



MERGING CLIENT INFORMATION

imMTrax User Role Training

Montana Immunization Program

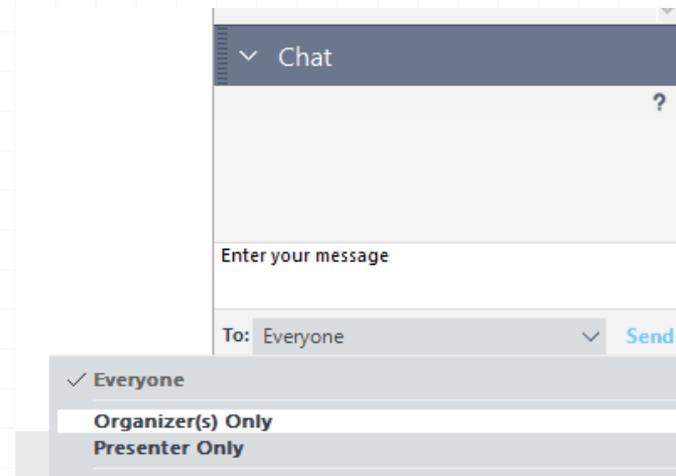
Last revised 3/2020

Housekeeping

- All participants are muted upon entering the presentation. Please do not put the line on hold.
- Any attendees listening to this presentation that do not currently have merge role access that would like to start assisting with the merge queue at your facility, please send me your contact information through the chat box and I will send you the merge role agreement via email.

To ask a question:

1. Send the host a message through the “Chat” function.



Merging Client Information

Goals and Implications

The primary goal of merging client records is to create one current and complete record for each individual client.

Two (or more) client records may need to be merged if each record reflects or includes:

- Changes in client last name (change in marital status, adoption)
- Data entry variations
- Data entry errors

Merging Client Information,

New imMTrax Merge :

- Merge queue is site specific
- Daily patient level deduplication scans
- Daily vaccine level deduplication scans

We expect to see less records flagged for manual resolution.

Merging Client Information

Practices for a Well-Maintained imMTrax

- **Make evaluating your “merge queue” a routine task**

Merging clients on a routine basis reduces the overall number of records pending evaluation and helps keep your clients' information accurate and up-to-date!

- **Do your research**

When you see information that is either outdated or in question, you may need to refer to your records to make the best selection.

- **Use your best judgment**

- **If you are not 100% sure, DO NOT MERGE**



How to...Report Patient Duplicates



Merging Client Information

Report Patient Duplicate

If two or more possible duplicate patient records are identified in the Patient Search Results, select Report Duplicates

Report Duplicate Patients

Reason for deduplication:

Please select two or more records you would like to merge.

Select	First Name	Middle Name	Last Name		Grd First Name	Grd Last Name
<input type="checkbox"/>	STRAWBERRY		PIE	--select-- --select-- ENTRY ERROR SAME PATIENT SAME PATIENT DIFFERENT DOB SAME PATIENT NAME VARIATION		
<input type="checkbox"/>	STRAWBERRY		SHORTCAKE			

1

Back Report Duplicates

Merging Client Information

Report Patient Duplicate

Select a reason for deduplication:

- Entry Error
- Same Patient
- Same Patient Different DOB
- Same Patient Name Variation

Report Duplicate Patients

Reason for deduplication:

Please select two or more records you would like to merge.

Select	First Name	Middle Name	Last Name		Grd First Name	Grd Last Name
<input type="checkbox"/>	STRAWBERRY		PIE	--select-- --select-- ENTRY ERROR SAME PATIENT SAME PATIENT DIFFERENT DOB SAME PATIENT NAME VARIATION		
<input type="checkbox"/>	STRAWBERRY		SHORTCAKE			

2

Back Report Duplicates

Merging Client Information

Report Patient Duplicate

- Select the check boxes next to the identified possible duplicate records
- Select Report Duplicates

Report Duplicate Patients

3

Reason for deduplication:

SAME PATIENT NAME VARIATION ▼

Please select two or more records you would like to merge.

