DUPLICATE RECORD MERGE: PATIENT MERGE

INSTALLATION GUIDE

PATCH XT*7.3*23

April 1998

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Department of Veterans Affairs
Health System Design & Development (HSD&D)
Infrastructure and Security Services (ISS)

Installation Overview

The purpose of this overview is to outline the steps necessary to install the application Duplicate Record Merge: Patient Merge. Please perform the following steps in order:

Preliminary Considerations

It is not necessary to instruct users to log off the system, or to bring down TaskMan in order to install the Duplicate Record Merge: Patient Merge application.

Patient Merge is an enhancement patch (i.e., Patch XT*7.3*23) to Kernel Toolkit V. 7.3. Only those routines that are new or have changed with Patch XT*7.3*23 are exported with this release.

The Patient Merge application requires a standard **V**_IST_**A** operating environment in order to function correctly. Check your **V**_IST_**A** environment for packages and versions installed.

Minimum **V**_IST_**A** application requirements are:

> Kernel V. 8.0
> Kernel Toolkit V. 7.3
> VA FileMan V. 21.0
> NDBI V. 1.0

V_IST_**A** patch installations needed to <u>install</u> the Duplicate Record Merge: Patient Merge application are:

Package	Designation
Immunology Case Registry	IMR*2.1*2
Inpatient Medications	PSJ*4.5*43
Integrated Billing	IB*2*94
Integrated Billing	IB*2*97
Lab Service	LR*5.2*205
Registration	DG*5.3*156
VA FileMan	DI*21*41
VA FileMan	DI*21*42

V_IST_**A** packages needed to fully utilize the capabilities of the Duplicate Record Merge: Patient Merge application are:

> Patient Information Management System (PIMS) V. 5.3
> Health Summary V. 2.5

The following **V**_IST_**A** packages have files that require special processing during the merge process. Additionally, a routine for National Database Integration is also included for special processing during the merge process.

Lab Service V. 5.2
Immunology Case Registry V. 2.0
Integrated Billing V. 2.0
National Database Integration (Consolidation Site activity)

Records in these files contain fields affected by the merging of the PATIENT file (#2), but are not identified as pointer fields. Routines for processing these files are sent with this application since the PATIENT file commonly points to these files. Your site can create additional routines for processing other files pointed to the PATIENT file. Any time an additional routine is created, it is necessary that an entry be made in the PACKAGE file (#9.4) in the AFFECTS RECORD MERGE subfile.

Review Global Storage

This application will use the global ^VA. Five files are exported with the application. File numbers, global locations, and file names are listed below:

File Number	Global Location	File Name
File #15	^VA(15,	DUPLICATE RECORD
File #15.1	^VA(15.1,	DUPLICATE RESOLUTION
File #15.2	^VA(15.2,	XDR MERGE PROCESS
File #15.3	^VA(15.3,	XDR REPOINTED ENTRY
File #15.4	^XDRM(	MERGE IMAGES

Review global protection, translation, and journaling.

Note: File #15.1 is released with default site parameters. Files 15, 15.2, 15.3, 15.4 are not distributed with data.

Load Distribution Files

```
D ^XUP

Setting up programmer environment
Terminal Type set to: C-VT100   <RET>

Select OPTION NAME: EVE     <RET>      Systems Manager Menu

          Core Applications ...
          Device Management ...
   FM     VA FileMan ...
          Manage Mailman ...
          Menu Management ...
          Programmer Options ...
          Operations Management ...
          Spool Management ...
          System Security ...
          Taskman Management ...
          User Management ...
          A6 UTILITY MENU ...
          Application Utilities ...
          Capacity Management ...

Select Systems Manager Menu Option: PROgrammer Options  <RET>

   KIDS   Kernel Installation & Distribution System ...
   NTEG   Build an 'NTEG' routine for a package
   PG     Programmer mode
          ALS MENU TEXT SAMPLE ...
          Calculate and Show Checksum Values
          Delete Unreferenced Options
          Error Processing ...
          Global Block Count
          List Global
          Map Pointer Relations
          Number base changer
          Routine Tools ...
          Test an option not in your menu
          Verifier Tools Menu ...

Select Programmer Options Option: KIDS  <RET>  Kernel Installation &
Distribution System

          Edits and Distribution ...
          Utilities ...
          Installation ...

Select Kernel Installation & Distribution System Option: INStallation   <RET>

   1       Load a Distribution
   2       Verify Checksums in Transport Global
   3       Print Transport Global
   4       Compare Transport Global to Current System
   5       Backup a Transport Global
```

```
   6      Install Package(s)
          Restart Install of Package(s)
          Unload a Distribution

Select Installation Option: LOAD  <RET>  a Distribution
Enter a Host File: XT73_23.KID

KIDS Distribution saved on Apr 10, 1998@15:33:10
Comment: Patient Merge

This Distribution contains Transport Globals for the following Package(s):
    XT*7.3*23

Want to Continue with Load? YES// <RET>
Loading Distribution...

Want to RUN the Environment Check Routine? YES// <RET>

   XT*7.3*23

Use INSTALL NAME: XT*7.3*23 to install this Distribution.
```

