SUN SEEBEYOND

eINDEX™ SPV ENTERPRISE DATA MANAGER USER'S GUIDE

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Introduction

This chapter provides an overview of this guide and the conventions used throughout, as well as a list of supporting documents and information about using this guide.

What's in This Chapter

1.1 About the Enterprise Data Manager

The Enterprise Data Manager (EDM) is a web-based interface that allows you to access, monitor, and maintain the data stored by eIndex™ Single Patient View (eIndex SPV). The EDM provides the ability to search for, add, update, deactivate, merge, unmerge, and compare patient profiles. You can also view and correct potential duplicate profiles, view transaction histories, view an audit log, and print reports.

The EDM is your primary tool to view and maintain the data stored in the master index database and cross-referenced by the master index.

1.2 What's New in This Release

For this release, the Reports Search page includes new "time" fields that provide the ability to narrow down the date and time range for a search. Production reports can now be sorted by one or more columns. For complete information about the changes to eIndex SPV for this release, see the *eIndex Single Patient View Release Notes*.

1.3 About This Document

This guide provides information and instructions for using the Enterprise Data Manager (EDM) for eIndex SPV. eIndex SPV is an enterprise-wide master patient index that maintains information about the people who participate throughout your business, linking information from different locations and computer systems. The EDM allows you to monitor and maintain the information stored in the master index database.

1.3.1 What's in This Document

This guide is divided into the chapters that cover the topics shown below.

- Chapter 1 **"Introduction"** gives a general preview of this document—its purpose, scope, and organization—and provides sources of additional information.
- Chapter 2 **"Getting Started"** gives a general summary of the master index and the available functions in the EDM, as well as instructions for logging on and off the EDM.
- Chapter 3 **"Searching for Patient Profiles"** gives background information and instructions for searching for patient information and viewing search results.
- Chapter 4 **"Viewing Patient Profiles"** gives background information about patient profiles, transaction histories, profile comparisons, and audit logs, and also includes instructions for viewing this information.
- Chapter 5 **"Maintaining Patient Profiles"** gives instructions for adding and updating patient profiles, comparing profiles, resolving potential duplicate profiles, and merging and unmerging profiles.
- Chapter 6 **"Generating Reports"** gives background information and instructions for generating reports from the EDM.

1.3.2 Scope

This guide provides the information you need to quickly get started with the EDM. It includes navigational instructions, functional instructions, and background information about the application's features. This guide also provides step-by-step instructions for all of the functions of the EDM, such as adding and updating patient profile information, identifying duplicate patient profiles, merging and unmerging patient profiles, and deactivating patient profiles. It also includes information on searching for patient profiles, viewing a transaction history, and comparing patient profiles.

This guide does not include information or instructions on setting up security, configuring the master index, or working with eGate components. These topics are covered in the appropriate user guide (for more information, see **Related Documents** on page 13).

1.3.3 Intended Audience

Any user who needs to review, monitor, or modify data in the master index database should read this guide. Intermediate or advanced users who need a refresher on using some of the basic functions of the master index should also read this guide. A thorough knowledge of the master index is not needed to understand this guide. It is presumed the user is familiar with basic web browser tools and with the types of information stored in the master index database.

1.3.4 Text Conventions

The following conventions are observed throughout this document.

Table 1 Text Conventions

Text Convention	Used For	Examples
Bold	Names of buttons, files, icons, parameters, variables, methods, menus, and objects	▪ Click **OK**. ▪ On the **File** menu, click **Exit**. ▪ Select the **eGate.sar** file.
`Monospaced`	Command line arguments, code samples; variables are shown in ***bold italic***	`java -jar` ***filename***`.jar`
Blue bold	Hypertext links within document	See **Text Conventions** on page 12
Blue underlined	Hypertext links for Web addresses (URLs) or email addresses	http://www.sun.com

1.3.5 Mouse Conventions

You can use either a single-button mouse or a multiple-button mouse with the EDM. If you use a multiple-button mouse, the left mouse button is the primary button, unless the mouse is configured differently.

The instructions in this guide might require you to use the mouse in a variety of ways:

- **Point** means to position the mouse pointer until the tip of the pointer rests on whatever you want to point to on the screen.
- **Click** means to press and then immediately release the left mouse button without moving the mouse.
- **Double-click** means to click the left mouse button twice in rapid succession.
- **Right-click** means to click the right mouse button once.
- **Drag** means to point and then hold down the mouse button as you move the mouse. **Drop** means to let go of the mouse button to place the dragged information where you want it to be moved.
- **Highlight** means to select an area of text by dragging the mouse over the desired portion of text that appears on a window.

- **Select** means to point to a list of information on an EDM page, and then click once to choose the data you want. The information becomes highlighted when selected.
- **Expand** means to double-click a row of information on an expandable list to display more details. The details appear on another row, below the row you double-click.
- **Collapse** means to double-click a row of information on an expandable list to hide the details that appear on the following row.

1.3.6 Screenshots

Depending on what products you have installed, and how they are configured, the screenshots in this document might differ from what you see on your system.

1.4 Related Documents

Sun has developed a suite of user's guides and related publications that are distributed in an electronic library. The following documents might provide information useful in using the EDM for the master index, including eView Studio documents that explain the underlying framework of the master index. In addition, complete documentation of the Java API is provided in Javadoc format.

- *Sun SeeBeyond eIndex Single Patient View User's Guide*
- *Sun SeeBeyond eView Studio Configuration Guide*
- *Sun SeeBeyond eView Studio Reference Guide*
- *Sun SeeBeyond eView Studio Reporting Guide*

1.5 Sun Microsystems, Inc. Web Site

The Sun Microsystems web site is your best source for up-to-the-minute product news and technical support information. The site's URL is:

http://www.sun.com

1.6 Documentation Feedback

We appreciate your feedback. Please send any comments or suggestions regarding this document to:

CAPS_docsfeedback@sun.com

Chapter 2

Getting Started

This chapter provides information about the master index and how the EDM helps to monitor and maintain patient information. It also provides information about the design of the EDM and instructions for logging on to and off of the EDM.

What's in This Chapter

2.1 eIndex Single Patient View

eIndex SPV is an enterprise-wide master index built using the eView Studio platform and provides all of the functionality of an eView Studio master index. eIndex SPV creates a single, consistent view of all patient data by providing an automatic, common identification process regardless of the location or system from which the data originates. Patient profiles from various locations are cross-referenced using an enterprise-wide unique identifier (EUID) assigned to each profile by eIndex SPV. By creating EUIDs, eIndex SPV can identify many types of participants, such as patients, customers, employees, contacts, and so on.

The identification and demographic information for all patients is centralized in one shared index. eIndex SPV is designed specifically to support scattered business locations and disparate information systems across an enterprise, as well as various applications from multiple vendors. eIndex SPV makes it easy to find information that was previously scattered among multiple systems.

2.1.1 Features of the Master Index

The components of the master index are highly configurable, allowing the master index to be customized for your specific data processing needs. Primary features of the master index include:

- **Centralized Information**
  The master index maintains a centralized database, enabling the integration of data records throughout the enterprise while allowing local systems to continue operating independently. The index stores copies of local system records and the

single best record (SBR), which represents the most accurate and complete data for each patient. This database is the central location of all patient information and identifiers, and is accessible throughout the enterprise. Records from various systems are cross-referenced using the EUID assigned by the master index to each patient profile.

- **Configurability**
  Before deploying the master index, you can customize the components and processing capabilities of the system. The configurable components include:
  - The types of objects to index
  - The types of data stored in the master index
  - The standardization and match engines to use
  - Matching, standardization, and phonetic conversion rules
  - Survivorship and weighting rules for determining the SBR
  - The types of queries available
  - How queries are blocked, or grouped, for match processing
  - EDM appearance
  - Searches available to the EDM
  - Local ID validation rules
- **Cross-referencing**
  The master index is a global cross-referencing application, matching profiles across disparate source systems and simplifying the process of sharing data between systems. The master index uses the local identifiers assigned by your existing systems as a reference, allowing you to maintain your current systems and practices.
- **Data Cleansing**
  The master index uses configurable matching algorithm logic to uniquely identify patient profiles, and to identify duplicate and potential duplicate profiles. The master index provides the ability to easily merge or resolve duplicates, and can be configured to automatically match profiles that are found to be duplicates of one another.
- **Data Updates**
  The master index provides the ability to add, update, deactivate, merge, and delete data in the database tables through messages received from external systems or the EDM. Messages received from external systems and the EDM are checked for potential duplicates during processing.
- **Updates to External Systems**
  eGate provides the master index with the ability to publish updated information to external systems, provided the external systems can accept incoming messages. This is handled through a JMS Topic to which the master index publishes XML messages that contain the updates.
- **Identification**
  The master index employs configurable probabilistic matching technology. This

technology uses a matching algorithm to formulate an effective statistical measure of how closely profiles match. Using a state-of-the-art algorithm in real-time mode and establishing a common method of locating patient profiles, the master index consistently and precisely identifies objects within an enterprise.

- **Integration**
  Relying on the eGate Integrator, the master index provides the power and flexibility to identify, route, and transform data to and from any system or application throughout your business enterprise. It can accept incoming transactions and distribute updates to any external system, providing seamless integration with the systems in your enterprise.
- **Matching Algorithm**
  The master index is designed to use the Sun SeeBeyond Match Engine (SBME) or a custom matching algorithm to provide a matching probability weight between patient profiles. The Sun SBME provides the flexibility to create user-defined matching thresholds, which control how potential duplicates and automatic merges are determined.
- **Unique Identifier**
  The master index assigns an enterprise-wide unique identifier (EUID) to each object added to the database. The index uses the EUID to cross-reference the local IDs assigned to each patient by the various computer systems throughout the enterprise.

2.1.2 Functions of the EDM

While the master index cleanses data automatically as it is entered through the back end or the EDM, there are instances where it cannot be determined automatically whether two patient profiles truly match one another. In these cases, manual review through the EDM is needed to verify the status of the two profiles and then to possibly join two potential duplicate profiles or separate two profiles that were automatically joined. The EDM provides additional functions to help you maintain the data you store. Using the EDM, you can perform the following activities.

- **View a Patient's History**
  The system provides a complete transaction history of each patient profile by recording all changes to each patient's data. This allows you to view before and after images of a profile for each change made. The table also records the user ID of the person who made the changes. This history is maintained for both the local system records and the SBR.
- **Search for Patient Profiles**
  Using the EDM, you can search for specific patients or sets of patients. The EDM allows you to perform different types of searches using different combinations of data elements, and returns a list of potential matches to your search criteria. The master index also parses address components, so you can search for a patient profile by their street address. For certain searches, the results are assigned a matching weight that indicates the probability of a match.
- **Maintain Patient Data**
  The EDM supports all the necessary features for maintaining patient profiles. It

allows you to add new profiles; view, update, deactivate, or reactivate existing profiles; and compare profiles for similarities and differences. You can also view each local system record associated with an SBR.

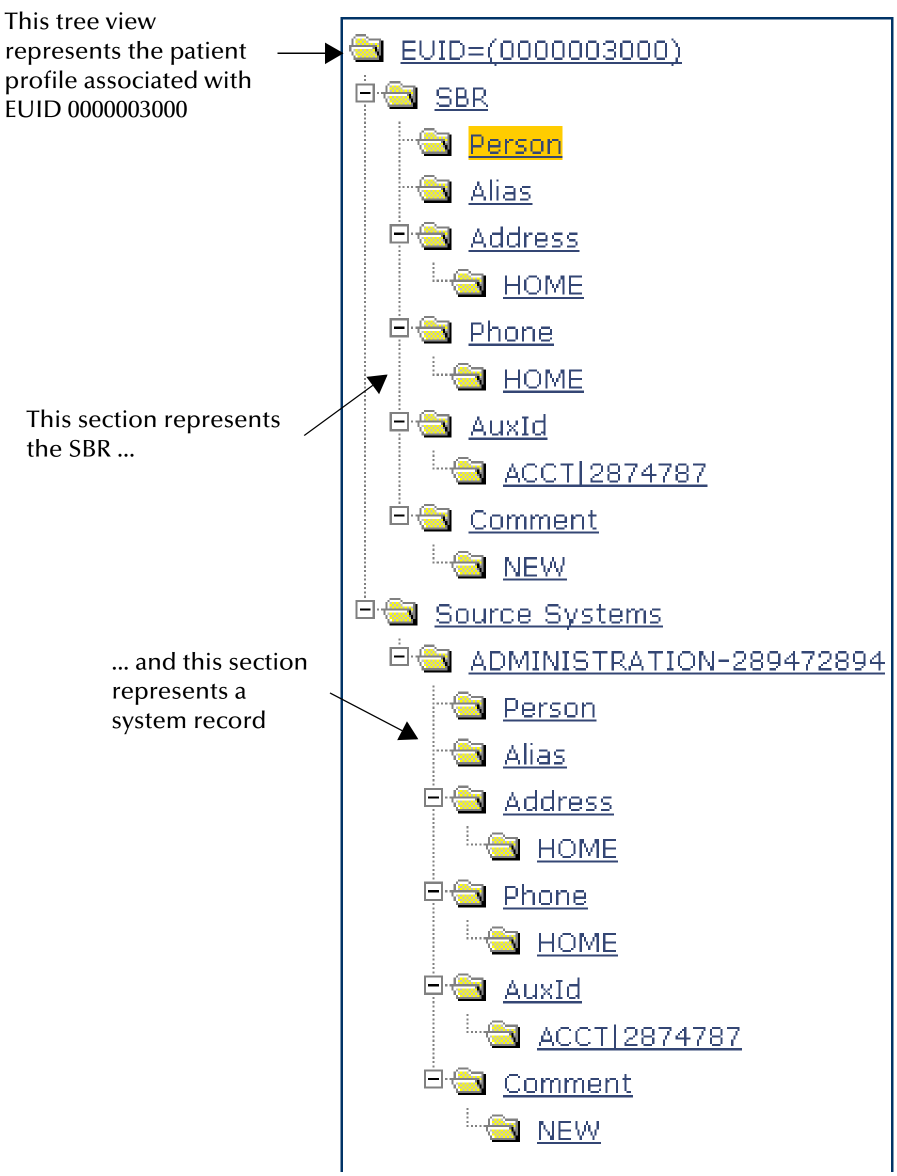
- **Compare Patient Data**
  The EDM allows you to compare two patient profiles in a side-by-side comparison so you can evaluate their differences or similarities. You can also compare different objects within one patient profile in the same comparison view. For example, you can compare the profile’s SBR with a record from System A; or you can compare a profile’s record from System A with its record from System B.
- **View and Resolve Potential Duplicates**
  Using algorithm matching logic, the master index has the ability to identify potential duplicate profiles, and the EDM provides the functionality to correct the duplicate profiles. Profiles that are potential duplicates can be viewed online in a side-by-side comparison. Potential duplication is resolved by either merging the profiles in question or removing their potential duplicate flags.
- **Merge and Unmerge Profiles**
  You can compare potential duplicate profiles and then merge the profiles if you find them to be actual duplicates of one another. Using the merge feature, you can determine which profile to retain as the active profile. The EDM also allows you to merge system records between patient profiles, and to specify which information from each system record to preserve in the resulting profile. If two patient profiles or system records are merged in error, you can unmerge them, returning the information to the original records. You can also view a history of merges for a profile by viewing its merge tree.
- **Add and View Comments**
  You can add free-text comments to a patient profile or system record to provide additional information about the patient that might not be included in the standard fields.
- **Audit Log**
  The system administrator can specify that a log be maintained of each instance that patient data is accessed from the EDM. This log provides information such as the user ID of the user who accessed the data, the type of action that was performed against the data, and the date and time of access. From the audit log, you can also view a transaction history for each transaction that caused an audit log entry.
- **Security**
  Security is provided through the integration or application server, and includes basic access to the database through user login IDs and passwords, as well as access to specific functions and actions of the master index. Access can be restricted by functions, actions within functions, data element, and user ID.

2.2 Learning about Patient Profiles

2.2.1 Patient Profile Components

A patient profile, also known as an *enterprise object*, is a set of information that describes characteristics of an individual patient in the master index. Figure 1 illustrates an EUID tree for a patient profile, which shows all components of a profile.

Figure 1 Patient Profile Components



A patient profile contains two types of records:

- **System Records**
  A *system record* is a set of information from an external system that shares data with the master index. A patient profile might contain several system records.
- **Single Best Record**
  The *single best record* (SBR) is a set of information derived from the best information from each system record in a patient profile (as determined by the survivor calculator). Each patient profile has only one SBR.

System Records

System records are different from the SBR in that each system record contains a system and local ID pair and only contains data from a specific system. The information in the system records of a patient profile is used to determine the best value for the SBR in that profile. If a patient profile only contains one system record, the SBR will be identical to that system record. However, if a patient profile contains multiple system records, the SBR might be identical to one system record but will more likely include a combination of information from all system records. Certain actions against a system record will cause the SBR to be changed, such as updating, deactivating, or merging a system record. Each active patient profile must have at least one active system record. If all system records in a profile are deactivated, then the entire profile will also be deactivated.

Single Best Record

The single best record (SBR) for a patient profile is made up of a combination of information from all active system records associated with that patient profile. The SBR represents the information that is determined by the master index to be the most reliable and current of all system records in a patient profile. The SBR is dynamic, and is recalculated each time an update is made to an associated system record, a merge or unmerge affects the patient profile, or a system record in the profile is deactivated or reactivated. You can use the overwrite capability of the EDM to update the SBR directly, or you can update a system record and allow the survivor calculator to determine how to update the SBR (for more information, see **Survivor Calculator** on page 19).

If you use the overwrite capability to update a field, that field remains locked and cannot be updated by changes to system records until the field is unlocked. For more information about the overwrite function and locked fields, see **EDM Overwrite Capabilities** on page 84.

Survivor Calculator

The survivor calculator determines which information from each system record in a patient profile is stored in the SBR for that profile. The calculator uses information defined by the system administrator to calculate the SBR. By default, the survivor calculator uses a *weighted strategy* for most fields, using the relative reliability assigned to each system in combination with the reliability given to the most recently updated value.

For some fields, such as alias and auxiliary IDs, a union strategy is typically used. This means that all unique alias names and auxiliary IDs from all systems are included in the SBR. For detailed information about the survivor calculator and configuring the survival strategy, see the *Sun SeeBeyond eView Studio Configuration Guide*.

2.2.2 Patient Profile Indicators

In the master index, a patient profile or system record can have three different statuses: active, inactive, or merged. The EDM uses special characters in the EUID tree to indicate profiles or system records that have a status other than active. The EDM also uses indicators in the EUID tree to denote the type of profile you are viewing when a side-by-side comparison of the same EUID is displayed. For example, when a transaction history is displayed, the previous image of the profile appears in parentheses. Table 2 lists and describes each indicator.

Table 2 Patient Profile Indicators

Indicator	Status
No indicator.	The status of the profile or system record is active.
Tilde (~)	The status of the profile or system record is inactive. For example, **EUID=~1001002135**. In addition to the tilde, the EUID appears in fuchsia typeface.
Asterisk (*)	The status of the profile or system record is merged. For example, **EUID=*1001002135**. In addition to the asterisk, the EUID appears in brown typeface. **Note:** *When an asterisk appears next to a profile on the Transaction History Search Results page, it means the transaction history could not be accessed.*
Brackets ([])	Brackets indicate that the records displayed are the same version of the same profile. This is used on the Comparison page when comparing different components of the same profile. The EUID on the left appears in brackets. For example, **EUID=[1001002135]**.
Parentheses (())	When a transaction or merge history is displayed, the EUID representing the previous version of the displayed profile appears in parentheses. This profile represents the status of the profile before the transaction or merge occurred. For example, **EUID=(1001002135)**.

2.2.3 System Record and SBR Components

In the master index, each system record and SBR in a patient profile contains a set of sub-objects that store different types of information about the patient. Generally, a record contains a parent object and several child objects. By default, the parent object is a person object, which is associated with these child objects: address, telephone, alias, auxiliary ID, and comment. A record can have only one parent object, but can have multiple child objects and multiple instances of each child object, with each instance being identified by a unique field. For example, a record can only contain one patient name and social security number (contained in the parent object), but could have multiple addresses and telephone numbers (contained in child objects). Each address must be of a different type, such as a home address, billing address, or mailing address.