Select	First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
<input checked="" type="checkbox"/>	STRAWBERRY		PIE	09/20/1983	1306729		
<input checked="" type="checkbox"/>	STRAWBERRY		SHORTCAKE	09/20/1983	1306728		

4

Back

Report Duplicates

Merging Client Information

Report Patient Duplicate

- Use the radio button. Located above the patient record name, to select the Master patient record.
 - The most complete record, the one with the most updated information or the record with the most complete spelling should be marked as the Master record.

Patient Set Merge

Master Patient: **5**

SIIIS ID	1306729	1306728
First Name	STRAWBERRY	STRAWBERRY
Middle Name		
Last Name	PIE	SHORTCAKE
Suffix		
Birth Date	09/20/1983	09/20/1983
Sex	FEMALE	FEMALE
Medicaid Number		
Birth File		
Race		
Language		
Mother Maiden Name		
Guardian First Name		
Guardian Middle Name		
Guardian Last Name		
Street Address	4201 LOVELAND DR.	4201 LOVELAND DR.
City	MISSOULA	MISSOULA
State	MONTANA	MONTANA
Zip Code	59804	59804
Phone		
Email		
Health Plan		
Health Plan ID		
HP Enroll Date		
Multi Birth Indicator	N	N
Birth Order		

Reason for deduplication: SAME PATIENT NAME VARIATION
Same Patient Name Variation

Back Merge

Reporting Duplicates

Best Practice Tip

- It's best practice to enter a note in the notes field for the merge user to review before consolidating the record, especially for complex merges where it is not readily apparent that the patients are the same.

Example: Patient has legally changed their name.

Patient Set Merge		
Master Patient:		
SIS ID	1306729	1306728
First Name	STRAWBERRY	STRAWBERRY
Middle Name		
Last Name	PIE	SHORTCAKE
Suffix		
Birth Date	09/20/1983	09/20/1983
Sex	FEMALE	FEMALE
Medicaid Number		
Birth File		
Race		
Language		
Mother Maiden Name		
Guardian First Name		
Guardian Middle Name		
Guardian Last Name		
Street Address	4201 LOVELAND DR.	4201 LOVELAND DR.
City	MISSOULA	MISSOULA
State	MONTANA	MONTANA
Zip Code	59804	59804
Phone		
Email		
Health Plan		
Health Plan ID		
HP Enroll Date		
Multi Birth Indicator	N	N
Birth Order		

Reason for deduplication:
Same Patient Name Variation

SAME PATIENT NAME VARIATION
Patient recently got married and legally changed their name.

6

Back Merge

Merging Client Information Report Patient Duplicate

- Last step of reporting a merge is Select Report Duplicates.

Patient Set Merge		
Master Patient:		
SIIS ID	1306729	1306728
First Name	STRAWBERRY	STRAWBERRY
Middle Name		
Last Name	PIE	SHORTCAKE
Suffix		
Birth Date	09/20/1983	09/20/1983
Sex	FEMALE	FEMALE
Medicaid Number		
Birth File		
Race		
Language		
Mother Maiden Name		
Guardian First Name		
Guardian Middle Name		
Guardian Last Name		
Street Address	4201 LOVELAND DR.	4201 LOVELAND DR.
City	MISSOULA	MISSOULA
State	MONTANA	MONTANA
Zip Code	59804	59804
Phone		
Email		
Health Plan		
Health Plan ID		
HP Enroll Date		
Multi Birth Indicator	N	N
Birth Order		

Reason for deduplication: Same Patient Name Variation

SAME PATIENT NAME VARIATION
Patient recently got married and legally changed their name.

Back Merge

Merging Client Information Report Patient Duplicate

Note: Selecting Merge will not consolidate the records. The records will be flagged for manual resolution and available for a facility level merge user to review and consolidate. You will see a message like below if your flag for manual review was successfully submitted.

• Your request for record merging has successfully been submitted for manual review.