Note: Loading the distribution files takes approximately three minutes.

Verify Routine Checksums

```
           Edits and Distribution ...
           Utilities ...
           Installation ...

Select Kernel Installation & Distribution System Option: INstallation   <RET>

    1        Load a Distribution
    2        Verify Checksums in Transport Global
    3        Print Transport Global
    4        Compare Transport Global to Current System
    5        Backup a Transport Global
    6        Install Package(s)
             Restart Install of Package(s)
             Unload a Distribution

Select Installation Option: 2  <RET>  Verify Checksums in Transport Global
Select INSTALL NAME: XT*7.3*23  <RET>  Loaded from Distribution
4/10/98@15:38:58

    => Patient Merge ;Created on Apr 10, 1998@15:42:10

DEVICE: HOME//  <RET>  SYSTEM


PACKAGE: XT*7.3*23      Apr 10, 1998 3:40 pm                              PAGE 1
-------------------------------------------------------------------------------
-



    46 Routine checked, 0 failed.
```

Note: Verifying Routine Checksums takes approximately one minute.

Run the Kernel Installation and Distribution System (KIDS)

```
     1        Load a Distribution
     2        Verify Checksums in Transport Global
     3        Print Transport Global
     4        Compare Transport Global to Current System
     5        Backup a Transport Global
     6        Install Package(s)
              Restart Install of Package(s)
              Unload a Distribution
```

Select Installation Option: **Install** **<RET>** Packages(s)
Select INSTALL NAME: **Install** **<RET>** XT*7.3*23   Loaded from
Distribution 4/10/98@15:43:31

    => Patient Merge   ;Created on Apr 10, 1998@15:42:10

This Distribution was loaded on Apr 10, 1998@15:43:31 with header of
Patient Merge   ;Created on Apr 10, 1998@15:42:10
It consisted of the following Install(s):

   XT*7.3*23

   XT*7.3*23

Install Questions for XT*7.3*23

Incoming Files:

   15   DUPLICATE RECORD

   15.1   DUPLICATE RESOLUTION (including data)

   15.2   XDR MERGE PROCESS

   15.3   XDR REPOINTED ENTRY

   15.4   MERGE IMAGES

Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES// **NO**

Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.

DEVICE: HOME//   **<RET>**   SYSTEM   **<RET>**
 Install Started for XT*7.3*23 :
              Apr 10, 1998@15:44:37

Installing Routines:
              Apr 10, 1998@15:44:41

```
 Installing Data Dictionaries:
            Apr 10, 1998@15:44:49

 Installing Data:
            Apr 10, 1998@15:44:50

 Installing PACKAGE COMPONENTS:

 Installing PRINT TEMPLATE

 Installing SORT TEMPLATE

 Installing FORM

 Installing OPTION
            Apr 10, 1998@15:45:02

 Updating Routine file...

 Updating KIDS files...

 XT*7.3*23 Installed.
            Apr 10, 1998@15:45:10.

 Install Message sent #839673

----------------------------------------------------------------------------
-
          +-------------------------------------------------------------+
  100%    |              25             50             75               |
Complete  +-------------------------------------------------------------+
```

Note: The install status bar, above, will show you when the install is complete.

```
XT*7.3*23 Installed.
 Apr 10, 1998@15:45:12.

Install Message sent #2205396


Install Completed
```

Note: The installation takes approximately twelve minutes. Loading the
       distribution files, verifying routine checksums, and performing the
       installation of this application takes approximately seven minutes, total time.

