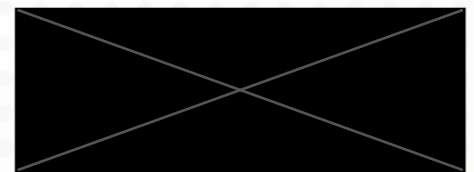
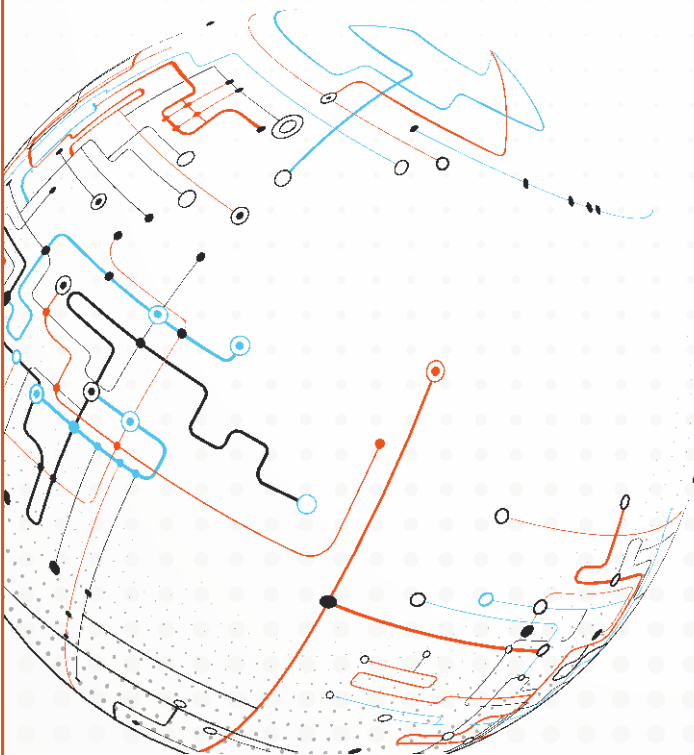


OneConnect

Patient Identity

Data Integrity Specialist & Chart Corrections



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Note to Trainer

Dear Trainer,

Since the COVID-19 pandemic of 2020, most OneConnect courses have been moved from physical instructor-led trainings to computer-based education. This companion is meant to work for both physical classroom and remote online training.

For the best possible outcomes in your training and end-user experience, there are some tips and recommendations throughout this guide. Some lessons work best a demo, where the end-user will watch you demonstrate the workflow instead of following along. When the lesson is a demo, the title of the lesson will appear with DEMO in caption.

Finally, it is highly recommended that you review the components of Hyperspace with your trainees. This will ensure they are familiar with the locations of toolbars, button and workqueue lists.

How to Use this Training Companion

- **Bold** text items indicate a button within Hyperspace
- Underlined text indicate an act to be performed within Hyperspace
- The stop and think sign is meant for prompted questions and discussions with your end-user(s)



- [Classroom Information Sheet](#)

Lesson One – Locating and Resolving System Found Duplicates

TELL CLASS TO FOLLOW ALONG

Find your user and password on your classroom info sheet.

- Log in as the data integrity specialist from your classroom info sheet.

Password: train

DISCUSSION

- Identity is Epic's EMPI application (Enterprise Master Patient Index).
- We'll start class today by covering system-identified duplicate patient records and how to address them.
- It works behind the scenes to make sure that records in Epic can be located correctly and have correct identifiers associated with them.
- **Ask: How could duplicate patients affect patient safety?**
 - Responses will vary

It's important to prevent, locate, and merge duplicate patient records for patient safety; all within a timely manner.

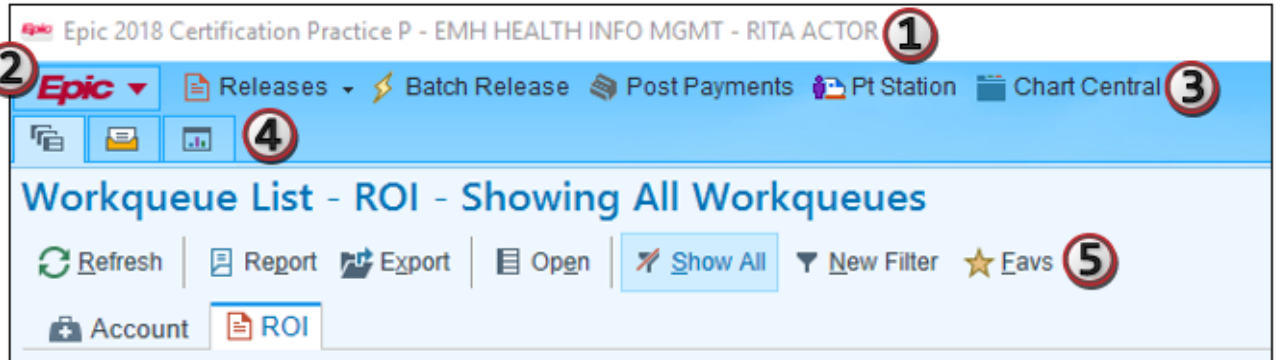
The system checks for duplicate patients at several points.

- Patient creation:
 - The system looks for potential duplicates and displays a list of possible duplicates before the record is created.
- Changing of patient information:
 - If a user tries to update a patient's demographic information, the system displays a warning if patient no longer looks like herself or if patient now looks like another patient record.

Identity collects potential duplicates in these workqueues to serve as a work list for users.

Let's take a look!