The Person Object

The person object is the primary object in a system record or SBR, and stores demographic information about a patient. Each record can have only one person object. By default, the person object of the SBR contains the information from each system that is determined to be the best information by the survivor calculator. Certain fields must be entered in the person object in order to save a patient profile. By default, these fields include first and last names, date of birth, and gender.

Address Objects

Address objects store a patient’s address information in a system record or SBR. Each address is identified by an address type. Each system record or SBR can store multiple addresses, but can only store one address of each type. For example, a record can have a home and a business address, but cannot have two home addresses. By default, the survivor calculator determines which system record addresses to store in the SBR by looking at all system record addresses. If each address type is unique, then all addresses are included in the SBR. If there are multiple addresses of one type, the survivor calculator determines which address to store in the SBR.

Phone Objects

Phone objects store a patient’s telephone numbers in a system record or SBR. Each telephone number is identified by a phone type. Each system record or SBR can store multiple telephone numbers, but can only store one number of each type. For example, a record can have a home and a cellular telephone number, but cannot have two home telephone numbers. By default, the survivor calculator determines which system record telephone numbers to store in the SBR by looking at all system record numbers. If each phone type is unique, then all telephone numbers are included in the SBR. If there are multiple telephone numbers of one type, the survivor calculator determines which number to store in the SBR.

Alias Objects

Alias objects store nicknames, maiden names, or any other names used by a patient. Each system record or SBR can have multiple alias names. By default, all unique alias names from each system record in a patient profile are included in the SBR. If two system records contain identical alias objects, then only one of those objects is stored in the SBR.

AuxId Objects

AuxId objects store a patient’s auxiliary IDs in a system record or SBR. Auxiliary IDs are identifiers assigned to a patient that are not necessarily unique to each patient. For example, it can be used to store a credit card number for a joint credit card, an account number for a joint checking account, or an insurance policy number for a policy that covers each family member. Each system record or SBR can store multiple auxiliary IDs. By default, all auxiliary IDs from each system record in a patient profile are included in the SBR. If two system records contain identical auxiliary ID objects, then only one of those objects is stored in the SBR.

Comment Objects

Additional information about patients appears in the form of comments. Comment objects contain free-form fields in which you can enter information about a patient that does not appear in standard EDM fields. Each comment you add to a patient profile must include a comment code that is unique for the patient profile. This code is used to identify the comment. By default, the survivor calculator determines which system record comments to store in the SBR by looking at all system record comments. If each comment type is unique, then all comments are included in the SBR. If there are multiple comments of one type, the survivor calculator determines which comment to store in the SBR.

Comments can be used to store information about such issues as resolving or merging potential duplicates or reasons for merging or unmerging profiles. They can also be used to store additional information about a patient, such as recording information from a conversation with the patient.

2.2.4 Identification Numbers for each Patient

Each patient profile in the master index is assigned a unique identification number in addition to the local IDs assigned by individual systems. Each patient has one unique identification number throughout your organization, and a unique identification number within each system with which they are registered. Patients might also have several auxiliary IDs, meaning that they share these identification numbers with other patients.

EUID

Every patient profile in the master index system is assigned an enterprise-wide unique identification number. This number is the same for that patient regardless of the system from which the patient information originates. This number is called the enterprise-wide unique identifier (EUID) and is used to cross-reference patient profiles in order to accurately identify the patients throughout your organization.

Local ID

A local ID is a unique local identification number that is assigned to a patient in each system at which they are registered. These numbers are assigned using a numbering system unique to each local system, and are used internally by the systems to identify each patient. The master index uses a patient's EUID to cross-reference their local IDs in different systems. Note that the name of the Local ID field is configurable and might have been modified for your implementation.

Auxiliary ID

An auxiliary ID is an identification code that does not necessarily uniquely identify a single patient within the database, but might identify a group of patients. For example, if a family shares the same account or insurance policy, every family member would have the same identification code for that account or policy.

2.3 Working with the Enterprise Data Manager

The EDM is a web-based application, which means you access the application through an internet browser. The EDM uses standard web-based features, such as hyperlinks, data fields, and action buttons, to help you enter information and navigate through the different EDM pages. The following topics provide basic information about the design of the EDM and logging on and off the application.

- **Logging on to the EDM** on page 23
- **Navigation Tips** on page 24
- **Logging Off the EDM** on page 27

2.3.1 Logging on to the EDM

Before you can use the EDM, you must first log in to the application by entering the correct URL in your web browser, and then specifying your login ID and password. Make sure you have a user ID and password for the master index before logging on. The application or integration server running the master index application must be started before you can log in to the EDM.

URL Information

The URL for the EDM is:

```
http://<host>:<port>/<app_name>edm
```

where

- <host> is the name of the server machine.
- <port> is the port number used by the EDM.
- <app_name> is the name of the eIndex SPV application (typically, the <app_name> is Person).

The port for the Sun SeeBeyond Integration Server is listed on the Domain Manager in the **HTTP** property (18001 by default). If the server is configured for Secure Sockets Layer (SSL), the URL is:

```
https://<host>:<port>/<app_name>edm
```

where <port> is the value of the **HTTPS** property (18004 by default).

The port number for the Sun Java System Application Server is listed in the **domain.xml** file in the **http-listener** element identified by the name given to the eIndex

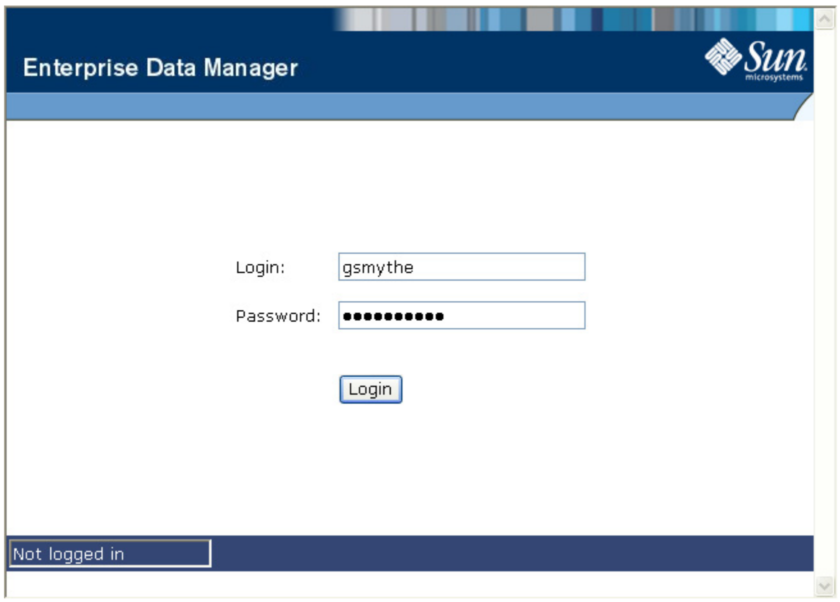
SPV server (8082 by default). The **domain.xml** file is located in <app_server_home>\domains\<domain_name>\config.

To log in to the EDM

1. Launch a web browser (Internet Explorer 6.0 with SP1 or later).
2. In the Address field, enter the appropriate URL.

   The login page appears.

Figure 2 EDM Login Page



3. Enter your login ID and password in the appropriate fields.
4. Click **Login**.

   The initial page appears. (By default, the initial page is the Search page, but this is configurable.)

Note: *After a certain period of inactivity, the EDM automatically logs off and returns you to the Login page when you try to perform an activity on the EDM. Simply re-enter your user name and password to access the EDM again. The system administrator can set the inactivity period at the server level in the* ***session-timeout*** *element of* ***default-web.xml*** *(in <logicalhost_home>\is\domains\<domain_name>\config) or at the application level in* ***web.xml*** *in the eIndex SPV application .war file (located in the deployment .ear file) or in the deployment folder itself. The application level overrides any values set at the server level. The default inactivity period is 30 minutes.*

2.3.2 Security Permissions

Security for the EDM is defined at the function level. You might not be able to perform all the functions described in this guide depending on the security permissions you are assigned. For more information about functions you can perform, see your system administrator.

2.3.3 Navigation Tips

The EDM provides hyperlinks and command buttons to help you access and move through the EDM pages. When you place the cursor over links and images on the EDM pages, tooltips appear to provide additional information. Information is also provided to facilitate the use of screen readers and other assistive technology.

Navigating the EDM Functions

The actions you can perform on the EDM are grouped into five primary functions: Person Search, Matching Review, History, Create System Record, and Reports. The main menu on all EDM pages provides hyperlinks to each of these functions, as shown in Figure 3. The first page to appear for each function, except the Create System Record function, is a search page. The names of these headings can be modified for your application.

Figure 3 Main Menu Navigation Tools

- **Person Search**
  The Person Search function allows you to perform a search for a patient profile or set of patient profiles in the master index. From the associated pages, you can compare two patient profiles, compare records in one patient profile, view all information for one patient profile, update a patient profile, view a transaction history of a patient profile, view a patient's potential duplicates, or merge patient profiles or system records.
- **Matching Review**
  The Matching Review function allows you to perform a search for potential duplicate profiles or for any profiles that were updated by an assumed match. From the associated pages, you can compare, merge, or resolve potential duplicate profiles, and you can view and reverse assumed match transactions.
- **History**
  The History function allows you to perform a search for transaction histories or audit log entries. From the Transaction History pages, you can compare information about a patient before and after a transaction occurred, select patient profiles to unmerge, and view a merge history for a patient profile. From associated Transaction History pages, you can unmerge patient profiles. The audit log pages allow you to view information about transactions in which data about a patient was accessed through the EDM.

- **Create System Record**
  The Create System Record function allows you to create new patient profiles by creating a system record. When you save the information in the system record, the master index automatically generates the SBR using the survivor calculator.

- **Reports**
  The Reports function allows you to display and print reports about certain transactions performed from both the EDM and messages sent in from external systems. For complete information on configuring and running reports, see the *Sun SeeBeyond eView Studio Reporting Guide*.

Navigating the Search Pages

When you perform a search for patient information using the Person Search, History, or Matching Review functions, information appears in three different pages. The *Search* page displays the fields you can use as search criteria, the *Search Result* page displays a list of search result profiles, and the *detail* pages display the patient profiles you select from the results list. Once you perform a search, you can navigate back through these pages using the hyperlinks provided in a secondary menu below the main menu, as shown in Figure 4. The Matching Review page for potential duplicate searches includes an additional results page called the *Associated Records* page.

Figure 4 Search Page Navigation Tools

The behavior of the commands on the secondary menu for Person Search, Matching Review, and History is described in Table 3.

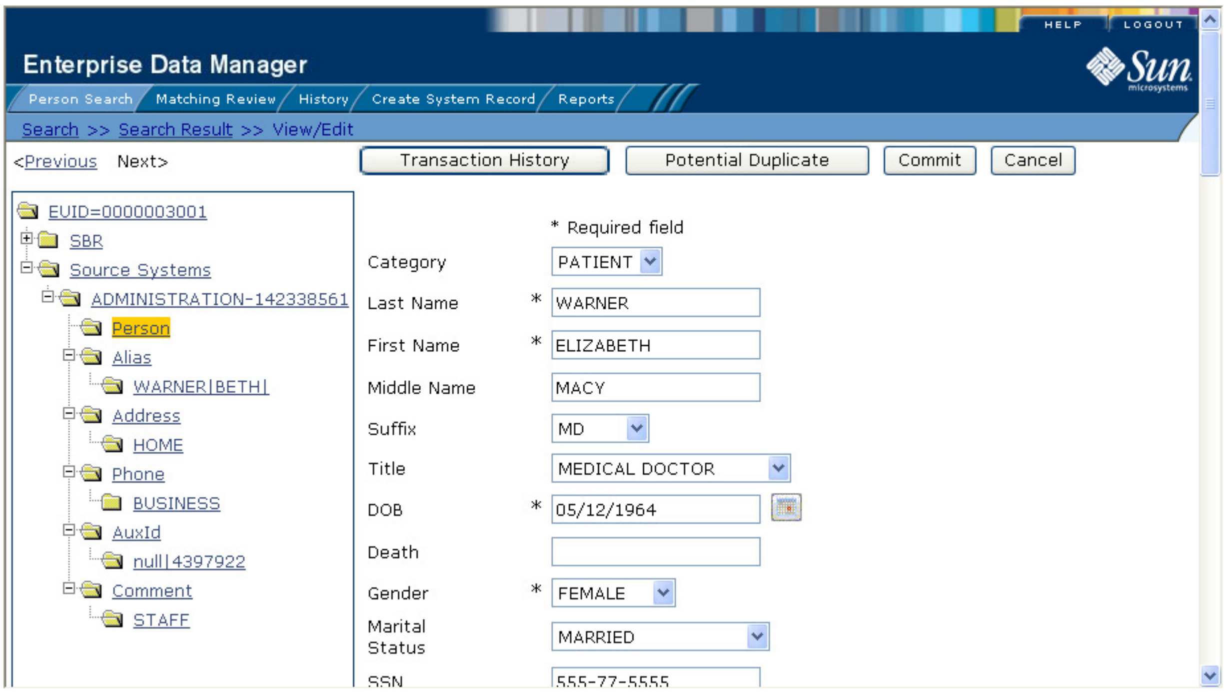
Table 3 Secondary Menu Navigational Tools

Menu Option	Description
Search	Returns to the original search page with the search criteria filled in.
Search Result	Returns to the search results list.
<Detail Page Name>	This is the name of the current detail page. Clicking this menu option does not perform any action unless you perform a merge from the Comparison page. In this case the Comparison option becomes active and returns to the Comparison page.
Back to Person Search	This option becomes available when you select Transaction History or Potential Duplicate from the View/Edit page. It returns to the View/Edit page.

Navigating the Detail Pages

The detail pages display an EUID tree view of the patient profile on the left, and the detailed information for the selected tree-view object on the right. If you are viewing a comparison of patient profiles, the tree views appear in the outer sections of the page, with the detailed information in the center. Figure 5 illustrates the View/Edit page, and shows the tree view on the left with the person object of the SBR selected. The detailed information displayed on the right is associated with the selected person object. When you select a different object from the tree view, the detailed information in the right portion of the page changes accordingly.

Figure 5 Sample View/Edit Page



2.3.4 Logging Off the EDM

Before you exit the EDM, make sure you have saved any changes. To exit the EDM, click **Logout** in the upper right corner of the page. The Login page reappears.

Chapter 3

Searching for Patient Profiles

Before you can view or modify a patient profile, you must perform a search for the profile using the search tools provided by the EDM. This chapter presents the background information and the step-by-step instructions you need to find patient information using the EDM. This chapter does not describe the additional search capabilities provided on the History or Matching Review pages. History searches are described in **Chapter 4**, and Matching Review searches are described in **Chapter 5**.

The information in this chapter is based on the default configuration for eIndex SPV, and the appearance of your EDM might vary from the descriptions and illustrations depending on how your application is configured.

What's in This Chapter

3.1 Learning About Patient Queries

Before you can view or update patient information, you need to perform a search for the patient. There are several different search capabilities within the EDM. You can perform lookups for specific patient profiles using unique identifiers such as the EUID or local ID, and you can perform broader searches using standard demographic information and parsed address components as criteria.

3.1.1 About the Person Search Function

By default, the Person Search tab includes four different search pages: Simple Person Lookup, Advanced Person Lookup (Alpha), Advanced Person Lookup (Phonetic), and Comparison Lookup. The design of the search functionality provides flexibility in designing database queries. You can narrow a search for a specific patient or a range of patients using various search fields located on the search pages. You can enter search criteria on the Advanced Person Lookup pages, and then view your search results on the Search Result page. When you select a specific patient from the Search Result page, detailed information for that patient appears on the View/Edit page.

The Simple Person Lookup Page

The Simple Person Lookup page of the Person Search function allows you to perform lookups using unique identifiers to find a specific patient profile. By default, the unique identifiers you can use as search criteria include the EUID, local ID and system, or social security number (SSN). When you perform this type of search, the Search Result page is generally bypassed and the View/Edit page appears displaying information about the matching profile. An exception to this is when different patient profiles contain the same or very similar SSNs. Performing a search for one of these profiles brings up the Search Result page with a list of matching profiles.

The Advanced Person Lookup (Alpha) Page

The Advanced Person Lookup (Alpha) page of the Person Search function allows you to perform searches against the database using a combination of demographic and address fields as criteria. The patient profiles returned by these searches are not assigned a matching probability weight to indicate how closely they match the search criteria. The searches performed on this page are exact match searches, meaning that they only return profiles that exactly match the criteria you specify. The only exceptions are street address fields, which are parsed and standardized before searching for matching profiles. Most fields in this search allow wildcard characters if the exact value is unknown.

The Advanced Person Lookup (Phonetic) Page

The Advanced Person Lookup (Phonetic) page of the Person Search function allows you to perform searches against the database using pre-defined combinations of demographic and address fields as criteria. The patient profiles returned by these searches are assigned a matching probability weight to indicate how closely they match the search criteria. The searches performed on this page are not exact match searches, allowing for misspellings and for nicknames. They do not support wildcard characters.

The Comparison Lookup Page

The Comparison Lookup page of the Person Search function allows you to perform a search for multiple patient profiles by entering their EUIDs. You can then select two of the resulting records to view on the Comparison page. Use this type of search if you want to compare patient profiles and you know the EUIDs of the patient profiles to compare.

The Search Result Page

The Search Result page of the Person Search function displays a list of patient profiles found in the database that closely match the search criteria you entered. The results list appears in a table, with the number of profiles returned for the search displayed above the table. This page displays information to help you identify the patient profile, such as the EUID, name, date of birth, address information, and status. This page also displays a list of the search criteria entered for the search that returned the displayed list. For more information about search results and the Search Result page, see **Working with Search Results** on page 39.

3.1.2 Types of Searches

There are several different methods of searching for patients, depending on the search criteria you enter. The search pages of the Person Search function are organized into different sections that allow you to perform different types of searches based on specific categories of criteria. On the Simple Person Lookup page, you can only perform one type of search at a time, using the fields from only one search section.

Note: *The names of the search types are configurable. Searches are described by their default names and by their default search criteria. See your system administrator if you have questions about how your search pages are configured.*

EUID Lookup

You can perform an EUID Lookup using the field in the **Enterprise Unique ID** section of the Simple Person Lookup page. Enter the patient's EUID number to perform an exact match search against the database.

Social Security Number Lookup

A Social Security Number Lookup is used to perform an exact match search against the database using the patient's social security number (SSN) for search criteria. This type of search is performed in the **SSN** section of the Simple Person Lookup page.

Local ID Lookup

The Local ID section of the Simple Person Lookup page consists of two required fields, System and Local ID. To increase search accuracy, you can only select a system listed in the drop-down list and the Local ID field is case-sensitive. The name of this section is configurable and might have been modified for your implementation. See your system administrator for more information.

Advanced Person Lookup (Alpha)

You can perform an alphanumeric search on the Advanced Person Lookup (Alpha) page, using a combination of demographic and address fields as criteria. Using a combination of required and optional fields, you can form a search as precise or general as you prefer. An alphanumeric search looks for profiles that exactly match the criteria as you entered it, without allowing for misspellings or typographic errors. You can use wildcard characters (a percent sign to indicate multiple unknown characters). This type of search also supports searching on a range of values, such as a range of dates for a date of birth.

Advanced Person Lookup (Phonetic)

The Advanced Person Lookup (Phonetic) function differs from the alphanumeric lookup in that it returns phonetic variations of the entered name or street address, allowing room for misspellings and typographic errors. Name and address criteria for phonetic searches are not sensitive to case or to diacritical marks. You can include any combination of address fields in the search, and you can perform partial searches on the street address by only entering the street name. An address search uses the parsed street address field components and the phonetic version of the street name. By default, you can only search on the following data combinations; however, your system might be configured for different combinations.

