 223376847
  PATIENT TYPE: SC <Enter> VETERAN
  PATIENT VETERAN (Y/N)? : Y <Enter> YES

  ...searching for potential duplicates

  No potential duplicates have been identified.

  ...adding new patient

  Please enter the following additional information:

Patient name components--
FAMILY (LAST) NAME: ALPHONSE// <Enter>
GIVEN (FIRST) NAME: LAWRENCE// <Enter>
MIDDLE NAME: <Enter>
PREFIX: <Enter>
SUFFIX: <Enter>
DEGREE:
  PATIENT SERVICE CONNECTED?: Y <Enter> YES
  PATIENT MULTIPLE BIRTH INDICATOR: N <Enter> NO

Please verify or update the following information:

MOTHER'S MAIDEN NAME: PIERRE
PLACE OF BIRTH [CITY]: BROOKLYN
PLACE OF BIRTH [STATE]: NEW YORK
Select ALIAS: <Enter>

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

Patient was not found in the MPI...

Message sent to MPI requesting Patient to be added.

ALPHONSE,LAWRENCE                223-37-6847                FEB 2,1952
=====
                                COORDINATING MASTER OF RECORD: ALBANY
Address: STREET ADDRESS UNKNOWN    Temporary: NO TEMPORARY ADDRESS
                                UNK. CITY/STATE
  
```

```

County: UNSPECIFIED                From/To: NOT APPLICABLE
Phone: UNSPECIFIED                 Phone: NOT APPLICABLE
Office: UNSPECIFIED
Bad Addr:

Confidential Address:              Confidential Address Categories:
      NO CONFIDENTIAL ADDRESS
From/To: NOT APPLICABLE

Primary Eligibility: UNSPECIFIED
Other Eligibilities:

ALPHONSE,LAWRENCE                223-37-6847                FEB 2,1952
=====
                        COORDINATING MASTER OF RECORD: ALBANY

Status      : PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER

Future Appointments: NONE

Remarks:
      Money Verified: NOT VERIFIED      Service Verified: NOT VERIFIED
Do you wish to request a HINQ inquiry ? No// <Enter> (No)

Select Admitting Area: ^

Financial query sent ...
Do you want to enter Patient Data? Yes// N <Enter> (No)

Checking data for consistency...

==> 12 inconsistencies found in 0 seconds...
==> 12 inconsistencies filed in 0 seconds...

ALPHONSE,LAWRENCE (223-37-6847)                FEB 2,1952
=====
5  - MARITAL STATUS UNSPECIFIED                6  - RELIGION UNSPECIFIED
8  - ADDRESS DATA INCOMPLETE                  12 - SC% UNSPECIFIED FOR SC VET
13 - POS UNSPECIFIED                          14 - ELIG CODE UNSPECIFIED
52 - INSURANCE PROMPT UNANSWERED              53 - EMPLOYMENT STATUS UNANSWERED
55 - INCOME DATA MISSING**                   61 - MISSING PHONE NUMBER DATA
62 - EMERGENCY CONTACT NAME MISSING           99 - CAN'T PROCESS FURTHER

Inconsistencies followed by two (2) asterisks [**] must be corrected by
using the appropriate MAS menu option(s).
All items not followed by an asterisk can be edited at this time.  If these
items are not corrected at this time, a bulletin will be sent to the
appropriate hospital personnel.

DO YOU WANT TO UPDATE THESE INCONSISTENCIES NOW? Yes// N <Enter> (No)

Initial notification message sent...

Is the patient currently being followed in a clinic for the same condition? N
<Enter> (No)

Is the patient to be examined in the medical center today? Yes// ^

```

**Figure 6-1: No match found, patient is added to MPI**

## 2. Exact Record Match Found for Patient on the MPI:

- a. Your site is added to the list of treating facilities where the patient has been seen and to the subscription list.
- b. The CMOR remains the same.

Figure 6-2 shows the MPI process for updating the ICN and CMOR assignment if an exact record match is found for the patient on the index. The process is the same for each of the four PIMS options listed in this chapter. For the purposes of this example, we are using the PIMS option Register a Patient.

```

Select Registration Menu Option: register <Enter> a Patient

Select PATIENT NAME: LALA,BILLY
  ARE YOU ADDING 'LALA,BILLY' AS A NEW PATIENT (THE 698TH)? No// Y <Enter> (Yes)
  PATIENT SEX: M <Enter> MALE
  PATIENT DATE OF BIRTH: FEB 22,1949 <Enter> (FEB 22, 1949)
  PATIENT SOCIAL SECURITY NUMBER: 676789899
  PATIENT TYPE: SC <Enter> VETERAN
  PATIENT VETERAN (Y/N)?: Y <Enter> YES

  ...searching for potential duplicates

  No potential duplicates have been identified.

  ...adding new patient

  Please enter the following additional information:

Patient name components--
FAMILY (LAST) NAME: LALA// <Enter> LALA
GIVEN (FIRST) NAME: BILLY// <Enter> BILLY
MIDDLE NAME: <Enter>
PREFIX: <Enter>
SUFFIX: <Enter>
DEGREE: <Enter>
  PATIENT SERVICE CONNECTED?: Y <Enter> YES

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

Found Patient LALA,BILLY in MPI, updating ICN and CMOR...

LALA,BILLY                                676-78-9899                                FEB 22, 1949
=====
                COORDINATING MASTER OF RECORD: BPSAGINAW
Address: STREET ADDRESS UNKNOWN            Temporary: NO TEMPORARY ADDRESS
        UNK. CITY/STATE

County: UNSPECIFIED                        From/To: NOT APPLICABLE
Phone: UNSPECIFIED                          Phone: NOT APPLICABLE
Office: UNSPECIFIED
        POS: UNSPECIFIED                    Claim #: UNSPECIFIED
        Relig: UNSPECIFIED                  Sex: MALE

Primary Eligibility: UNSPECIFIED
Other Eligibilities:
  
```

```

LALA,BILLY                                676-78-9899                                FEB 22, 1949
=====
                                COORDINATING MASTER OF RECORD: BPSAGINAW

Status      : PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER

Future Appointments: NONE

Remarks:
    Money Verified: NOT VERIFIED           Service Verified: NOT VERIFIED
Do you wish to request a HINQ inquiry ? No// <Enter> (No)

Select Admitting Area: ^
    
```

**Figure 6-2: Exact Match found on MPI. Patient file (#2) updated.**

### 3. Multiple Patient Records Found on the MPI that Closely Match Patient's Identifying Information:

- a. An HL7 message is sent back to the sending site and processed, instead of the ICN and CMOR normally returned.
- b. A Local ICN is assigned and the CMOR is updated to this site.
- c. A new entry is made in the CIRN HL7 EXCEPTION LOG file (#991.1) indicating that a list of potential matches has been found for this patient.

Figure 6-3 shows that LALA,BILLY has been added to the local PATIENT file (#2) as a new patient. Internally, the MPI was queried for an ICN and CMOR designation for this patient. Potential matches were returned from the MPI that closely match this patient's identifying information.

The MPI process for finding potential record matches, and resulting from this, assigning a local ICN for the patient is the same for each of the four PIMS options listed in this chapter. For the purposes of this example, we are using the PIMS option Register a Patient.

```
Select Registration Menu Option: REGISTER <Enter> a Patient

Select PATIENT NAME: LALA,BILLY
  ARE YOU ADDING 'LALA,BILLY' AS A NEW PATIENT (THE 891ST)? No// Y <Enter> (Yes)
  PATIENT SEX: M <Enter> MALE
  PATIENT DATE OF BIRTH: AUG 12,1956 <Enter> (AUG 12, 1956)
  PATIENT SOCIAL SECURITY NUMBER: 676789899
  PATIENT TYPE: SC <Enter> VETERAN
  PATIENT VETERAN (Y/N)?: Y <Enter> YES

  ...searching for potential duplicates

  No potential duplicates have been identified.

  ...adding new patient

  Please enter the following additional information:

Patient name components--
FAMILY (LAST) NAME: LALA// <Enter> LALA
GIVEN (FIRST) NAME: BILLY// <Enter> BILLY
MIDDLE NAME: B <Enter>
PREFIX: <Enter>
SUFFIX: JR. <Enter> (JR)
DEGREE: <Enter>
Ok to file 'LALA,BILLY and its name components? Yes// <Enter> (Yes)
  PATIENT SERVICE CONNECTED?: Y <Enter> (YES)

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

Potential Matches Found, Assigning Local ICN...

LALA,BILLY B JR                676-78-9899                FEB 22,1949
```

```

=====
                COORDINATING MASTER OF RECORD: ALBANY
Address: STREET ADDRESS UNKNOWN          Temporary: NO TEMPORARY ADDRESS
                UNK. CITY/STATE
County: UNSPECIFIED                      From/To: NOT APPLICABLE
Phone: UNSPECIFIED                      Phone: NOT APPLICABLE
Office: UNSPECIFIED

Primary Eligibility: UNSPECIFIED
Other Eligibilities:

Status      : PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER

Future Appointments: NONE

Remarks:
    Money Verified: NOT VERIFIED          Service Verified: NOT VERIFIED
Do you wish to request a HINQ inquiry ? No// <Enter> (No)

Select Admitting Area: ^
    
```

**Figure 6-3: MPI found possible matches. Local ICN assigned to patient record**

- d. The View Potential Match Patient option is available on the Message Exception Menu, Figure 6-4. This option produces a list of patients who have been identified as having multiple potential matches on the MPI and who haven't yet been resolved using the option Single Patient Initialization to MPI (i.e., have not been assigned a national ICN or CMOR). Patient entries are listed by Name, Social Security Number, DOB, and DFN. The status of a patient is current as of the date/time the report is generated. This data is pulled from the CIRN HL7 EXCEPTION LOG file (#991.1). For example:

```

Select Message Exception Menu Option: View <Enter> Potential Match Patient

...one moment please..

0 duplicate patient entries for POTENTIAL MATCH exceptions were identified and
deleted from the CIRN HL7 EXCEPTION LOG file (#991.1).

The right margin for this report is 80.

DEVICE: HOME// <Enter>          Right Margin: 80// <Enter>

PATIENT LIST of Potential Matches to be Resolved          Page: 1
Printed at ALBANY, NY on Aug 08, 2000@17:09

Patient Name                SSN            DOB            DFN
-----
PATIENT96,JOHN R            999456789P    1940           279
PATIENT99,DEBBIE           999123123     1955           337
PATIENT100,HARRY P         999126126P    1952           381
PATIENT101,TILLIE          999546546     1952           320
PATIENT112,FREDDY         999222222P    1952           319
TOTAL: 5
    
```

**Figure 6-4: Potential Match Patient Report identifying multiple potential matches on the MPI**



The MPI/PD Exception Handling option can also be used to produce a report with a list of exceptions that have not yet been processed. You can sort the list by date (default), by patient, or by exception type. A user can also choose to view only those of selected exception type. For more information on how to use this option, refer to the “MPI/PD Exception Handling” option on the Message Exception Menu in Chapter 5 of this manual.

- e. The patients found in this report must be resolved using the option Single Patient Initialization to MPI.

The Single Patient Initialization to MPI option also establishes the TCP/IP direct connection with the MPI. It can also be used to initialize a patient record to the MPI that currently exists in the PATIENT file (#2), but that has no national ICN and CMOR designation. (This option is documented in Chapter 5 in the “Single Patient Initialization to MPI” option). It is recommended that this option be used when potential duplicate records have been found during the initialization phase or Missing/Local ICN resolution job.

## PIMS Option: Load/Edit Patient Data

This section describes the interaction of the MPI and the PIMS option Load/Edit Patient Data. The user attempting to do the following:

1. Add a patient to the local PATIENT file (#2) and to the MPI for the first time.
2. Select a patient record for processing that currently exists in the local PATIENT file (#2) and who already has an ICN and CMOR.

### Add New Patient to MPI for First Time

Figure 6-4 shows a new patient being added to the PATIENT file (#2) using the PIMS option Load/Edit Patient Data. The patient is being added to the MPI for the first time. The MPI will return an ICN and CMOR assignment for that patient. Boldface text shows that the following procedures are taking place:

- A connection is made to the MPI.
- There is currently no matching patient entry in the MPI for this patient.
- The patient is added to the MPI.

Once a patient has been added to the MPI, the corresponding ICN and CMOR fields in the PATIENT file (#2) are updated. Notice in Figure 6-5, that the CMOR for this patient was returned from the MPI and is displayed in the computer dialogue.

```

Select Registration Menu Option: LOAD/EDIT <Enter> Patient Data

Select PATIENT NAME: PATIENT97, DAVE
  ARE YOU ADDING 'PATIENT97,DAVE' AS A NEW PATIENT (THE 971ST)? No// Y <Enter>
(Yes)
  PATIENT SEX: M <Enter> MALE
  PATIENT DATE OF BIRTH: 2/28/70 <Enter> (FEB 28, 1970)
  PATIENT SOCIAL SECURITY NUMBER: 999548444
  PATIENT TYPE: NSC <Enter> VETERAN
  PATIENT VETERAN (Y/N)?: Y <Enter> (YES)

  ...searching for potential duplicates

  No potential duplicates have been identified.

  ...adding new patient

  Please enter the following additional information:

Patient name components--
FAMILY (LAST) NAME: PATIENT97// <Enter>
GIVEN (FIRST) NAME: DAVE// <Enter>
MIDDLE NAME: CHARLES
PREFIX: <Enter>
SUFFIX: <Enter>
DEGREE: <Enter>
Ok to file 'PATIENT97,DAVE CHARLES' and its name components? Yes// <Enter> (Yes)
  PATIENT SERVICE CONNECTED?: N <Enter> (NO)
  PATIENT MULTIPLE BIRTH INDICATOR: <Enter>

Please verify or update the following information:

MOTHER'S MAIDEN NAME: SADKE
PLACE OF BIRTH [CITY]: <Enter>
PLACE OF BIRTH [STATE]: NEW YORK
Select ALIAS: <Enter>

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient...