Components of Hyperspace



1. Hyperspace Title Bar	Displays basic information about your Hyperspace session, such as the department you logged in to.
2. Epic Button	Contains menus that are available to you, such as HIM and Reports. Click a menu to access the options on it.
3. Hyperspace Toolbar	Lists the menu options most frequently accessed by a user. In addition to buttons for your most common workflows, it includes the Print and Logout buttons.
4. Workspace Tabs	Tabs, such as Release for the patient , are linked to active workspaces. Each workspace you open generates a tab. Click the tab of an open workspace to go to that workspace. Click X to close the workspace.
5. Activity Toolbar	Provides buttons such as Filtering Options and Report , to accomplish tasks related to the current activity.

Using Identity Workqueues (1)

SCENARIO

We are data integrity specialists cleaning up our organization's EMPI by reducing the number of duplicate patients. We need to identify the potential duplicate patients in the system and investigate their records to determine if they should be merged into one patient record.

Select Workqueue List located on the Hyperspace Toolbar

Point out the workqueues in the list.

▪ (Note the ways to locate dups)

- The workqueue name usually tells you what kind of patient records you can expect to find in that workqueue.
- The Potential Duplicates workqueues are one of the primary tools used to maintain the EMPI:
 - Display a list of all of the patients in the system that have one or more potential duplicates
 - Act as worklists to identify and resolve potential duplicates

Click the Potential Duplicates tab within the workqueue workspace

Open workqueue 4238 POTENTIAL DUPLICATES – NOT ADMITTED

- *In the real-world, or live environment there won't be this many patients in the WQ and it's designed to catch the system-found duplicate pairs. This is only for training purposes*

SORTING WQ

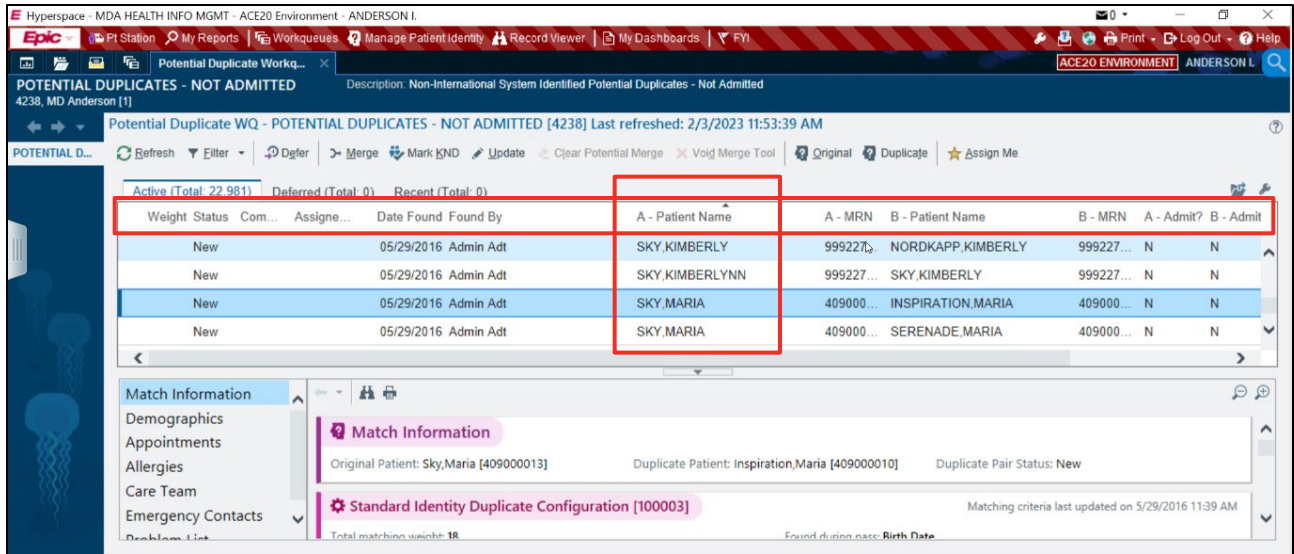
The training environment is an identity nightmare, due to all of the duplicates that are created in MST for training. We will have to do a little finessing with a lot of patience to find our group of patients in this course.

SORTING RECOMMENDATIONS

Speed finder tip: with the Patient header selected, highlight, and select any patient on the WQ. Then swiftly type the first letter of the last name of you patient or you can type the entire name. This will rapidly take you to your patient within the WQ list.

Or

- Slide each column header closer to one another, they are pretty spaced out
- Sort by A – Patient Name in ascending order (arrow faced up, pictured below)
- Take your time and find your patient's last name from the CIS, each name is grouped together in the column
- Be patient, they're in there.
 - o You can also presort before class starts for yourself and your trainees by logging in as the user from each CIS being used and organizing the worklist prior to training.



Select your Kimberly patient duplicate pair.