- First Name and Last Name
- Address Line 1 and, optionally, Address Line 2
- Last Name, Address Line 1, and, optionally, Address Line 2
- Social Security Number
- First Name, DOB, and Gender
- Last Name and Mother's Maiden Name

The EDM only searches on the above combinations that have complete data. For example, if Last Name, First Name, DOB, and Gender are entered as criteria, only the first and fifth combinations are carried out. The returned result set would include any records that match on first and last name *or* that match on first name, date of birth, and gender. If only First Name is entered as search criteria, no records are returned since it does not fulfill any of the combination requirements.

Comparison Lookup

The Comparison Lookup function provides a simple way to search for two or more records to compare in a side-by-side comparison. You can enter up to five EUIDs as search criteria, and all records matching any of the specified EUIDs are returned.

3.1.3 Searching by Ranges

Your system administrator can configure the search pages to allow you to enter a range by which to search for certain fields. For example, you might want to search for profiles with a specific first and last name, but with a date of birth that falls within a five-year range. If a field is defined for searching by a user-defined range, the EDM displays a ‘from’ field and a ‘to’ field so you can specify the range (for example, “Date From” and “Date To”). If you only enter a value in the ‘from’ field, the EDM searches for profiles with a value greater than or equal to that value. If you only enter a value in the ‘to’ field, the EDM searches for profiles with a value less than or equal to that value.

Ranges can also be defined as the entered value plus or minus a specific value. For example, a date field can be configured to search for dates that fall within a range five years earlier than the date you enter and five years later than the date you enter. Finally, ranges can be defined as specific upper and lower limits. These limits are used when no value is entered. For example, if you perform a search without the date, the EDM searches between the defined lower and upper limits. If you enter only a ‘from’ date, the EDM searches between the date you entered and the defined upper limit. For more information about how your system has been configured for range searching, see your system administrator.

3.1.4 Required Fields

Certain fields might be required for the searches on the EDM. If a field is marked with an asterisk (*), it is required. If multiple fields are marked with daggers (†), at least one of those fields must be populated in order to perform the search. The required fields can vary depending on which type of search you are performing.

3.2 Searching for Patient Profiles

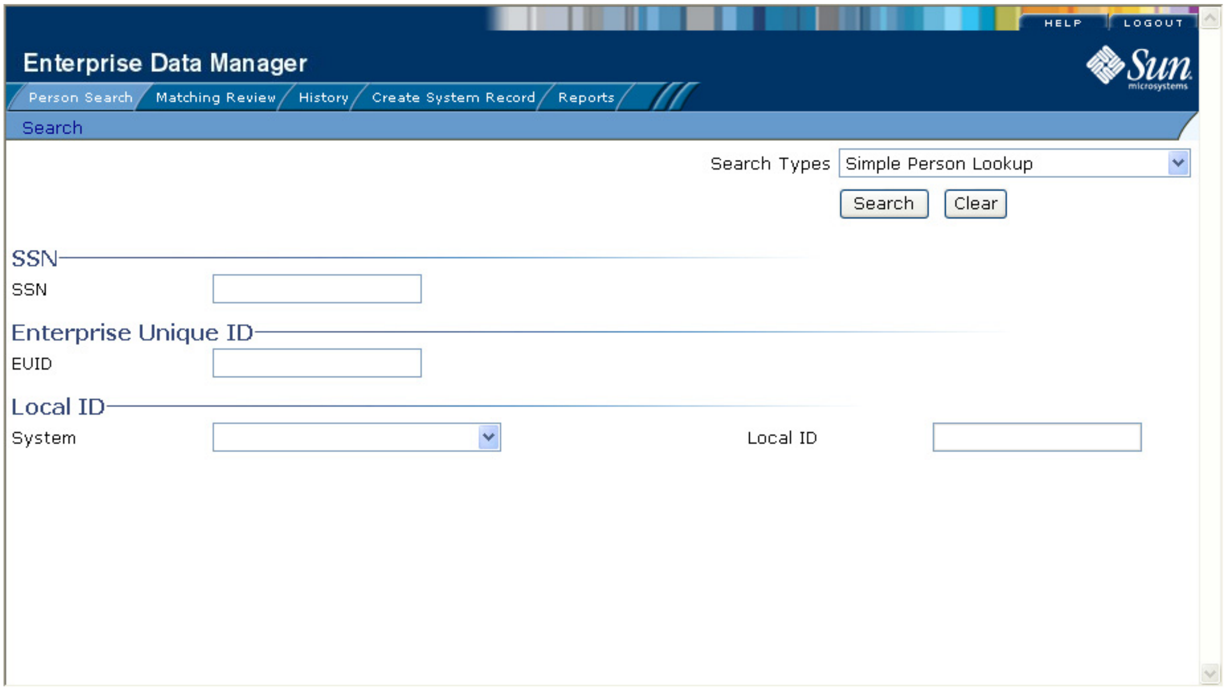
The following topics provide step-by-step instructions to help you perform the various types of searches available on the EDM. To move from one field to another on the search pages without using the mouse, press the **Tab** key. The name of the Local ID section is configurable.

- **Performing an EUID Lookup** on page 32
- **Performing a Social Security Number Lookup** on page 33
- **Performing an Advanced Alphanumeric Lookup** on page 34
- **Performing an Advanced Phonetic Lookup** on page 37
- **Performing an EUID Comparison Lookup** on page 39

3.2.1 Performing an EUID Lookup

To search for a patient profile using only a patient's EUID, you need to enter the EUID number in the EUID Search section of the Simple Person Lookup page. This type of search should result in only one matching profile.

Figure 6 Simple Person Lookup Page



To perform an EUID lookup

1. On the Person Search page, select **Simple Person Lookup** from the **Search Types** drop-down list.
2. In the Enterprise Unique ID section, enter the patient's EUID.
3. Click **Search** or press **Enter** to initiate the search.

   The View/Edit page appears, displaying detailed information about the patient whose EUID you entered.

3.2.2 Performing a Social Security Number Lookup

To search for a patient profile using only the patient's social security number, use the SSN section of the Simple Person Lookup page (see Figure 6). While this type of search should result in only one matching profile, there might be multiple resulting profiles.

To perform a social security number lookup

1. On the Person Search page, select **Simple Person Lookup** from the **Search Types** drop-down list.

   The Simple Person Lookup page appears (see **Figure 6 on page 33**).
2. In the SSN section, enter the social security number of the patient you want to find.
3. Click **Search** or press **Enter** to initiate the search.

If there are multiple matching profiles, the Search Result page appears with a list of matching profiles. If there is only one matching profile, the Search Result page is bypassed, and the View/Edit page appears.

3.2.3 Performing a Local ID Lookup

To search for a patient profile by their local ID in a specific system, you need to enter search criteria in the Local ID section of the Simple Person Lookup page. This type of search should result in only one matching profile. If the Local ID field contains alphabetic characters, the criterion is case-sensitive.

Note: *The name of this section might have been modified for your implementation. See your system administrator for more information.*

To perform a local ID lookup

1. On the Person Search page, select **Simple Person Lookup** from the **Search Types** drop-down list.

   The Simple Person Lookup page appears (see **Figure 6 on page 33**).

2. Enter your search criteria in the Local ID section (for more information, see **About Local ID Lookup Fields** on page 34).

3. Click **Search** or press **Enter** to initiate the search.

   The Search Result page is bypassed, and the View/Edit page appears.

About Local ID Lookup Fields

The fields in the Local ID section of the Simple Person Lookup page allow you to search for a patient by their local ID. There are no defaults for these fields, and both fields are required for the search.

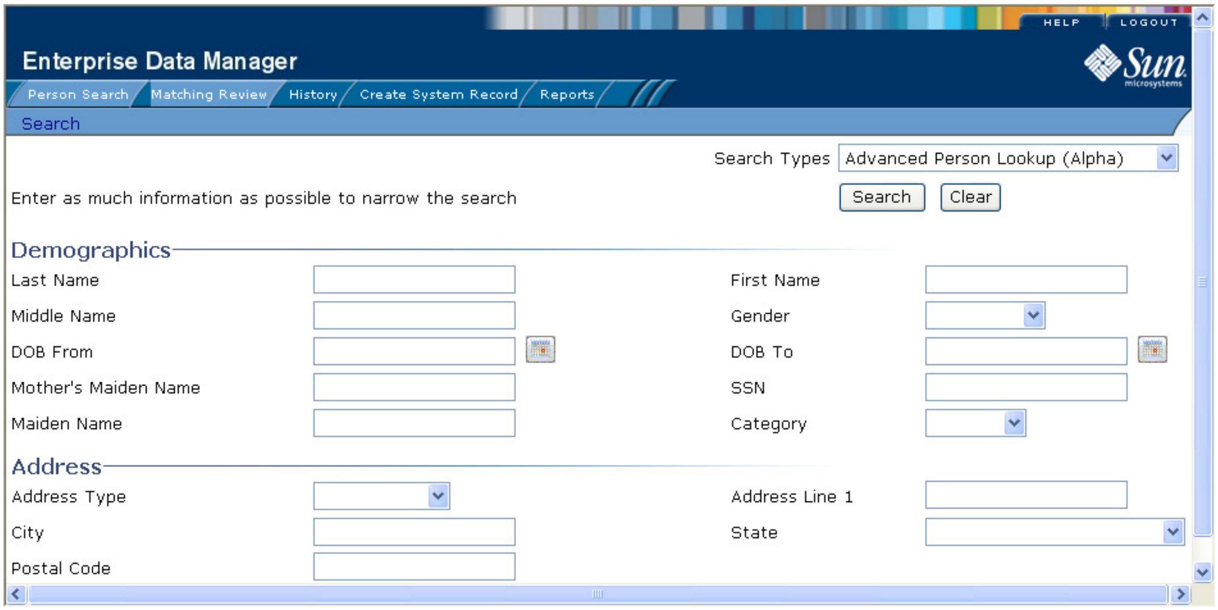
Table 4 Local ID Lookup Fields

In this field …	type or select …
System	The computer system, such as a registration system, for which the patient's local ID is known.
Local ID	The patient's unique identification code at the specified system. ***Note:*** *If alphabetic characters are entered in this field, the search is case-sensitive. This field name might have been modified for your implementation.*

3.2.4 Performing an Advanced Alphanumeric Lookup

To perform an advanced alphanumeric search for a patient profile, you need to specify identifying information for the patient, such as their first and last names, on the Advanced Person Lookup (Alpha) page. This type of search might result in several matching profiles.

Figure 7 Advanced Person Lookup (Alpha) Page



To perform an advanced alphanumeric lookup

1. On the Person Search page, select **Advanced Person Lookup (Alpha)** from the **Search Types** drop-down list.
2. In the Demographics and Address sections, enter search criteria for the patient you want to find (for more information, see **About Alphanumeric Search Fields** on page 35).
3. Click **Search** or press **Enter** to initiate the search.

   The Search Result page appears with a list of matching profiles. If only one matching profile is returned, the View/Edit page appears.

Important: *The system administrator can choose whether to display the EUID field or the local ID and system fields on this page. Any values entered into these optional fields take precedence over information entered into other search fields. For example, if an invalid EUID is entered but valid first and last names are entered, no results are returned due to the invalid EUID. The EUID field takes precedence over the local ID and system fields.*

About Alphanumeric Search Fields

The alphanumeric search fields, located in the Demographics and Address sections of the Advanced Person Lookup (Alpha) page, allow you to specify search criteria for the patient you want to find. You should make your search as specific as possible. This type of search allows wildcard characters; use a percent sign (%) to indicate any unknown characters.

Any required fields are marked with an asterisk (*). If at least one field in group of fields is required, the fields in that group are marked with a dagger (†). This type of search supports searching by a range of values. Range searching is supported for any field type that has two fields, one with “From” appended to the name and one with “To” appended to the name (for example, “DOB From” and “DOB To”). If your EDM is set up for range searching, see the system administrator for more information about how it is configured.

Note: *These fields are defined by default, but your implementation might be configured differently.*

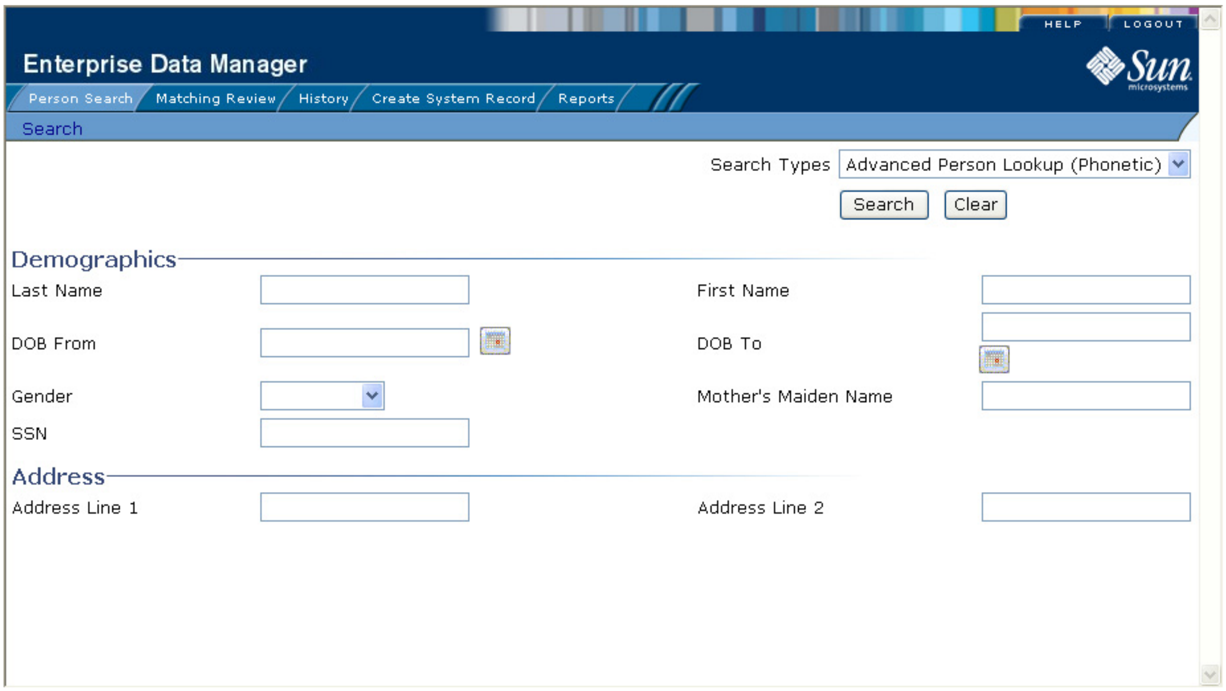
Table 5 Advanced Alphanumeric Search Fields

In this field ...	type or select ...
Demographics	
Last Name	The last name of the patient you want to find.
First Name	The first name of the patient you want to find.
Middle Name	The middle name or initial of the patient you want to find.
DOB To	The start date for a range of dates that includes the patient’s date of birth. Enter the same date in the DOB To and DOB From fields to search on an exact date. ***Tip:*** *You can click the calendar icon to the left of this field to bring up a calendar from which you can select a date. To select today’s date, click **Today** on the calendar dialog box.*
DOB From	The end date for a range of dates that includes the patient’s date of birth. ***Note:*** *Your EDM might be configured to search on an exact date and not a range of dates. In this case, there will only be one field named “DOB”.*
Gender	The gender of the patient you want to find.
Mother's Maiden Name	The maiden name of the patient's mother.
SSN	The social security number of the patient you want to find.
Maiden Name	The maiden name of the patient you want to find.
Category	The type of patient profile for which you are searching, such as customer, employee, patient, and so on.
Address	
Address Type	The type of address you are entering as criteria, such as home, billing, office, and so on.
Address Line 1	The street address of the patient you want to find. Enter only a street number and street name in this field, and do not enter a street type or direction.
City	The city in which the address is located.
State	The state in which the address is located.
Postal Code	The zip code of the address.

3.2.5 Performing an Advanced Phonetic Lookup

To perform an advanced phonetic search for a patient profile, you need to specify identifying information for the patient, such as their first and last names, on the Advanced Person Lookup (Phonetic) page. This search might return several profiles.

Figure 8 Advanced Person Lookup (Phonetic)



To perform an advanced phonetic lookup

1. On the Person Search page, select **Advanced Person Lookup (Phonetic)** from the **Search Types** drop-down list.
2. In the Demographics and Address sections, enter search criteria for the patient you want to find in one or more of the allowed combinations (at least one combination must be entered).

   By default, the following combinations are allowed:

   - First Name and Last Name
   - Address Line 1 and, optionally, Address Line 2
   - Last Name, Address Line 1, and, optionally, Address Line 2
   - Social Security Number
   - First Name, DOB, and Gender
   - Last Name and Mother's Maiden Name

   For more information about these fields, see **About Phonetic Search Fields** on page 38. For more information about phonetic searches, see **Advanced Person Lookup (Phonetic)** on page 30.

Note: *The system administrator might have modified the phonetic search criteria so it is different from the above list. If you are unsure of the required criteria combinations, see your system administrator.*

3 Click **Search** to initiate the search.

The Search Result page appears with a list of matching profiles. If only one matching profile is found, the results page is bypassed and the View/Edit page appears.

Important: *The system administrator can choose whether to display the EUID field or the local ID and system fields on this page. Any values entered into these optional fields take precedence over information entered into other search fields. For example, if an invalid EUID is entered but valid first and last names are entered, no results are returned due to the invalid EUID. The EUID field takes precedence over the local ID and system fields.*

About Phonetic Search Fields

The phonetic search fields, located in the Demographics and Address sections of the Advanced Person Lookup (Phonetic) page, allow you to specify search criteria for the patient you want to find. You should make your search as specific as possible. This type of search does not allow wildcard characters.

The Address section consists of fields that are parsed once the search is initiated. Parsed fields are separated into their various components and then standardized before the search is carried out. Parsed fields might include any of the Address Lines 1 through 4 fields, depending on how parsing is configured.

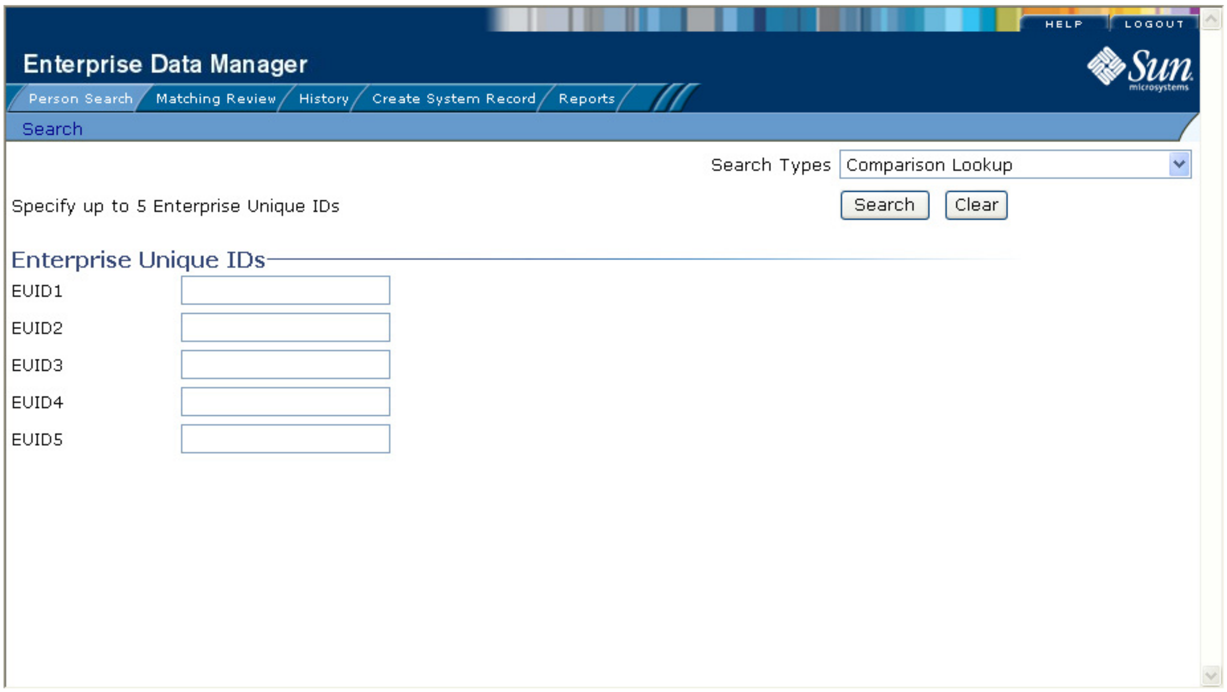
Table 6 Advanced Phonetic Search Fields

In this field ...	type or select ...
Demographics	
Last Name	The last name of the patient you want to find.
First Name	The first name of the patient you want to find.
DOB	The date of birth for the patient you want to find. **Tip:** *You can click the calendar icon to the left of this field to bring up a calendar from which you can select a date. To select today's date, click* ***Today*** *on the calendar dialog box.*
Gender	The gender of the patient you want to find.
Mother's Maiden Name	The maiden name of the patient's mother.
SSN	The social security number of the patient you want to find.
Address	
Address Line 1	The first line of the patient's street address.
Address Line 2	The second line of the patient's street address.

