

Duplicate Patient Merge Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. Designate person to be responsible for the parameter setup of the Duplicate Record Patient Merge package			
2. Manager Utilities menu – Edit Site Parameters. User must hold XDRMGR security key			
A. MERGE MAIL GROUP – Receives bulletin when a merge process is completed. Receives mailman message comprised of FROM and TO records detected as having data errors Also, receives mailman message of FROM and TO records that have been excluded from the merge			
1) Mail group must be an entry in the MAIL GROUP file and should have at least one active member			
B. DUPLICATE MANAGER MAILGROUP			
1) This mail group will be sent a bulletin whenever any known problems occur during the duplicate checking or merging process. This mail group must be an entry in the MAIL GROUP file. Sites are required to supply their own mail groups.			
C. POTENTIAL DUPLICATE THRESHOLD -			
1) This field contains a computed percentage based on the values defined in the duplicate tests. When record pair scores evaluate equal to or above this percentage, they are considered to be potential duplicates. Record pairs may differ on the maximum			

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<p>score to which the percentage threshold is applied. The default potential duplicate threshold with this application release is 60%.</p>			
<p>D. DAYS BEFORE FINAL VERIFY - This is the number of days within which ancillary reviewers are expected to conduct their reviews. All reviews must be resolved prior to merging the affected record pair. If action is still pending by any ancillary reviewers after this period, the site may take alternative action to:</p> <ol style="list-style-type: none"> 1) notify designated persons via a mail group 2) establish an additional reviewer 3) otherwise to resolve the review 			
<p>E. DAYS BETWEEN VERIFY AND MERGE - This is the number of days to elapse between final verification of a duplicate pair and the earliest possible merge date (i.e., the date records are approved to be merged). This parameter is available for sites that may be concerned about possible on-going actions related to entries that will be merged and want to establish a period of inactivity prior to the actual merge. The value of this field is set by IRM. The number of days entered in this field should be between zero and 30. The default with this application release is five days.</p>			
<p>F. NUMBER OF THREADS - This field is used to help manage the most time consuming portion of the merge process. It is used to indicate the number of threads that should be used during</p>			

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<p>the longest phase of the merge process. (Phase 3 is the longest phase of the merge process. It is described in more detail in the "Merge Process" section of this manual.) Your site can set the number of threads (jobs) according to your system resources</p>			
<p>3. Edit Ancillary Service Subfile - The necessary default values associated with each of the three ancillary services (e.g., Laboratory, Pharmacy, and Radiology) are included with this application. Sites are required to supply mail groups and/or assign individuals to receive alerts. Your site can add more ancillary services to the ancillary service multiple if desired Please refer to user manual for setup</p>			
<p>4. Security Keys A. XDR B. XDRMGR C. DG ELIGIBILITY</p>			