Patient was not found in the MPI...

Message sent to MPI requesting Patient to be added.

PATIENT97,DAVE CHARLES                999-54-8444                FEB 28,1970
=====
                COORDINATING MASTER OF RECORD: ALBANY
Address: STREET ADDRESS UNKNOWN                Temporary: NO TEMPORARY ADDRESS
                UNK. CITY/STATE
County: UNSPECIFIED                From/To: NOT APPLICABLE
Phone: UNSPECIFIED                Phone: NOT APPLICABLE
Office: UNSPECIFIED

Confidential Address:                Confidential Address Categories:
                NO CONFIDENTIAL ADDRESS
From/To: NOT APPLICABLE

```

**When registering a new patient using LOAD/EDIT PATIENT DATA, these fields (MOTHER'S MAIDEN NAME, PLACE OF BIRTH [CITY] and [STATE], and ALIAS) are now asked prior to the MPI query.**

```

Primary Eligibility: UNSPECIFIED
Other Eligibilities:

PATIENT97,DAVE CHARLES                999-54-8444                FEB 28,1970
=====
                COORDINATING MASTER OF RECORD: ALBANY

Status      : PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER

Future Appointments: NONE

Remarks:
    Money Verified: NOT VERIFIED          Service Verified: NOT VERIFIED
Do you wish to request a HINQ inquiry ? No// <Enter> (No)

Financial query sent ...
Do you want to enter Patient Data? Yes// N <Enter> (No)

Checking data for consistency...

==> 12 inconsistencies found in 0 seconds...

==> 12 inconsistencies filed in 0 seconds...

PATIENT97,DAVE CHARLES (999-
=====
5  - MARITAL STATUS UNSPECIFIED
8  - ADDRESS DATA INCOMPLETE
14 - ELIG CODE UNSPECIFIED
53 - EMPLOYMENT STATUS UNANSWERED
61 - MISSING PHONE NUMBER DATA
64 - POB CITY/STATE MISSING

New data elements were added to the INCONSISTENT
DATA ELEMENTS (#38.6) file. These fields are: POB
CITY/STATE MISSING, MOTHER'S MAIDEN NAME
MISSING, and PSEUDO SSN IN USE.

                    NAME DATA MISSING**
                    EMERGENCY CONTACT NAME MISSING
                    - CAN'T PROCESS FURTHER

Inconsistencies followed by two (2) asterisks [**] must be corrected by
using the appropriate MAS menu option(s).

All items not followed by an asterisk can be edited at this time.  If these
items are not corrected at this time, a bulletin will be sent to the
appropriate hospital personnel.

DO YOU WANT TO UPDATE THESE INCONSISTENCIES NOW? Yes// N <Enter> (No)

Initial notification message sent...

Download VIC data? No// <Enter> (No)
    
```

**Figure 6-5: Load/Edit Patient Data – Add patient to PATIENT file (#2) and MPI for first time**

## Process Existing Patient Already on MPI

Figure 6-6 shows that once patients have been added to the MPI, they are assigned an ICN and CMOR. Anytime the PIMS option Load/Edit Patient Data (or any of the other three PIMS options: Register a Patient, 10-10T Registration, or Electronic 10-10EZ Processing) is used to process an existing patient that has an ICN and CMOR, the assigned CMOR is displayed in the resulting computer dialogue.

```

Select Registration Menu Option: LOAD/EDIT <Enter> Patient Data

Select PATIENT NAME: PATIENT98,BOB <Enter> PATIENT98,BOB      9-8-42      999678889
NO      NSC VETERAN

Please verify or update the following information:

NAME: PATIENT98,BOB//
DATE OF BIRTH: 09/08/1942//
SEX: MALE//
SOCIAL SECURITY NUMBER: 999678889//
MULTIPLE BIRTH INDICATOR:
MOTHER'S MAIDEN NAME: SECRETO,//
PLACE OF BIRTH [CITY]:
PLACE OF BIRTH [STATE]:
Select ALIAS:

PATIENT98,BOB                                999-67-8889                                SEP 8,1942
=====
                COORDINATING MASTER OF RECORD: ALBANY
Address: STREET ADDRESS UNKNOWN              Temporary: NO TEMPORARY ADDRESS
                UNK. CITY/STATE
County: UNSPECIFIED                          From/To: NOT APPLICABLE
Phone: UNSPECIFIED                           Phone: NOT APPLICABLE
Office: UNSPECIFIED
Bad Addr:

Confidential Address:                        Confidential Address Categories:
                NO CONFIDENTIAL ADDRESS
From/To: NOT APPLICABLE

Primary Eligibility: UNSPECIFIED
Other Eligibilities:
    
```

**Additional fields (MULTIPLE BIRTH INDICATOR, MOTHER'S MAIDEN NAME, PLACE OF BIRTH [CITY] and [STATE], and ALIAS) added to support the MPI Changes project.**

**Figure 6-6: Load/Edit Patient Data- Select patient for processing, already having ICN and CMOR assignment**

## PIMS Option: Register a Patient

The following describes the interaction between the MPI and the PIMS option Register a Patient when processing an existing patient. This patient does not have an ICN and CMOR assignment.

Boldface is used to highlight user responses to online prompts. It is also used to highlight computer dialogue that is new to this PIMS option based on its interaction with the MPI, showing:

1. A connection being made to the MPI.
2. That there are currently no matching patient entr(ies) in the MPI for this patient.
3. The patient being added to the MPI.

Once a patient has been added to the MPI, the corresponding ICN and CMOR fields in the PATIENT file (#2) are updated. Figure 6-7 shows that the CMOR (Coordinating Master of Record) for this patient was returned from the MPI and is displayed in the computer dialogue.

```

Select Registration Menu Option: REGISTER <Enter> a Patient

Select PATIENT NAME: PATIENT99, PAUL
  ARE YOU ADDING 'PATIENT99,PAUL' AS A NEW PATIENT (THE 973RD)? No// Y <Enter>
(Yes)
  PATIENT SEX: M <Enter> MALE
  PATIENT DATE OF BIRTH: 2/29/76 <Enter> (FEB 29, 1976)
  PATIENT SOCIAL SECURITY NUMBER: 999433245
  PATIENT TYPE: NSC <Enter> VETERAN
  PATIENT VETERAN (Y/N)?: Y <Enter> (YES)

...searching for potential duplicates

No potential duplicates have been identified.

...adding new patient

Please enter the following additional information:

Patient name components--
FAMILY (LAST) NAME: PATIENT99// <Enter>
GIVEN (FIRST) NAME: PAUL// <Enter>
MIDDLE NAME: <Enter>
PREFIX: <Enter>
SUFFIX: JR
DEGREE: <Enter>
Ok to file 'PATIENT99,PAUL JR' and its name components? Yes,

  PATIENT SERVICE CONNECTED?: N <Enter> NO
  PATIENT MULTIPLE BIRTH INDICATOR: ??
    The MULTIPLE BIRTH INDICATOR will designate whether or not
    the patient is part of a multiple birth (i.e. to identify
    twins, etc.)

    Choose from:
      N          NO
      Y          *MULTIPLE BIRTH*
  PATIENT MULTIPLE BIRTH INDICATOR: N <Enter> NO

Please verify or update the following information:

```

**The MULTIPLE BIRTH INDICATOR (#994) is a new field that has been added to the REGISTER A PATIENT option for input. The field has been added to the PATIENT (#2) file and is an identifier.**

MOTHER'S MAIDEN NAME: JONES  
 PLACE OF BIRTH [CITY]: <Enter>  
 PLACE OF BIRTH [STATE]: NY <Enter> NEW YORK  
 Select ALIAS: <Enter>

These fields  
 (MOTHER'S  
 MAIDEN NAME,  
 PLACE OF BIRTH  
 [CITY] and [STATE],  
 and ALIAS) are  
 now verified  
 when using the  
 option REGISTER  
 A PATIENT, prior  
 to the query to  
 the MPI.

Attempting to connect to the Master Patient Index in Austin.  
 If no SSN or inexact DOB or common name, this request  
 may take some time, please be patient...

Patient was not found in the MPI...

Message sent to MPI requesting Patient to be added.

PATIENT99,PAUL JR 999-43-3245 FEB 29,1976  
 =====

COORDINATING MASTER OF RECORD: ALBANY  
 Address: STREET ADDRESS UNKNOWN Temporary: NO TEMPORARY ADDRESS  
 UNK. CITY/STATE  
 County: UNSPECIFIED From/To: NOT APPLICABLE  
 Phone: UNSPECIFIED Phone: NOT APPLICABLE  
 Office: UNSPECIFIED

Confidential Address: Confidential Address Categories:  
 NO CONFIDENTIAL ADDRESS  
 From/To: NOT APPLICABLE

Primary Eligibility: UNSPECIFIED  
 Other Eligibilities:

PATIENT99,PAUL JR 999-43-3245 FEB 29,1976  
 =====

COORDINATING MASTER OF RECORD: ALBANY

Status : PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER

Future Appointments: NONE

Remarks:

Money Verified: NOT VERIFIED Service Verified: NOT VERIFIED  
 Do you wish to request a HINQ inquiry ? No// <Enter> (No)

Select Admitting Area: ??

Choose from:  
 ALBANY ADMITTING  
 TROY ADMITTING

Select Admitting Area: ALBANY <Enter> ADMITTING

PRINT BARCODE LABELS FOR PATIENT'S FOLDERS? YES// <Enter>

ISSUE REQUEST FOR RECORDS? YES// <Enter>

Financial query sent ...  
 Do you want to enter Patient Data? Yes// N <Enter> (No)

Checking data for consistency...

===> 12 inconsistencies found in 0 seconds...

===> 12 inconsistencies filed in 0 seconds...

**New data elements were added to the INCONSISTENT DATA ELEMENTS (#38.6) file. The consistency checker will now look to see if POB CITY/STATE and MOTHERS MAIDEN NAME fields are missing and if a pseudo SSN is in use.**

PATIENT99,PAUL JR (999-43-3245)

```

=====
5 - MARITAL STATUS UNSPECIFIED          6 - RELI
8 - ADDRESS DATA INCOMPLETE            13 - POS
14 - ELIG CODE UNSPECIFIED              52 - INSURANC
53 - EMPLOYMENT STATUS UNANSWERED       55 - INCOME D
61 - MISSING PHONE NUMBER DATA         62 - EMERGENCY CONTACT NAME MISSING
64 - POB CITY/STATE MISSING             99 - CAN'T PROCESS FURTHER
    
```

Inconsistencies followed by two (2) asterisks [\*\*] must be corrected by using the appropriate MAS menu option(s).

All items not followed by an asterisk can be edited at this time. If these items are not corrected at this time, a bulletin will be sent to the appropriate hospital personnel.

DO YOU WANT TO UPDATE THESE INCONSISTENCIES NOW? Yes// **N <Enter>** (No)

Initial notification message sent...

Is the patient currently being followed in a clinic for the same condition? **N <Enter>** (No)

Is the patient to be examined in the medical center today? Yes// **N <Enter>** (No)

Registration login date/time: NOW// **<Enter>** (MAY 13,2003@07:47)

TYPE OF BENEFIT APPLIED FOR: ??

Enter the type of care this patient has applied for whether it be inpatient (dom, hospital, or nursing home) or outpatient (dental, or non-dental).

Choose from:

- 1 HOSPITAL
- 2 DOMICILIARY
- 3 OUTPATIENT MEDICAL
- 4 OUTPATIENT DENTAL
- 5 NURSING HOME CARE

TYPE OF BENEFIT APPLIED FOR: **3 <Enter>** OUTPATIENT MEDICAL

TYPE OF CARE APPLIED FOR: ??

Enter the type of care that the patient is requesting service for. If the patient will be receiving treatment for plastic surgery, dental care, sterilization, or pregnancy, enter that choice. Otherwise, enter all other.

Choose from:

- 1 DENTAL
- 2 PLASTIC SURGERY
- 3 STERILIZATION
- 4 PREGNANCY
- 5 ALL OTHER

TYPE OF CARE APPLIED FOR: **5 <Enter>** ALL OTHER

FACILITY APPLYING TO: ALBANY// **<Enter>** 500A

REGISTRATION ELIGIBILITY CODE: HUMANITARIAN EMERGENCY

// **6 <Enter>** 6 NON-VETERAN

```
Updating eligibility status for this registration...

NEED RELATED TO AN ACCIDENT: N <Enter> NO
NEED RELATED TO OCCUPATION: N <Enter> NO

Do you wish to enroll in the VA Patient Enrollment System? YES// <Enter>

ENROLLMENT APPLICATION DATE: MAY 13, 2003// <Enter>

PREFERRED FACILITY: ALBANY// <Enter>

Application is pending for enrollment in the VA Patient Enrollment System...
Enrollment Date           : -none-
Enrollment Application Date : MAY 13, 2003
Enrollment Category       : IN PROCESS
Enrollment Status         : UNVERIFIED
Enrollment Priority        : -none-
Preferred Facility         : ALBANY
Enrollment Group Threshold : GROUP 8c

PRINT 10/10? Yes// N <Enter> (No)
ROUTING SLIP? Yes// N <Enter> (No)

Download VIC data? No// <Enter> (No)
```

**Figure 6-7: Register a Patient- Add new patient, and connect to MPI for first time**

## PIMS Option: 10-10T Registration

Figure 6-8 shows a new patient being added to the PATIENT file (#2) using the PIMS option 10-10T Registration. This patient is also being added to the MPI for the first time. The MPI will return an ICN and CMOR assignment for this patient.

Boldface is used to highlight user responses to online prompts. It is also used to highlight computer dialogue that is new to this PIMS option based on its interaction with the MPI, showing:

1. A connection being made to the MPI.
2. There are currently no matching patient entr(ies) in the MPI for this patient.
3. The patient being added to the MPI.

Once a patient has been added to the MPI, the corresponding ICN and CMOR fields in the PATIENT file (#2) are updated.