3.2.6 Performing an EUID Comparison Lookup

To perform a search by EUID for multiple profiles to compare, you need to specify each EUID on the Comparison Lookup page. You can enter from two to five EUIDs to compare in the search results list, and then select one or two of the resulting profiles to compare information.

Figure 9 Comparison Lookup Page



To perform an EUID comparison lookup

1. On the Person Search page, select **Comparison Lookup** from the **Search Types** drop-down list.
2. Enter at least two, and up to five, EUIDs.
3. Click **Search** or press **Enter** to initiate the search.

   The Search Result page appears with a list of matching profiles. To learn how to compare profiles, see **Comparing Patient Information** on page 68.

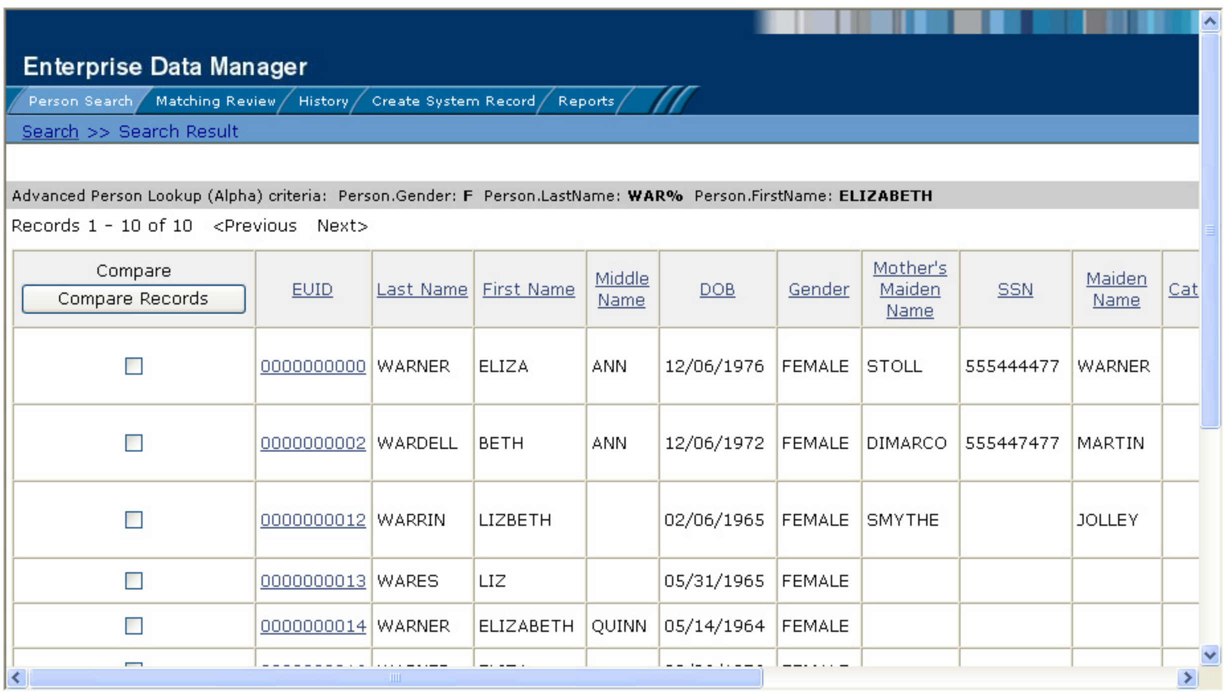
3.3 Working with Search Results

The following topics describe the Search Result page, how to sort and select the profiles that match the searches you perform, and how to print a search result report. The criteria that you entered for a search appear above the results list table on the result page.

3.3.1 Viewing the Results of a Search

The matching profiles that result from a patient search appear in table format on the Search Result page. The table displays a limited number of fields contained in the SBR of the patient profile.

Figure 10 Search Results List



To view the profiles on the Search Result page

1. Perform a search for the patient whose profile you want to access.

   If more than one record matches the criteria, the Search Result page appears.

2. In the results list, view the information presented for each returned profile to determine which profile you want to view (for information about the fields on this page, see **About Results Fields** on page 42).

3. If an address or telephone number field is included in the results list and contains an ellipsis ("..."), you can click the ellipsis to view additional address or telephone information, as shown in Figure 11 and Figure 12.

Figure 11 Address Information Page

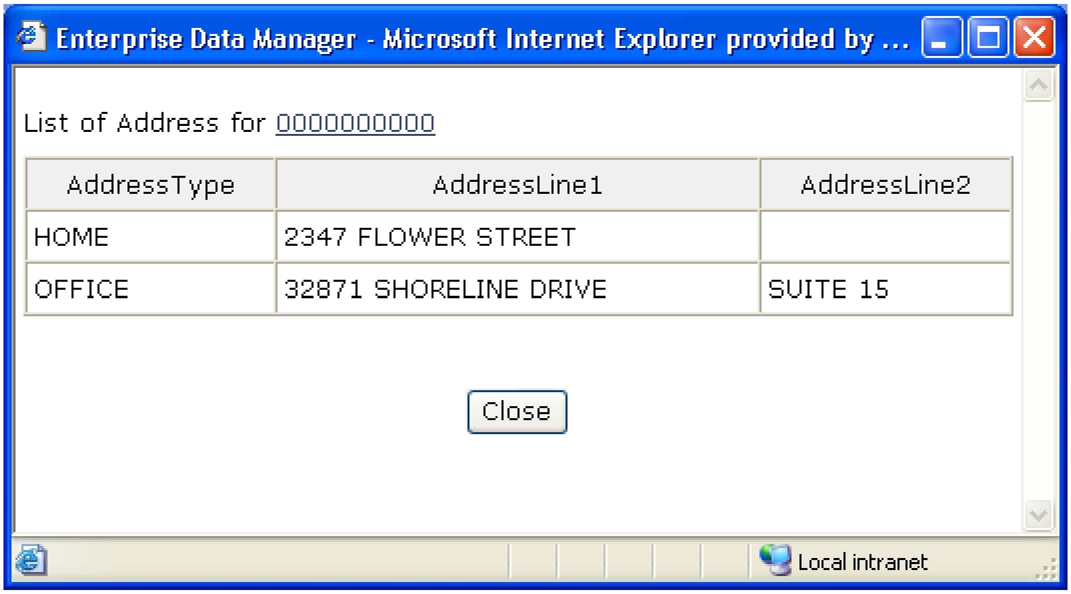
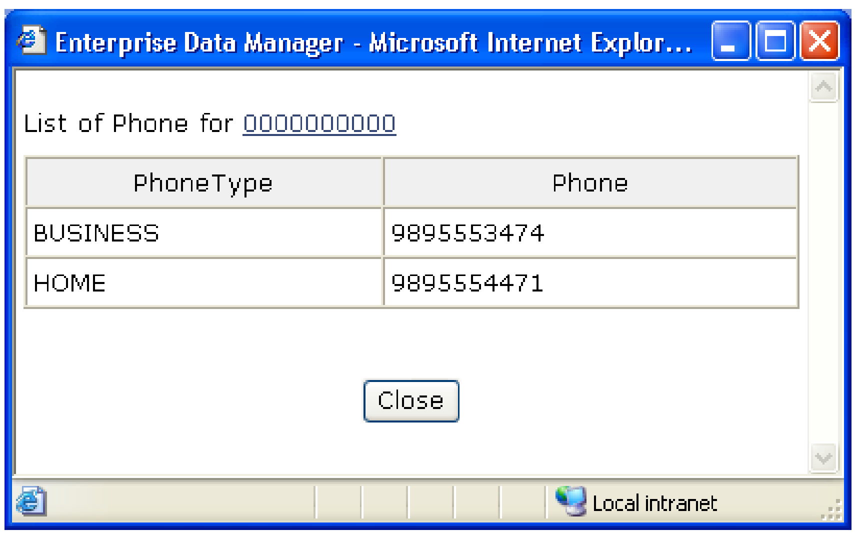


Figure 12 Telephone Information Page



4. When you are finished viewing the additional address or telephone information, click **Close**.
5. To view the following page of search results, click **Next>**.
6. To return to the previous page of results, click **<Previous**.
7. To select a profile to display on the View/Edit page, click the EUID of that profile.
8. To perform a new search, click **New Search** in the upper portion of the page.
9. To view and print the results in a report, click **Print Report...**.

About Results Fields

The fields located on the Search Result page display information to help you identify the appropriate patient. The fields listed in the following table describe the default fields in the results list. Your list might differ depending on the EDM configuration.

Table 7 Search Result page Fields

This field ...	displays this information ...
EUID	The enterprise-wide unique identification number assigned to the patient by eIndex SPV.
Last Name	The last name of the patient.
First Name	The first name of the patient.
Middle Name	The middle name of the patient.
DOB	The date the patient was born.
Gender	The gender of the patient.
Mother's Maiden Name	The maiden name of the patient's mother.
SSN	The patient's social security number.
Maiden Name	The patient's maiden name.
Category	The person category assigned to the patient profile.
Address Type	The type of address information being displayed.
Address Line 1	The first line of the patient's street address.
Address Line 2	The second line of the patient's street address.
Phone Type	The type of telephone information being displayed.
Phone	A telephone number for the patient.
Status	The status of the patient profile.
Weight	A matching probability weight that indicates how closely each profile matches the criteria you entered. ***Note:*** *This field only appears in the results of a phonetic search.*

3.3.2 Sorting the Results of Your Search

The matching profiles that result from a patient search appear in table format on the Search Result page. By default, the results are sorted by EUID, but you can sort the results by any column in the table.

To sort the profiles on the Search Result page

1. Perform a search for the patient whose profile you want to access.
2. In the results list that appears on the Search Result page, click the column heading of the column by which you want to sort the results (for more information, see **About Results Fields** on page 42).

Note: *Clicking a heading once sorts the profiles in ascending order; clicking the heading a second time sorts the profiles in descending order.*

3.3.3 Selecting a Profile from the Results List

From the search results list, you can select one patient profile to view detailed information for that profile, or you can select two patient profiles to compare the information in both profiles. You can also select one patient profile to compare different components of that profile.

To select a profile to view

1. Perform a search for the patient profiles you want to view.
2. To view detailed information for one patient profile, click the EUID of that profile.

   The View/Edit page appears, displaying the person object for that profile.
3. To compare two patient profiles, select the check boxes to the left of each profile you want to compare, and then click **Compare Records**.

   The Comparison page appears, displaying a side-by-side comparison of the two profiles.
4. To compare different components of one patient profile, select the check box to the left of the profile you want to view, and then click **Compare Records**.

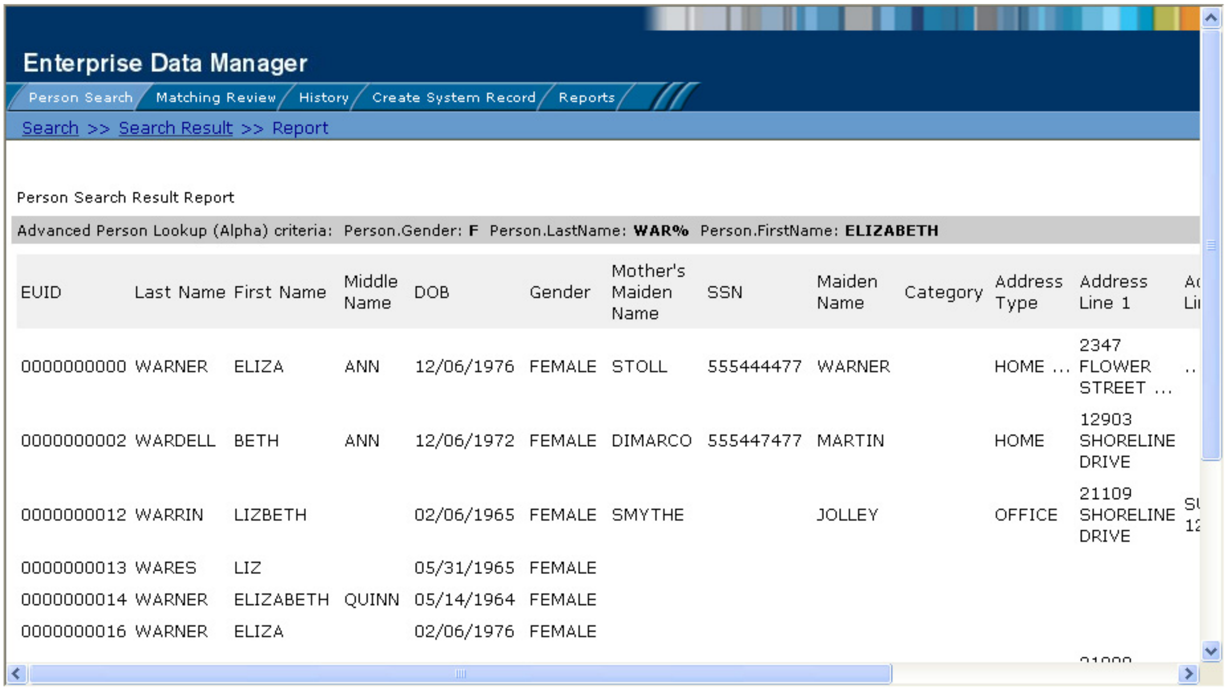
   The Comparison page appears, displaying a side-by-side comparison of two instances of the same patient profile.

Note: *Once a comparison check-box is selected in the search results list, it remains checked until you clear it. If you return to the Search Result page from the Comparison page, clear the selected check boxes before making another selection.*

3.3.4 Creating and Printing a Search Result Report

You can create a report displaying all results of a search, and then print that report to a designated printer.

Figure 13 General Search Result Report Page



To create and print a Search Result report

1. Perform a search for the patient profiles you want to view.
2. In the upper right portion of the Search Result page, click **Print Report...**.

   The Search Result Report page appears.
3. To print the report, click **Print**, and then select a printer from the Print dialog box.

Note: *This reporting capability is provided on all search result pages.*

Chapter 4

Viewing Patient Profiles

This chapter presents the background information and the step-by-step instructions you need to view and compare patient information using the EDM. The information in this chapter is based on the default configuration for eIndex SPV, and the appearance of your EDM might vary depending on how eIndex SPV is configured.

What's in This Chapter

4.1 Patient Profile Views

Before you can view patient information, you need to perform a search for the patient using one of the search techniques described under **Searching for Patient Profiles** on page 32. Once you retrieve a search results list, you can view a patient's detailed information, compare patient profiles, view a merge transaction history for a profile, and view a history of all transactions for a profile.

You can view patient information in any of these formats, which are described on the following pages.

4.1.1 Patient Profile Details

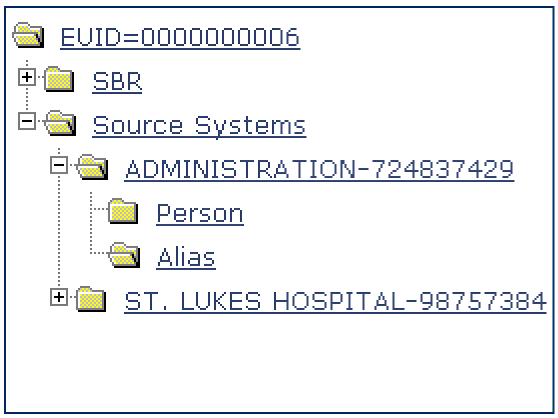
When you select a profile on the Search Result page, detailed information about the selected patient appears on the View/Edit page. This page is divided into two sections. The left side of the page is a tree view that displays the EUID, the components of the

SBR, and the components of each system record. You can select a component from the EUID tree to display detailed information about that component in the right portion of the page. The View/Edit page displays the selected patient's identification, demographic, alias, and local ID information, and you can select an address, telephone number, auxiliary ID, or system record to view additional information. From the View/Edit page, you can perform several actions, such as viewing a transaction history for the patient, viewing potential duplicate profiles, deactivating the profile, updating patient information, and so on.

The Tree View

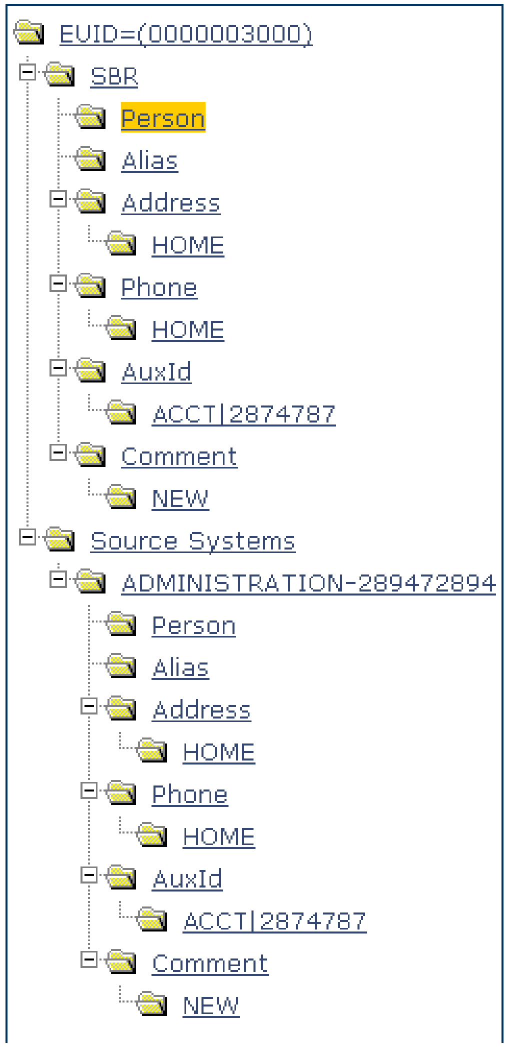
A tree view on the left side of the View/Edit page displays an outline of the profile, including the SBR and any associated system records. This is called the EUID tree.

Figure 14 Patient Profile Tree View



You can expand this tree view to view the different types of information contained in the SBR and in each system record. A plus sign (+) to the left of an item indicates that the item contains additional information. For addresses and telephone numbers, only the address or phone type appears in the tree; and for comments, only the comment code appears. For aliases, each alias name appears in the tree.

Figure 15 Expanded Patient Profile Tree View



Information Fields

The right side of the View/Edit page displays detailed information about the item that is selected in the EUID tree. For example, selecting an address type under the SBR entry in the EUID tree displays the detailed information for that address type in the SBR. Selecting "Person" under a source system record in the EUID tree displays demographic information for that patient as it is stored in that system record. The information contained in a patient's system record might be different from that stored in the patient's SBR.

By default, you can view the selected patient's demographic, alias, address, telephone, auxiliary ID, and local ID information for both the SBR and associated system records. For more information about patient profiles, see **Learning about Patient Profiles** on page 18).

4.1.2 Patient Profile Comparisons

You can compare two different patient profiles by selecting the profiles to compare from a search results list. You can also compare different components of one patient profile. The Comparison page allows you to view the selected profiles or components of one profile in a side-by-side comparison with the differences between the two sides highlighted. Like the View/Edit page, the Comparison page displays an EUID tree for each profile, from which you can select the type of information you want to compare. This design allows you to compare one patient's SBR with another's SBR, one patient's system records with another's system records, or one patient's SBR with another's system records. You can also compare a profile's SBR with one of its own system records or two system records from one profile. This gives you a complete comparison between patient profiles and between the different records in a patient profile.