Patient Search		Click here to use the 'advanced' search	
Last Name or Initial:	<input type="text"/>	ID:	<input type="text"/>
First Name or Initial:	<input type="text" value="Strawberry"/>	SIIS Patient ID / Bar Code:	<input type="text"/>
Birth Date:	<input type="text" value="09/20/1983"/>	Chart Number:	<input type="text"/>
Family and Address Information:			
Guardian First Name:	<input type="text"/>	Mother's Maiden Name:	<input type="text"/>
Street:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text" value="Select..."/>
Zip Code:	<input type="text"/>	Phone Number:	<input type="text"/>
Country:	<input type="text" value="United States"/>		

Note: When searching by First and Last Name, you may use the wildcard character % to replace multiple characters and _ to replace a single character.
 Check here if adding a new patient.

Patient Search Results						
Records Found = 2				Search Criteria: First Initial / Birth Date		
Show <input type="text" value="100"/> entries Search: <input type="text"/>						
First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
STRAWBERRY		PIE	09/20/1983	1306729		
STRAWBERRY		SHORTCAKE	09/20/1983	1306728		
Showing 1 to 2 of 2 entries ◀ ▶						

Merging Client Information

Navigating to the Merge Functions

Main
Home
Logout
Document Center
Help

Message
View Messages

Favorites

Patient
Search/Add
Demographics
Review Duplicates
Manage Population

Vaccinations

Inventory Management

Reports

Settings

Reminder/Recall

Scheduled Reports

Change Password

Administration

Answers

Patient Search [Click here to use the 'advanced' search](#)

First Name or Initial:	<input type="text"/>	ID:	<input type="text"/>
Last Name or Initial:	<input type="text"/>	SIIS Patient ID / Bar Code:	<input type="text"/>
Birth Date:	<input type="text"/>	Chart Number:	<input type="text"/>

Family and Address Information:

Guardian First Name:	<input type="text"/>	Mother's Maiden Name:	<input type="text"/>
Street:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text" value="Select..."/>
Zip Code:	<input type="text"/>	Phone Number:	<input type="text"/>
Country:	<input type="text" value="Select..."/>		

Note: When searching by First and Last Name, you may use the wildcard character % to replace multiple characters and _ to replace a single character.

Check here if adding a new patient.

Merging Client Information, Navigating to the Merge Functions

REMEMBER!!!!

Always review Batch Imports and User Flagged when reviewing your facility's merge queue.



Manual Deduplication

Limit Report By

Batch Imports User Flagged

Merging Client Information

Batch Imports: Navigating to the Merge Function

The screenshot shows the 'Manual Deduplication' interface. A green oval highlights the 'Batch Imports' radio button and the 'Oldest First' radio button. Another green oval highlights the 'Continue' button. A green arrow points from the 'Continue' button to the 'Birth Dates' field.

Organization (IRMS) ID	Organization (IRMS) Name	Total # of Records
18507	DEB'S DISNEYWORLD	2

Merge by selection from your “merge queue”

Select *Continue* to evaluate records for merging

- Option to display records:
1. Oldest First or Newest First
 2. Birth date range

Merging Client Information

Merging by User Flagged

If the records should be merged, **select Merge.**

Manual Deduplication Record 1 of 1

Return to Select Screen Previous Skip Merge New Patient Collapse

Incoming Patient Record		Potential Match in System
18507	System ID	18507
SLEEPING BEAUTY'S SLEEP DIAGNOSTICS	Facility ID	SLEEPING BEAUTY'S SLEEP DIAGNOSTICS
SP9048450078	Patient ID	SIISCLIENT29811
ROCKY	First Name	ROCKY
C	Middle Name	CREAM
ROAD	Last Name	ROAD
	Suffix	
10/15/2015	Birth Date	10/15/2015
F	Sex	F
	SSN	
	Medicaid Number	
	Birth File	
	Race	White
	Language	
	Mother Maiden	
	Grd First Name	
	Grd Middle Name	
	Grd Last Name	
	Guardian SSN	
298 TEST AVEUNE	Street Address	PO BOX 1111
MISSOULA	City	ST IGNATIUS
MT	State	MT
59874	Zip Code	59865
(406)444-9353	Phone	(406)544-1785
	Email	
	Health Plan	
	Health Plan ID	
	HP Enroll Date	
	Multi Birth Indicator	N
	Birth Order	
	Block Mail Reason	
12/29/2018 12:04:12	Registry Entry Stamp	12/29/2018 12:01:39

Yes Make Incoming Record Historical

Return to Select Screen Previous Skip Merge New Patient

Note: Upon selecting Merge, if the demographic information in the Incoming Patient Record is different than the Potential Match in System, the information will be updated to reflect the information in the Incoming Patient Record.