New Browser Setup: XDRBROWSER1

XDRBROWSER1 is specifically designed to work with Patient Merge. It is a modified version of the VA FileMan Browser. Setup instructions for OpenM platforms are included on the following page.

The following information should be entered in your TERMINAL TYPE file (#3.2) and DEVICE file (#3.5), respectively:

Entry in TERMINAL TYPE File

```
NAME: P-XDRBROWSER
    SELECTABLE AT SIGN-ON: NO
    RIGHT MARGIN: 255
    FORM FEED: #
    PAGE LENGTH: 99999
    BACK SPACE: $C(8)
    OPEN EXECUTE: D OPEN^XDRDVAL
    CLOSE EXECUTE: D CLOSE^XDRDVAL
    DESCRIPTION: BROWSER FOR DUPLICATE RESOLUTION APPLICATIONS
```

Entry in DEVICE File

```
NAME:  XDRBROWSER1
    $I:  XDRBROW.TXT
    ASK DEVICE:  NO
    ASK PARAMETERS:  NO
    QUEUING:  ALLOWED
    LOCATION OF TERMINAL:  HFS/CRT
    ASK HOST FILE:  NO
    ASK HFS I/O OPERATION:  NO
    *MARGIN WIDTH:  255
    *FORM FEED:  #
    *PAGE LENGTH:  99999
    *BACK SPACE:  $C(8)
    OPEN PARAMETERS:  NEW:DELETE

    PRE-OPEN EXECUTE:  S %ZIS("HFSNAME")="XDR"_$J_".TXT" I
      '$D(XDRDVALF),'$$TEST^DDBRT S %ZISQUIT=1 W $C(7),!,"Browser not selectable
      from current terminal.",!

    SUBTYPE:  P-XDRBROWSER
    TYPE:  HOST FILE SERVER
```

Note: You must have a NULL device defined in the device setup.

New Browser Setup: XDRBROWSER1 (OpenM)

The following setup instructions are for OpenM platforms. The information should be entered in your TERMINAL TYPE file (#3.2) and DEVICE file (#3.5), respectively:

Entry in TERMINAL TYPE File

```
NAME:  P-XDRBROWSER
    SELECTABLE AT SIGN-ON:  NO
    RIGHT MARGIN:  255
    FORM FEED:  #
    PAGE LENGTH:  99999
    BACK SPACE:  $C(8)
    OPEN EXECUTE:  D OPEN^XDRDVAL
    CLOSE EXECUTE:  D CLOSE^XDRDVAL
    DESCRIPTION:  BROWSER FOR DUPLICATE RESOLUTION APPLICATIONS
```

Entry in DEVICE File

```
NAME:  XDRBROWSER1
    $I:  T:\TEMP\XDRBR.TXT      (or the desired drive and directory)
    ASK DEVICE:  NO
    ASK PARAMETERS:  NO
    QUEUING:  ALLOWED
    LOCATION OF TERMINAL:  HFS/CRT
    ASK HFS I/O OPERATION:  NO
    OPEN PARAMETERS:  "NWS"

PRE-OPEN EXECUTE:  S %ZIS("HFSNAME")=$P(IO,".")_$J_"."_$P(IO,".",2) I
    '$D(XDRDVALF),'$$TEST^DDBRT S %ZISQUIT=1 W $C(7),!,"Browser not selectable from
    current terminal.",!

SUBTYPE:  P-XDRBROWSER
TYPE:  HOST FILE SERVER
```

Note: You must have a NULL device defined in the device setup.

Create Mail Groups

If you don't have existing mail groups to designate as recipients of the various bulletins involved with the patient identification and merge processes, your site will have to create them using MailMan V. 7.1 utilities. If your site chooses to create mail groups, they must be added to the MAIL GROUP file (#3.8).