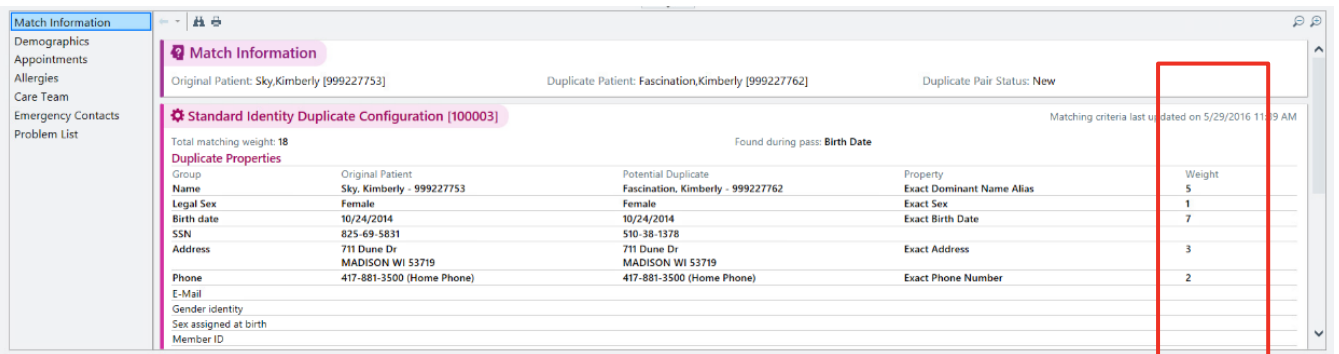
- This can be your Kimberly (CIS) to Kimberly Inspiration, Serenade, Sky, etc.

Look at the Match Information in the pane below the duplicate list.

- You can adjust the view of this window by moving it up or down for better viewing

These reports act as the starting point for duplicate analysis.

The patients are paired together based on the weights of their demographic Information. For example, a patient with the same Name, date of birth and address will equate to a specific number, and if that number exceeds the threshold of 18 in our case, they will both 'fall' into the WQ.



Compares the patient selected and the patient's potential duplicate.

Original Patient (A -Patient) column displays the patient selected from the workqueue.

Potential Duplicate (B -Patient) column displays the patient's potential duplicate record.

Property column bolds the properties on which the two patients match.

Click through the other reports to see additional information about the patients, such as emergency contacts, allergies, and medications.

Investigate clinical information to help determine whether patients are duplicates.

Identify patients' blood types, problem lists, weight, height, appointment information, etc. You can find clinical details on the side tabs, such as Appointments, Allergies, etc.

From the workqueue, click **Original** (A - Patient) on the workqueue toolbar to open Identity Manager. Navigate through the different tabs and review Kimberly's identity information.

The Identity Manager is used to view and edit all Identity-related information about a patient including:

- Identity-related events that occurred in the system
- Patient identifiers
- Patient demographics
- Chart correction cases related to the patient
- Patient alerts

Return to the workqueue and click **Duplicate** (B – Patient) to open Identity Manager for the Kimberly duplicate as well.

In the Kimberly duplicate's record, select Chart Review from the tabs on the left.

Chart Review is an activity to review all clinical information for a patient including encounter notes, medication orders, procedure documentation, lab results, etc. We can use this additional information to compare both Kimberly's, in order to determine the accuracy of their duplicate status

Use the tabs to navigate to the information you need.

Selecting a row will display more information in the right pane.

Select the Meds tab and select a med.

Use the tabs to navigate through the activity.

Close Chart Review and Identity Manager workspace for both patients and return to the workqueue.

In this scenario, after reviewing the information in the workqueue and in Identity Manager, we have determined that these Kimberly patient records belong to a single patient.

Now we need to merge the records together.

The Patient Merge Process

(PowerPoint Slide)

When two patient records are merged in Epic, one record is preserved and one is deleted.

The Source patient represents the record that is deleted.

The Target patient represents the record that is preserved.

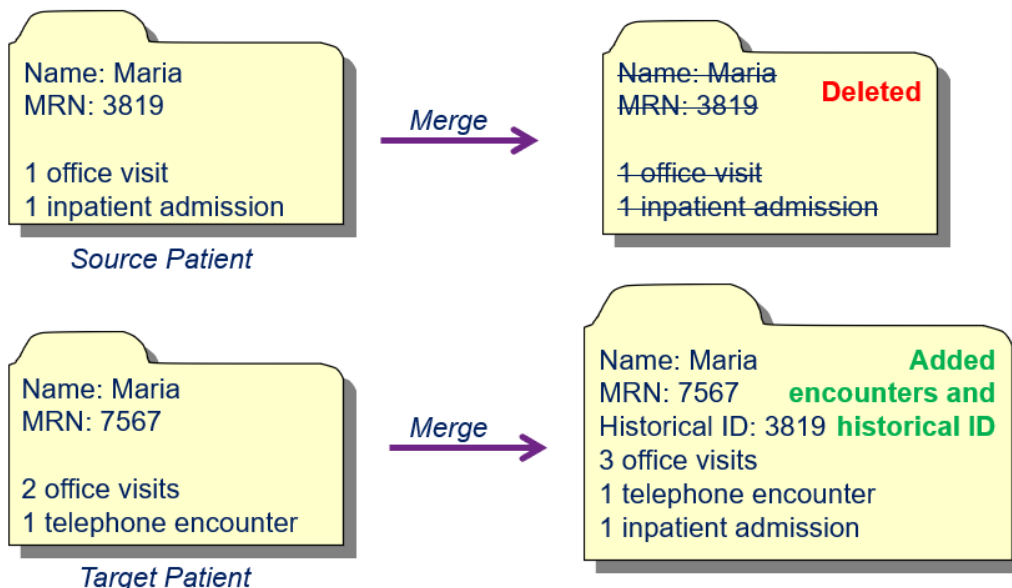
- Information from the deleted record is moved to the preserved record.
- Prior to the merge, Epic takes a snapshot of the data in both records in case an unmerge is ever needed.
- The snapshot is used to return the records to their original, pre-merge state.
- Source patient information is moved onto the Target patient record.

Point out the example in the slide.