Differences between displayed profiles are only highlighted when viewing the same type of information on each side. For example, viewing two SBR addresses highlights the differences, but viewing an SBR address and system object address does not. From the Comparison page, you can merge patient profiles or system records if they are found to represent the same patient.

4.1.3 Patient Profile Transaction Histories

You can view a history of all transactions performed against patient profiles either by performing a search as described in **Searching for Patient Profiles** on page 32, or by performing a Transaction History search on the History page (described in **Viewing a Transaction History** on page 62). You can trace the events that modified a patient profile from the time the profile was added to the master index to the most previous transaction, including merged and deactivated profiles.

The Transaction History page allows you to view a side-by-side comparison of one patient profile before and after a transaction occurred against that profile. Like the Comparison page, the Transaction History page displays an EUID tree for each profile, from which you can select the type of information you want to compare with differences between the two profiles highlighted. For a true comparison, be sure the type of information you are viewing is the same on both sides of the page. You can also compare an SBR against an SBR, an SBR against a system record, or a system record against a system record. From associated Transaction History pages, you can unmerge previously merged profiles.

4.1.4 Patient Profile Merge Histories

On the Merge History page, you can display a history of the merges that have affected a specific patient profile. The merge history appears in an EUID tree format on the left side of the page. The top level displays the EUID of the current active profile. The two profiles at the second level show you the EUIDs of the profiles that were merged to form the top-level profile. If there are profiles listed at the third level, they display the EUIDs of the profiles that were merged to form the profile above them. There might be several levels of merges displayed in a patient's merge history.

The right side of the page displays information about the merge transactions that involved the EUID that is selected in the EUID tree on the left. You can select a specific transaction to view a transaction history comparison for that merge transaction.

4.1.5 The Audit Log

The audit log allows you to track and view all instances in which information about the patients in the master index was accessed through the EDM. If audit logging is enabled, an audit log entry is created each time the EDM accesses database tables that contain patient information. The audit log keeps a record of each time the tables are accessed, along with the database function used to access the tables, the login ID of the user accessing the tables, the date and time the tables were accessed, and the EUIDs of the patient profiles that were accessed. This allows you to closely monitor access to the patient records in the master index database and supports HIPAA privacy regulations. The audit log is enabled and disabled in the Enterprise Data Manager file in the eIndex SPV Project.

4.2 Viewing Patient Profiles

The View/Edit page displays patient profiles in a series of pages you can select and view. Each page except the Person page displays the same four fields in the upper portion to help you identify the patient. These fields are First Name, Last Name, Date of Birth, and Gender. You can view information contained in both the SBR and any associated system records.

The following topics provide the instructions you need to view information associated with a patient profile.

- **Viewing a Patient's Demographic Information** on page 49
- **Viewing a Patient's Addresses** on page 53
- **Viewing a Patient's Telephone Numbers** on page 55
- **Viewing a Patient's Aliases** on page 56
- **Viewing a Patient's Auxiliary IDs** on page 58
- **Viewing Comments Associated with a Patient** on page 60

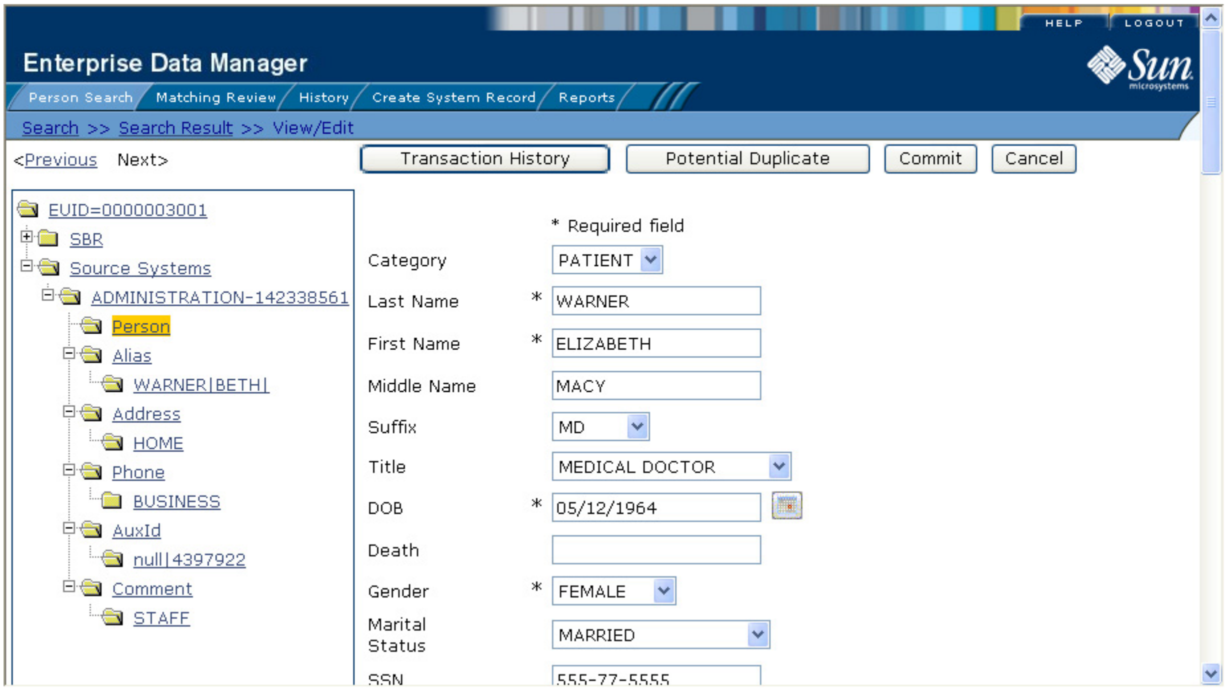
Important: *The system administrator can customize the appearance of the EDM. The information included in the following topics describes the field names and tab names as they appear in the default version of the EDM. The appearance of your EDM might differ from the following descriptions.*

4.2.1 Viewing a Patient's Demographic Information

You can view the demographic information contained in a patient's SBR or in any of the associated system records for that patient. A patient's SBR contains the demographic information that is determined to be the most current and accurate information about that patient from all local systems. By default, when the View/Edit page first appears, the Person page of the SBR is visible.

The system records associated with a patient profile contain the demographic information that is stored in the external systems that share information with the master index. The information in a patient's system records might not match the information stored in the patient's SBR.

Figure 16 View/Edit Page - Demographic Information



To view demographic information

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to view on the View/Edit page.

   For information about the fields on this page, see **About Demographic Fields** on page 51.

2. To view demographic data in a system record:
   - In the EUID tree in the left portion of the page, expand **Source Systems**.
   - Expand the system and local ID you want to view.
   - Under the expanded system and local ID, click **Person**.

Note: *If you change the view to a different page, you can return to the Person page for the SBR by clicking* **Person** *under* **SBR** *in the EUID tree on the left side of the page.*

3. From the View/Edit page, you can do any of the following:
   - To view additional demographic information about the patient, use the scrollbar on the right side of the page.

- To modify patient information, follow the appropriate procedure under **Maintaining Patient Information** on page 93.
- To view a history of transactions for the displayed profile, click **Transaction History** (for more information, see **Viewing a Transaction History** on page 62).
- To view potential duplicates of the displayed profile, click **Potential Duplicate** (for more information, see **Handling Potential Duplicates** on page 83).
- To view detailed information for the following patient in the search results list, click **Next>** in the upper portion of the page.
- To view detailed information for the preceding patient in the search results list, click **<Previous** in the upper portion of the page.

About Demographic Fields

The fields located on the Person page of the View/Edit page allow you to view detailed demographic information about a patient.

Note: *The fields are configurable, and might have been modified or removed. For more information about fields on your EDM that differ from those listed below, see the system administrator. The field descriptions below describe the fields in the default configuration.*

Table 8 Demographic Fields

This field …	displays this information …
SSN	The patient's social security number.
Category	The type of patient whose profile appears, such as employee, patient, customer, vendor, and so on.
Last Name	The patient's last name.
First Name	The patient's first name
Middle Name	The middle name or initial of the patient.
Suffix	The suffix to the patient's name, such as III, Sr., or M.D.
Title	The patient's title, such as Ph.D., Medical Doctor, or Reverend.
DOB	The month, day, and year that the patient was born.
Death	An indicator of whether the patient is deceased.
Gender	The gender of the patient.
Marital Status	The patient's marital status, such as married, single, divorced, or widowed.
Race	The racial background of the patient, such as Asian, White, or Hispanic.
Ethnic Group	The ethnic or cultural background of the patient, such as European, French Canadian, or African American.

Table 8 Demographic Fields

This field ...	displays this information ...
Religion	The name of the patient's religion or denomination, such as Agnostic, Catholic, or Buddhist.
Language	The patient's first language.
Spouse's Name	The first name of the patient's spouse.
Mother's Name	The first name of the patient's mother.
Mother's Maiden Name	The maiden name of the patient's mother.
Father's Name	The first name of the patient's father.
Maiden Name	The maiden name of the patient.
POB City	The city in which the patient was born.
POB State	The state in which the patient was born.
POB Country	The country in which the patient was born.
VIP Flag	An indicator that specifies the VIP status of the patient.
Veteran Status	An indicator that specifies whether the patient is a war veteran.
Driver License	The driver's license number of the patient.
DOD	The month, day, and year of the patient's death.
Death Certificate	The ID number of the patient's death certificate.
Nationality	The nation to which the patient belongs.
Citizenship	The country of which the patient is a citizen.
Pension No	The ID number of the patient's pension account.
Pension Exp. Date	The expiration date of the patient's pension.
Repatriation No.	The patient's repatriation number.
District of Residence	The patient's district of residence (DOR).
Lga Code	The patient's Lga code.
Military Branch	The military branch in which the patient served or is currently serving.
Military Rank	The military rank achieved by the patient in the specified military branch.
Military Status	The patient's current status in the specified military branch (such as active or inactive).
Class 1-5	These fields might have been customized or removed to suit your company's specific requirements. For more information about these fields, see the system administrator.
String 1-10	These fields might have been customized or removed to suit your company's specific requirements. For more information about these fields, see the system administrator.

Table 8 Demographic Fields

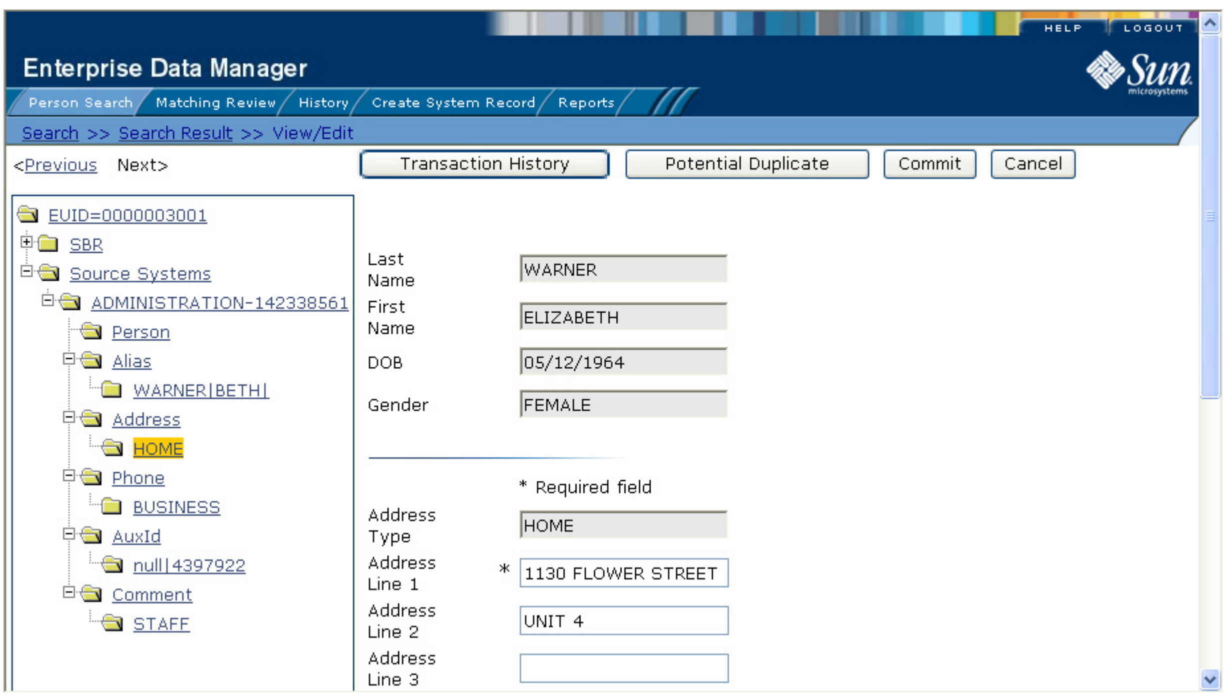
This field ...	displays this information ...
Date 1-5	These fields can only store dates, and might have been customized or removed to suit your company's specific requirements. For more information about these fields, see the system administrator.

4.2.2 Viewing a Patient's Addresses

You can view the address information contained in a patient's SBR or in any of the associated system records. You can perform several actions against the displayed patient profile, such as viewing a transaction history, modifying patient information, and so on (for more information, see **To view demographic information** on page 50).

A patient's SBR contains the address information that is determined to be the most current and accurate information about that patient from all local systems. The system records associated with a patient profile contain the address information that is stored in the external systems that share information with the master index. The information in a patient's system records might not match the information stored in the patient's SBR.

Figure 17 View/Edit Page - Address Information



To view address information

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to view on the View/Edit page.
2. To view an address in the SBR:

- In the EUID tree in the left portion of the page, expand **SBR**.
- Under **SBR**, expand **Address**.
- Under **Address**, click the address type for the address you want to view. The Address page appears.

3 To view an address in a system record:

- In the EUID tree in the left portion of the page, expand the system and local ID you want to view.
- Under the expanded system and local ID, expand **Address**.
- Under **Address**, click the address type for the address you want to view. The Address page appears.

For information about the fields on this page, see **About Address Fields** on page 54.

About Address Fields

The fields located on the Address page of the View/Edit page allow you to view detailed address information for the displayed patient profile. Header fields appear at the top of the page to help you identify the patient whose profile you are viewing.

Note: *The Address fields are configurable, and might have been modified or removed. For more information about fields on your Addresses page that differ from those listed below, see the system administrator. The field descriptions below describe fields in the default configuration.*

Table 9 Address Fields

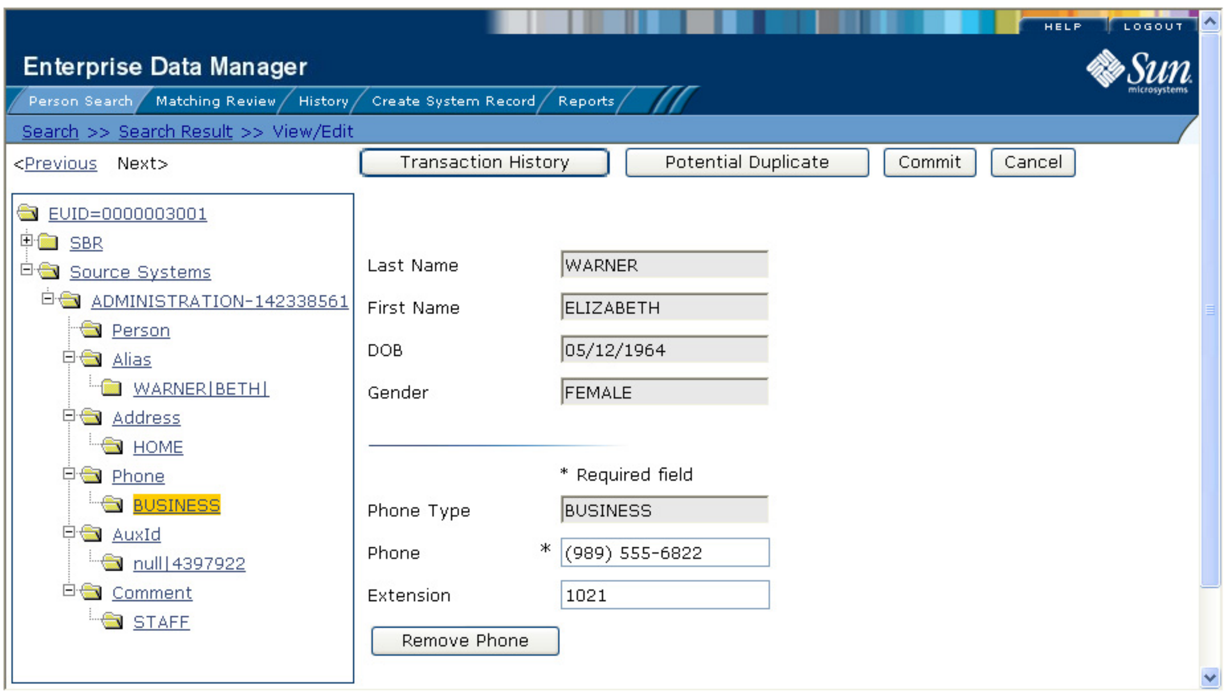
This field ...	displays this information ...
Identifying Fields	
Last Name	The patient's last name.
First Name	The patient's first name
DOB	The month, day, and year that the patient was born.
Gender	The gender of the patient.
Address Fields	
Address Type	The type of address displayed, such as home, work, billing, and so on.
Address 1 through Address 4	Up to four lines of the patient's address.
City	The city in which the patient’s address is located.
State	The state in which the patient’s address is located.
Postal Code	The zip code of the patient’s address.
Postal Code Extension	The 4-digit extension to the patient’s zip code.
County	The county in which the address is located.
Country	The country in which the address is located.

4.2.3 Viewing a Patient's Telephone Numbers

You can view the telephone numbers contained in a patient’s SBR or in any of the associated system records. You can perform several actions against the displayed patient profile, such as viewing a transaction history, modifying patient information, and so on (for more information, see **To view demographic information** on page 50).

A patient’s SBR contains the telephone information that is determined to be the most current and accurate information about that patient from all local systems. The system records associated with a patient profile contain the telephone information that is stored in the external systems that share information with the master index. The information in a patient’s system records might not match the information stored in the patient’s SBR.

Figure 18 View/Edit Page - Telephone Information



To view telephone numbers

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to view on the View/Edit page.
2. To view a telephone number in the SBR:
   - In the EUID tree in the left portion of the page, expand **SBR**.
   - Under **SBR**, expand **Phone**.
   - Under **Phone**, click the phone type for the telephone number you want to view. The Telephone page appears.
3. To view a telephone number in a system record:

- In the EUID tree in the left portion of the page, expand the system and local ID you want to view.
- Under the expanded system and local ID, expand **Phone**.
- Under **Phone**, click the phone type for the telephone number you want to view. The Phone page appears.

For information about the fields on this page, see **About Telephone Fields** on page 56.

About Telephone Fields

The fields located on the Phone page of the View/Edit page allow you to view detailed telephone information for the displayed patient profile. Header fields appear at the top of the page to help you identify the patient whose profile you are viewing.