(See the section "Assign Mail Groups" of this guide for more information on package specific bulletins.) [See the *VA Electronic Mail System (Mailman) Technical Manual* and *Systems Management Guide*, both version 7.1 for information on creating mail groups.]

Distribute Menus and Security Keys to Users

You should now assign menus and keys to users using the following Kernel V. 8.0 utilities. Menus may be assigned using the Systems Manager Menu and the User Edit sub-menu (for assigning primary or secondary menus). Keys may be assigned by using the Systems Manager Menu, the Menu Management sub-menu, and the Key Management sub-menu.

Menus

There are three menus:

Operations   **(XDR OPERATIONS MENU)**

This menu contains options for:

1. approving verified duplicate record pairs for merging,
2. verifying a potential duplicate record pair as duplicates, and for
3. examining a potential duplicate record pair for duplicate status for ancillary services.

Utilities   **(XDR UTILITIES MENU)**

This menu offers various Duplicate Record Merge Utilities for:

1. adding a pair of records to the DUPLICATE RECORD file (#15) based on the merging criteria set forth in the POTENTIAL DUPLICATE THRESHOLD percentage. (See the section "Review Site Parameters" for more information on the POTENTIAL DUPLICATE THRESHOLD percentage.),
2. checking the status of all merge processes,
3. checking a pair of records for their duplicate match score,
4. displaying the search status of any merge job,
5. editing the Status field of a duplicate record,
6. finding all potential duplicate record pairs for a single entry in a file,
7. identifying potential merge problems,
8. printing a list of records based on their duplicate status,
9. printing a list of the zero nodes for all possible duplicates in the PATIENT file (#2),
10. printing a summary report of a file's duplicate record and merge statuses, and for
11. viewing duplicate record entries in a captioned format.

Manager Utilities   **(XDR MANAGER UTILITIES)**

The manager's menu, accessed by use of the security key XDRMGR, gives a Site Manager control of specific functions of the system. These include:

1. setting up the control record [(i.e., the DUPLICATE RESOLUTION file (#15.1)], editing site parameters,
2. printing a summary of the errors found in the PATIENT file (#2),
3. doing a pre-search scan through the primary file for records that have anomalies,
4. deleting selected record entries in the DUPLICATE RECORD file,
5. deleting selected record entries in the MERGE PROCESS file (#15.2),
6. restarting an inactive merge process,
7. starting a merge process, merging verified duplicate record pairs,
8. searching the database for potential duplicate record pairs, and for
9. stopping an active merge process.

Security Keys

Three security keys are involved with the Patient Merge release. Their purpose is to set a layer of protection on the range of available computing capabilities. Two of which (i.e., XDR and XDRMGR) are used in the Duplicate Resolution System menu. The accessibility of this menu is based on the level of system access granted to each user. These security keys are described below:

1. The **XDR** security key authorizes access to the Duplicate Resolution System menu on the Application Utilities menu.

2. The **XDRMGR** security key is required in order to access the Manager Utilities menu. This key should be given to IRM personnel responsible for managerial control over the file being searched for duplicate record pairs and the subsequent merge process.

    The **XDRMGR** security key also authorizes the holder to add a pair of records directly into the DUPLICATE RECORD file through the option Add Verified Duplicate Pair, bypassing the Potential Duplicate Threshold Percentage.

    Note: Care should be used in granting the **XDRMGR** security key, since other options that impact system resources (e.g., Schedule Process to Merge Verified Duplicates) are controlled by it.

3. Although distributed by another package, the person initiating the merge process must be authorized to hold the **DG ELIGIBILITY** security key.

   The **DG ELIGIBILITY** security key, although not required to select and run the option Identify Potential Merge Problems, is required to provide <u>valid</u> error checking results. The key may or may not be required to actually make the necessary edits.

Review Site Parameters

Several parameters are involved in the operation of this application. They are related to how potential duplicates are identified, defining reviewers, naming users to a mail group, and defining the length of waiting periods applied in the process. They are described in the next topic section.