- The top Maria record with an MRN of 3819 has an office visit and inpatient admission.
- The bottom Maria record has two office visits and a telephone encounter.
- The top record is the Source patient and the bottom record is the Target patient.

When the patients are merged, encounters from the Source record are added to the Target record.

- The MRN of the Source patient is added to the Target patient as a historical ID.
- The Source patient record is deleted



With your Kimberly patients selected, click **Merge** on your workqueue toolbar

- Patient Merge activity opens.
- Demographic values are shown for the Source and Target patients.

Click **SSN Acknowledgement** – we're bypassing for training purposes

The Merge Result column shows the information that will remain on the post-merge record.

- By default, everything in the Target patient column will remain unless you manually select a value from the Source patient column.

Select the source patient SSN

- Now the Source patient's SSN will remain on the post-merge record as reflected in the Merge Result column.

Select Duplicate Cleanup as the reason for the merge

Enter comment “System found duplicate has been investigated. Both are proven to be the same patient and a true duplicate pair”

Click **Continue**

Verify that the changes are correct and click **Merge**

- The records are now merged together.

You return to the workqueue, and the records no longer appear.

Now that we have performed the merge, we need to review the merge to ensure it completed correctly.

Reasons to review merges include:

- Verify that the merge was successful.
- Merges can fail due to Pre-Merge checks, a power outage or server problem, etc.
- When a merge fails, it will appear on a report and indicate why it failed.
- Pre-Merge Checks are a series of validation checks that run prior to the merge.
 - If one of the checks fails, the merge will also fail.

Examples of checks include overlapping admissions, two active MyChart accounts, etc

Exit Potential Duplicate workqueue and navigate to the Chart Correction Tool Runs WQ tab.

- Here you will find incomplete or merge errors

Use workqueues to locate and merge user-reported potential duplicate records (2)

In this scenario, you're a provider working the night shift. You receive a call from your patient, Kimberlynn, about a rash. You start to document the phone call but notice two similar records during patient lookup. Since you need to log the phone call, you choose the record with more information. After you're done with the call, you will inform the data integrity team about the potential duplicate records. You will use the Mark Patient for Merge activity to alert the identity staff of the potential duplicate.

Log in as the provider on your classroom information sheet.

Search for and Select "Mark Patients for Merge" in Chart Search.

The Mark Patients for Merge activity is used by other end users to inform you of potential duplicate patients that might need to be merged.

When users mark patients for merge, the patients appear on a worklist.

Worklist helps you can easily identify and follow up on them.

Select Mark Patients for Merge.

The First Patient window appears asking you to select the first potential duplicate.

Enter your Kimberlynn patient.

The Second Patient window appears asking you to select the other potential duplicate record.

Enter another Kimberlynn patient.- that is NOT in use

The Mark Patient for Merge window appears and displays demographic information for each patient.

You can select items that you think you should remain.

This information will go to the data integrity team.

Select demographic values.

Enter Similar Demographics in the Reason field.

You can enter a comment about why you are marking the patients for merge.

Click Mark for Merge.

You marked these patients for merge and a notification has been sent to the data integrity team.

Log out as the provider.

Review User-Reported Merges

Log in as a data integrity specialist.

Open the Workqueue List workspace and click Refresh.

Select the <4237 Marked for Merge – NOT ADMITTED> workqueue.

- This workqueue will show all of the patients that have been marked for merge by other users.

Find and select your Kimberlynn patient.

In the bottom pane, we can see the recommended override values and information about the patients.



Ask: Thinking back to the previous lesson, what are some activities that you could use to investigate the potential duplicates?

Chart Review, Chart Central, Identity Manager

Other users can also mark patients for merge.

Review and Merge records just like the Kimberly investigation earlier

This is a good time for the trainee to review and determine the outcome for these patients.

Resolve potential duplicate records by not merging them (3)

In the next section, we'll go over resolving potential duplicates *without* merging.

TELL CLASS TO FOLLOW ALONG

Known Non-Duplicates (also referred to as "KNDs") are patient records that look similar but are confirmed to be separate patients.

- Are actually separate patients with similar demographics and properties
- Example: twin sisters since they have the same birthdate and most likely the same last name, address, home phone number, etc.

Patients that are marked as KNDs do not appear on Potential Duplicate workqueues.

- Can't be merged together until the KND status is removed

- The system will display an error if a user attempts to merge KNDs.

Use the Mark Known Non-Duplicates activity to flag patients as KNDs.

For example, while working through the Potential Duplicates workqueues today, you find a pair of potential duplicates with the same name, but one patient has the suffix of Jr. and the other one has the suffix of Sr.

You guess that this is a father-son pair but decide research further before taking action.

Open workqueue 4238 POTENTIAL DUPLICATES – NOT ADMITTED

Select your Thomas Jr. and Sr. duplicate pair.

- It should be a little easier to find now that you've presorted from earlier lessons. But it's still tricky so take your time, they're in there.

From here, what do we click to start our comparison?



- i. The Match Information report and other reports in the lower pane, Identity Manager, Chart Review

What kind of demographic information would be helpful in determining if these patients are a father-son pair?

- ii. Age, address, phone number, emergency contact info, etc.

Review the Match Information.

Thomas Jr. is younger and could likely be the son.