Note: *The fields on the Phone page are configurable, and might have been modified or removed. For more information about fields on your Phone page that differ from those listed below, see the system administrator. The field descriptions below describe the fields in the default configuration.*

Table 10 Telephone Fields

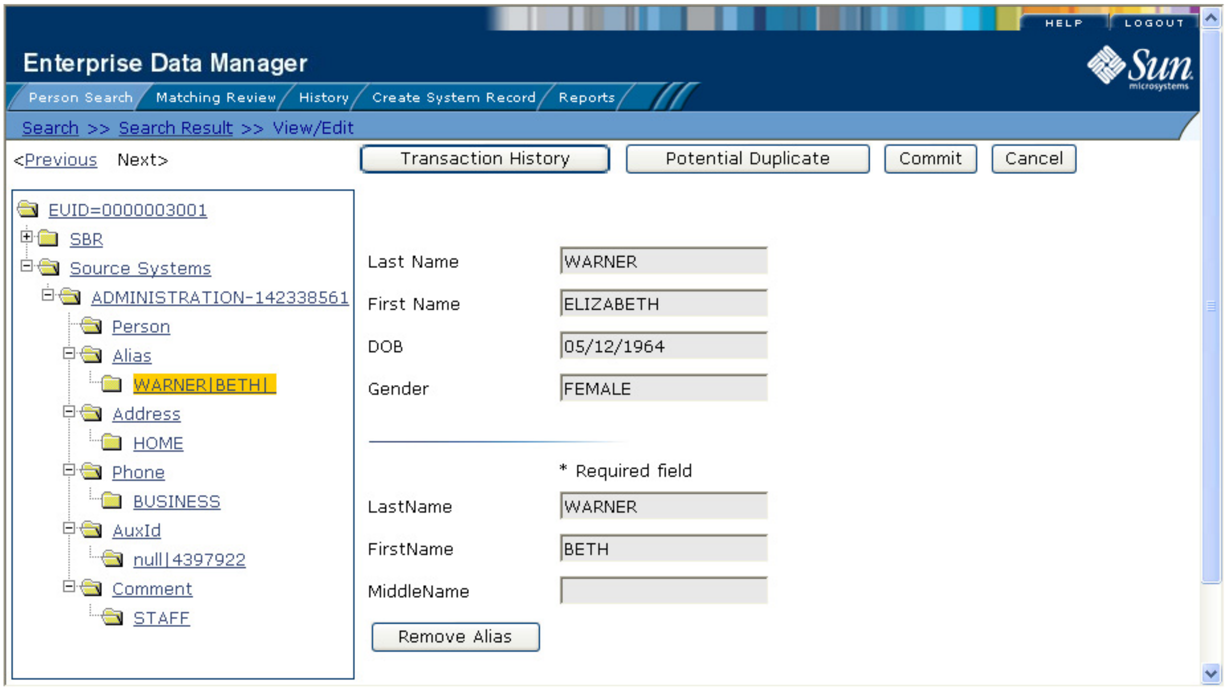
This field ...	displays this information ...
Identifying Fields	
Last Name	The patient's last name.
First Name	The patient's first name
DOB	The month, day, and year that the patient was born.
Gender	The gender of the patient.
Telephone Fields	
Phone Type	The type of telephone number you are viewing, such as home, work, cellular, and so on.
Phone	The telephone number for the specified Phone Type.
Ext	The extension to the telephone number, if any.

4.2.4 Viewing a Patient's Aliases

You can view the alias names contained in a patient's SBR or in any of the associated system records. You can perform several actions against the displayed patient profile, such as viewing a transaction history, modifying patient information, and so on (for more information, see **To view demographic information** on page 50).

A patient's SBR contains the alias names from all of the associated system records, and any alias names that were added specifically to the SBR. The system records associated with a patient profile contain the alias information that is stored in the external systems that share information with the master index. The information in a patient's system records might not match the information stored in the patient's SBR.

Figure 19 View/Edit Page - Alias Information



To view alias names

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to view on the View/Edit page.
2. To view an alias in the SBR:
   - In the EUID tree in the left portion of the page, expand **SBR**.
   - Under **SBR**, expand **Alias**.
   - Under **Alias**, click the alias name you want to view. The Alias page appears.
3. To view an alias in a system record:
   - In the EUID tree in the left portion of the page, expand the system and local ID you want to view.
   - Under the expanded system and local ID, expand **Alias**.
   - Under **Alias**, click the alias name you want to view. The Alias page appears.

   For information about the fields on this page, see **About Alias Fields** on page 57.

About Alias Fields

The fields located on the Alias page of the View/Edit page allow you to view a patient's aliases. These names might include nicknames, middle names, or any other names that were previously used by the patient. Header fields appear at the top of the page to help you identify the patient whose profile you are viewing.

Note: *The fields on the Alias page are configurable, and might have been modified or removed. For more information about fields on the Alias page that differ from those* *listed below, see the system administrator. The field descriptions below describe fields in the default configuration.*

Table 11 Alias Fields

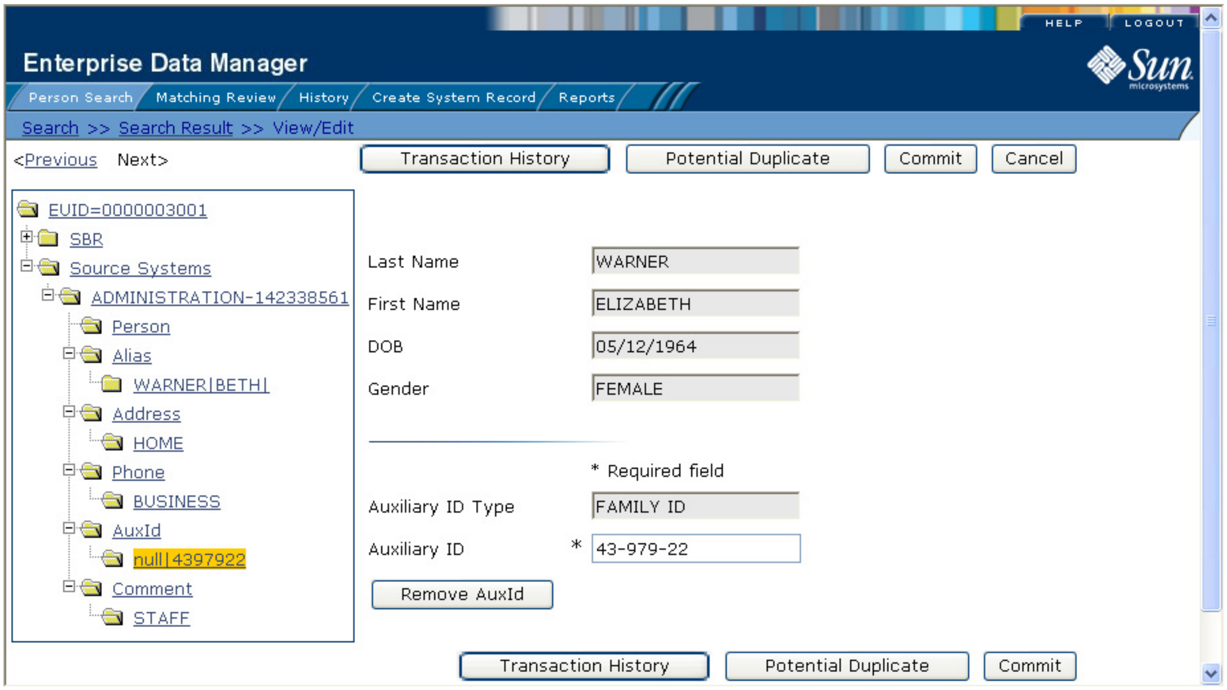
This field ...	displays this information ...
Identifying Fields	
Last Name	The patient's last name.
First Name	The patient's first name
DOB	The month, day, and year that the patient was born.
Gender	The gender of the patient.
Alias Fields	
Last Name	The last name of the patient's alias.
First Name	The first name of the patient's alias.
Middle Name	The middle name of the patient's alias.

4.2.5 Viewing a Patient's Auxiliary IDs

You can view the auxiliary IDs contained in a patient’s SBR or in any of the associated system records. You can perform several actions against the displayed patient profile, such as viewing a transaction history, modifying patient information, and so on (for more information, see **To view demographic information** on page 50).

A patient’s SBR contains the auxiliary IDs from all of the associated system records, and any auxiliary IDs that were added specifically to the SBR. The system records associated with a patient profile contain the auxiliary IDs that are stored in the external systems that share information with the master index. The information in a patient’s system records might not match the information stored in the patient’s SBR.

Figure 20 View/Edit Page - Auxiliary IDs



To view auxiliary IDs

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to view on the View/Edit page.
2. To view an auxiliary ID in the SBR:
   - In the EUID tree in the left portion of the page, expand **SBR**.
   - Under **SBR**, expand **AuxId**.
   - Under **AuxId**, click the auxiliary ID type you want to view. The Auxiliary ID page appears.
3. To view an auxiliary ID in a system record:
   - In the EUID tree in the left portion of the page, expand the system and local ID you want to view.
   - Under the expanded system and local ID, expand **AuxId**.
   - Under **AuxId**, click the auxiliary ID type you want to view. The Auxiliary ID page appears.

   For information about the fields on this page, see **About Auxiliary ID Fields** on page 59.

About Auxiliary ID Fields

The fields located on the Auxiliary ID page of the View/Edit page allow you to view a patient's auxiliary IDs assigned within your organization. Header fields appear at the top of the page to help you identify the patient whose profile you are viewing.

Note: *The fields on the Auxiliary ID page are configurable, and might have been modified or removed. For more information about fields on this page that differ from those listed below, see the system administrator. The field descriptions below describe the fields in the default configuration.*

Table 12 Auxiliary ID Fields

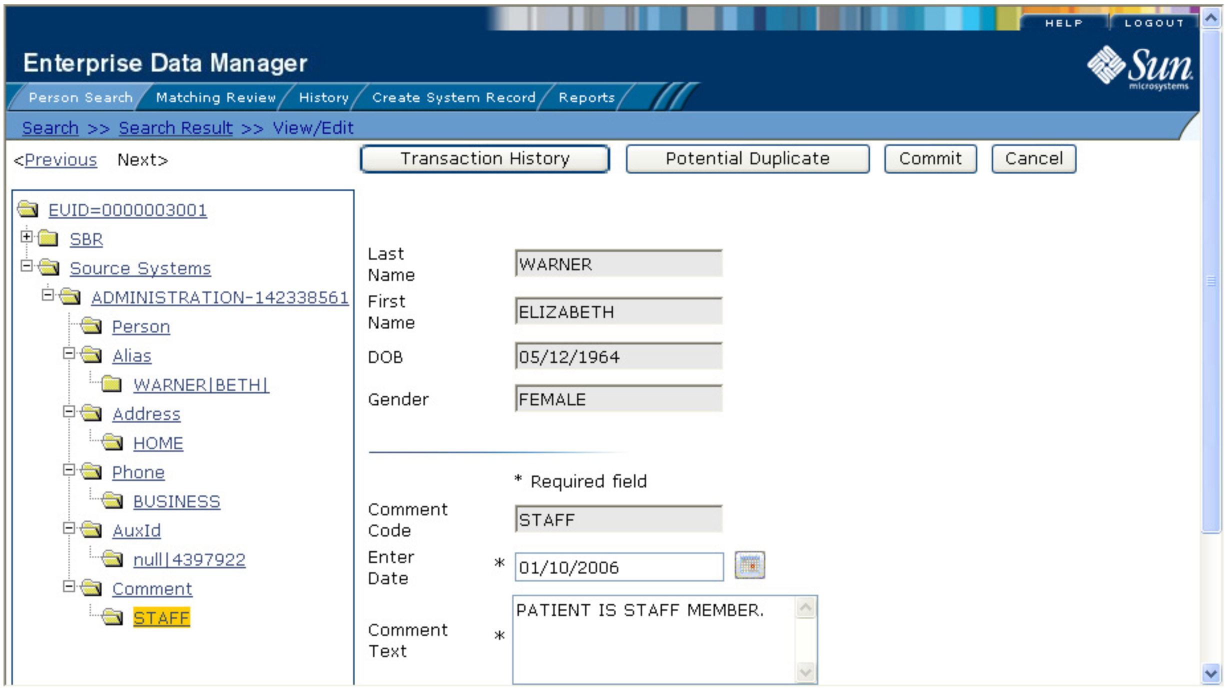
This field ...	displays this information ...
Identifying Fields	
Last Name	The patient's last name.
First Name	The patient's first name
DOB	The month, day, and year that the patient was born.
Gender	The gender of the patient.
Auxiliary ID Fields	
Auxiliary ID Type	The type of auxiliary ID displayed.
Auxiliary ID	The identification code assigned to the patient that corresponds with the specified ID type.

4.2.6 Viewing Comments Associated with a Patient

You can view the comments associated with a patient’s SBR or in any of the associated system records. You can perform several actions against the displayed patient profile, such as viewing a transaction history, modifying patient information, and so on (for more information, see **To view demographic information** on page 50).

A patient’s SBR contains the comments associated with all of the associated system records, and any comments that were added specifically to the SBR. The system records associated with a patient profile contain the comments that are stored in the external systems that share information with the master index. The information in a patient’s system records might not match the information stored in the patient’s SBR.

Figure 21 View/Edit Page - Comments



To view comments

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to view on the View/Edit page.
2. To view a comment in the SBR:
   - In the EUID tree in the left portion of the page, expand **SBR**.
   - Under **SBR**, expand **Comment**.
   - Under **Comment**, click the comment code of the comment you want to view. The Comment page appears.
3. To view a comment in a system record:
   - In the EUID tree in the left portion of the page, expand the system and local ID you want to view.
   - Under the expanded system and local ID, expand **Comment**.
   - Under **Comment**, click the comment code of the comment you want to view. The Comment page appears.

For information about the fields on this page, see **About Comment Fields** on page 61.

About Comment Fields

The fields located on the Comments page of the View/Edit page allow you to view any comments associated with a patient profile. Header fields appear at the top of the page to help you identify the patient whose profile you are viewing.

Note: *The fields on the Comments page are configurable, and might have been modified or hidden by the system administrator. For more information about fields on this page that differ from those listed below, see the system administrator. The field descriptions below describe the fields in the default configuration.*

Table 13 Comment Fields

This field ...	displays this information ...
Identifying Fields	
Last Name	The patient's last name.
First Name	The patient's first name
DOB	The month, day, and year that the patient was born.
Gender	The gender of the patient.
Comment Fields	
Comment Code	An identification code for the comment that must be unique to each system record. The code must also be unique to the patient profile in order for all comments to appear in the SBR.
Enter Date	The date and time that the displayed comment was created.
Comment Text	The text of the comment.

4.3 Comparing Patient Information

You can compare a patient profile before and after a specific transaction occurred, two different patient profiles, or different components within one profile. The following topics provide the step-by-step instructions you need in order to compare patient information in the master index.

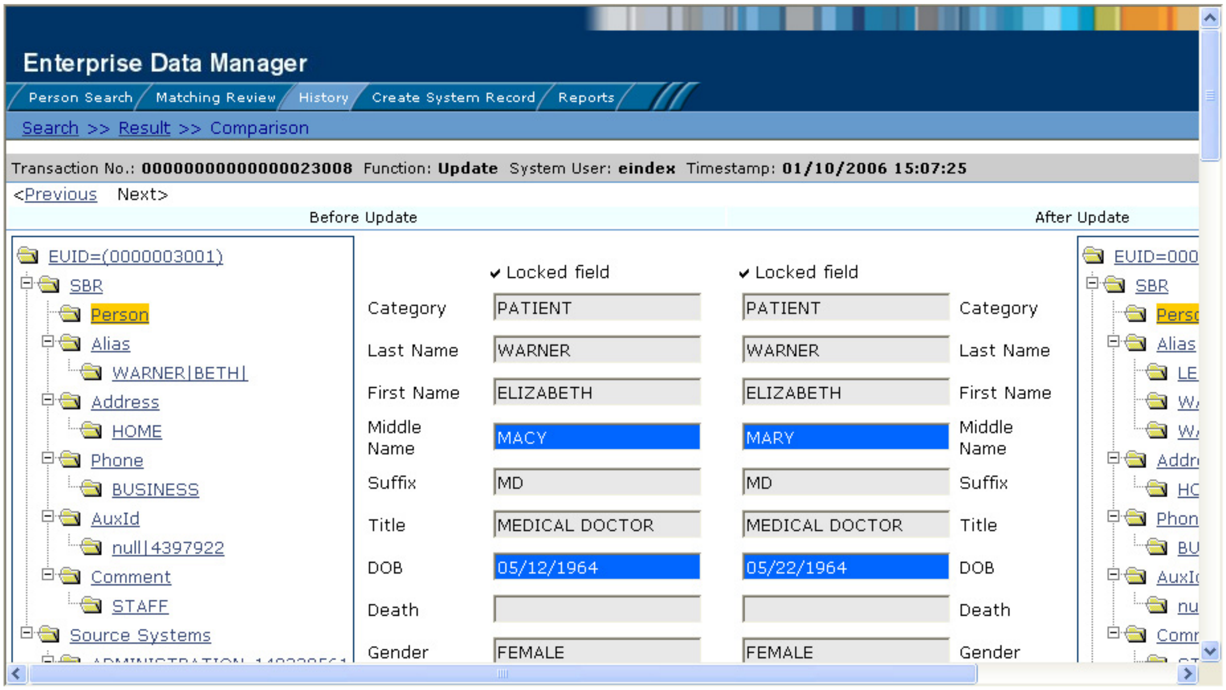
- **Viewing a Transaction History** on page 62
- **Comparing Patient Information** on page 68

4.3.1 Viewing a Transaction History

Using the History function, you can view historical information for a specific patient, and compare the patient's profile before and after a specific transaction occurred to determine what information was modified as a result of the transaction. The Transaction History page contains an EUID tree for the before image and one for the after image. From the EUID trees you can select the type of information to view and whether to view SBR or system record information.

The image on the left side of the Transaction History Comparison page reflects the patient's information before the transaction occurred. The image on the right reflects the patient's information after the transaction occurred. If the displayed record has no historical data, then the message "**There is nothing to show in this area**." appears in the left side of the page.

Figure 22 Transaction History Comparison Page

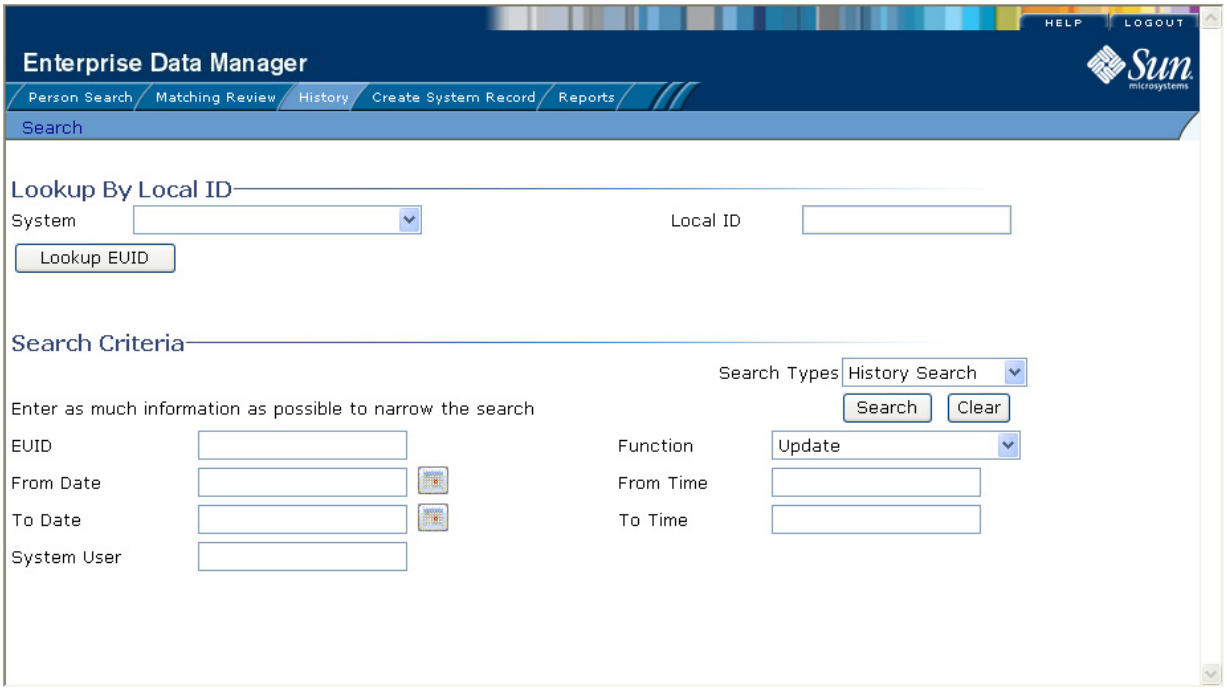


To view a transaction history

1. Obtain information about the patient, such as the EUID, a system in which the patient was registered, or a specific transaction performed against the patient's profile.
2. To access a transaction history, you can perform a search for a patient profile, display the profile on the View/Edit page, and then click **Transaction History**, or you can perform the following steps.
3. On the EDM main menu, click **History**.

   The Transaction History Search page appears.