Incoming Patient Record		Shared Vaccinations		Potential Match in System	
Date	Vaccine Type	Date	Vaccine Type	Date	Vaccine Type
02/10/2017	pneumococcal polysaccharide PPV23			08/08/2016	IPV
				08/08/2016	DTaP
				03/03/2017	Hep A, adult
				03/03/2017	DTaP-IPV
				12/29/2018	MMR
				12/29/2018	Tdap
				12/29/2018	Meningococcal MCV40

The vaccinations in the Incoming Patient Record and Potential Match in System will be consolidated and saved.

Merging Client Information Batch Imports



Manual Deduplication

Limit Report By

Batch Imports User Flagged

Display Incoming Records By:

Oldest First Newest First

Birth Dates: From: Through:

Back Continue

Organization (IRMS) ID	Organization (IRMS) Name	Total # of Records
Process Manual Deduplication Records		

After merging records in your facility's merge queue, select Return Back to Select Screen or the system will automatically return you to the screen if you merge all records in the queue.

Select Process Manual Deduplication Records.



Failure to select Process Manual Deduplication Records will result in the incoming message not appearing in record for an extended amount of time.



Merging Client Information

User Imports: Navigating to the Merge Function

The screenshot shows the 'Manual Deduplication' interface. A green oval highlights the 'Display Incoming Records by:' section, which includes radio buttons for 'Batch Imports' (selected) and 'User Flagged', and another set of radio buttons for 'Oldest First' (selected) and 'Newest First'. Below this is a checkbox for 'Birth Dates:' and two input fields for 'From:' and 'Through:'. A green arrow points from the 'Continue' button to the 'Birth Dates:' checkbox. Another green oval highlights the 'Continue' button.

Organization (IRMS) ID	Organization (IRMS) Name	Total # of Records
18507	DEB'S DISNEYWORLD	2

Process Manual Deduplication Records

Merge by selection from your “merge queue”

Select *Continue* to evaluate records for merging

- Option to display records:
1. Oldest First or Newest First
 2. Birth date range

Merging Client Information, Merging by User Flagged

Filtered by Organization (IRMS):18507
Manual Deduplication Record 1 of 1

Return to Select Screen Previous Skip Merge Different Patients Collapse

Suggested Master	Master Record	Suggested Merge
<input checked="" type="radio"/>	<input type="radio"/>	
18507	System ID	18507
SLEEPING BEAUTY'S SLEEP DIAGNOSTICS	Facility ID	SLEEPING BEAUTY'S SLEEP DIAGNOSTICS
10867	Patient ID	17437
BAR	First Name	BAR
	Middle Name	
KITKAT	Last Name	KITKAT
	Suffix	
01/02/2001	Birth Date	01/03/2001
F	Sex	M
	SSN	
	Medicaid Number	
	Birth File	
White	Race	White
	Language	
	Mother Maiden	
	Grd First Name	
	Grd Middle Name	
	Grd Last Name	
	Guardian SSN	
PO BOX 56	Street Address	PO BOX 80
THREE FORKS	City	HELENA
MT	State	MT
59752	Zip Code	59601
	Phone	(406)446-5223
	Email	
	Health Plan	
	Health Plan ID	
	HP Enroll Date	
	Multi Birth Indicator	
	Birth Order	
	Block Mail Reason	
11/07/2018 10:52:21	Registry Entry Stamp	11/07/2018 11:02:53
Reason Records are Believed to be Duplicates: TEST		
Comments		
Return to Select Screen	Previous	Skip Merge Different Patients