IRM staff, perhaps the ADPACs, will set up patient identification and merge capability for the PATIENT file. This depends largely on whom holds the XDRMGR security key. This key allows access to the Manager Utilities menu used in the site configuration of the application. Either IRM, or the ADPACs, whomever is determined as responsible for editing this data, should be given this security key. Care should be used, however, in granting this key since other options that impact system resources (e.g., Schedule Process to Merge Verified Duplicates) are controlled by it.

File Setup and Default Site Parameters

The default parameters exported with this application are related to how potential duplicates are identified, to designating ancillary reviewers, and to defining the length of waiting periods applied in the process of identifying and merging duplicate records.

Your site may edit any one of these parameters. Included in this section is the list of the default parameters released with this application.

To setup patient identification and merge parameters for the PATIENT file (#2), it is necessary to enter the desired data into the DUPLICATE RESOLUTION file (#15.1). This can be accomplished by using the option Edit Site Parameters located on the Manager Utilities menu. It is through this option that the necessary entries to the DUPLICATE RESOLUTION file are made. The DUPLICATE RESOLUTION file contains the parameters by which the DUPLICATE RECORD file (#15) is populated. The DUPLICATE RESOLUTION file also contains parameters that are specific to the merge process.

You must possess the XDRMGR security key to access this option. By entering PATIENT at the prompt "Select DUPLICATE RESOLUTION FILE TO BE CHECKED:" you are designating the PATIENT file as your primary file for patient identification and merge processing.

Note: If you don't have existing mail groups to designate as recipients of the
        various bulletins involved with the patient identification and merge

processes, your site will have to create them using MailMan V. 7.1 utilities. If your site chooses to create mail groups, they must be added to the MAIL GROUP file (#3.8)

(See the section "Assign Mail Groups" of this guide for more information on application specific bulletins.) [See the *VA Electronic Mail System (MailMan) Technical Manual* and *Systems Management Guide*, both version 7.1 for information on creating mail groups.]

The following are field names and descriptions. References are made to both site parameters that are default values included with this application, and to fields that require the site assignment of values.

MERGE MAIL GROUP—This mail group is sent a bulletin when a merge process has been completed. This mail group must be an entry in the MAIL GROUP file and should contain at least one active member. Sites are required to supply their own mail groups.

DUPLICATE MANAGER MAIL GROUP—This mail group will be sent a bulletin whenever any known problems occur during the duplicate checking or merging process. This mail group must be an entry in the MAIL GROUP file. Sites are required to supply their own mail groups.

POTENTIAL DUPLICATE THRESHOLD%—This field contains a computed percentage based on the values defined in the duplicate tests. When record pair scores evaluate above this percentage, they are considered to be potential duplicates. Record pairs may differ on the maximum score to which the percentage threshold is applied. The default potential duplicate threshold with this application release is 60%.

DAYS BEFORE FINAL VERIFY—This is the number of days within which ancillary reviewers are expected to conduct their reviews. All reviews must be resolved prior to merging the affected record pair. If action is still pending by any ancillary reviewers after this period, the site may take alternative action; notify designated persons via a mail group, establish an additional reviewer, or otherwise resolve the review. This would only apply if verification of a potential duplicate pair were not completed before the site configurable time runs out. The number of days entered in this field should be between zero and 30. This application is exported with the default value set to five days.

DAYS BETWEEN VERIFY AND MERGE—This is the number of days to elapse between final verification of a duplicate pair and the earliest possible merge date (i.e., the date records are approved to be merged). This parameter is available for sites that may be concerned about possible on-going actions related to entries that

will be merged, and want to establish a period of inactivity prior to the actual merge. The default with this application release is five days. The value of this field is set by IRM. The number of days entered in this field should be between zero and 30.

NUMBER OF THREADS—This field is used to help manage the most time consuming portion of the merge process. It is used to indicate the number of threads that should be used during the longest phase of the merge process. (Phase 3 is the longest phase of the merge process. It is described in more detail in the "Merge Process" section of the *Duplicate Record Merge: Patient Merge User Manual*.) Your site can set the number of threads (jobs) according to your system resources.

For example, an entry of 1 would indicate that only the main process would be running. An entry of 2 to 3 indicates that the main process along with 1 to 2 other threads should be used during this phase. The greater the number of threads, the more parallel processing occurs. Each thread is used to process one of the more time consuming files, which reduces the amount of time the overall process takes, at the expense of increased system utilization.