```

Select Registration Menu Option: 10-10T <Enter> Registration

Select PATIENT NAME: ABS, MARTIN
ARE YOU ADDING 'ABS,MARTIN' AS A NEW PATIENT (THE 976TH)? No// Y <Enter> (Yes)
PATIENT SEX: M <Enter> MALE
PATIENT DATE OF BIRTH: 1/14/45 <Enter> (JAN 14, 1945)
PATIENT SOCIAL SECURITY NUMBER: 456456777
PATIENT TYPE: NSC VETERAN
PATIENT VETERAN (Y/N)?: Y <Enter> YES

...searching for potential duplicates...

No potential duplicates have been identified.

...adding new patient

Please enter the following additional information:

Patient name components--
FAMILY (LAST) NAME: ABS// <Enter>
GIVEN (FIRST) NAME: MARTIN// <Enter>
MIDDLE NAME: <Enter>
PREFIX: <Enter>
SUFFIX: <Enter>
DEGREE: <Enter>
PATIENT SERVICE CONNECTED?: N <Enter> NO
PATIENT MULTIPLE BIRTH INDICATOR: ??
    The MULTIPLE BIRTH INDICATOR will designate whether or not
    the patient is part of a multiple birth (i.e. to identify
    twins, etc.).

Choose from:
    N          NO
    Y          *MULTIPLE BIRTH*
PATIENT MULTIPLE BIRTH INDICATOR: N <Enter> NO

Please verify or update the following information:

NAME: ABS,MARTIN// <Enter>
DATE OF BIRTH: 01/14/1945// <Enter>
  
```

**New MULTIPLE BIRTH INDICATOR field to indicate whether or not the patient is part of a multiple birth.**

SEX: MALE// <Enter>  
 SOCIAL SECURITY NUMBER: 456456777// <Enter>  
 MULTIPLE BIRTH INDICATOR: <Enter>  
 MOTHER'S MAIDEN NAME: CARLSBAD  
 PLACE OF BIRTH [CITY]: TAMPA  
 PLACE OF BIRTH [STATE]: FLORIDA  
 Select ALIAS: <Enter>

These fields (MULTIPLE BIRTH INDICATOR, MOTHER'S MAIDEN NAME, PLACE OF BIRTH [CITY] and [STATE], and ALIAS) are verified prior to the query to the MPI when using 10-10T REGISTRATION to register a new patient.

Attempting to connect to the Master Patient  
 If no SSN or inexact DOB or common name, this  
 may take some time, please be patient...

Patient was not found in the MPI...

Message sent to MPI requesting Patient to be added.

---Patient: Eligibility, Demographic---  
 Emergency Contact and Military Service  
 STREET ADDRESS [LINE 1]: 25 LAURA LANE  
 STREET ADDRESS [LINE 2]: <Enter>  
 ZIP+4: 10977  
 CITY: SPRING VALLEY// <Enter>  
 STATE: NEW YORK <Enter>  
 COUNTY: ROCKLAND <Enter>  
 PHONE NUMBER [RESIDENCE]: 555-354-0000  
 PHONE NUMBER [WORK]: <Enter>  
 BAD ADDRESS INDICATOR: <Enter>  
 MARITAL STATUS: UNKNOWN  
 K-NAME OF PRIMARY NOK: <Enter>  
 E-NAME: <Enter>  
 SERVICE BRANCH [LAST]: <Enter>  
 SERVICE NUMBER [LAST]: <Enter>  
 POW STATUS INDICATED?: U <Enter> UNKNOWN  
 CURRENT PH INDICATOR: N <Enter> NO  
 Enter your division: ??

- Choose from:
- |   |                  |       |
|---|------------------|-------|
| 1 | ALBANY           | 500A  |
| 2 | TROY             | 500T  |
| 3 | OLD ALBANY       | 500   |
| 4 | NEW TROY         | 500Z  |
| 5 | DENNIS TEST      | 500DK |
| 6 | SATELLITE CLINIC | 500BY |

Enter your division: 1 <Enter> ALBANY 500A??

Exit Interview? YES// NO

---Marital---  
 MARRIED LAST CALENDAR YEAR: NO// <Enter> NO

---Income---  
 LAST YEAR'S ESTIMATED "HOUSEHOLD" TAXABLE INCOME: <Enter>

---Insurance---

COVERED BY HEALTH INSURANCE?: ??

Enter 'Y' if this patient is covered by health insurance, 'N' if not.  
 Choose from:

```

      Y      YES
      N      NO
      U      UNKNOWN
COVERED BY HEALTH INSURANCE?: U <Enter> UNKNOWN

---HINQ Inquiry---
      Money Verified: NOT VERIFIED      Service Verified: NOT VERIFIED
Do you wish to request a HINQ inquiry ? No// <Enter> (No)

---Consistency Checker---

Checking data for consistency...

==> 8 inconsistencies found in 0 seconds...

==> 8 inconsistencies filed in 0 seconds...

ABS,MARTIN (456-45-6777)                                JAN 14,1945
=====
6  - RELIGION UNSPECIFIED                13 - POS UNSPECIFIED
14 - ELIG CODE UNSPECIFIED                53 - EMPLOYMENT STATUS UNANSWERED
55 - INCOME DATA MISSING**              61 - MISSING PHONE NUMBER DATA
62 - EMERGENCY CONTACT NAME MISSING      99 - CAN'T PROCESS FURTHER

Inconsistencies followed by two (2) asterisks [**] must be corrected by
using the appropriate MAS menu option(s).

All items not followed by an asterisk can be edited at this time.  If these
items are not corrected at this time, a bulletin will be sent to the
appropriate hospital personnel.

DO YOU WANT TO UPDATE THESE INCONSISTENCIES NOW? Yes// N <Enter> (No)

Initial notification message sent...

At this time you may Register the patient if he or she is present and
seeking care.  Answer 'No' if this was a mail-in application.

Would you like to Register the patient? YES// <Enter>

Please verify or update the following information:

MOTHER'S MAIDEN NAME: CARLSBAD, // <Enter>
PLACE OF BIRTH [CITY]: TAMPA // <Enter>
PLACE OF BIRTH [STATE]: FLORIDA // <Enter>
Select ALIAS: <Enter>

Select Admitting Area: ??

      Choose from:
      ALBANY ADMITTING
      TROY ADMITTING

Select Admitting Area: ALBANY ADMITTING

PRINT BARCODE LABELS FOR PATIENT'S FOLDERS? YES// <Enter>

ISSUE REQUEST FOR RECORDS? YES// <Enter>

Financial query sent ...

```

```

Is the patient currently being followed in a clinic for the same condition? N
<Enter> (No)

Is the patient to be examined in the medical center today? Yes// N <Enter> (No)

Registration login date/time: NOW// <Enter> (MAY 14,2003@07:37)
TYPE OF BENEFIT APPLIED FOR: DENTAL??
    Enter the type of benefit this patient is now applying for.
    Choose from:
        1      HOSPITAL
        2      DOMICILIARY
        3      OUTPATIENT MEDICAL
        4      OUTPATIENT DENTAL
        5      NURSING HOME CARE
TYPE OF BENEFIT APPLIED FOR: OUTPATIENT DENTAL <Enter> OUTPATIENT DENTAL
TYPE OF CARE APPLIED FOR: ??
    Enter the type of care that the patient is requesting service for.  If
    the patient will be receiving treatment for plastic surgery, dental care,
    sterilization, or pregnancy, enter that choice.  Otherwise, enter all
    other.

    Choose from:
        1      DENTAL
        2      PLASTIC SURGERY
        3      STERILIZATION
        4      PREGNANCY
        5      ALL OTHER
TYPE OF CARE APPLIED FOR: 1 <Enter> DENTAL
FACILITY APPLYING TO: ALBANY// <Enter> 500A
REGISTRATION ELIGIBILITY CODE: HUMANITARIAN EMERGENCY
    // 6 <Enter> 6    NON-VETERAN

Updating eligibility status for this registration...

SERVICE DENTAL INJURY?: N <Enter> NO
SERVICE TEETH EXTRACTED?: N <Enter> NO
    NEED RELATED TO AN ACCIDENT: N <Enter> NO
    NEED RELATED TO OCCUPATION: N <Enter> NO

Do you wish to enroll in the VA Patient Enrollment System? YES// <Enter>

ENROLLMENT APPLICATION DATE: MAY 14, 2003// <Enter>

PREFERRED FACILITY: ALBANY// <Enter>

Application is pending for enrollment in the VA Patient Enrollment System...
    Enrollment Date           : -none-
    Enrollment Application Date : MAY 14, 2003
    Enrollment Category       : IN PROCESS
    Enrollment Status         : UNVERIFIED
    Enrollment Priority        : -none-
    Preferred Facility        : ALBANY
    Enrollment Group Threshold : GROUP 8c

PRINT ERROR? Yes// <Enter> (Yes)    (Task: 627490)
PRINT 10/10? Yes// <Enter> (Yes)
ROUTING SLIP? Yes// <Enter> (Yes)
Download VIC data? No// <Enter> (No)
    
```

**Figure 6-8: 10-10T Registration – Add Patient to PATIENT file (#2) and to MPI for first time**



During registration of a new patient, the following fields are asked prior to the MPI query: MOTHERS MAIDEN NAME (#.2403), PLACE OF BIRTH [CITY] (#.092), PLACE OF BIRTH [STATE] (#.093), and ALIAS (#1) sub file 2.01, (#.01). For an existing patient, the following additional fields must be verified prior to the MPI query: NAME (#.01), DATE OF BIRTH (#.03), SEX (#.02), SOCIAL SECURITY NUMBER (#.09), and MULTIPLE BIRTH INDICATOR (#994). This change was made as a result of the MPI Changes patch MPIF\*1.0\*28.

## Other PIMS Options Affected by the MPI

The following two PIMS options don't interact with, but are impacted by the MPI:

1. Patient Inquiry [DG Patient Inquiry]
2. Preregister a Patient [DGPRE PRE-REGISTER OPTION]

The CMOR for the patients that have been assigned an ICN (local or national) will display in the computer dialogue from these two options. If the patient has not been assigned an ICN, the CMOR field will have a value of None or Unknown.

### PIMS Option: Patient Inquiry

Figure 6-9 shows the PIMS option Patient Inquiry displaying the CMOR for patient Daniel Doe.

```

Select Option: PATIENT Inquiry <Enter>
Select PATIENT NAME: DOE,DANIEL <Enter> 07-09-50 000067984 YES SC VETERAN
DOE,DANIEL 000-06-7984 JUL 9,1950
=====
COORDINATING MASTER OF RECORD: SAN FRANCISCO
Address: 000 MAIN STREET Temporary: NO TEMPORARY ADDRESS
ANYTOWN,NY 12018
County: RENSSELAER (083) From/To: NOT APPLICABLE
Phone: 5553457689 Phone: NOT APPLICABLE
Office: UNSPECIFIED

Primary Eligibility: SC LESS THAN 50% (NOT VERIFIED)
Other Eligibilities:

Status: PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER
Future Appointments: NONE
Remarks:
    
```

**Figure 6-9: PIMS Patient Inquiry- Computer Dialogue displays patient's CMOR**

## PIMS Option: Preregister a Patient

The figure below shows the PIMS option Preregister a Patient displaying the CMOR for the patient Daniel Doe.

```

Select Registration Menu Option: Preregistration <Enter> Menu

  CALL  Display Preregistration Call List
  OUT   Outputs for Preregistration ...
  SU    Supervisor Preregistration Menu ...
        Patient Inquiry
        Preregister a Patient

Select Preregistration Menu Option: Preregister a Patient
Select Patient to Preregister: DOE,DANIEL <Enter> 07-09-50    000067984    YES
SC VETERAN
DOE,DANIEL                000-06-7984                JUL 9,1950
=====
                        COORDINATING MASTER OF RECORD: SAN FRANCISCO

Address: 000 MAIN STREET                                Temporary: NO TEMPORARY ADDRESS
        ANYTOWN,NY 12018
County: RENSSELAER (083)                               From/To: NOT APPLICABLE
Phone: 5553457689                                     Phone: NOT APPLICABLE
Office: UNSPECIFIED

Primary Eligibility: SC LESS THAN 50% (NOT VERIFIED)
Other Eligibilities:
-----
[PRE-REGISTER DATE:]  NONE ON FILE
-----

Status      : PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER

This option continues as it would normally

```

**Figure 6-10: PIMS Preregister a Patient- Computer dialogue displays patient's CMOR**

## Summary of Patient Update Message Flow

### Receiving Messages

The CMOR site receives demographic update messages from treating facilities via the MPI. The data is placed in a Patient Data Review. If changes are accepted for the key fields, your system (CMOR) sends an "official" update message to the MPI, and the MPI then broadcasts those changes to the treating facilities associated with this patient. Changes to other fields will update only your own PATIENT file (#2).

If you are not the CMOR, you will receive "official" update messages from the patient's CMOR, via the MPI. The information in the message will be used to automatically update the key fields in your PATIENT file (#2).

### Sending Messages

If you are the CMOR your site will be sending the "official" update message to other treating facilities, via the MPI.

If you are not the CMOR, your site will be sending update request messages to the CMOR for approval. Results of the CMOR review will be broadcast as the "official" update message through the MPI.

### Patient Sensitivity

If a shared patient is flagged as sensitive at one of the treating facility sites, a bulletin is sent to the RG CIRN DEMOGRAPHIC ISSUES mail group at each treating facility telling where, when, and by whom the flag was set. Each site can then review whether the circumstances meet the local criteria for sensitivity flagging.

## MPI Direct Connection Unavailable: Local ICN Assignments

The figure below shows the computer dialogue resulting from the MPI unexpectedly becoming unavailable while the direct connection is in use. If this happens, a local ICN is assigned to the patient being processed. The current site attempting to connect to the MPI is then assigned as the CMOR. This allows the user to continue processing the current patient, and flags this patient as needing a national ICN. Patient records having received Local ICN and CMOR assignments will be resolved through the Local/Missing ICN Resolution background job (i.e., MPIF LOC/MIS ICN RES).

The process is the same for each of the four PIMS options listed in this chapter. However, we will use the PIMS option Register a Patient for the purposes of this example, Figure 6-11.