Patient Vaccination Record

Suggested Master	Shared Vaccinations	Suggested Merge
Date	Date	Date
Vaccine Type	Vaccine Type	Vaccine Type
03/09/2011		04/08/2011
DTaP-Hep B-IPV		DTaP-Hep B-IPV

Select Merge

Demographic
information will reflect
Suggested Master

Immunizations in both
records will be
combined and merged
into the new record

Merging Client Information, Merging by User Flagged

Filtered by Organization (IRMS):18507
Manual Deduplication Record 1 of 1

Merge Different Patients Collapse

Suggested Master	Master Record	Suggested Merge
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
18507	System ID	18507
SLEEPING BEAUTY'S SLEEP DIAGNOSTICS	Facility ID	SLEEPING BEAUTY'S SLEEP DIAGNOSTICS
10867	Patient ID	17437
BAR	First Name	BAR
	Middle Name	
KITKAT	Last Name	KITKAT
	Suffix	
01/02/2001	Birth Date	01/03/2001
F	Sex	M
	SSN	
	Medicaid Number	
	Birth File	
White	Race	White
	Language	
	Mother Maiden	
	Grd First Name	
	Grd Middle Name	
	Grd Last Name	
	Guardian SSN	
PO BOX 56	Street Address	PO BOX 80
THREE FORKS	City	HELENA
MT	State	MT
59752	Zip Code	59601
	Phone	(406)446-5223
	Email	
	Health Plan	
	Health Plan ID	
	HP Enroll Date	
	Multi Birth Indicator	
	Birth Order	
	Block Mail Reason	
	Registry Entry Stamp	

Reason Records are Believed to be Duplicates: TEST

Comments

Return to Select Screen Previous Skip Merge Different Patients

Patient Vaccination Record					
Suggested Master		Shared Vaccinations		Suggested Merge	
Date	Vaccine Type	Date	Vaccine Type	Date	Vaccine Type
03/09/2011	DTaP-Hep B-IPV			04/08/2011	DTaP-Hep B-IPV

Review the information
in each column

Suggested Master=
record user flagged as the
most complete record

Suggested Merge= record
user indicated should be
merged into master
record

Merging Client Information, Merging by User Flagged

Filtered by Organization (IRMS):18507
Manual Deduplication Record 1 of 1

Return to Select Screen Previous Skip Merge Different Patients Collapse

Suggested Master	Master Record	Suggested Merge
<input checked="" type="radio"/>	18507 SLEEPING BEAUTY'S SLEEP DIAGNOSTICS 10867 BAR KITKAT 01/02/2001 F White PO BOX 56 THREE FORKS MT 59752 11/07/2018 10:52:21 Reason Records are Believed to be Duplicates: TEST Comments	<input type="radio"/> 18507 SLEEPING BEAUTY'S SLEEP DIAGNOSTICS 17437 BAR KITKAT 01/03/2001 M White PO BOX 80 HELENA MT 59601 (406)446-5223 11/07/2018 11:02:53

Return to Select Screen Previous Skip Merge Different Patients

Patient Vaccination Record			
Suggested Master		Suggested Merge	
Date	Vaccine Type	Date	Vaccine Type
03/09/2011	DTaP-Hep B-IPV	04/08/2011	DTaP-Hep B-IPV

Review the information
in each column

If records are a match,
use the radio button to
select Suggested Master
or Suggested Merge

In most cases, the
Suggested Master will
be selected, but carefully
consider before merging