Weight	Status	Com...	Assigne...	Date Found	Found By	A - Patient Name	A - MRN	B - Patient Name	B - MRN	A - Admit?	B - Admit
	New			05/29/2016	Admin Adt	SKY, THOMAS JR.	412000...	CENTURY, THOMAS JR.	412000...	N	N
	New			05/29/2016	Admin Adt	SKY, THOMAS JR.	412000...	SEABORN, THOMAS JR.	412000...	N	N
	New			05/29/2016	Admin Adt	SKY, THOMAS JR.	412000...	NORDKAPP, THOMAS JR.	412000...	N	N
21	Saw...			05/29/2016	Admin Adt	SKY, THOMAS JR.	412000...	SKY, THOMAS SR.	413000...	N	N
	New			05/29/2016	Admin Adt	SKY, THOMAS SR.	413000...	INSPIRATION, THOMAS SR.	413000...	N	N
	New			05/29/2016	Admin Adt	SKY, THOMAS SR.	413000...	OOSTERDAM, THOMAS SR.	413000...	N	N
	New			05/29/2016	Admin Adt	SKY, THOMAS SR.	413000...	FREDOLSEN, THOMAS SR.	413000...	N	N

Thomas Sr.'s age compared to Thomas Jr.'s suggests that Thomas Sr. is the father.

Click Emergency Contacts.

- Thomas Jr.'s emergency contact is his mother, Sharon.
- Thomas Sr.'s emergency contact is his spouse, Sharon.
 - This is the same emergency contact listed as the mother for Thomas Jr.

Ask: Do you think we have enough information to confirm that the duplicate records are a father-son pair and not the same patient?

- Yes. The patients should not be merged.

Mark patients as KND

After sufficient research, we determine that the Thomas patients are a father and son pair. We need to indicate that these potential duplicates were researched and confirmed to be separate patients.

Click Mark KND.

- The Mark Known Non-Duplicates window appears.
- Review the match information to ensure you have the correct patients selected.
- You can expand the window if needed.

Click Non-Duplicates.

- A verification window asks you to confirm you want to mark the patients as KNDs.

Click Yes.

- The patients are now marked as Known Non-Duplicates.

When you mark patients as KNDs:

- The patients are removed from the Potential Duplicates workqueue.
- If a user tries to merge the patients, the system will prevent the merge.

Click Manage Patient Identity on the Hyperspace toolbar.

Look up your Thomas Jr. patient.

Show the Known Non-Duplicates section of Patient Overview tab.

Select the Known Non-Duplicates tab.

- On this tab, you can view all current and historical KNDs for the patient.

Close the workspace.

Remove KND status

While doing your job, you determine that the KND status for another set of patients was added in error. You need to remove the KND status.

You will typically only remove the KND status if it was assigned in error.

Select Manage Patient Identity.

Search for and select your Adam Jr. patient.

- The Identity Manager activity opens.

Click the Known Non-Duplicates tab.

Use this tab to view and manage patients' current and historical known non-duplicates.

Click the linked name of the Adam Sr. patient.

- View information about the Known Non-Duplicate in the bottom pane.
- You can enter comments by clicking Details.

Click Inactivate.

- The patients are no longer marked as KNDs.
- The patients are eligible again to be merged.

Close the workspace.

Chart Corrections (4)

What are Overlays?

- An overlay is a special type of duplicate record.
 - It's created when users modify patient demographics
 - the patient's identity either matches another patient or no longer matches itself
 - Ex. changing a patient's name or SSN
- Overlay detection is a form of duplicate checking that is used to prevent overlays.
 - This occurs when users modify or edit patient information
- A warning appears for the user and informs them that they are making an Identity change.

Create an overlay – DEMO

A patient's mother calls to inform the provider that her child has a rash, and is unsure of what to do for treatment. The provider misunderstands some details while looking up the patients information, and unknowingly creates an overlay.

- Log in as the provider from your CIS.
- Select Telephone Call on Epic toolbar.
- Search for and select your Tyson patient.
- Click **Accept**.
 - The Telephone Encounter activity opens.
 - Welcome overlay may open, click Let's Go
- Click the Call Intake tab
- Navigate to the Reason for Call form.
- In the Reason for Call field, enter "Rash".
- In the Onset field, enter "T-1".
- In the Comment field, enter "lower abdomen".
- Document your note in the sidebar: Type "Advised mother to wash and dry Tyrone's abdomen thoroughly. If rash persists longer than three days, seek immediate assistance."
- Click Tyson's name in the upper left sidebar bar and open Demographics.
- Click the cursive "N" in the Name field.
 - This will allow you to edit the patient's name.
- Edit the First Name to be Tyrone.
- Click Accept.
- Edit the Birth date to 11/10/2010.
- Click the Call Intake tab.
 - A pop-up will appear notifying you of the patient overlay you are about to create.
 - This is the overlay detection functionality.
- Enter a reason of Original Entry Made in Error.

- Click Continue.
- Click Sign Encounter
 - Bypass any cautions alerts

Review Overlay

- Log in as your data integrity specialist.
- Navigate to your workqueue list
- Select the Overlays Tab
- Open the MDA ID All Outstanding Overlays WQ
 - Lists all the patients who had modifications made to their demographics that caused a change in their identity.
 - The reason for the change is included in the Reason column.
- Locate your Tyrone patient
 - **Speed finder tip: with the Patient header selected, highlight and select any patient on the WQ. Then swiftly type the first letter of the last name of you patient or you can type the entire name. This will rapidly take you to your patient within the WQ list.**
 - The Patient Overlay report appears in the bottom half of the window.
 - The report shows Old and New values for the items that were changed along with any additional comments made by the user.