The site parameter NUMBER OF THREADS is exported with the Patient Merge application with a default of 3. The maximum allowable value is 5. It is resident in the DUPLICATE RESOLUTION file. You can change the value of this field.

Ancillary Service Site Parameters

Three default ancillary services for the PATIENT file come with this application. They are Laboratory, Radiology, and Pharmacy. Your local IRM might want to add more, for example Dentistry. Individuals in the ancillary services will be designated to receive MailMan messages and/or alerts in the file setup process.

The necessary default values associated with each of the three ancillary services (e.g., Laboratory, Pharmacy, and Radiology) are included with this application. Sites are required to supply mail groups and/or assign individuals to receive alerts. Your site can add more ancillary services to the ancillary service multiple if desired.

There are two mechanisms to activate any of these default ancillary services: 1) at least one recipient must be specified to receive alerts, and/or 2) a mail group must be designated to receive MailMan messages. Both means of ancillary service activation can be established using the option Edit Site Parameters in the Manager Utilities Menu. A facility may add additional ancillary services if desired. The following is a list of the exported parameters in the Ancillary Service data entry screen.

Individuals notified of pending review activity through alerts will be taken into the review process automatically. However, mail group recipients will NOT be taken into the review process automatically. They must take the extra step of using the Ancillary Data Review option in the Operations menu to process potential duplicate record pairs. Either way produces the same results.

Note: Recipients can be designated to receive alert notifications of potential duplicate record pairs, as well as belong to mail groups designated to receive MailMan message notifications for the same duplicate entries. Should the recipients' process alerts first, the same duplicate record pairs will not be accessible through the option Ancillary Data Review. The opposite is also true. Should the recipient's process duplicate entries using the option Ancillary Data Review first, the alert goes away.

The following are field names and descriptions for the ancillary service site parameters. References are made to both site parameters that are default values included with this application, and to fields that require the site assignment of values.

ANCILLARY SERVICE—Duplicate record pairs may require secondary reviews when data is present in ancillary files. This field is the name of the V*IST*A ancillary service associated with each duplicate record pair. Three default ancillary services are released with Patient Merge: Laboratory, Pharmacy, and Radiology. Each of these ancillary services has an associated primary file, which could provide information on whether the entries are in fact, duplicates or not. In addition, the ancillary reviewers' expertise in evaluating other data in health summaries may provide information on the duplicate question. This entry must be from three to 30 characters in length.

PRIMARY FILE NUMBER - Primary file number for the main file associated with the ancillary service. Enter the file number to be used for identifying duplicate record pairs for this ancillary service [e.g., LAB DATA file (#63), RADIOLOGY PATIENT file (#70), PHARMACY PATIENT file (#55), etc.]. Each ancillary service distributed with this application release contains a default value for this field.

SUBFILES (FIELD NUMBERS) - Subfiles in the primary file. To show how many particular types of data, or entries, exist for some of the subfiles, you can enter the field numbers for the subfile(s). These entries should be separated by semicolons (e.g., 1;.085;2;4;5). Each ancillary service distributed with this application release contains a default value for this field.

DISPLAY NAMES FOR SUBFILES—Respective subfile names for each of the specified subfiles in the primary file. Specify the names that will be associated with

the subfile numbers as they are entered in the field SUBFILES (FIELD NUMBERS). The names entered must be in the same position as their corresponding field numbers. These names will appear on the screen so you might want to make them descriptive. Semicolons (e.g., Bld Bank; Transfusn; EM; Lab Tests; Microbiol) should separate these entries. Each ancillary service distributed with this application release contains a default value for this field.

MAIL GROUP NAME—Optional. This field is a pointer to the MAIL GROUP file. Your answer must be the name of an actual mail group entry in that file. Once potential duplicate record pairs are established from the search, populated into File #15, and reviewed by the primary reviewers, MailMan messages are automatically sent to these designated mail groups if data is present for both entries in the potential duplicate pair in the file specified as the primary file for the ancillary service. Alerts can also be sent to individuals separately by designating one or more reviewer in the INDIVIDUAL FOR ALERTS field. Sites are required to supply mail groups.