```

Select OPTION NAME: Register a Patient

Select PATIENT NAME: DOE,CHRISTINE
ARE YOU ADDING 'DOE,CHRISTINE' AS A NEW PATIENT (THE 276TH)? No// Y <Enter>
(Yes)
  PATIENT SEX: F <Enter> FEMALE
  PATIENT DATE OF BIRTH: 090817 <Enter> (SEP 08, 1917)
  PATIENT SOCIAL SECURITY NUMBER: 000099589
  PATIENT TYPE: SC VETERAN
  PATIENT VETERAN (Y/N)?: Y <Enter> YES

...searching for potential duplicates

No potential duplicates have been identified.

...adding new patient

Please enter the following additional information:

Patient name components-
FAMILY (LAST) NAME: DOE//
GIVEN (FIRST) NAME: CHRISTINE//
MIDDLE NAME:
PREFIX:
SUFFIX:
DEGREE:
  PATIENT SERVICE CONNECTED?:
  PATIENT MULTIPLE BIRTH INDICATOR:

Please verify or update the following information:

MOTHER'S MAIDEN NAME:
PLACE OF BIRTH [CITY]
PLACE OF BIRTH [STATE]:
Select ALIAS:

Attempting to connect to the Master Patient Index in Austin...
If no SSN or inexact DOB or common name, this request
may take some time, please be patient

Could not connect to the MPI or Timed Out, assigning local ICN (if not already
assigned). . .

New page:
DOE,CHRISTINE                                000-09-9589                                SEP 8,1917
=====
                                COORDINATING MASTER OF RECORD: SAN FRANCISCO
Address: STREET ADDRESS UNKNOWN                Temporary: NO TEMPORARY ADDRESS
        UNK. CITY/STATE
  County: UNSPECIFIED                          From/To: NOT APPLICABLE
    Phone: UNSPECIFIED                          Phone: NOT APPLICABLE
  Office: UNSPECIFIED

Primary Eligibility: UNSPECIFIED
Other Eligibilities:
Status   : PATIENT HAS NO INPATIENT OR LODGER ACTIVITY IN THE COMPUTER

Future Appointments: NONE

Remarks:

(This option continues as it would normally...)

```

**Figure 6-11: Computer dialogue displayed if MPI direct connection becomes unavailable**



For information on resolving local ICNs, see “Local/Missing ICN Resolution” in this manual.

### **Single Patient Initialization to MPI Option Also Establishes TCP/IP Direct Connection With MPI**

It is important to note that in addition to the PIMS options, the Single Patient Initialization to MPI option also establishes the TCP/IP direct connection with the MPI. It can also be used to initialize a patient record to the MPI that currently exists in the PATIENT file (#2), but does not have a national ICN assignment. It is recommended that this option be used especially when potential duplicate records have been found during the initialization phase.

# Chapter 7: Managing Incoming and Outgoing CMOR Requests

Once a CMOR has been assigned to a site, the MPI will only accept updates to patient demographic information from that CMOR site. The CMOR keeps the Treating Facility List updated every time a new facility where the patient has been seen identifies itself to the MPI. The CMOR then broadcasts, via the MPI, the updated lists to all the other facilities that share this patient. A CMOR change request can be sent to the CMOR at any time. It is up to the CMOR to accept or decline the request.

The Coordinating Master of Record (CMOR) Request menu option is located on the MPI/PD Patient Admin Coordinator Menu, shown below. It is the primary menu for managing incoming and outgoing CMOR requests.

```
Select MPI/PD Patient Admin User Menu Option: COORDINATING <Enter> Master of Record (CMOR) Request

      Create a New CMOR Change Request
      Push CMOR Request
      Edit Open CMOR Change Request
      Review Pending Change of CMOR Requests
      Batch Review of CMOR Change Requests
      Display a CMOR Change Request
PEND  Report - Pending Received Requests
SENT  Report - Sent Requests Still Pending
DIS   Report - CMOR Requests Disapproved
APP   Report - CMOR Requests Approved

Select Coordinating Master of Record (CMOR) Request Option:
```

**Figure 7-1: Coordinating Master of Record (CMOR) Request Menu**

## Requesting a Change of CMOR

Use the Create a New CMOR Change Request option, located on the Coordinating Master of Record (CMOR) Request menu, to create a request that the current CMOR site be changed to the non-CMOR site making the request (i.e., transfer the patient's CMOR to another site).

Figure 7-2 shows that by selecting the option Create a New CMOR Change Request, a request form is presented to you in a prompt-by-prompt format. The following list is an example of the information required to submit this report:

1. Request Number.
2. Patient's Name (Displays the patient's identifying information. Entering the patient's identifying information displays the current Coordinating Master of Record (CMOR) site).
3. Reason for request (In this case the patient had a change of address).
4. Requestor Phone Number.
5. Finally the new request is submitted to be sent by accepting the default (pressing the Enter key) and the prompt "Select Request Action (SEND/EDIT/DELETE)? SEND//".

```
Select Coordinating Master of Record (CMOR) Request Option: CREATE <Enter> a New
CMOR Change Request

Select PATIENT: PATIENT4,RICH <Enter> PATIENT4,RICH    9-2-01    999437773    YES
SC VETERAN
REQUEST NUMBER: 500-8
*** Current CMOR: SAN FRANCISCO (662) ***
Reason for Request: TEST
Requestor's Name:: USER7,LADY// <Enter>
Requestor Phone:: 727-320-1804// <Enter>
Select Request Action (SEND/EDIT/DELETE)? SEND// SEND
... Request will be sent
```

**Figure 7-2: Submit request to transfer a patient's CMOR to new site**

## Transferring a CMOR Change Request to Another Site

The Push CMOR Request option is used when your site is currently the CMOR for a patient and you want to make one of the other treating facilities the CMOR. As soon as the request is sent, the CMOR is updated to be the new site. A message is sent to the MPI and all treating facilities making the change. The site that is becoming the CMOR has the request filed in the MPIF CMOR REQUEST file (#984.9) but no action is needed, this is an automatic change to the CMOR.

```
Select Coordinating Master of Record (CMOR) Request Option: push <Enter> CMOR
Request
Select PATIENT: PATIENT4,RICH <Enter> PATIENT4,RICH      08-06-02   999437773   YES
SC VETERAN
REQUEST NUMBER: 500-6
Reason for Request: moved
Requestor's Name: POSTMASTER// <Enter>
Requestor's Phone: // 555-5555
Select Site to Be CMOR: Albany <Enter> NY   VAMC   500           INACTIVE Jul 01, 2000
Select Request Action (SEND/EDIT/DELETE)? SEND// <Enter>
... Request will be sent
```

Figure 7-3: Push CMOR request to another site

## Edit a CMOR Change Request With a Status of Open

The option Edit Open CMOR Change Request is located on the Coordinating Master of Record (CMOR) Request menu. It allows editing of a CMOR change request that has a status of Open. To have a status of Open, there had to be a system problem (e.g., crash, disconnect, etc) that prevented the user from completing the request and that stopped the software from deleting the incomplete request.

```
Select Coordinating Master of Record (CMOR) Request Option: EDIT <Enter> OPEN CMOR
Change Request
Select Patient's Request you would like to edit (Must have a Status of Open):
HAIN,KAIN <Enter> 02-18-58   035523385   NO           NSC VETERAN
REQUEST NUMBER: 500-31
PATIENT: HAIN,KEN// <Enter>
*** Current CMOR: TAMPA (673) ***
REASON FOR REQUEST: TESTING // <Enter>
REQUESTOR PHONE NUMBER: 5555556959// <Enter>
Select Request Action (SEND/EDIT/DELETE)? SEND// <Enter>
```

Figure 7-4: Edit a CMOR change request with a status of Open

## Processing Received CMOR Change Requests

The three Coordinating Master of Record (CMOR) Request options that fall under the category of "Processing Received CMOR Change Requests" are:

1. Review Pending Change of CMOR Requests
2. Batch Review of CMOR Change Requests
3. Display a CMOR Change Request

## Review Pending Change of CMOR Requests

The Review Pending Change of CMOR Requests option is used to process requests received, either marking as approved or disapproved. If more than one pending request has been received from different sites for the same patient, the user will be told that there are multiple requests before going to the approval/disapproval screen. The message will also tell the user that if this request is approved the other requests for this patient will be disapproved automatically. The disapproval will give the reason as multiple requests received another one was approved.

**Disapproved Request** – As defined by the “Select Review Action” in Figure 7-5 and Figure 7-6, DISAPPROVE marks the request in the CMORs outstanding request file as rejected and notifies the original requester of the disapproval.

**Approved Request** – As defined by the “Select Review Action” in Figure 7-5 and Figure 7-6, APPROVE updates CMOR field to new CMOR. If you are the new CMOR look for the request in your outstanding request file and mark it complete. If you are the relinquishing CMOR, check the outstanding request file and mark the request processed.

```

Select Coordinating Master of Record (CMOR) Request Option: Review Pending Change
of CMOR Requests
Select CMOR request to review: 553-10 <Enter> 08-02-02  PATIENT102,CHARLES

OCT 2,2001          View of CMOR Request {RECEIVED}          553-10
-----
Requested by: USER11,MERRY          Date: AUG 2,2001
Phone (req): 555-555-5555
Patient: PATIENT102,CHARLES (4444)  Type: REQUEST RECEIVED FROM
Status: PENDING APPROVAL           DETROIT (553)
Reviewed by: Date:
Phone (rev):
-----
Requestor Comments:
Moved here

Reviewer Comments:
Happy to oblige.

Select Review Action (APPROVE/DISAPPROVE, OR '^' to Exit)? a <Enter> APPROVE
REVIEWER PHONE NUMBER: 555-555-5556
REVIEWER COMMENTS: <Enter>

Processing.....

... Done!
    
```

**Figure 7-5: Process CMOR Requests Received**

### Batch Review of CMOR Change Requests

The option Batch Review of CMOR Change Requests is located on the Coordinating Master of Record (CMOR) Request menu.

Use this option to approve or disapprove pending requests to change the CMOR from your site (the current site) to the sending site by station, rather than having to enter each individual request number. The Request Number is used to identify each request.

In the next figure, by answering "Yes" to the prompt "Do you want to approve by SITE?", you are selecting to approve all CMOR change requests by requesting facility, rather than by individual CMOR request.

```

Select Coordinating Master of Record (CMOR) Request Option: Batch <Enter> Review of
CMOR Change Requests
Do you want to approve by SITE? n <Enter> NO

AUG 2,2001          View of CMOR Request {RECEIVED}          553-10
-----
Requested by: USER11,MERRY          Date: AUG 2,2001
Phone (req): 555-555-5555
Patient: PATIENT102,CHARLES (4444)  Type: REQUEST RECEIVED FROM
Status: PENDING APPROVAL           DETROIT (553)
Reviewed by:                          Date:
Phone (rev):
-----
Requestor Comments:
  Moved here

Reviewer Comments:
  Happy to oblige.

Select Review Action (APPROVE/DISAPPROVE, OR '^' to Exit)? a <Enter> APPROVE
REVIEWER PHONE NUMBER: 555-555-5556
REVIEWER COMMENTS: Happy to oblige.

Processing.....
... Done!
    
```

**Figure 7-6: Receiving site processes pending CMOR change requests by station**

## Display a CMOR Change Request

The option Display a CMOR Change Request is located on the Coordinating Master of Record (CMOR) Request menu.

Use this option to view all information for a particular CMOR request. This includes the information known for both sending requesting and receiving sites.

Enter the Request number at the "Select Request #:" prompt. (The Request Number is used to identify each CMOR request.) This displays the date of the request and the patient's name. Next, enter the Device you want the output sent to (e.g., screen or printer). Notice that this is the same request number that was submitted as a new request in Figure 7-2.

```
Select Coordinating Master of Record (CMOR) Request Option: Display <Enter> a CMOR
Change Request

Select Request #: 500-8 <Enter> 08-06-02          PATIENT4,RICH
DEVICE: <Enter>      Right Margin: 80//
AUG  6,2002          View of CMOR Request {SENT}          500-8
-----
Requested by: USER7,LADY          Date: AUG  6,2002
  Phone (req): 727-320-1804
    Patient: PATIENT4,RICH (7773)          Type: REQUEST SENT TO
    Status: REQUESTED                      SAN FRANCISCO (662)
  Reviewed by:          Date:
  Phone (rev):
-----
Requestor Comments:
  TEST
Reviewer Comments:
```

Figure 7-7: Sending and receiving sites view all information for a CMOR request

## Report Option for CMOR Change Requests

### Report-Pending Received Requests

This report lists all outstanding CMOR requests that need to be reviewed and processed. Once you have approved or disapproved a request it will not appear on this report.

```
Select Coordinating Master of Record (CMOR) Request Option: pend <Enter> Report -
Pending Received Requests
DEVICE: <Enter>      Right Margin: 80// <Enter>
Pending CMOR Requests          OCT 2,2001 12:14          PAGE 1
Request                          Date
Number          Requested By          Patient          Requested
-----
Request From: DETROIT
553-10          USER11,MERRY          PATIENT102,CHARLES (4444) OCT 2,2001
Reason:  moved here
```

Figure 7-8: Report lists all outstanding CMOR requests that need to be reviewed and processed

## Report-Sent Requests Still Pending

This report lists all CMOR requests entered that are still outstanding (requests you have made but have not received a response on). The report sorts by station number and date requested.