During your investigation, you contacted the provider who made the name change and she tells you that she did not have any information to validate the change. This leads you to believe that there are two separate patients under one name. They need to be split into two records with the correct information.

- Click Manage Patient Identity on the Hyperspace toolbar.
- In the Name/MRN field, enter the name of your Tyrone patient
- Enter Male for the sex.
 - This is all the information you have for the Tyrone patient.
- Click **Find Patient.**
 - Only one patient is found.

- We know that this is the Overlay record that actually belongs to Tyson.
- We can search again using less information.
- Click Go Back.
- In the Patient Lookup window, remove the sex and type Tyson with your last name from the CIS.
- Click Find Patient.
 - Tyson's returns a result with Tyrone with a possible alias.
- You determine that the Tyrone patient record doesn't exist in the system.

The screenshot shows a 'Patient Select' window with the following search criteria: 'Name/MRN: Epic, TYSON'. Below the search criteria is a table with one row highlighted in blue:

MRN	Patient Name	Date Of Birth	Leg...	Phone	Street Address
2002380	EPIC, TYRONE (aka EPIC, TYSON)	11/10/2010	M	417-881-3500	1500 N Creek Dr, MADISON WI 53719

Below the table, the patient record for 'Epic, Tyrone - 2002380' is displayed. The record includes the following information:

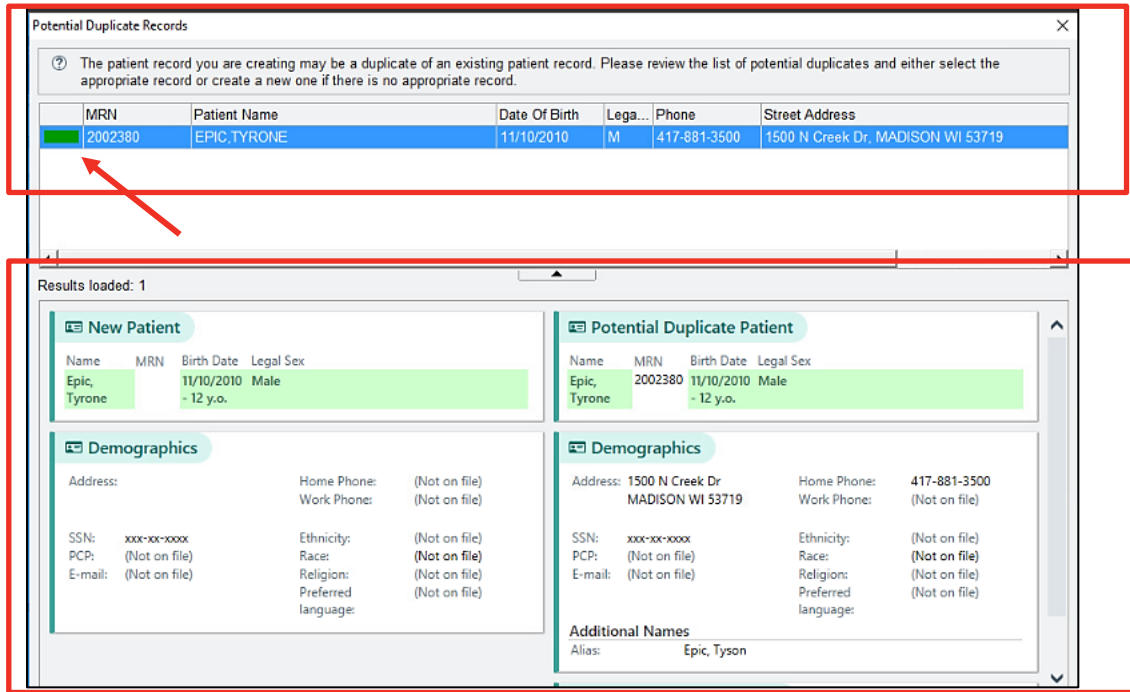
- Born 11/10/2010
- 12 y.o. Male
- 1500 N Creek Dr, MADISON WI 53719
- No PCP on file
- Phone: xxx-xx-xxxx
- Phone: 417-881-3500 (H)
- No e-mail address on file
- Aliases: EPIC, TYSON

Resolve an overlay

- The overlay record currently has two patients on the same record.
- To resolve the overlay, we need to:
 - Create an additional record for Tyrone.
 - Undo the name change on Tyson's record.
 - Move the Telephone encounter from Tyson's record to Tyrone's new record.

Although you might not actually create a new patient in your role, it will be helpful to see the new patient creation process. To check for duplicate records in the system and maintain complete patient records, certain items can be required for new patient creation.

- Click Patient Station on the Hyperspace Toolbar
- In the Patient Search window, enter the name of your Tyrone patient: last name, Tyrone
- Enter Male for the sex.
- Enter Tyrone's birth date of 11/10/2010.
- Click Find Patient.
- Click Go Back.
- Enter 000-00-0000 for the SSN
- Click New
 - The Potential Duplicate Records window appears due to duplicate checking.
 - This window warns you that you are creating a potential duplicate patient record.



- Click New.
- In the Reason field, select Administrative Correction [3].
- Click Continue.

- You have now created a new patient for Tyrone.
- Close Tyrone's record.

Undo an overlay

Now that you have created a new record for Tyrone, you need to correct the changes on Tyson's record.

- Return back to your Overlay WQ
- Select your Tyrone/Tyson patient.
- Click Undo Overlay.
 - The Current Values and the Future Values from the overlay display to verify the changes that will take place.
- Click Accept.
 - The Change Status changes to Restored.
 - The Patient Overlay details can also be found on the Events tab of the Identity Manager.
- Close the WQ

Now that the Patient Overlay is resolved, the Telephone Call encounter that is on Tyson's record needs to be moved to Tyrone's record.

