

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

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Department: 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.
 - c. 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.

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- 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://awsscsw01.ttuhscc.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.

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Exhibit A.

MPIP Back Hide VTB

Enterprise Index Duplicate Worklists Duplicate Workfiles Manually Flag Duplicates

Patient Services
Invoice Inquiry
Comments
TES
Task Manager
Fin Activities
EDI
Claim Forms
Dictionaries
View Fee Schedu
DBMS
Eligibility
Enterprise Index
Links
Select HMO/Org/

Duplicate Report

Workfile/View: [V] [Search] Report Refresh Clear

Duplicate Status (blank=ALL):
1 [Text Box] [Search]
2 [Text Box] [Search]
3 [Text Box] [Search]

Stages to Include (blank=ALL): [Text Box]
Minimum Weighted Score: [Text Box]
Maximum Weighted Score: [Text Box]

Include only patients with future appts
 Include only patients with open visits
 Include only patients with A/R balance
 Include only manually flagged pairs

Sort By:
1 [Text Box]
2 [Text Box]

Last Name Alpha Range
From: [Text Box]
To: [Text Box]

Orig Flag Dt Range
From: [Text Box] To: [Text Box]

Last Flag Dt Range
From: [Text Box] To: [Text Box]

Last Upd Dt Range
From: [Text Box] To: [Text Box]

Find duplicates for patient: [Text Box]

OK Cancel

User: Acosta,Debbie System: ELP1

Exhibit B.

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER EL PASO Duplicate Patient Registration [Sign Out] Debra Acosta

Home Catalogs Request Reports Role

Duplicate Patient Registration

Show: 25 entries

Transaction Id	Submitted Date	Submitted By	Patients	Status	Processed Date	Requested Department	Actions
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