```

Select Coordinating Master of Record (CMOR) Request Option: SENT <Enter> Report -
Sent Requests Still Pending
Do you only want to list your requests? YES// n <Enter> NO
Display requests entered on or before date: T-2// <Enter> (SEP 27,2001)
DEVICE: <Enter> Right Margin: 80// <Enter>
Pending CMOR Requests SEP 27,2001 16:44 PAGE 1
Request Date
Number Requested By Patient Requested
-----
STATION: ALBANY TESTING (501A)
500-3 USER12,TOMMY PATIENT103,MARY SEP 24,2001
Reason: Patient request
STATION: ALBANY, NY (500)
500-21 PATIENT89,CHARLES PATIENT104,PETER (0101) SEP 3,2001
Reason: moving
STATION: ALTOONA, PA (503)
500-22 USER13,ARTHUR PATIENT105,ANDREW (5555) SEP 6,2001
Reason: TEST
STATION: ANN ARBOR (506)
500-28 USER14,DREW PATIENT106,ROCKY (5678) SEP 8,2001
Reason: Patient request
STATION: BAY PINES, FL (516)
500-27 USER15,SALLY PATIENT107,LUCY (2345) AUG 25,2001
Reason: CHANGE OF ADDRESS
STATION: DETROIT, MI (553)
500-5 USER16,MARGARET PATIENT108,TIMOTHY (2222) SEP 28,2001
Reason: Patient request
    
```

**Figure 7-9: Report lists all CMOR requests entered that are still outstanding**

## Report-CMOR Requests Disapproved

This report prints the CMOR requests that have a disapproved status starting with the date selected by the user.

```

Select Coordinating Master of Record (CMOR) Request Option: Dis <Enter> Report -
CMOR Request Disapproved
Display requests DISAPPROVED on or SINCE (date): T-10// <Enter> (SEP 27, 2000)
DEVICE: <Enter>      Right Margin: 80// <Enter>
MPIF CMOR REQUEST LIST                SEP 27,2001  16:46    PAGE 1
                                     DATE
STATUS      REQUEST NUMBER    SITE      REVIEWED
PATIENT
REASON FOR REQUEST
REVIEWER COMMENTS
-----
DISAPPROVED      500-4                SEP 24,2001
PATIENT109,ROGER TF1                ALBANY
T18 AUTO DISAPPROVE                SEP 24,2001
Multiple Request to Change CMOR, Other Request received 1st
DISAPPROVED      553-4                SEP 24,2001
PATIENT109,ROGER TF1                BPSAGINAW
T18 AUTO DISAPPROVE 1 OF 2                SEP 24,2001
Multiple Request to Change CMOR, Other Request received 1st
    
```

**Figure 7-10: Report lists the CMOR requests that have a disapproved status**

## Report-CMOR Requests Approved

This report prints the CMOR requests that have an approved status starting with the date selected by the user.

```

Select Coordinating Master of Record (CMOR) Request Option: app <Enter> Report -
CMOR Requests Approved
Display requests APPROVED on or SINCE (date): T-10// T-366 <Enter> (SEP 26, 2000)
DEVICE: <Enter>      Right Margin: 80// <Enter>
MPIF CMOR REQUEST LIST                SEP 27,2001  16:47    PAGE 1
                                     DATE
STATUS      REQUEST NUMBER    SITE      REVIEWED
PATIENT
REASON FOR REQUEST
REVIEWER COMMENTS
-----
APPROVED      553-1                SEP 24,2001
PATIENT110,SAMUEL TF1                BPSAGINAW
T18 1 OF 2                SEP 24,2001
APPROVED      999-5                SEP 24,2001
PATIENT111,HARRY TF1                BPSAGINAW
T18 1 OF 2                SEP 24,2001
APPROVED      553-5                SEP 25,2001
PATIENT112,WILLIAM TF1                ALBANY
CHECKING HL7 PURGE
    
