TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER-EL PASO MEDICAL PRACTICE INCOME PLAN – POLICY AND PROCEDURE

Revised Da	te: 01/04/2021	Effective Date. 02/01/2021				
Prepared By: Ana Deslongchamps		Approved By: Latty M= Carvall				
Ana Deslongchamps, Senior Director		Patty McCarroll, Vice President of Clinical Administration				
		DocuSigned by:				
		Anthony Esposito Anthony Loporoscano Anthony				
		Anthony 250755230FA0A44Bve Director				
Departmen	nt: MPIP Central Registration					
TITLE:	The Process to Identify and Merge Duplicate Accounts in CBIZ.					
Policy:	#6					

Policy: Central Registration will utilize the Enterprise Index report on a weekly basis. (THIS MUST BE DEFINED, Weekly, Bi-Weekly, 2nd Tuesday of the month, etc.) to identify potential duplicate accounts. This will ensure that potential duplicate accounts are addressed and merged in CBIZ soon after creation, reducing the risk to patient care. Also, it is important to prevent duplicate accounts in order to ensure the integrity of patient data in CBIZ.

Procedure:

- 1) Duplicate Account Identification Process
 - a. Process regularly the Enterprise Index Worklist identifying potential duplicate accounts in CBIZ. Exhibit A.
- 2) Merge Request Process
 - a. CBiz users submit their duplicate accounts merge requests directly to the NEW Duplicate Patient Registration Portal at the time they identify a potential duplicate account. Exhibit B.
 - b. Central Registration staff will receive a notification via email when a duplicate request is submitted in the Duplicate Patient Registration portal.
 - Merge requests are submitted and reviewed on a weekly basis.. (THIS MUST BE DEFINED, Weekly, Bi-Weekly, 2nd Tuesday of the month, etc.)
- 3) Merge Process in CBIZ Enterprise Index
 - a. Select Enterprise Index in CBIZ tool bar & click on Duplicate Worklists Tab.
 - b. Enter E# in the Find Duplicates for Patient field. Accounts not recognized by Enterprise Index, must be manually flagged in CBIZ. Select Manually Flag Duplicates Tab & enter corresponding E# in (Patient 1 & Patient 2 Field) & click Ok.
 - c. Duplicate Worklist: select duplicate pair and click Ok.
 - d. Duplicate Registration Summary: Select Compare Patient Data & click on View Registration. Review the following information in each Tab (Prim Demo, Secondary Demo, Add'l Demo, Guarantor, AKA, Other #, and General Comments).
 - e. Identify Surviving Record: Identify the survivor account. Select (L) Patient in Left Column or (R) Patient in Right Column & click ok.
 - f. Move Patient Data: Transfer the following information if applicable; Demographic, Insurance, Appointments/Visits, Invoice, TES, and General Comments to survivor account.

02/01/2021

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER-EL PASO MEDICAL PRACTICE INCOME PLAN – POLICY AND PROCEDURE

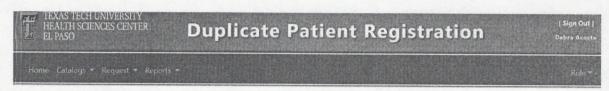
- g. Duplicate Resolutions: Select the appropriate duplicate resolution from the drop menu. (Not Duplicate-Flagged in Error, Merged Duplicate, Multiple Births, Needs more research, etc.) Enter comments according to duplicate solution & click Ok.
- h. Deactive Duplicate: After all the account activity has been transferred, proceed to deactivate the duplicate account & select Yes.
- i. Deactivation Reason: Enter the following comment (Dup acct keep E#) and click Ok.
- j. Merge process is complete in CBiz.
- 4) Duplicate Patient Registration Portal
 - a. After the merge has been processed in CBiz, Central Registration staff will edit the request in the Duplicate Patient Registration portal.
 - b. Duplicate Patient Registration portal website: https://awscssw01.ttuhsc.edu/DuplicatePatientPortal/
 - c. Log in with eraider credentials.
 - d. In the Home screen menu, select duplicate merge request and select Process Request link.
 - e. Edit Merge Request: Identify survivor account by adding a check mark.
 - f. Identify the source of the duplicate account: Enterprise Index, Duplicate Registration portal or Other.
 - g. Merge Status: Select the duplicate resolution; (Complete, Not Duplicate/Different patients, Denied-Accounts in CBiz or Multiple CBiz User Request).
 - h. Identify CBiz user that created the duplicate account: Enter full name, department/clinic name, & the date that the duplicate account was created.
 - i. Click Save. Process in Duplicate Registration portal is complete.
 - j. EMR Team will proceed with merge process in the EMR System.
- 5) Training and Accountability
 - a. CBiz users will be provided periodic training (THIS MUST BE DEFINED, Weekly, Bi-Weekly, 2nd Tuesday of the month, Annual etc.) by the EMR team on their role and accountability for processes to prevent duplicate patient accounts.
 - a. Describe the process to document the individuals that completed the education.
 - b. Central Registration periodic reporting (THIS MUST BE DEFINED, Weekly, Bi-Weekly, 2nd Tuesday of the month, Annual etc.) will be used to identify staff that repeatedly create duplicate accounts in order to provide more in depth training and to hold them accountable.

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER-EL PASO MEDICAL PRACTICE INCOME PLAN – POLICY AND PROCEDURE

Exhibit A.

MLTh	<u>B</u> ack <u>Hide VTB</u>			
Enterprise Inde	Duplicate Worklists Duplicate Workl	files Manually Flag Duplicat	es	
Patient Services Invoice Inquiry Comments TES Task Manager Fin Activities EDI Claim Forms Dictionaries View Fee Schedu	Dunlicate Report Workfile/View: V	Report Refresh Clear Last Name Alpha Range From: To: Orig Flag Dt Range From: Last Flag Dt Range From:		
DBMS Eligibility Enterprise Index Links Select HMO/Org/	Include only patients with A/R balance Include only manually flagged pairs Sort By: 1	Last Upd Dt Range From: To: Cancel Corporation Corpora		
	User: Acosta, Debbie System: ELP1			

Exhibit B.



Duplicate Patient Registration

Show 25	thes							Search	
Transaction * †*	Submitted 0	Submitted o	Patients	6	Status >	Processed o	Requested Operation of the Department	Actions	•

DocuSign Envelope ID: C21204DC-8D28-4AED-A45C-3A781727BC76

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER-EL PASO MEDICAL PRACTICE INCOME PLAN – POLICY AND PROCEDURE