INDIVIDUAL FOR ALERTS—Optional. Enter one or more ancillary reviewer. Once potential duplicate record pairs are established from the search, populated into File #15, and reviewed by the primary reviewers, alerts are automatically sent to these designated individuals if data is present for both entries in the potential duplicate pair in the file specified as the primary file for the ancillary service. Answer with the NEW PERSON NAME, INITIAL, SSN, NICK NAME, DEA#, or VA#.

Sites are required to supply individuals for alerts. For a review by an ancillary service to be active, there must be at least one member in a specified mail group OR at least one individual specified to receive alerts.

Options No Longer Referenced in Duplicate Resolution Utilities

These three options have become obsolete in Kernel Toolkit with the release of Duplicate Record Merge: Patient Merge:

    Automatically Merge all Ready Verified Duplicates [XDR AUTO MERGE]
    Merge Selected Verified Duplicate Pair [XDR MERGE SELECTED PAIR]
    Verify Selected Potential Duplicate Pair [XDR VERIFY SELECTED PAIR]

Health Summary for Paper Backup

Your site may want to specify a health summary (which should be as complete as possible) to be used to produce a paper record for each entry in a duplicate record

pair prior to the merge process. Specification of the health summary must be accompanied by specification of a printer for automatic printing to occur. This feature is intended to serve as a means of a "before" image to document what data was available when previous clinical decisions were made.

Designate Ancillary Reviewers

The Ancillary Reviewer can be a single person or group of people given the responsibility to conduct secondary 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. Your site may want to notify these services to have them assign their own representative(s).

Ancillary Reviewers will receive alerts and/or MailMan messages notifying them of pending review activity. It is up to that particular ancillary service to elect whom will be notified to process potential duplicate record pairs and through what means. Designated ancillary reviewers must be entered during the application setup either as members of a specified mail group, or as individuals to receive alerts. Do this by selecting the option Edit Site Parameters in the Manager Utilities menu. You must posses the XDRMGR key to access this option.

To enter a mail group, edit the MAIL GROUP NAMES field in the ANCILLARY SERVICE INFORMATION data entry multiple. To enter a single individual designated to receive alerts, edit the INDIVIDUAL field of the ANCILLARY SERVICE INFORMATION multiple.

Individuals notified of pending review activity through alerts will be taken into the review process automatically. However, mail group recipients will NOT be taken into the review process automatically. They must take the extra step of using the Ancillary Data Review option in the Operations menu to process potential duplicate record pairs. Either way produces the same results.

Assign Mail Groups

By now you've either designated existing mail groups, or created new ones using MailMan V. 7.1 utilities. You can assign these mail groups to the various bulletins involved with the patient identification and merge processes using the option Edit Site Parameters in the Manager Utilities menu. You must posses the XDRMGR security key to access this option. Remember that the name of the mail group must be in the MAIL GROUP file. The following are descriptions of the mail groups associated with this application:

Use the MERGE MAIL GROUP to enter the name of the mail group that you want a:

1) bulletin sent to when a merge process has been completed.
2) bulletin sent to comprised of FROM and TO record pairs detected as having data errors during the beginning of the actual merge process. Records contained in this message are excluded from the merge process. The subject of this MailMan message is "MERGE PAIRS EXCLUDED DUE TO PROBLEMS".
3) bulletin sent to comprised of FROM and TO record pairs excluded from the merge process resulting from their multiple relationship(s) with the record pair selected to be merged. The subject of the MailMan message is "PAIRS EXCLUDED FROM MERGE DUE TO MULTIPLE REFERENCES".

    (See the section "Schedule Process to Merge Verified Duplicates" in the *Duplicate Record Merge: Patient Merge User Manual* for more information on data error and/or multiple pair processing excluding records from being merged.)

Use the DUPLICATE MANAGER MAIL GROUP to enter the name of the mail group that you want a bulletin sent to when an error causes the halting of a duplicate record search, or a merge process.

Use the MAIL GROUP NAME in the Ancillary Service data screen to enter members who need to be notified when their particular ancillary service needs to process duplicate record pairs.