Centricity Business

Clinic Process for Merging and Deactivating Duplicate Accounts in Centricity Business

Duplicate patient accounts identified on the New Patient List generated in Centricity Business will be merged and deactivated on a daily basis to ensure MSU HealthTeam maintains a clean Master Patient Index.

Clinic designee/s will receive an e-mail with a HIT-SRS link. Click on link in the e-mail to access the Issue Track (HealthTeam Service Request System). Review and proceed as follows.

To merge and deactivate duplicate accounts take the following steps.

**Step One**

Click on “Duplicates” on the Centricity Business Web vertical toolbar.
Enter the patient’s name (may need to enter partial name) in the Patient Name Field.

Compare identified accounts to ensure it is the same person.

<table>
<thead>
<tr>
<th>Patient Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Selection</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>MRN</th>
<th>Date Of Birth</th>
<th>Sex</th>
<th>SS#</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRASH, DUPLICATE1</td>
<td>080000117</td>
<td>10/29/2010</td>
<td>F</td>
<td>000-10-2010</td>
<td>138 SERVICE ROAD</td>
</tr>
<tr>
<td>TRASH, DUPLICATE2</td>
<td>080000128</td>
<td>10/29/2010</td>
<td>F</td>
<td>000-10-2010</td>
<td>138 SERVICE ROAD</td>
</tr>
</tbody>
</table>

Look at:

- Names
- SS #
- Date of Birth
- Address
- Contacts

**NOTE:** If you were not able to confirm the accounts were duplicate proceed to page 12 and see Issue Track instructions. Respond to Issue Track with Comment: “Unable to confirm duplicate” and return to the sender.
**Step Two**

Highlight the newer account and click okay (This is the account you will merge and deactivate.)

**Step Three**

Click on Patient Inquiry on the Horizontal Tool Bar.

**Step Four**

Click on the appropriate action code at the bottom of the screen to check TES Inquiry and Referrals.
Click on “R” and “Y” to check the account for TES Encounters or Open Referrals. If either or both exist see “To Move TES Encounter Items” and “To deactivate an Account with Open Referrals - page 17-19

If neither exist go to the next step
Example of an account that has TES encounters

Example of an account that has no Referrals
Step Five

Click on “Demo, Ins, Case Info” Action Code.

Click on OK to view demographics and insurance information.
Print demographic and insurance information (select page/screen and click on Print to copy). Make sure all screens that hold any data are copied.
Step Six

Click on Add/Edit Account Tab on the Horizontal Tab.

Enter the Patient Account number of the older account (the account being retained) and click in the edit registration box.

Click OK

Go to page 6 (ON6) and enter the newer patient’s account number on the older patient’s account in the “other number” field.

If the account being deactivated has a Chart Number, enter the Chart Number in both the Other Number Field and the Chart.
Number Field (Chart numbers will start with a zero, one or two).

**Step Seven**

Compare the printed screens from the newer account to the same screens on the older account and edit the oldest account so the most current information is on the oldest account.

Click OK. You will be returned to the Add/Edit registration Screen.

**Step Eight**

Click on “Edit Insurance” and click “OK”. Update the insurance information with the most current insurance.
Step Nine

To Merge and Deactivate Duplicated Accounts

Click on Merging Accounts on the horizontal tool bar and create a new payment batch. Press Tab after completing each field. Fields highlighted in yellow are required fields.

Enter: Deactivate Duplicate Pt, followed by your initials and Clinic Name

Enter “G” to generate a batch and enter “T” in Bank Deposit Date.

Enter “zero” in the control fields

Enter a “Y” in the Action field and click okay.

Enter:  "G" to generate a batch and enter "T" in Bank Deposit Date.

Enter "zero" in the control fields

Enter a “Y” in the Action field and click okay.
On the Merge Patient screen enter the newer account number (account being deleted) in the “Move From” field.

Enter “Y” in the Deactivate Field and enter “Duplicate Patient” in the Reason Field.

Enter the oldest account number in the “Move To” field.

Check the “Deactivate” Box

If there is a referral attached to the account being deactivated do not check the deactivate box. See page 18.

Click “OK” and the account will display any invoices and appointments being moved. Return to batch header and enter “X” in the Action field.
Step Ten

Click on Issue Track on the Horizontal Tool Bar or access Issue Track from the link in the Duplicate Patient e-mail notification you received.

The following sign in screen will display

Enter the generic username for your clinic.

Usernames to log into Issue Track (Upper or Lower Case)

AdultClinic
IMClinic
PMClinic
MRIClinic
RehabClinic
CBOOffice
GudakunstClinic
FMClinic (Family Medicine)
FMCClinic (Family Health Center)
BreslinClinic
CBCDClinic
DewittClinic
Neonatology
OkemosClinic
OlinClinic
OMMClinic
SpineClinic
PsychClinic
SportsClinic
SurgeryClinic
Urology
WestsideClinic
RadCC
RadEyde
NeurologyClinic
PsychClinic
PSCClinic
PediatricsClinic
PCCClinic
UPhysClinic
WHCClinic

The password is: Repeat the username for your clinic in lower case letters.
If not accessing Issue Track through the e-mail link, click on My Issues on the Vertical Tool Bar. If clicking on the e-mail link to access the issue see next page.

The following screen will display the Issue # and description for the specific duplicate account sent to you through issue track.

Note: You will get a separate issue for every duplicate patient identified.

Click on “Add Note”
Click on Add Note
The following screen will display.

Enter note in the “New Note” field and then click on “Add Note”.

NOTE: If you were unable to confirm accounts were duplicates. Note will read “Unable to confirm Duplicate”.

#1 Enter Note

#2 Click on Add Note

New Note: Duplicate researched, combined and deactivated. Duplicate2 deactivated, Duplicate1 kept.
The above notification will display stating the note was successfully added.

Click on Next Action on the Vertical Tool Bar
The following screen will display. Change the assigned field to IDX Section, with subtype Duplicate Patient.

Click on Update.

NOTE: If it was not a duplicate, at this point you will leave the next action field as Deb Doubrava and then click on the “Update” button.
The following message will display.

Click on Log Out
ADDENDUM A

Moving TES Encounters From One Account to Another

Click on Moving TES Encounters on the Horizontal tool bar.

Enter the account being deactivated that has TES encounters attached and click OK.

The following pop up appears. Click on Yes.
Enter the name or number of the account being retained (older account) and click OK.

The following pop up will appear.

Click on “Yes” and the encounters being transferred will display
ADDENDUM B

To Move Referrals From An Account Being Deactivated:

If unable to deactivate a duplicated patient account because there is a referral attached, follow steps for issue track on pages 12 through 19, changing the comment to “did not deactivate because of open referral”.

NOTE: Take all other duplicate patient merge steps except do not click in the deactivate box.
ADDENDUM C

TO REACTIVATE A PATIENT ACCIDENTLY DEACTIVATED:
Click on the Activate/Deactivate Tab on the Horizontal Tool Bar

Click in Activate

Enter Patient Name to be activated

Click on OK

Click YES

Click OK

Click Cancel