Figure 23 Transaction History Search Page



4 Select **History Search** from the **Search Types** drop-down list.

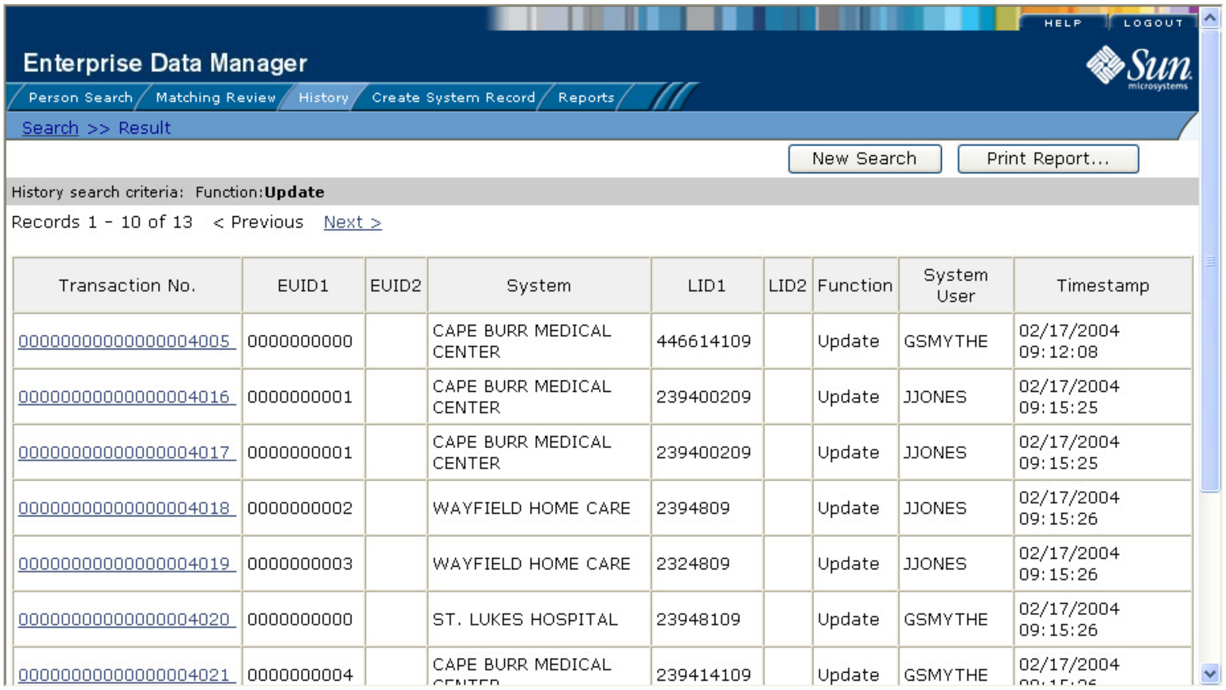
5 Do one of the following:

- To search for a record by system and local ID, enter the system and local ID in the upper section of the window and then click **Lookup EUID**. If an EUID is found, it is populated into the EUID field in the Search Criteria section.
- To search by EUID or transactional information, enter the search criteria for the patient you want to view (for more information, see **About Transaction History Search Fields** on page 66).

6 On the Transaction History Search page, click **Search**.

If more than one transaction matches the search, the Transaction History Result page appears with a list of matching profiles (for more information, see **About Transaction History Results Fields** on page 67).

Figure 24 Transaction History Results



7 If the Transaction History Result page appears, click the transaction number of the transaction you want to view. (If an asterisk appears next to a transaction, it means the transaction history cannot be accessed.)

The Transaction History Comparison page appears, displaying information in the SBR with any differences between the before and after image highlighted in blue.

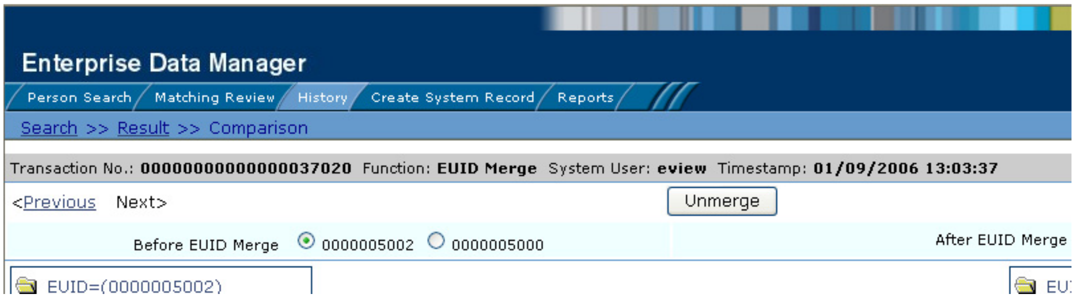
8 Select the type of information you want to view from the EUID trees on both sides of the page (for more information, review the instructions and field descriptions under **Viewing Patient Profiles** on page 49).

Note: *If you select different types of information from the two sides, differences are not highlighted (for example, if you view SBR address data on one side and system record address data on the other side; or if you view SBR address data on one side and SBR phone data on the other).*

9 If you are viewing a merge transaction, additional options appear in the upper left portion of the page, allowing you to view different images for the transaction (see Figure 25).

- Select the first EUID to view the before image of the surviving profile.
- Select the second EUID to view the before image of the non-surviving profile.

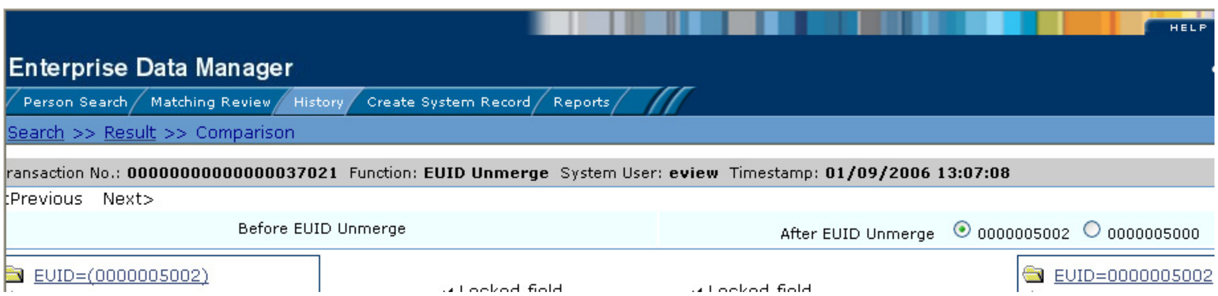
Figure 25 Transaction History for Merge



10 If you are viewing an unmerge transaction, additional options appear in the upper right portion of the page, allowing you to view different images for the transaction (see Figure 26).

- Select the first EUID to view the after image of the surviving profile.
- Select the second EUID to view the after image of the non-surviving profile.

Figure 26 Transaction History for Unmerge



About Transaction History Search Fields

The fields located on the Transaction History Search page allow you to specify search criteria for the transactions you want to view. Note that the "Lookup By Local ID" section is customizable and might have been changed for your implementation.

Table 14 Transaction History Search Fields

In this field ...	type or select ...
Lookup By Local ID Section	
System	The system in which the local ID is known.
Local ID	The local ID corresponding to the record you want to find and the system selected in the previous field. This field name might be different for your implementation.
Search Criteria Section	
EUID	The patient's enterprise-wide unique identifier assigned by the master index.

Table 14 Transaction History Search Fields

In this field ...	type or select ...
Function	The type of transaction that caused the patient's profile to change. See Table 16 on page 68 for more information about transaction types.
From Date	The beginning date for the search. The query is performed for transactions that fall between the **From Date** and **To Date**.
From Time	The beginning time for the search using 24-hour notation. The query is performed for transactions that fall between the **From Time** and **To Time** on the specified dates. If no time is entered, the default value is 00:01 (12:01 A.M.).
To Date	The ending date for the search.
To Time	The ending time for the search using 24-hour notation. If no time is entered, the default value is 24:00.
System User	The login ID of the user who performed the transaction for which you are searching.

About Transaction History Results Fields

The fields located on the Transaction History Result page help you identify a specific patient profile and transaction to view. The LID fields and the last name and first name fields are configurable and might have been changed for your implementation.

Table 15 Transaction History Results Fields

This field ...	displays this information ...
Transaction No	The sequential identification code of the transaction that caused the transaction history record.
EUID1	The enterprise-wide unique identification number of the first patient profile involved in the transaction.
EUID2	The enterprise-wide unique identification number of the second patient profile involved in the transaction.
System	The name of the system in which the transaction that created the history record occurred.
LID1	The local ID of the first system record involved in the transaction.
LID2	The local ID of the second system record involved in the transaction. This is only used for system record merges, unmerges, and transfers.
Function	The type of transaction that changed the patient profile and caused the history record to be written. See Table 16 for a description of each transaction type.
System User	The login ID of the user who performed the transaction.
Timestamp	The date and time the transaction occurred.
First Name	The patient's first name.
Last Name	The patient's last name.

Transaction History Transaction Types

Each transaction performed by the master index is assigned a transaction type, indicating the type of action that was performed. Table 16 lists and describes each transaction type.

Table 16 Transaction Type Descriptions

Transaction Type	Description
Add	This transaction type is assigned when a new patient profile is added to the database, whether it is through a direct add or through reversing an assumed match.
EUID Activate	This transaction type is assigned when a deactivated patient profile is reactivated.
EUID Deactivate	This transaction type is assigned when an active patient profile is deactivated.
EUID Merge	This transaction type is assigned when two patient profiles are merged.
EUID Unmerge	This transaction type is assigned when two patient profiles are unmerged.
System Record Merge	This transaction type is assigned when two system records are merged.
System Record Transfer	This transaction type is assigned when a system record is transferred from one patient profile to another.
System Record Unmerge	This transaction type is assigned when two system records are unmerged.
Update	This transaction type is assigned when a patient profile is modified in any way other than those described above. This includes such transactions as modifying a patient profile, reversing an assumed match, deactivating or reactivating a system record, and adding or removing a child object (such as an address or telephone number).

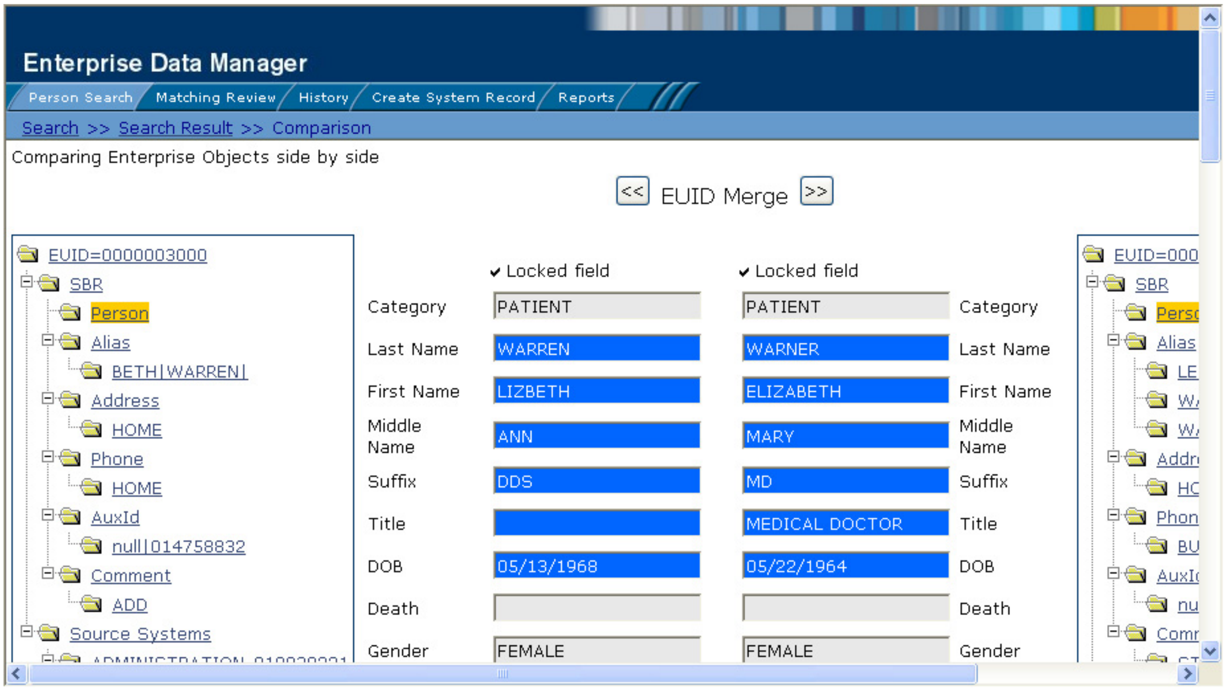
4.3.2 Comparing Patient Information

Using the Comparison function of the EDM, you can compare two patient profiles side-by-side to check for similarities and differences. You can also compare different components of the same patient profile. From the EUID trees, you can select the type of information to view and whether to view SBR or system record information.

Comparing two Patient Profiles

To compare two different patient profiles, you must perform a search for the profiles to compare and then select them from the results list. The Comparison page contains an EUID tree on each side of the page, one for each profile you are comparing.

Figure 27 Comparison Page - Two Patient Profiles



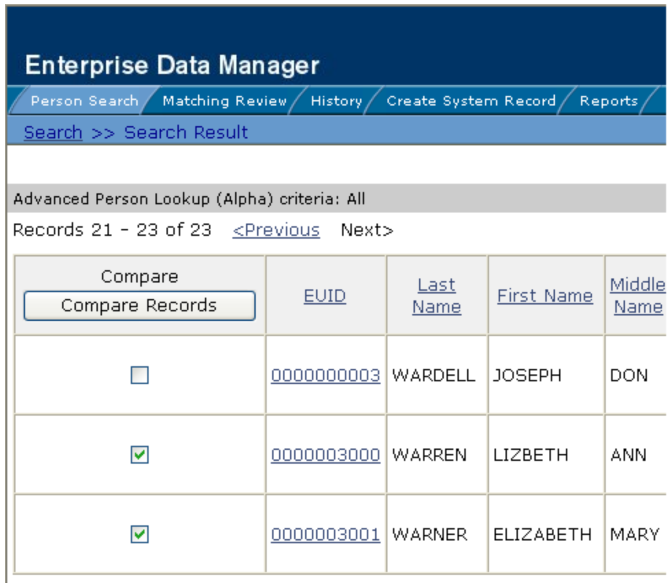
To compare two patient profiles

1 Perform a search for the patient profiles you want to compare, as described in **Searching for Patient Profiles** on page 32.

Note: *If you know the EUIDs of the patient profiles to compare, use the Comparison Lookup to retrieve those profiles.*

2 On the search results list, select the check boxes to the left of the two patient profiles you want to compare.

Figure 28 Selecting Two Profiles to Compare



3 In the first cell of the results table, click **Compare Records**.

The Comparison page appears with SBR information displayed with any differences between the two profiles highlighted.

4 To view and compare different types of information, select the type of information you want to view from the EUID trees on both sides of the page (for more information, review the instructions and field descriptions under **Viewing Patient Profiles** on page 49).

Note: *If you select different types of information from the two sides, differences are not highlighted (for example, if you view SBR address data on one side and system record address data on the other side; or if you view SBR address data on one side and SBR phone data on the other).*

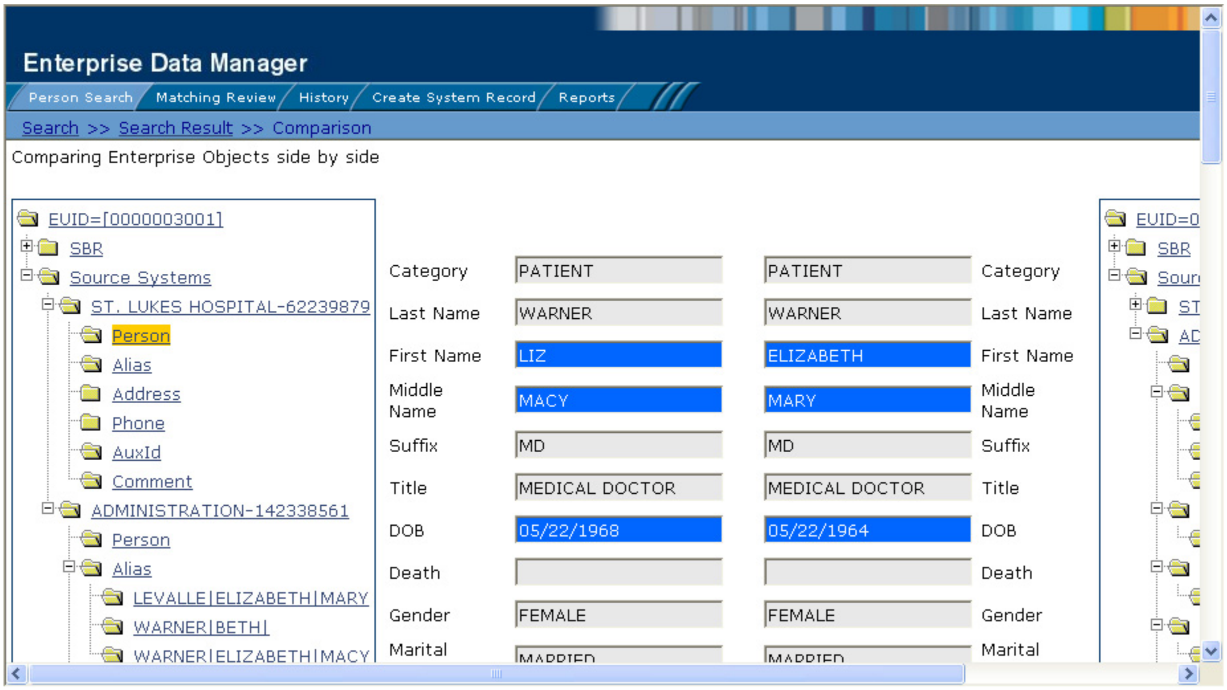
5 To merge patient information, do either of the following:

- To combine the two patient profiles, see **Merging Patient Profiles** on page 125.
- To combine two system records in the displayed patient profiles, see **Merging System Records** on page 126.

Comparing Records in one Patient Profile

To compare different components of one patient profile, you must perform a search for that profile and then select it from the results list. The Comparison page contains an EUID tree on each side of the page, both containing the most current version of the profile you are comparing.

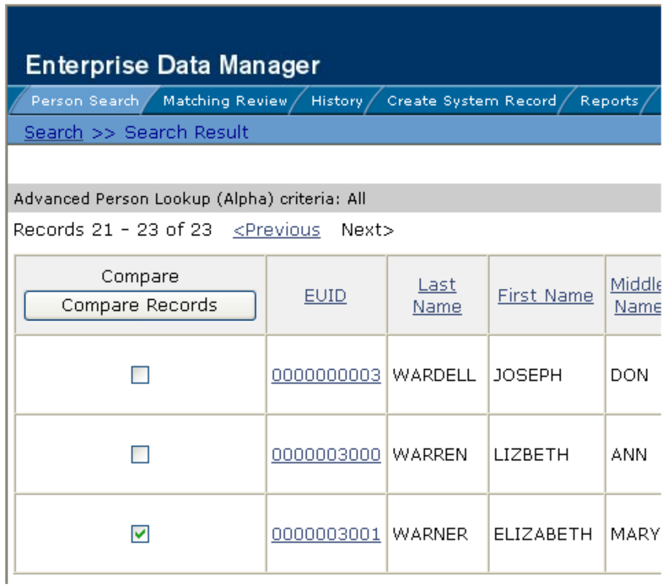
Figure 29 Comparison Page - One Patient Profile



To compare records in one patient profile

1. Perform a search for the patient profile you want to view, as described in **Searching for Patient Profiles** on page 32.
2. On the search results list, select the check box to the left of the patient profile you want to compare.

Figure 30 Selecting one Profile to Compare



3 In the first cell of the results table, click **Compare Records**.

The Comparison page appears with SBR information displayed.

4 To view and compare different types of information, select the type of information you want to view from the EUID trees on both sides of the page (for more information, review the instructions and field descriptions under **Viewing Patient Profiles** on page 49).