Patient contact mover tool

The Patient Contact Mover is a tool used to transfer clinical contacts that are currently documented on the wrong patient record.

- It may be used to clean up after an unmerge, to clean-up an overlay, or resolve erroneous admissions.

Contact Mover utility...

- Can transfer *encounter* or contact level data
- *Can't* transfer patient level data, such as allergy history, immunization history, or medications
- Before a Contact Move can be performed, the encounter must be reviewed and a Patient Extract must be generated.
- Open the Chart Correction Tools workspace.
 - You may need to search this tab in the Chart Search



- Select Contact Mover and click **Start**.
 - The Source Patient window appears.
 - The Source Patient is the patient that the contact is on currently.
- Who is the patient who currently has the encounter that needs to be moved?
 - Tyson
- Enter the name of your Tyson patient: <lastname,Tyson>.
- Click Find Patient.
- Click **Accept**.
 - The Destination Patient window appears.
 - The Destination Patient is the patient to which the encounter actually belongs.
- Enter the name of your Tyrone patient: <lastname,Tyrone>.
- Click **Accept**.
- The Patient Contact Mover activity appears.
 - Information about the Source Patient appears on the left, and information about the Destination Patient appears on the right.
- Select the telephone encounter that needs to be moved.
 - Information about the contact populates in the bottom of the activity.
 - Review the contact information to make sure this is the correct contact to move.
- Click the **Add** button
 - The encounter transfers from the Source patient window to the Destination patient window.
- Click Continue.
- The Pre-Move Checks window appears and notifies us that any notes written on the encounter may reference the wrong patient and should be reviewed.
 - Pre-Move Checks run before a contact move is performed to make sure that the move is safe.
 - This logic will prevent related encounter-level data from existing on two different patients.

- An example is a referral ordered during an admission for a hospital outpatient visit for blood work.
 - If the hospital outpatient visit is moved, but the admission is not, then the referral was placed for one patient but completed for another patient.
- Resolve any outstanding stop signs before moving to the next steps
 - Reason – Other
 - Provider documented clinical information on wrong patient
 - Click Acknowledge.
 - We can acknowledge this check since it's just a warning.
 - Click Continue
 - Click Move Contacts.

NOTE

A Chart Corrections Case will automatically open, and you will need to do the following:

- Bypass the corrections by clicking **Corrected**
- You will need to validate your corrections by entering your password to authenticate the updates.

We will discuss and create a Chart Corrections case in the next lesson. We are only bypassing for this lesson, due to the nature of what have *not* been discussed.

The screenshot displays the Epic Hyperspace interface for a Chart Correction case. The main content area shows a task list with the following items:

Name	Due Date	Status	Assigned To	Issue Area
Contact Mover		Confirmed	Anderson Inspiration	
Contact Move Resolution: CSN 150622 - Telephone on 03/02/2023		Confirmed	Anderson Inspiration	

The detailed view for the selected task shows:

- Status:** Confirmed
- Correction:** Completed on 3/2/2023 10:47 AM by Anderson Inspiration. View Summary
- Correction Status:** Corrected
- Description:** Complete the associated follow-up tasks to resolve data that could not be automatically updated by the system.
- Assignment:** Assigned to: Anderson Inspiration, Due on:

Managing Chart Correction Issues

Creating a Chart Correction Case

Documentation errors are a risk to patient safety. Users may need to notify data integrity staff of chart corrections in real time if it is an Identity-owned chart correction such as a patient merge or an overlay scenario. In the previous lesson, you saw how staff can mark patients for merge, send a Help Desk request, and flag documentation for chart correction.

The following principles will help guide your organization's chart correction policies.

- Identify the incorrect data. If the charting errors impact multiple charts, identify each effected chart.
- Communicate the charting error to parties specified in your chart correction policy.
- Correct the inaccurate data.
- Verify that the clinical information was updated completely and correctly.
- Document the outcome of the chart correction process according to your organization's policies and ensure you communicate the resolution of the error back to the user who identified it.

Data integrity staff use Chart Correction Cases to organize and track the tasks they must perform to resolve those charting errors. The Chart Correction workspace, pictured below, is the central hub that helps your staff manage all of these different tasks.

The screenshot displays the 'Chart Correction Case' workspace for Case ID: 24. The interface is divided into several sections:

- Summary:** Shows the case status as 'In Correction', opened on 04/27/2021, and assigned to 'Chart Correction Analyst Him'. It lists two patients: Carl Anders (MRN: 204585) and Carl Anders (MRN: 204584), both with 'No affected contacts'.
- Administrative Information:** Includes impact details (Priority, Patient care impact, Error start date, Financial impact), team information (Name: Chart Correction Analyst Him, Roles: Requester, Analyst, Owner, Phone: 555-5555), and root causes (No root causes).
- Identifiers:** Lists the type as 'CHART CORRECTION CASE ID' and the identifier as '24'.
- Left Sidebar:** Provides a quick overview of the case, including the owner's name, priority, task status (1 incomplete), and patient details for both Carl Anders (MRN: 204585 and MRN: 204584), noting their MyChart status as 'Inactive' and CE status as 'Sharing, Receiving'.