```

**Figure 7-11: Report lists the CMOR requests that have an approved status**

# Glossary

|                      |  |
|----------------------|--|
| 10-10EZ              | Form used to apply for health benefits.  |
| AAC                  | Austin Automation Center.  |
| ABBREVIATED RESPONSE | This feature allows you to enter data by typing only the first few characters for the desired response. This feature will not work unless the information is already stored in the computer.   |
| ACCESS CODE          | Code that allows the computer to identify you as a user authorized to gain access to the computer. Your code is greater than six and less than twenty characters long; can be numeric, alphabetic, or a combination of both; and is usually assigned by a site manager or application coordinator.   |
| ACTIVE PATIENTS      | Patients who have been seen at a site within the past three years.   |
| ADPAC                | Automated Data Processing Application Coordinator.   |
| ADT                  | Admission Discharge and Transfer- Part of the Patient Information Management System (PIMS).  |
| ADT/HL7 PIVOT FILE   | Changes to any of the fields of patient information will be recorded and an entry created in the ADT/HL7 PIVOT file (#391.71). When an update to a patient's treating facility occurs, this event is to be added to the ADT/HL7 PIVOT file (#391.71) and marked for transmission. A background job will collect these updates and broadcast the appropriate HL7 message (ADT-A08 Patient Update).    |
| ALERTS               | Brief online notices that are issued to users as they complete a cycle through the menu system. Alerts are designed to provide interactive notification of pending computing activities, such as the need to reorder supplies or review a patient's clinical test results. Along with the alert message is an indication that the View Alerts common option should be chosen to take further action. |
| ANCILLARY REVIEWER   | This can be a single person or group of people given the responsibility to conduct reviews of potential duplicate record pairs with data in files other than the PATIENT file (#2). For example, selected personnel in Laboratory, Radiology, and Pharmacy.  |
| ANSI                 | American National Standards Institute.   |
| API                  | Application Programming Interface.   |
| APPLICATION          | VistA software and documentation that supports the automation of a service (e.g., Laboratory or Pharmacy) within the Veterans Health Administration (VHA).   |

|  |   |
|--|---|
| APPLICATION COORDINATOR                | Designated individuals responsible for user-level management and maintenance of an application package such as IFCAP, Lab, Pharmacy, Mental Health, etc.  |
| APPLICATION PACKAGE                    | In VistA, software and documentation that support the automation of a service, such as Laboratory or Pharmacy, within VA medical centers. The Kernel is like and operating system relative to other VistA applications.   |
| APPLICATION PROGRAMMER INTERFACE (API) | Programmer calls provided for use by application programmers. APIs allow programmers to carry out standard computing activities without needing to duplicate utilities in their own software. APIs also further DBA goals of system integration by channeling activities, such as adding new users, through a limited number of callable entry points.  |
| ARRAY                                  | An arrangement of elements in one or more dimensions. An M array is a set of nodes referenced by subscripts that share the same variable name.  |
| BATCH ACKNOWLEDGEMENTS                 | The format of a HL7 batch acknowledgement message consists entirely of a group of ACK (acknowledgment) messages. In the case of MPI, batch acknowledgements are returned during the initialization process and during the Local/Missing ICN Resolution job. The background job files the ICN, ICN checksum and CMOR, updates the MPI, and then the associated treating facilities and systems. Data returned from this process constitute the acknowledgment of the batch message.                |
| BATCH MESSAGES                         | There are instances when it is convenient to transfer a batch of HL7 messages. Common examples related to MPI are queries sent to the MPI for an ICN during the initialization process, the resolution of Local or Missing ICNs, and CMOR Batch Comparisons. Such a batch could be sent online using a common file transfer protocol. In the case of the MPI, the HL7 Batch Protocol uses the Batch Header Segment (BHS) and Batch Trailer Segment (BTS) message segments to delineate the batch. |
| BATCH PROTOCOL, HL7                    | Protocol utilized to transmit a batch of HL7 messages. The protocol generally uses File Header Segment (FHS), BHS, BTS, and File Trailer Segment (FTS) segments to delineate the batch. In the case of the MPI, the protocol only uses the BHS and BTS segments.  |
| BULLETINS                              | Electronic mail messages that are automatically delivered by VistA MailMan under certain conditions. For example, a bulletin can be set up to "fire" when database changes occur, such as adding a new Institution in the INSTITUTION file (#4). Bulletins are fired by bulletin-type cross-references.   |
| CALLABLE ENTRY POINT                   | Authorized programmer call that may be used in any VistA application software. The DBA maintains the list of DBIC-approved entry points.  |

|   |  |
|---|--|
| CHUI  | <b>CH</b> aracter-based User Interface (i.e., roll-and-scroll).  |
| CLINICAL PATIENT RECORD SYSTEM (CPRS)         | Clinical <b>P</b> atient <b>R</b> ecord System provides a computer-based patient record and organizes and presents all relevant data on a patient in a way that directly supports clinical decision-making. CPRS integrates the extensive set of clinical and administrative applications available within VistA.  |
| COMMON MENU                                   | Options that are available to all users. Entering two question marks at the menus select prompt displays any secondary menu options available to the signed-on user, along with the common options available to all users.   |
| CONTROLLED SUBSCRIPTION INTEGRATION AGREEMENT | This applies where the IA describes attributes/functions that must be controlled in their use. The decision to restrict the IA is based on the maturity of the custodian package. Typically, these IAs are created by the requesting package based on their independent examination of the custodian package's features. For the IA to be approved, the custodian grants permission to other VistA packages to use the attributes/functions of the IA; permission is granted on a one-by-one basis where each is based on a solicitation by the requesting package. An example is the extension of permission to allow a package (e.g., Spinal Cord Dysfunction) to define and update a component that is supported within the Health Summary package file structures. |
| COORDINATING MASTER OF RECORD (CMOR)          | The CMOR site is the designated "owner" of the patient's clinical and descriptive data. A patient only has one CMOR at a time, but the CMOR can change. Initially, the MPI assigns the CMOR based upon the first site at which the MPI encounters the patient. The designation of a site as the CMOR for a patient does not provide "workload credit" or any other distinction. The CMOR is a field that can be found in the PATIENT file (#2).  |
| CROSS REFERENCE                               | There are several types of cross-references available. Most generally, a VA FileMan cross-reference specifies that some action be performed when the field's value is entered, changed, or deleted. For several types of cross-references, the action consists of putting the value into a list; an index used when looking-up an entry or when sorting. The regular cross-reference is used for sorting and for lookup; you can limit it to sorting only.   |
| DATA  | A representation of facts, concepts, or instructions in a formalized manner for communication, interpretation, or processing by humans or by automatic means. The information you enter for the computer to store and retrieve. Characters that are stored in the computer system as the values of local or global variables. VA FileMan fields hold data values for file entries.   |

|                                |   |
|--------------------------------|---|
| DATA DICTIONARY (DD)           | <p>The <b>Data Dictionary</b> is a global containing a description of what kind of data is stored in the global corresponding to a particular file. VA FileMan uses the data internally for interpreting and processing files.</p> <p>A Data Dictionary contains the definitions of a file's elements (fields or data attributes); relationship to other files; and structure or design. Users generally review the definitions of a file's elements or data attributes; programmers review the definitions of a file's internal structure.</p> |
| DATA DICTIONARY ACCESS         | <p>A user's authorization to write/update/edit the data definition for a computer file. Also known as DD Access.</p>  |
| DATABASE                       | <p>A set of data, consisting of at least one file, that is sufficient for a given purpose. The VistA database is composed of a number of VA FileMan files. A collection of data about a specific subject, such as the PATIENT file (#2); a data collection has different data fields (e.g. patient name, SSN, Date of Birth, and so on). An organized collection of data about a particular topic.</p>  |
| DATABASE MANAGEMENT SYSTEM     | <p>A collection of software that handles the storage, retrieval, and updating of records in a database. A <b>Database Management System (DBMS)</b> controls redundancy of records and provides the security, integrity, and data independence of a database.</p>  |
| DBA                            | <p><b>Database Administrator</b>, oversees software development with respect to VistA Standards and Conventions (SAC) such as namespacing. Also, this term refers to the Database Administration function and staff.</p>  |
| DBIA                           | <p><b>Database Integration Agreement</b>, see Integration Agreements.</p>   |
| DEFAULT                        | <p>Response the computer considers the most probable answer to the prompt being given. It is identified by double slash marks (//) immediately following it. This allows you the option of accepting the default answer or entering your own answer. To accept the default you simply press the Enter (or Return) key. To change the default answer, type in your response.</p>   |
| DELIMITER                      | <p>Special character used to separate a field, record, or string. VA FileMan uses the caret character ("^") as the delimiter within strings.</p>  |
| DEMOGRAPHIC DATA               | <p>Identifying descriptive data about a patient, such as: name, sex, date of birth, marital status, religious preference, SSN, address, etc.</p>  |
| DEPARTMENT OF VETERANS AFFAIRS | <p>The Department of <b>Veterans Affairs</b>, formerly called the <b>Veterans Administration</b>.</p>   |
| DEVICE                         | <p>Peripheral connected to the host computer, such as a printer, terminal, disk drive, modem, and other types of hardware and equipment associated with a computer. The host files of underlying operating systems may be treated like devices in that they may be written to (e.g., for spooling).</p>   |

|                                       |   |
|---------------------------------------|---|
| DHCP                                  | <b>D</b> ecentralized <b>H</b> ospital <b>C</b> omputer <b>P</b> rogram now known as Veterans Health Information Systems and Technology Architecture (VistA).   |
| DIRECT CONNECT                        | <p>The Direct Connect is a real-time TCP/IP connection to the MPI to allow for an immediate request for an ICN. Direct Connect is activated when using any of the following PIMS options:</p> <ul style="list-style-type: none"> <li>• Register A Patient,</li> <li>• Load/Edit Patient Data,</li> <li>• 10-10T Registration</li> </ul> <p>and when using the following MPI options:</p> <ul style="list-style-type: none"> <li>• Single Patient Initialization to MPI</li> <li>• Display Only Query</li> </ul> |
| DIRECT MODE UTILITY                   | A programmer call that is made when working in direct programmer mode. A direct mode utility is entered at the MUMPS prompt (e.g., >D ^XUP). Calls that are documented as direct mode utilities <i>cannot</i> be used in application software code.   |
| DUPLICATE RECORD MERGE: PATIENT MERGE | <p>Patient Merge is a VistA application that provides an automated method to eliminate duplicate patient records within the VistA database (i.e., the VistA PATIENT file (#2)). It consists of three steps:</p> <ol style="list-style-type: none"> <li>1. Search for potential duplicate records pairs</li> <li>2. Review, verification, and approval of those pairs</li> <li>3. Merge process.</li> </ol>  |
| DUZ                                   | Local variable holding the user number that identifies the signed-on user.  |
| ELECTRONIC SIGNATURE CODE             | Secret password that some users may need to establish in order to sign documents via the computer.  |
| ELIGIBILITY CODES                     | Codes representing the basis of a patient's eligibility for care.   |
| ENCRYPTION                            | Scrambling data or messages with a cipher or code so that they are unreadable without a secret key. In some cases encryption algorithms are one directional, that is, they only encode and the resulting data cannot be unscrambled (e.g. access/verify codes).   |
| ENTER (<RET>)                         | Pressing the return or enter key tells the computer to execute your instruction or command or to store the information you just entered.  |
| ENTRY                                 | VA FileMan record. An internal entry number (IEN, the .001 field) uniquely identifies an entry in a file.   |

## Glossary

|                                |  |
|--------------------------------|--|
| EXCEPTION MESSAGE              | MPI/PD VistA generates messages and bulletins to alert the user to problems that occur in generating or processing HL7 messages. The MPI/PD Message Exception Menu contains options to manage the problems.  |
| EXTRINSIC FUNCTION             | Extrinsic function is an expression that accepts parameters as input and returns a value as output that can be directly assigned.  |
| FACILITY                       | Geographic location at which VA business is performed.   |
| FIELD                          | In a record, a specified area used for the value of a data attribute. The data specifications of each VA FileMan field are documented in the file's data dictionary. A field is similar to blanks on forms. It is preceded by words that tell you what information goes in that particular field. The blank, marked by the cursor on your terminal screen, is where you enter the information. |
| FILE                           | Set of related records treated as a unit. VA FileMan files maintain a count of the number of entries or records.   |
| FILE MANAGER (VA FILEMAN)      | VistA's Database Management System (DBMS). The central component of Kernel that defines the way standard VistA files are structured and manipulated.   |
| FORCED QUEUING                 | Device attribute indicating that the device can only accept queued tasks. If a job is sent for foreground processing, the device rejects it and prompt the user to queue the task instead.   |
| FORM                           | Please refer to the Glossary entry for "ScreenMan Forms."  |
| FORUM                          | The central E-mail system within VistA. Developers use FORUM to communicate at a national level about programming and other issues. FORUM is located at the OI Field Office—Washington, DC (162-2).  |
| FREE TEXT                      | A DATA TYPE that can contain any printable characters.   |
| GAL                            | <b>Global Address List.</b>  |
| GLOBAL VARIABLE                | Variable that is stored on disk (M usage).   |
| GUI                            | <b>Graphical User Interface.</b>   |
| HEALTH LEVEL SEVEN (HL7)       | National level standard for data exchange in all healthcare environments regardless of individual computer application systems.  |
| HEALTH LEVEL SEVEN (HL7) VISTA | Messaging system developed as a VistA software that follows the HL7 Standard for data exchange.  |
| HEC                            | <b>Health Eligibility Center.</b>  |
| HINQ                           | <b>Hospital Inquiry-</b> The HINQ module provides the capability to request  |

and obtain veteran eligibility data via the VA national telecommunications network. Individual or group requests are sent from a local computer to a remote Veterans Benefits Administration (VBA) computer where veteran information is stored. The VBA network that supports HINQ is composed of four computer systems located in regional VA payment centers.

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| HIPAA  | <b>Health Insurance Portability and Accountability Act</b>  |
| HSD&D<br>(Formerly SD&D—System Design and Development) | Health Systems Design and Development   |
| INPATIENT  | Patient who has been admitted to a hospital in order to be treated for a particular condition.  |
| INPUT TEMPLATE   | A pre-defined list of fields that together comprise an editing session.   |
| INSTITUTION  | A Department of Veterans Affairs (VA) facility assigned a number by headquarters, as defined by Directive 97-058. An entry in the INSTITUTION file (#4) that represents the Veterans Health Administration (VHA).   |
| INTEGRATION AGREEMENTS (IA)                            | <b>Integration Agreements (IA)</b> define agreements between two or more VistA software applications to allow access to one development domain by another. Any software developed for use in the VistA environment is required to adhere to this standard; as such it applies to vendor products developed within the boundaries of DBA assigned development domains (e.g., MUMPS AudioFax). An IA defines the attributes and functions that specify access. All IAs are recorded in the Integration Agreement database on FORUM. Content can be viewed using the DBA menu or the System Design & Development's web page. |
| INTEGRATION CONTROL NUMBER (ICN)                       | The <b>Integration Control Number</b> is a unique identifier assigned to patients when they are added to the MPI. The ICN follows the ASTM-E1714-95 standard for a universal health identifier. ICNs link patients to their records across VA systems.  |
| INTERNAL ENTRY NUMBER (IEN)                            | The number used to identify an entry within a file. Every record has a unique internal entry number.  |
| IRA  | <b>Initial Request Analysis.</b>  |
| IRM  | <b>Information Resource Management.</b> A service at VA medical centers responsible for computer management and system security.  |
| ISO  | <b>Information Security Officer.</b>  |
| ISS  | <b>Infrastructure and Security Services.</b>  |

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| ITAC                          | <b>I</b> nformation <b>T</b> echnology <b>A</b> pproval <b>C</b> ommittee was established as an advisory committee to the Chief Information Officer to ensure that the Information Technology (IT) program supports VHA goals and to provide guidance concerning priorities for IT initiatives.  |
| KERNEL                        | Kernel is VistA software that functions as an intermediary between the host operating system and other VistA software applications (e.g., Laboratory, Pharmacy, IFCAP, etc.). Kernel provides a standard and consistent user and programmer interface between software applications and the underlying M implementation.   |
| KERNEL TOOLKIT                | Kernel Toolkit is a robust set of tools developed to aid the VistA development community, and Information Resources Management (IRM) in writing, testing, and analysis of code. They are a set of generic tools that are used by developers, documenters, verifiers, and packages to support distinct tasks.   |
| KEY                           | The purpose of Security Keys is to set a layer of protection on the range of computing capabilities available with a particular software package. The availability of options is based on the level of system access granted to each user.   |
| LAN                           | <b>L</b> ocal <b>A</b> rea <b>N</b> etwork.  |
| LDAP                          | <b>L</b> ightweight <b>D</b> irectory <b>A</b> ccess <b>P</b> rotocol.   |
| LINK                          | Non-specific term referring to ways in which files may be related (via pointer links). Files have links into other files.  |
| MAIL MESSAGE                  | An entry in the MESSAGE file (#3.9). The VistA electronic mail system (MailMan) supports local and remote networking of messages.  |