Merging Client Information, Merging by User Flagged

Filtered by Organization (IRMS):18507
Manual Deduplication Record 1 of 1

Return to Select Screen Previous Skip Merge Different Patients Collapse

Suggested Master	Master Record	Suggested Merge
<input checked="" type="radio"/>	<input type="radio"/>	
18507	System ID	18507
SLEEPING BEAUTY'S SLEEP DIAGNOSTICS	Facility ID	SLEEPING BEAUTY'S SLEEP DIAGNOSTICS
10867	Patient ID	17437
BAR	First Name	BAR
	Middle Name	
KITKAT	Last Name	KITKAT
	Suffix	
01/02/2001	Birth Date	01/03/2001
F	Sex	M
	SSN	
	Medicaid Number	
	Birth File	
White	Race	White
	Language	
	Mother Maiden	
	Grd First Name	
	Grd Middle Name	
	Grd Last Name	
	Guardian SSN	
PO BOX 56	Street Address	PO BOX 80
THREE FORKS	City	HELENA
MT	State	MT
59752	Zip Code	59601
	Phone	(406)446-5223
	Email	
	Health Plan	
	Health Plan ID	
	HP Enroll Date	
	Multi Birth Indicator	
	Birth Order	
	Block Mail Reason	
11/07/2018 10:52:21	Registry Entry Stamp	11/07/2018 11:02:53
Reason Records are Believed to be Duplicates: TEST		
Comments		
Return to Select Screen	Previous	Skip Merge Different Patients

Patient Vaccination Record

Suggested Master	Shared Vaccinations	Suggested Merge
Date	Date	Date
Vaccine Type	Vaccine Type	Vaccine Type
03/09/2011		04/08/2011
DTaP-Hep B-IPV		DTaP-Hep B-IPV

Select Merge

Demographic
information will reflect
Suggested Master

Immunizations in both
records will be
combined and merged
into the new record

Merging Client Information Batch Imports



Manual Deduplication

Limit Report By

Batch Imports User Flagged

Display Incoming Records By:

Oldest First Newest First

Birth Dates: From: Through:

Back Continue

Organization (IRMS) ID	Organization (IRMS) Name	Total # of Records
Process Manual Deduplication Records		

After merging records in your facility's merge queue, select Return Back to Select Screen or the system will automatically return you to the screen if you merge all records in the queue.

Select Process Manual Deduplication Records.



Failure to select Process Manual Deduplication Records will result in the incoming message not appearing in record for an extended amount of time.



How to... Disassociate Client Records



Disassociating Client Records, Batch Import

Filtered by Organization (IRMS):18507

Manual Deduplication Record 1 of 1

Return to Select Screen Previous Skip Merge New Patient Collapse

Incoming Patient Record	Potential Match In System
18507	System ID 18507
SLEEPING BEAUTY'S SLEEP DIAGNOSTICS	Facility ID SLEEPING BEAUTY'S SLEEP DIAGNOSTICS
SP9404495865	Patient ID SP940009865
BUGS	First Name BUGS
SASSY	Middle Name
BUNNY	Last Name BUNNY
L	Suffix
05/05/1999	Birth Date 05/05/2013
F	Sex F
	SSN
	Medicaid Number
	Birth File
	Race
	Language
	Mother Maiden
	Grd First Name
	Grd Middle Name
	Grd Last Name
	Guardian SSN
1234 HONEY LANE AVEUNE	Street Address 1234 HONEY LANE AVEUNE
KALISPELL	City HELENA
MT	State MT
96501	Zip Code 96501
(406)444-9353	Phone (406)444-9353
	Email
	Health Plan
	Health Plan ID
	HP Enroll Date
	Multi Birth Indicator
	Birth Order
	Block Mail Reason
01/04/2019 09:00:59	Registry Entry Stamp 01/04/2019 08:57:34

Yes Make Incoming Record Historical

Return to Select Screen Previous Skip Merge **New Patient**

If you have more than two records being evaluated that should not be merged, select New Patient.

Patient Vaccination Record

Suggested Master		Shared Vaccinations		Suggested Merge	
Date	Vaccine Type	Date	Vaccine Type	Date	Vaccine Type
03/09/2011	DTaP-Hep B-IPV			01/02/2019	DTaP-Hep B-IPV

How to... Unmerge Client Records



Unmerge Client Records

Contact the Montana Immunization Program, 406-444-5580.

Note the SIIS Patient ID for record.



Montana Department of Health
and Human Services
Public Health and Safety
Division
Immunization Program

Questions?

Sarah R. Keppen, RHIA
IIS Training and Support
(406) 444-9539
sarah.keppen@mt.gov

Thank you for attending!