General Information	Document who owns the chart correction case along with the case's priority, impact, and important dates.
Advisories	Create patient chart advisories to alert other users accessing a patient's chart of an in-progress chart correction.
Case Notes	Add notes to a patient's chart to document an ongoing chart correction case. If you need to communicate with other users working on a case, you can use the Dialog tab.
Dialog	Document progress made on the chart correction case for others working on the chart correction case. You can also use this tab to send and reply to In Basket messages regarding the case.
Tasks	Document and track the steps you and others need to take to resolve a chart correction case, including different tools that need to be run.
Team	Document which users are involved with investigating and correcting the case.
Root Causes	Document a root cause for the chart correction case, how it was discovered, and how it can be prevented.

In this exercise, you'll create a new chart correction case and document case details.

SCENARIO:

A nurse just called you to report that **Jon** might have a duplicate patient record in Epic and that the allergies and history on both charts need to be resolved. Jon has a new severe allergy to bee venom. You'll create a chart correction case to track your investigation.

TRY IT OUT:

- Log in as a data integrity specialist
- Open the Chart Correction Cases workspace and click **New Correction**.
 - a. If it's not there you will need search "Chart Correction"
- Create a new case for your Jon patient.
- Assign yourself as the case owner.
- Enter other details on the **General Information** tab as desired.
 - a. w+1
 - b. Case type: Clinical Documentation Error
 - c. Priority: High
 - d. Error start date: t
- Create and activate an advisory for Jon with the following details:

- a. Advisory header: Potential Duplicate
- b. Display level: Patient
- c. Display as: Important
- d. Display text: Patient has a potential duplicate in the system.
- e. Click **Activate**
- Select the **Tasks** tab.
- Create a new task with the following details:
 - a. Name: Correct Allergies
 - b. Description: Chart needs allergies updated to include severe bee venom reaction.
 - c. Issue area: Allergies
 - d. Assigned to: your Heidi Provider
 - e. Due T+1
- Click **Start Corrections**.

If You Have Time: Exploring the Chart Correction Workspace

In this exercise, you'll explore the chart correction workspace and match the activity tab to its purpose.

Chart Correction Workspace Tabs	
Summary	General Information
Team	Root Causes
Case Notes	Advisories
Dialog	Tasks

Chart Correction Workspace Tab	Tab Purpose
	Quick glance view of entire case
	Record why the error occurred
	Add or recall patient chart advisories
	Assign, manage, and review tasks needed to resolve the case
	List owner, due date, and priority
	Record additional information helpful to others reviewing the case
	List users associated with the case
	Document non-task-related In Basket communication

Updating and Confirming Tasks

In this exercise, you'll update a task and confirm its completion.

- PATIENT: Jon

SCENARIO:

After the provider updates Jon's allergies, you'll mark the task as complete.

Hadi updated the patient's chart and the notification has been sent back via inbasket

TRY IT OUT:

- Log in as the data integrity manager.
- Open Jon's chart correction case.
- Confirm the task was completed.
 - How can you view the task you just confirmed as complete?

Chart Correction Tools

Exploring Text-Based Chart Correction Tools

In this exercise, you'll explore some of the Text-based chart correction tools available.

TRY IT OUT:

- Log in as a data integrity manager.
- Select the **Chart Correction Tools** home workspace tab.

- List four Text-based tools in this workspace:
 - How do you know that they're run in Text?
 - What type of transcription can't be updated by the Transcription Utility?
 - According to the related tool's description, what will prevent a medication from being unlinked?

If You Have Time: Adding the Chart Correction Tools Workspace As A Button On Your Toolbar

In this exercise, you'll practice adding a button to your Hyperspace toolbar for easy access.

TRY IT OUT:

- Click the wrench icon on the Hyperspace toolbar. The Customize Your Toolbar and Epic Menu activity opens.
- In the Epic button selection menu, go to **Tools > Identity Tools > Chart Correction Tools**.
- Select the **Chart Correction Tools** button.
- Drag it to the activity toolbar.
 - A green highlight appears around the button name.
- Click **Accept**.

CHECK YOUR WORK:

The **Chart Correction Tools** button should appear on your Hyperspace toolbar.

Using Medical and Surgical History Tools

In this exercise, you'll explore some of the Hyperspace-based chart correction tools available.

PATIENT: Jon, Jonathon

SCENARIO:

Jon and Jonathon need their medical and surgical history corrected.

TRY IT OUT:

- Select the **Chart Correction Tools** home workspace tab.
- Click **Start** next to Surgical History Replacement.

- Select your Jon patient.
 - Select your Jon's tonsillectomy.
 - In the **Procedure** field, search for and select "Remove Tonsils/Adenoids, 12+ Y/O."
 - Click **Continue**.
 - Click **Run Tool**.
 - Click **Tool run details**.
 - What is the current Run History status?
 - Click **Close**.
 - Click **Complete**.
 - Click **Start** next to Medical History Deletion.
 - Search for and select your Jonathon patient.
 - Select Jonathon's tonsillitis.
 - Click **Continue**, then run the tool.
 - Click the **Open in chart correction workspace** link. This opens a chart correction case for your correction.
 - Click **Summary**.
 - What is the current status of this chart correction case?
 - Return to the **Medical History Deletion** tab.
 - Click **Complete**.
 - Confirm the task completion.
 - Resolve the case and stay in the workspace.
 - Add a case note.
 - Click Publish
 - Close the workspace.
-
- True or False: When a nurse creates a Help Desk ticket to report a chart correction, a case is automatically assigned to the Identity manager.

- True or False: Dialog, Case Notes, Root Causes, and Team are activities within the chart correction workspace.
- What is the benefit of using task lists?