| MAILMAN                       | VistA software that provides a mechanism for handling electronic communication, whether it's user-oriented mail messages, automatic firing of bulletins, or initiation of server-handled data transmissions.   |
| MANAGER ACCOUNT               | UCI that can be referenced by non-manager accounts such as production accounts. Like a library, the MGR UCI holds percent routines and globals (e.g., ^%ZOSF) for shared use by other UCIs.  |
| MANDATORY FIELD               | Field that requires a value. A null response is not valid.   |
| MASTER PATIENT INDEX (AUSTIN) | The <b>M</b> aster <b>P</b> atient <b>I</b> ndex is the master index of all VHA patients. The MPI assigns and maintains unique national patient identifiers known as ICNs that link patients to their records across VA systems. The MPI also assigns the initial CMOR (first site to identify the patient to the MPI). It contains patient's identifying descriptive information (e.g., name, SSN, date of birth, mother's maiden name, place of birth state, place of birth city, home address etc.) |

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| MASTER PATIENT INDEX/PATIENT DEMOGRAPHICS (MPI/PD) VistA | <p>This software resides in VistA and supports the Austin side of the MPI, as well as the CMOR change requests. MPI/PD VistA enables sites to query the MPI for the:</p> <ul style="list-style-type: none"> <li>• Assignment of ICN</li> <li>• Inactivation of an ICN for a patient</li> <li>• Known data on the MPI</li> </ul> <p>Any updates to patient data are sent to the MPI and then to the sites where the patient has been seen. MPI/PD VistA also manages incoming and outgoing Change CMOR requests.</p> <p>The Patient Demographics (PD) part of MPI/PD VistA, identifies descriptive information about a patient. With MPI/PD VistA, key demographic information for a patient should be the same at each of the treating facilities where that patient is seen.</p> |
| MENU   | <p>List of choices for computing activity. A menu is a type of option designed to identify a series of items (other options) for presentation to the user for selection. When displayed, menu-type options are preceded by the word "Select" and followed by the word "option" as in Select Menu Management option: (the menu's select prompt).</p>   |
| MENU SYSTEM  | <p>The overall Menu Manager logic as it functions within the Kernel framework.</p>  |
| MENU TEXT  | <p>The descriptive words that appear when a list of option choices is displayed. Specifically, the Menu Text field of the OPTION file (#19). For example, User's Toolbox is the menu text of the XUSERTOOLS option. The option's synonym is TBOX.</p>   |
| MESSAGE SEGMENTS   | <p>Each HL7 message is composed of segments. Segments contain logical groupings of data. Segments may be optional or repeatable. A [ ] indicates the segment is optional, the { } indicates the segment is repeatable. For each message category, there will be a list of HL7 standard segments and/or "Z" segments used for the message.</p>   |
| NAMESPACEING   | <p>Convention for naming VistA software elements. The DBA assigns unique two to four character string prefix for software developers to use in naming routines, options, and other software elements so that software can coexist. The DBA also assigns a separate range of file numbers to each software application.</p>  |
| NON CMOR SITES   | <p>Sites that are not the CMOR for a given patient but which nevertheless have an interest in the patient.</p>  |
| NUMERIC FIELD  | <p>Response that is limited to a restricted number of digits. It can be dollar valued or a decimal figure of specified precision.</p>   |
| NVS  | <p>National VistA Support.</p>  |

## Glossary

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| OIFO                          | <b>Office of Information Field Office.</b>  |
| OPTION                        | An entry in the OPTION file (#19). As an item on a menu, an option provides an opportunity for users to select it, thereby invoking the associated computing activity. Options may also be scheduled to run in the background, non-interactively, by TaskMan.   |
| OPTION NAME                   | Name field in the OPTION file (e.g., XUMAINT for the option that has the menu text "Menu Management"). Options are namespaced according to VistA conventions monitored by the DBA.  |
| PACKAGE                       | Please refer to the Glossary entry for "Software."  |
| PIMS                          | <b>Patient Information Management System-</b> VistA software package that includes Registration and Scheduling packages.  |
| POINTER                       | The address at which a data value is stored in computer memory. A relationship between two VA FileMan files, a pointer is a file entry that references another file (forward or backward). Pointers can be an efficient means for applications to access data by referring to the storage location at which the data exists.  |
| PRIMARY KEY                   | A Data Base Management System construct, where one or more fields uniquely define a record (entry) in a file (table). The fields are required to be populated for every record on the file, and are unique, in combination, for every record on the file.   |
| PRIVATE INTEGRATION AGREEMENT | Where only a single application is granted permission to use an attribute/function of another VistA software application. These IAs are granted for special cases, transitional problems between versions, and release coordination. A Private IA is also created by the requesting software application based on their examination of the custodian software application's features. An example would be where one software application distributes a patch from another software application to ensure smooth installation. |
| PROMPT                        | The computer interacts with the user by issuing questions called prompts, to which the user issues a response.  |
| PROTOCOL                      | Entry in the PROTOCOL file (#101). Used by the Order Entry/Results Reporting (OE/RR) package to support the ordering of medical tests and other activities.   |
| PSEUDO-SSNs                   | False Social Security Numbers that are calculated internally to VistA and cannot be mistaken for valid SSNs because they end in P.  |
| QUEUING                       | Requesting that a job be processed in the background rather than in the foreground within the current session. Jobs are processed sequentially (first-in, first-out). The Kernel's Task Manager handles the queuing of tasks.   |

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| QUEUING REQUIRED                      | Option attribute that specifies that the option must be processed by Task Manager (the option can only be queued). The option may be invoked and the job prepared for processing, but the output can only be generated during specific time periods.   |
| READ ACCESS                           | A user's authorization to read information stored in a computer file.  |
| RECEIVING SITE                        | Receiving Site- As it relates to HL7 Messages, it is the site that the message was sent to.  |
| RECORD                                | Set of related data treated as a unit. An entry in a VA FileMan file constitutes a record. A collection of data items that refer to a specific entity (e.g., in a name-address-phone number file, each record would contain a collection of data relating to one person).  |
| REGISTRATION PROCESS                  | During a registration, if a patient does not have an ICN, the patient is checked against the entries in the MPI to determine if the patient already is established or needs to be added. The MPI may return a list of patients who are possible matches. If the patient is truly new and there are no potential matches on the MPI, the MPI will assign an ICN and assigns the requesting site as the CMOR. If the patient is already known at the MPI, the ICN and CMOR is returned and a HL7 message is sent to the CMOR to add this new facility to the list of Treating Facilities for this patient. Registration for patients who already have an ICN at the Facility. At the CMOR site, ADT-A04 Registration HL7 messages are sent to the MPI and the MPI then sends updates to those sites where the patient is known. These messages update the date of last activity and any changes to descriptive data. At a non-CMOR site an ADT-A04 message is sent to the CMOR, via the MPI. |
| REQUESTING SITE                       | Requesting Site- As is relates to HL7 Messages, it is the site initiating a message to another site requesting some action be taken.   |
| REQUIRED FIELD                        | A mandatory field, one that must not be left blank. The prompt for such a field will be repeated until the user enters a valid response.   |
| RG CIRN DEMOGRAPHIC ISSUES mail group | PIMS Personnel (e.g., ADPACs and/or Coordinators, etc.) are automatically notified of problems relating to data. Problems such as: <ul style="list-style-type: none"> <li>• Patient's dates of death not being synchronized between your local PATIENT file (#2) and the MPI.</li> <li>• Potential matches were found during the initialization or during the Local/Missing ICN resolution job that need to be resolved manually in order to obtain an ICN.</li> </ul>   |
| ROUTINE                               | Program or a sequence of instructions called by a program that may have some general or frequent use. M routines are groups of program lines, which are saved, loaded, and called as a single unit via a specific name.  |

## Glossary

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| SAC                   | Standards and Conventions. Through a process of quality assurance, all VistA software is reviewed with respect to SAC guidelines as set forth by the Standards and Conventions Committee (SACC).   |
| SACC                  | VistA's Standards and Conventions Committee. This Committee is responsible for maintaining the SAC.  |
| SCHEDULING OPTIONS    | The technique of requesting that Task Manager run an option at a given time, perhaps with a given rescheduling frequency.  |
| SCREEN EDITOR         | VA FileMan's Screen-oriented text editor. It can be used to enter data into any WORD-PROCESSING field using full-screen editing instead of line-by-line editing.   |
| SCREENMAN FORMS       | Screen-oriented display of fields, for editing or simply for reading. VA FileMan's Screen Manager is used to create forms that are stored in the FORM file (#.403) and exported with a software application. Forms are composed of blocks (stored in the BLOCK file [#.404]) and can be regular, full screen pages or smaller, "pop-up" pages.   |
| SCREEN-ORIENTED       | A computer interface in which you see many lines of data at a time and in which you can move your cursor around the display screen using screen navigation commands. Compare to Scrolling Mode.  |
| SCROLLING MODE        | The presentation of the interactive dialog one line at a time. Compare to Screen-oriented.   |
| SECURITY KEY          | The purpose of Security Keys is to set a layer of protection on the range of computing capabilities available with a particular software package. The availability of options is based on the level of system access granted to each user.   |
| SENSITIVE PATIENT     | Patient whose record contains certain information, which may be deemed sensitive by a facility, such as political figures, employees, patients with a particular eligibility or medical condition. If a shared patient is flagged as sensitive at one of the treating sites, a bulletin is sent to the DG SENSITIVITY mail group at each subscribing site telling where, when, and by whom the flag was set. Each site can then review whether the circumstances meet the local criteria for sensitivity flagging. |
| SHARED PATIENT        | Patient who has been seen at more than one site. The CMOR keeps the Treating Facility list updated every time a new facility where the patient has been seen identifies itself to the MPI. The CMOR then broadcasts, through the MPI, the updated lists to all the other facilities that share this patient.   |
| SITE MANGER/IRM CHIEF | At each site, the individual who is responsible for managing computer systems, installing and maintaining new modules, and serving as a liaison to the CIO Field Offices.  |

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| SOFTWARE  | The set of programs, files, documentation, help prompts, and installation procedures required for a given application (e.g., Laboratory, Pharmacy, and PIMS). A VistA software environment is composed of elements specified via the PACKAGE file (#9.4). Elements include files, associated templates, namespaced routines, and namespaced file entries from the OPTION, HELP FRAME, BULLETIN, and FUNCTION files. As public domain software, VistA software can be requested through the Freedom of Information Act (FOIA).  |
| SPACEBAR RETURN                                 | You can answer a VA FileMan prompt by pressing the spacebar and then the Return key. This indicates to VA FileMan that you would like the last response you were working on at that prompt recalled.   |
| SPECIAL QUEUING                                 | Option attribute indicating that Task Manager should automatically run the option whenever the system reboots.   |
| SUPPORTED REFERENCE<br>INTEGRATION<br>AGREEMENT | This applies where any VistA application may use the attributes/functions defined by the IA (these are also called " <b>Public</b> "). An example is an IA that describes a standard API such as DIE or VADPT. The software that creates/maintains the Supported Reference must ensure it is recorded as a Supported Reference in the IA database. There is no need for other VistA software applications to request an IA to use these references; they are open to all by default.   |
| TASK MANAGER                                    | Kernel module that schedules and processes background tasks (also called TaskMan)  |
| TEMPLATE  | Means of storing report formats, data entry formats, and sorted entry sequences. A template is a permanent place to store selected fields for use at a later time. Edit sequences are stored in the INPUT TEMPLATE file (#.402), print specifications are stored in the PRINT TEMPLATE file (#.4), and search or sort specifications are stored in the SORT TEMPLATE file (#.401).   |
| TOOLKIT   | <p>Toolkit (or Kernel Toolkit) is a robust set of tools developed to aid the VistA development community, and Information Resources Management (IRM), in writing, testing, and analysis of code. They are a set of generic tools that are used by developers, technical writers, software quality assurance (SQA) personnel, and software applications to support distinct tasks.</p> <p>Toolkit provides utilities for the management and definition of development projects. Many of these utilities have been used by the OI Field Office–Oakland for internal management and have proven valuable. Toolkit also includes tools provided by other OI Field Offices based on their proven utility.</p> |

## Glossary

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| TREATING FACILITY      | Any facility (VAMC) where a patient has applied for care, or has been added to the local PATIENT file (#2) (regardless of VISN) and has identified this patient to the MPI will be placed in the TREATING FACILITY LIST file (#391.91).   |
| TREATING FACILITY LIST | Table of institutions at which the patient has received care. This list is used to create subscriptions for the delivery of patient clinical and demographic information between sites.   |
| TRIGGER                | A type of VA FileMan cross-reference. Often used to update values in the database given certain conditions (as specified in the trigger logic). For example, whenever an entry is made in a file, a trigger could automatically enter the current date into another field holding the creation date.  |
| TRIGGER EVENTS         | An activity in VistA that creates HL7 messages.   |
| UCI                    | User Class Identification, a computing area. The MGR UCI is typically the manager's account, while VAH or ROU may be production accounts.   |
| USER ACCESS            | <p>This term is used to refer to a limited level of access, to a computer system, which is sufficient for using/operating a package, but does not allow programming, modification to data dictionaries, or other operations that require programmer access. Any option, for example, can be locked with the key XUPROGMODE, which means that invoking that option requires programmer access.</p> <p>The user's access level determines the degree of computer use and the types of computer programs available. The System Manager assigns the user an access level.</p> |
| VA                     | The Department of Veterans Affairs.   |
| VA FILEMAN             | Set of programs used to enter, maintain, access, and manipulate a database management system consisting of files. A software application of online computer routines written in the M language, which can be used as a standalone database system or as a set of application utilities. In either form, such routines can be used to define, enter, edit, and retrieve information from a set of computer-stored files.   |
| VAMC                   | Veterans Affairs Medical Center.  |
| VARIABLE               | Character, or group of characters, that refer(s) to a value. M (previously referred to as MUMPS) recognizes 3 types of variables: local variables, global variables, and special variables. Local variables exist in a partition of main memory and disappear at sign-off. A global variable is stored on disk, potentially available to any user. Global variables usually exist as parts of global arrays. The term "global" may refer either to a global variable or a global array. A special variable is defined by systems operations (e.g., \$TEST).               |

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| VDSI        | VistA <b>D</b> ata <b>S</b> ystems & <b>I</b> ntegration.   |
| VERIFY CODE | Additional security precaution used in conjunction with the Access Code. Like the Access Code, it is also 6 to 20 characters in length and, if entered incorrectly, will not allow the user to access the computer. To protect the user, both codes are invisible on the terminal screen.   |
| VHA         | Veterans <b>H</b> ealth <b>A</b> dministration.   |
| VISN        | Veterans <b>I</b> ntegrated <b>S</b> ervice <b>N</b> etwork.  |
| VISTA       | Veterans Health <b>I</b> nformation <b>S</b> ystems and <b>T</b> echnology <b>A</b> rchitecture (VistA) of the Veterans Health Administration (VHA), Department of Veterans Affairs (VA). VistA software, developed by the VA, is used to support clinical and administrative functions at VHA sites nationwide. Server-side code is written in M, and, via Kernel, runs on all major M implementations regardless of vendor. VistA is composed of software that undergoes a quality assurance process to ensure conformity with namespacing and other VistA standards and conventions. |
| WAN         | <b>W</b> ide <b>A</b> rea <b>N</b> etwork.  |

## Glossary

# Appendix A: VHA DIRECTIVE 2002-040

Department of Veterans Affairs  
Veterans Health Administration  
Washington, DC 20420

VHA DIRECTIVE 2002-040

July 5, 2002

## DATA QUALITY REQUIREMENTS FOR MPI AND PD SOFTWARE

**1. PURPOSE:** This Veterans Health Administration (VHA) Directive defines data integrity requirements for implementation of the Master Patient Index (MPI) and Patient Demographics (PD) version 1.0 software at VHA medical facilities.

**2. BACKGROUND:** Accurate and complete patient information is critical to VHA for patient care, management reporting, resource allocation, corporate forecasting, and other business and clinical needs. The quantity of patient information now stored electronically in VHA databases has grown both in size and complexity. It is also widely distributed, residing at each of 163 VHA health care facilities, as well as corporate (Austin Automation Center and other) databases. The accuracy of patient information and patient identification directly affects administrative, clinical, billing, and interdepartmental processes, such as eligibility data sharing between Veterans Benefits Administration (VBA) and VHA.

**3. POLICY:** It is VHA policy that accurate and complete patient information must be maintained in MPI and PD software.

**4. ACTION:** The facility Director is responsible for:

a. Ensuring that the entry of patient demographic data into the Veterans Information Systems and Technology Architecture (VistA) applications is accurate and complete.

b. Designating individuals as a Point-of-Contact (POC) responsible for processing Exception Handling, Patient Data Review cases and resolving local Integration Control Number (ICN) issues in VistA on a daily basis. Exceptions may or may not be related to local ICN issues. Some exceptions may already have a national ICN.

c. Ensuring that personnel are assigned and that national MPI Data Quality Management staff are apprised of staffing changes made for each of the following roles (including alternates for each of these categories): Administrative POC, Information Resource Management (IRM) POC and HL7 POC to resolve issues with exceptions, patient data reviews, data quality issues, communication links, infrastructure, and applications that support patient data communications in a timely manner.

d. Local MPI POCs are responsible for:

(1) Working with their counterparts, national MPI Data Quality Management staff and other Office of Information (OI) staff in correcting anomalies and addressing issues related to demographic data for shared patients. The local IRM and HL7 POCs work with their

counterparts and National VistA Support (NVS) staff to maintain communications links, infrastructure, and applications supporting patient data communications and resolve data quality issues. In general, responses to inquiries and requests for assistance to resolve data quality issues will be completed within 5 business days.

**THIS VHA DIRECTIVE EXPIRES MARCH 31, 2005**

(2) Processing Exception Handling and Patient Data Review cases in VistA to ensure the accuracy and completeness of patient data. Designees are responsible for taking appropriate action to resolve exceptions and patient data review cases within 5 business days. Exceptions, which generate local ICNs, are to be reviewed within 2 business days. Specific information regarding these processes can be found in Attachment A.

(3) Obtaining FORUM and Outlook access to facilitate communications.

(4) Obtaining the necessary VistA access to enable them to verify information and to make appropriate changes to patient data in their facility's VistA system, as well as perform POC functions, such as processing Exception Handling and Patient Data Review cases.

**5. REFERENCES:**

- a. M-1, Part I, Chapter 4.
- b. M-1, Part I, Chapter 16.
- c. VHA Directive 2000-010.

**6. FOLLOW-UP RESPONSIBILITY:** Director, Information Assurance (IA) (19F) is responsible for the content of this Directive. Questions may be referred to (202) 273-9220.

**7. RESCISSIONS:** None. This VHA Directive expires March 31, 2005. ***NOTE:** Expiration is due to expiration of reference directive 2000-010.*

Robert H. Roswell, M.D.  
Under Secretary for Health

DISTRIBUTION: CO: E-mailed 7/8/2002  
FLD: VISN, MA, DO, OC, OCRO, and 200 – E-mailed 7/8/2002

## ATTACHMENT A

### GUIDELINES FOR DATA ENTRY RELATED TO THE MASTER PATIENT INDEX (MPI)

1. It is imperative that the utmost care is taken when entering demographic data for patients. Incomplete or inaccurate data (including typographical errors) is the leading cause of duplicate entries in the MPI. The following guidelines are intended to increase the accuracy and completeness of the essential data elements and to clarify practices that need to be followed when data is not available or duplicate entries exist, and to emphasize the intended use of some demographic fields within the PATIENT file in the Veterans Health Information Systems and Technology Architecture (VistA). It is important that demographic data for patients is reviewed for accuracy and completeness, and updated, if necessary, each and every time the patient appears for treatment.
2. The use of Pseudo Social Security Numbers (SSNs) needs to be avoided whenever possible, as this limits the MPI's ability to match the patient with existing entries. If it is not possible to obtain the patient's SSN, enter "P" at the SSN prompt during registration to have the system create a pseudo-number for the patient. Do not make up fake Social Security Numbers for patients under any circumstances.
3. The NAME field is an important element in the unique identity of a patient. Sites need to ensure that the name entered for a patient is the complete proper name of the patient, including a full middle name, when available. Avoid using nicknames or ambiguous information.
4. The DATE OF BIRTH, MOTHER'S MAIDEN NAME, PLACE OF BIRTH [CITY] and PLACE OF BIRTH [STATE] demographic data fields are important in the unique identification of patients on the MPI, since these are fields that do not change over time. If these fields are inaccurate or incomplete, it is difficult to ensure that duplicates are not being created and that the patient is being linked to the correct Integration Control Number (ICN) on the MPI. DATE OF BIRTH should be entered as the DAY, MONTH and YEAR of birth. The MOTHER'S MAIDEN NAME should be entered as the LAST NAME only. Indicators such as "deceased" or "unknown" should not be used.
5. The ALIAS field is only to be used to enter previously used names, or names that may be used at other treating facilities, to assist in recognizing potential duplicate patients. Name changes due to marriage, divorce, etc., need to be entered into the ALIAS field as well.
6. The TEMPORARY ADDRESS fields in the PATIENT file need to be utilized when a patient will be away from their PERMANENT ADDRESS for an extended period of time. In the case where a patient spends several months at another location (i.e., seasonal travel to a different residence), the permanent residence address is to remain as the PERMANENT ADDRESS and the seasonal residence address is to be entered into the TEMPORARY ADDRESS fields, with

the appropriate active dates. This practice eliminates the necessity of repeatedly updating the permanent address fields at the Coordinating Master of Record (CMOR) site and treating facilities during the patient data review process.

7. When processing MPI exceptions in VistA, if potential duplicates are identified while matching the patient to the MPI, the patient is not to be matched with any of the entries, but a request for assistance with duplicate resolution should be sent via an e-mail message to the MPI EXCEPTIONS mail group or a request for national support should be entered via the OI national problem management system (currently National Online Information Sharing (NOIS), which will be replaced by Enterprise Support Solution (ESS) in the future). This will help to identify potential duplicates and resolve them with as minimal impact as possible. When submitting requests for assistance via the OI national problem management system, do not include patient identifying information (Name, SSN, etc.). The specialist assigned to the request will obtain this information directly from the Point-of-Contact (POC).

8. It is essential that TEST patients who exist in local VistA production systems be designated with an SSN containing five leading zeros (i.e., 000001111). This signifies that this is an entry for testing only.

9. Local VistA duplicates must be merged. Additionally, if local erroneous PATIENT file entries exist (i.e., patients that have incomplete demographic data, no clinical data AND have not been seen at the medical center). The following is additional guidance for TEST or incomplete entries:

a. Edit the NAME field of the erroneous or TEST entry to begin with “ZZ” (i.e., ZZSMITH,JOHN JAMES). This will prevent the entry from appearing in any lookup lists from the PATIENT file (#2).

b. Edit the SSN field of the erroneous or TEST entry to begin with five zeros (i.e., 000002345). This indicates to the system that this is an erroneous or test patient.



As of Patch DG\*5.3\*589, the AMPIZZ and ATSSN cross-references have been removed from the PATIENT file (#2). These cross-references were used to automatically inactivate patient entries from the MPI if records were found to be ZZ'd and/or if the first five digits of patient Social Security Numbers were replace with zeros.

c. To resolve local duplicate patient entries in VistA, use the process outlined in the DUPLICATE RECORD MERGE: Patient Merge User Manual located on the web at: [http://vista.med.va.gov/VistA\\_Lib/Infrastructure/Dupl\\_Rec\\_Merge/xt\\_73\\_p23\\_um.pdf](http://vista.med.va.gov/VistA_Lib/Infrastructure/Dupl_Rec_Merge/xt_73_p23_um.pdf) to merge the data from the two entries.

10. The Patient Data Review process and Local Exceptions processing need to be performed on a daily basis, to ensure that inconsistencies are addressed in a timely manner. Failure to resolve data quality issues results in the loss of the Remote Data View and Interfacility Consults

functions to operate correctly for the clinicians at your facility. Further information on these functions can be found in the following manuals:

a. The Patient Data Review Process Workbook can be found on the following website:  
[http://vaww.vistau.med.va.gov/VistaU/MPI\\_PD/doc/PtDR1\\_11\\_01.doc](http://vaww.vistau.med.va.gov/VistaU/MPI_PD/doc/PtDR1_11_01.doc)

b. The Exception Handling instruction document can be found on the following website:  
[http://vista.med.va.gov/VistA\\_Lib/clinical/MPI\\_Patient\\_Demographics\\_\(MPI-PD\)/Exception%20Handling.pdf](http://vista.med.va.gov/VistA_Lib/clinical/MPI_Patient_Demographics_(MPI-PD)/Exception%20Handling.pdf)

11. Additional information regarding the MPI Data Quality Management team and their function, along with a current listing of the national team and the VHA facility Points-of-Contact can be found on the following website: <http://vaww.vhaco.va.gov/dataquality/mpidqteam.htm> .



## Appendix B: MPI/PD Business Rules

|                     |   |
|---------------------|---|
| CMOR CHANGES        | Receiving site must be a treating facility (patient must be registered there).  |
| DATE OF DEATH       | A patient may be entered as deceased at a treating facility. If a shared patient is flagged as deceased, a bulletin is sent to the RG CIRN DEMOGRAPHIC ISSUES mail group. The bulleting tells where the deceased date was entered and the date the patient died. Each site can then review whether the patient should be marked as deceased at their site.  |
| DUPLICATE ICNs      | More than one patient in a single PATIENT file (#2) cannot have the same ICN. For example, let's say that the MPI returned an ICN to your local PATIENT file (#2) for a patient who previously did not have one assigned. If that same ICN is currently assigned to a different patient in your PATIENT file (#2), an exception (problem) message is sent to the MPIF EXCEPTIONS mail group, and the ICN, CMOR, and treating facilities list is not updated for this new patient.   |
| INITIAL CMOR        | A patient's CMOR will be the first treating site that identifies the patient to the MPI.  |
| INSTITUTION FILE    | <p>A site can be in only one VISN at a time. A record in the INSTITUTION file (#4) cannot have two parents of the same type.</p> <p>A record in the INSTITUTION file (#4) cannot be a child and have children of its own.</p>   |
| MPI (AUSTIN)        | The MPI assigns a national ICN and the initial CMOR (i.e., the initial CMOR is the first site to identify the patient to the MPI). It accepts update messages only from the CMOR. The MPI maintains a copy of the treating facilities list, but not the subscription list. Subscriber messages are not sent to the MPI.   |
| PATIENT SENSITIVITY | If a shared patient is flagged as sensitive at one of the treating sites, a bulletin is sent to the RG CIRN DEMOGRAPHIC ISSUES mail group at each subscribing site telling where, when, and by whom the flag was set. Each site can then review whether the circumstances meet the local criteria for sensitivity flagging. If the site chooses to change the patient to a sensitive status, the option to do so would be used and then a bulletin would be sent to the mail group established in the PIMS package for notifying users of a sensitive patient change. |
| TREATING FACILITIES | Broadcast messages to add a treating facility for a patient will come only from the Coordinating Master of Record (CMOR), via the MPI. Site requesting to be added sends message to MPI, the MPI then routes it to the CMOR and a complete treating facility list will go out to all sites via the MPI.   |
| UPDATE MESSAGES     | Descriptive data update messages are broadcast by the MPI Austin.   |

## Appendix B: MPI/PD Business Rules

# Appendix C: Patient Data Review

## Data To Review

The following is a list of the patient data elements to review when resolving a case (an exception):

- \*\*Social Security Number
- Date of Death (DOD)
- Marital Status
- Religion
- Phone Number (Res.)
- Phone Number (Work)
- Next of Kin Name
- K-Phone Number
- \*\*Date of Birth (DOB)
- \*\*Sex
- \*\*Mother's Maiden Name
- Employment Status



When the CMOR updates the fields preceded by asterisks (\*\*), as listed above, these are synchronized at all treating facilities through the MPI.



Due to the potential of a Coordinating Master of Record (CMOR) site accepting an old address without review, with the release of Patch DG\*5.3\*479 the Patient Data Review [VAFC EXCEPTION HANDLER] option will discontinue sending address information due to duplication with the Health Eligibility Center (HEC) data updates.

The following fields can no longer be displayed or merged in Patient Data Review [VAFC EXCEPTION HANDLER]:

- STREET ADDRESS [LINE 1] (#.111)
- STREET ADDRESS [LINE 2] (#.112)
- STREET ADDRESS [LINE 3] (#.113)
- CITY (#.114)
- STATE (#.115)
- ZIP+4 (#.1112)
- COUNTY (#.117)

## **Display Only Changes**

The following fields are for display only, and cannot be changed.

- Patient Type
- Veteran (Y/N)
- Service Connected
- Service Connected Percentage
- Who Verified
- Period of Service
- Primary Eligibility Code
- Date Eligibility Verified
- Verification Method

## Appendix D: Exceptions and Bulletins



For information on exception messages, their resolution, and the MPI/PD Exception Handling option [RG EXCEPTION HANDLING] introduced in Patch RG\*1.0\*3, see the Master Patient Index/Patient Demographics (MPI/PD) VistA Exception Handling manual at the following web site:

<http://www.va.gov/vdl/Infrastructure.asp?appID=16>

This document gives Master Patient Index/Patient Demographics (MPI/PD) sites information and assistance in dealing with exception messages.



## Appendix E: Data Stored at the MPI Austin

Several groups have expressed an interest in knowing what data (fields) are stored on the MPI in Austin. Currently, the MPI contains the following fields:

- Integration Control Number (ICN)
- Surname
- First Name
- Middle Name
- Name Prefix
- Name Suffix
- Mother's Maiden Name
- Date Of Birth
- Place of Birth City
- Place of Birth State
- Date Of Death
- Death Verification Status
- Gender
- Social Security Number
- SSN Verification Status
- Claim Number
- Coordinating Master of Record
- Sensitivity
- Primary ICN
- Date/Time of Original Creation
- Facility of Original Creation
- Created By
- Marital Status
- Street Address [Line 1]
- Street Address [Line 2]
- Street Address [Line 3]
- City [Residence]
- State [Residence]
- Zip+4 [Residence]
- Phone Number [Residence]
- POW Status Indicated?
- Multiple Birth Indicator
- Alias (multiple)
- Race Information (multiple)
- Ethnicity Information (multiple)
- Type of Client
- Other IDs (multiple)
- Date/Time Changed



The following fields are not populated on the MPI at this time:

- Death Verification Status
- Sensitivity
- SSN Verification Status
- Type of Client

Appendix E: Data Stored at the MPI Austin

## Appendix F: MPI/PD Exception Messages

The following is a list of the MPI/PD HL7 exception type number and exception type messages displayed in the various actions selectable in the MPI/PD Exception Handling option. These entries are location in the CIRN HL7 EXCEPTION TYPE FILE (#991.11).

| Exception Number | Exception Message                          |
|------------------|--|
| 1                | Invalid integration control number         |
| 2                | Missing segment identifier                 |
| 3                | Missing message header                     |
| 4                | Invalid segment type                       |
| 5                | Unrecognized message/event type pair       |
| 6                | Unexpected system error                    |
| 7                | Unknown segment identifier                 |
| 8                | Required field is missing                  |
| 9                | Invalid value for field                    |
| 10               | Missing patient identifier                 |
| 11               | Missing institution identifier             |
| 12               | Invalid or missing observation date        |
| 13               | Message chronology error                   |
| 14               | Patient not found                          |
| 15               | Incompatible units                         |
| 16               | Provider not found                         |
| 17               | Error updating narrative                   |
| 18               | Unclassified exception                     |
| 19               | Institution of origin is not known         |
| 20               | Target of query is not known               |
| 21               | Missing code identifier                    |
| 22               | Unknown coding system                      |
| 23               | Coding system not valid in current context |
| 24               | Error on code lookup                       |
| 25               | Code not found                             |
| 26               | Code not mapped                            |
| 27               | Patient validation error                   |
| 28               | Laboratory test not mapped                 |
| 29               | Drug not mapped                            |

Appendix F: MPI/PD Exception Messages

| Exception Number | Exception Message                                  |
|------------------|--|
| 30               | Cannot determine DD entry for test                 |
| 31               | Invalid event stub                                 |
| 32               | Not a container object                             |
| 33               | Master file names do not match                     |
| 34               | Master file does not exist on local system         |
| 35               | Error updating master file                         |
| 36               | Incorrect update version                           |
| 37               | Master file update successful                      |
| 38               | Logical link is not known                          |
| 39               | Query rejected                                     |
| 40               | File entry not mapped                              |
| 41               | Domain is not recognized                           |
| 42               | Domain is prohibited from sending to this receiver |
| 43               | Report entry not found                             |
| 200              | Missing BHS Segment                                |
| 201              | Missing MSH Segment                                |
| 202              | Missing QAK Segment                                |
| 203              | Missing MSA Segment                                |
| 204              | Missing RDF Segment                                |
| 205              | Missing RDT Segment                                |
| 206              | Could Not Create VTQ                               |
| 207              | Application Reject Error                           |
| 208              | Application Error                                  |
| 209              | Required field(s) missing for patient sent to MPI  |
| 210              | Patient DFN Failed                                 |
| 211              | CMOR Lookup Failed                                 |
| 212              | TF Update Failed in Pivot file                     |
| 213              | SSN Match Failed                                   |
| 214              | Name Doesn't Match                                 |
| 215              | Death Entry on MPI not in VISTA                    |
| 216              | Death Entry on Vista not in MPI                    |
| 217              | Death Entries on MPI and Vista DO NOT Match        |
| 218              | Potential Matches Returned                         |
| 219              | Missing ICN  |

| Exception Number | Exception Message                                 |
|------------------|---|
| 220              | Error Setting Up HL7                              |
| 221              | Missing Site/CMOR                                 |
| 222              | Invalid Event Type                                |
| 223              | Missing Excepted Field                            |
| 224              | Missing/Unable to get Logical Link                |
| 225              | Have Subscribers                                  |
| 226              | Not CMOR  |
| 227              | Multiple ICNs                                     |
| 228              | Patient Does Not Exist                            |
| 229              | Duplicate Station Number in Institution File (#4) |
| 230              | Invalid Sender Of Facility Integration Message    |
| 231              | Treating Facility Not Known To CMOR               |
| 232              | Subscriber Not Known To CMOR                      |
| 233              | Cannot Merge Duplicate Pair                       |

## Appendix F: MPI/PD Exception Messages

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