Note: *If you select different types of information from the two sides, differences are not highlighted (for example, if you view SBR address data on one side and system record address data on the other side; or if you view SBR address data on one side and SBR phone data on the other). However, if you view two different types of addresses the differences are highlighted.*

5 To merge two system records in the displayed patient profile, see **Merging System Records** on page 126.

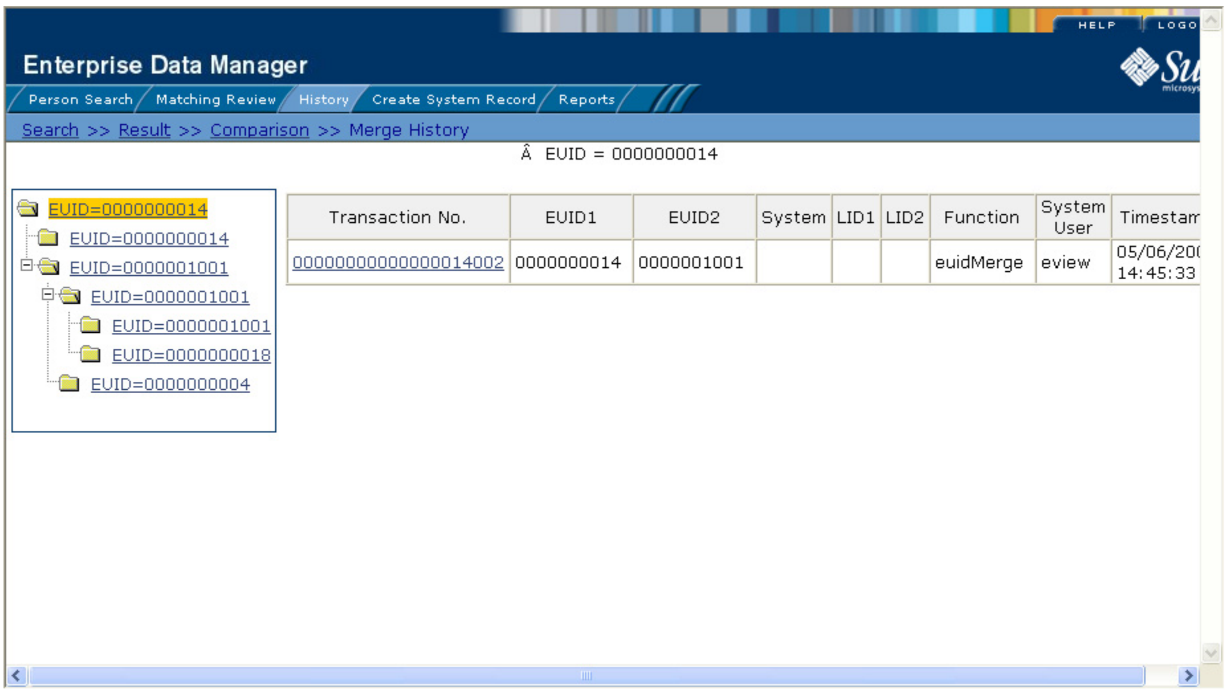
4.4 Viewing a Merge History

When a patient profile is displayed on the Transaction History page, you can display a history of all merges performed against the profile, allowing you to trace the origin of certain information contained in the profile. You can view a history for each merge transaction in the merge history tree.

4.4.1 Viewing a Merge History Tree

The master index tracks all merges performed against each patient profile in the database. You can view a history of merges that affect a specific patient profile, and view each EUID that was merged to form the final merge result profile. The merge history appears in a tree structure in the left portion of the Merge History page, showing each pair of profiles that were merged under the displayed patient profile. In the right portion of the page, transaction details appear for the EUID that is highlighted in the merge history tree.

Figure 31 Merge History Tree



To view a patient's merge history

1. On the Transaction History Search page, perform a search for the patient whose merge history you want to view (for more information, see **Viewing a Transaction History** on page 62).
2. On the Transaction History Result page, click the transaction number to the left of the EUID whose merge history you want to view.

   The Transaction History page appears.
3. In the upper portion of the page, click **Merge Tree** (if **Merge Tree** is not visible, the EUID does not have a merge history to view).

   The Merge History page appears with the merge tree on the left and transaction summaries in the right.
4. To view a summary of merge transactions for a merged profile, select the EUID of that profile from the merge history tree.

The transaction summary appears in the right portion of the page.

5 To view transaction information for two merged profiles, click the profile above the merged pair.

Transaction information appears in the right portion of the page.

4.4.2 Viewing a Patient Profile From a Merge History Tree

When you view a patient's merge history, you can also view a transaction history of any merged pair in the merge history list. The profiles you display from the merge history list contain the information about the profile before the merge occurred.

To view a patient profile from a merge history tree

1 Display a merge history tree, as described in **Viewing a Merge History Tree** on page 73.

2 Expand the merge history tree in the left portion of the Merge History page until you see the EUID of the patient profile you want to view, and then select that EUID.

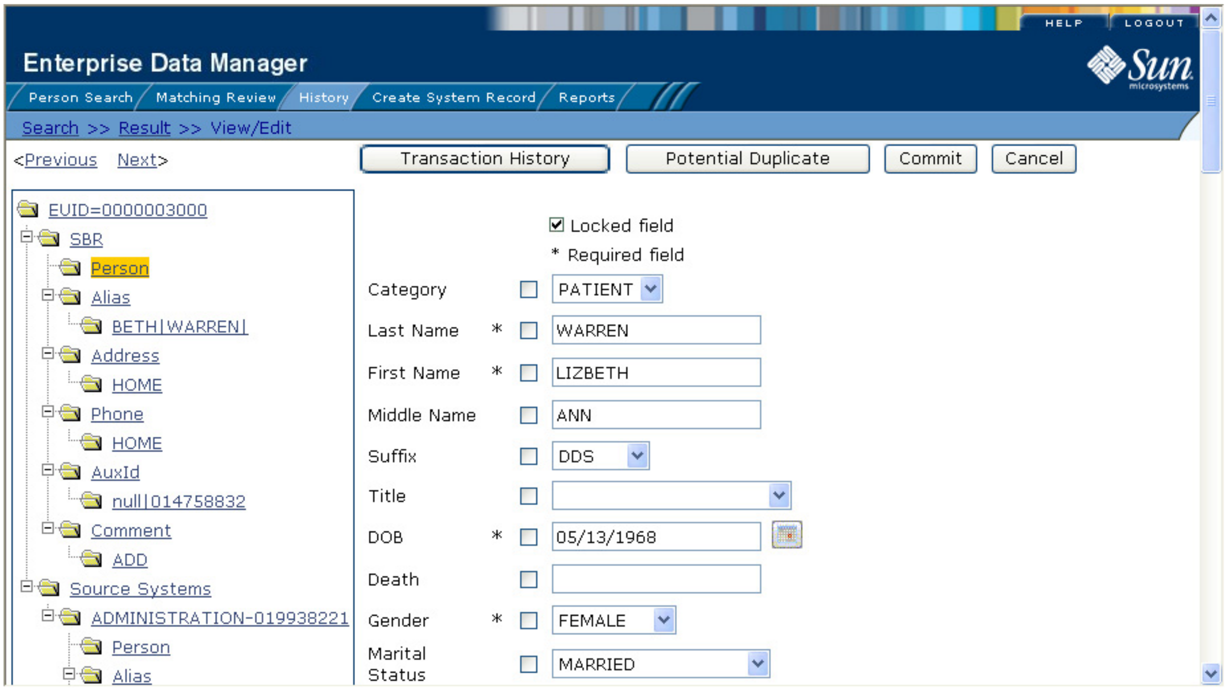
3 In the transaction list in the right portion of the page, click the transaction ID for the merge transaction you want to view.

The Transaction History page appears, displaying transaction details for the transaction you selected.

4.5 Viewing the Audit Log

Using the Audit Log function, you can view a record of each instance an EDM user accessed information about any patient in the master index database. The audit log includes instances in which a patient profile appeared in a search results list; was viewed or compared; was added, updated, or deactivated; or was merged or unmerged. The audit log can be enabled or disabled by the system administrator.

Figure 32 Audit Log Detail page

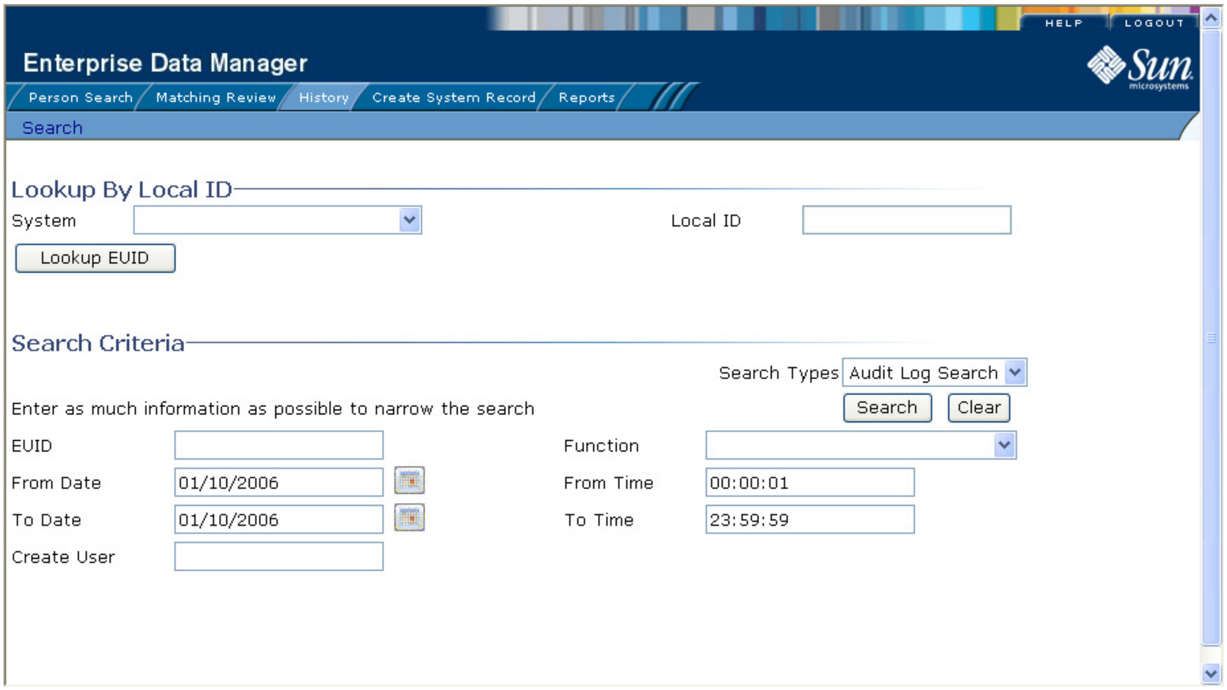


To view the audit log

1. Obtain information about the instances you want to view, such as the EUID, a time frame for when they occurred, the type of function that caused the audit log entries, the user who performed the functions, and so on.
2. On the EDM main menu, click **History**.

   The History Search page appears with the Transaction History Search page displayed.
3. Select **Audit Log Search** from the **Search Types** drop-down list.

Figure 33 Audit Log Search Page



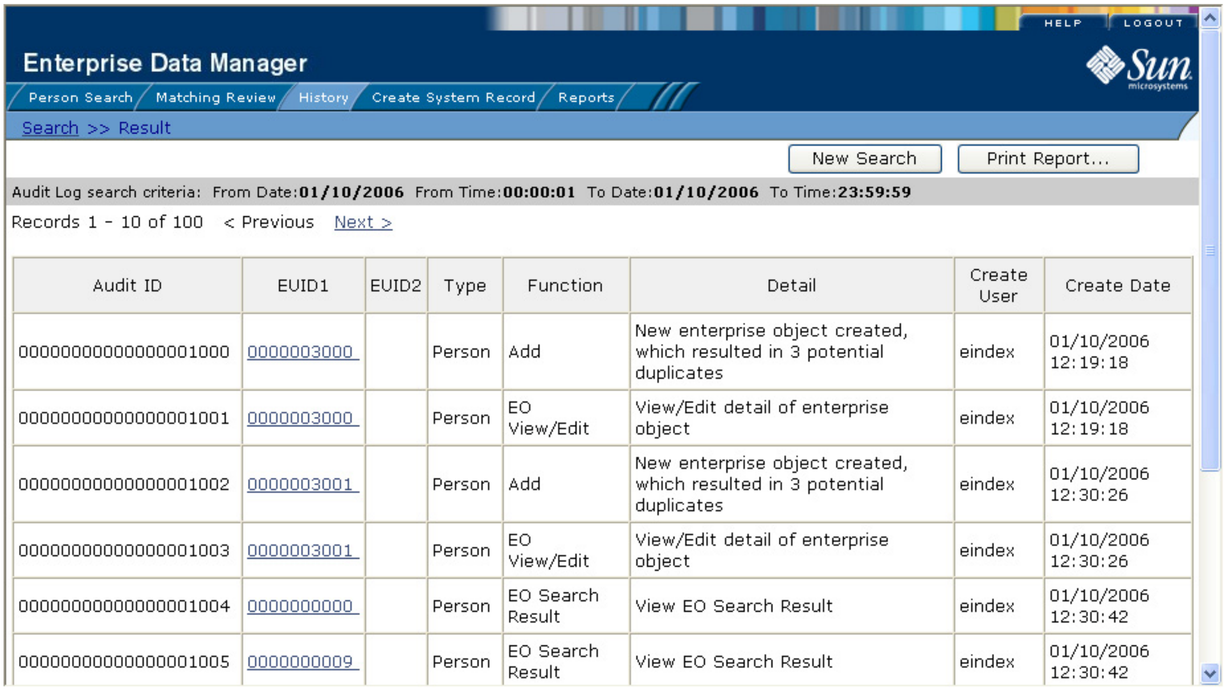
4 Do one of the following:

- To search for a profile by system and local ID, enter the system and local ID in the upper section of the window and then click **Lookup EUID**. If an EUID is found, it is populated into the EUID field in the Search Criteria section.
- To search by EUID or transactional information, enter the search criteria for the patient you want to view (for more information, see **About Audit Log Search Fields** on page 77)

5 In the right portion of the page, click **Search**.

The Audit Log Result page appears with a list of instances in which the data was accessed. For information about the fields displayed on this page, see **About Audit Log Results Fields** on page 78.

Figure 34 Audit Log Result page



6 To view additional information about a specific Audit Log entry, click an EUID in the row containing the entry you want to view.

The View/Edit page appears.

7 To view details for the previous entry in the results list, click **<Previous**.

8 To view details for the following entry in the results list, click **Next>**.

About Audit Log Search Fields

The fields located on the Audit Log Search page allow you to enter search criteria about the audit log entries you want to view.

Table 17 Audit Log Search Fields

In this field ...	type or select ...
Lookup By Local ID Section	
System	The system of the system in which the local ID is known.
Local ID	The local ID corresponding to the record you want to find and the system selected in the previous field. This field name might be different for your implementation.
Search Criteria Section	
EUID	The patient's enterprise-wide unique identifier assigned by the master index.
Type	The category type for the records whose audit log entries you want to view.

Table 17 Audit Log Search Fields

In this field ...	type or select ...
Function	The type of transaction that created the audit log entries you want to view. For more information about transaction types, see Table 19 on page 79.
Create User	The login ID of the user whose transactions you want to view.
From Date	The beginning date for the search. The query is performed for audit log entries that fall between the **From Date** and **To Date**.
From Time	The beginning time for the search using 24-hour notation. The query is performed for audit log entries that fall between the **From Time** and **To Time** on the specified dates. If no time is specified, the default value is 00:01 (12:01 A.M.).
To Date	The ending date for the search.
To Time	The ending time for the search using 24-hour notation. If no time is specified, the default value is 24:00.

About Audit Log Results Fields

The fields located on the Audit Log Result page display information about the instances in which patient data was accessed, where those instances match the search criteria you entered.

Table 18 Audit Log Results Fields

This field ...	displays this information ...
Audit ID	The unique ID code in the audit log for the audit log entry.
EUID1	The EUID of the first patient profile whose information was accessed.
EUID2	The EUID of the second patient profile whose information was accessed in the same transaction (as would occur in the case of a profile comparison or merge).
Type	The category type of the patient represented by the EUID.
Function	The primary transaction type that was used to access information. For more information about transaction types, see Table 19.
Detail	Specific information about the actions taken against the profile, such as the EDM page that was accessed or the type of function performed against a profile.
Create User	The login ID of the user who accessed the information.
Create Date	The date and time that the information was accessed.

Audit Log Functions

The audit log creates an audit entry whenever data is accessed through the EDM. Table 19 lists and describes each audit log function. Some of these functions refer to the actual viewing of data on an EDM page; others refer to an action taken against that data, such as clicking the merge or unmerge **Confirm** button or resolving a potential duplicate pair.

Table 19 Audit Log Function Descriptions

Audit Log Function	Description
Add	A user added a new patient profile to the database from the Create System Record page or by reversing an assumed match.
Associated Potential Duplicates	A user viewed profile summaries on the Associated Records page of a potential duplicate search.
Assumed Match Comparison	A user viewed two assumed match profiles on the Assumed Match page.
Assumed Match Search Result	A user viewed the results of a search for assumed matches.
Auto Resolve	A user permanently resolved two potential duplicate records on the Potential Duplicate Comparison page.
EO Comparison	A user viewed two patient profiles on the Comparison page.
EO Search Result	A user viewed profile summaries on the Search Results page after performing a search for patient profiles.
EO View/Edit	A user viewed a patient profile on the View/Edit page.
EUID Merge Confirm	A user initiated a merge of two patient profiles. This function refers to when the user views the merge result prior to clicking **Confirm**.
EUID Unmerge	A user finalized an unmerge of two patient profiles.
EUID Unmerge Confirm	A user initiated an unmerge of two patient profiles. This function refers to when the user views the unmerge result prior to clicking **Confirm**.
History Comparison	A user compared the before and after image of a patient profile on the Transaction History Comparison page.
History Search Result	A user viewed the results of a transaction history search on the Transaction History Search Results page.
LID Merge - Selection	A user initiated a merge of two system records. This function refers to when the user has selected **LID Merge** but has not finalized the merge.
LID Merge Confirm	A user finalized a merge of two system records.
LID Unmerge	A user finalized an unmerge of two system records.
LID Unmerge Confirm	A user initiated an unmerge of two system records. This function refers to when the user views the unmerge result record prior to clicking **Confirm**.
Matching Review Search Result	A user viewed the results of a search for potential duplicates.
Merge	A user finalized a merge of two patient profiles or two system records.
Merge Tree Comparison	A user viewed a merge tree. This function appears for each patient profile included in the merge tree.

Table 19 Audit Log Function Descriptions

Audit Log Function	Description
Potential Duplicate Comparison	A user viewed two patient profiles on the Potential Duplicate Comparison page.
Resolve	A user resolved two potential duplicate records on the Potential Duplicate Comparison page.
Undo Assumed Match	A user reversed an assumed match.
Unmerge Comparison	A user initiated an unmerge of two system records or two patient profiles. This function refers to when the user views the unmerge result record prior to clicking **Confirm**.
Unresolve	A user changed the status two patient profiles on the Potential Duplicate Comparison page from Resolved to Unresolved.
Update	A user modified a profile on the View/Edit window. Updates include any changes made to a profile, including activating and reactivating system records, adding or removing child objects, and so on.
View Merge Tree	A user viewed a merge tree.

Chapter 5

Maintaining Patient Profiles

The EDM allows you to monitor and maintain information in the master index database, including adding, updating, merging, and unmerging records. This chapter presents the background information and the step-by-step instructions you need to add and maintain information using the EDM.

The information in this chapter is based on the default configuration, and the appearance of your EDM might vary from the descriptions and illustrations depending on how your application is configured.

What's in This Chapter

5.1 About Maintenance Tasks

Patient profile maintenance involves a number of tasks you can perform to ensure that your database contains the most current and accurate information. These tasks include editing, adding, and deleting patient information, detecting and fixing profiles that are potential duplicates of each other, merging and unmerging patient profiles or system records, and deactivating patient profiles or system records that are no longer active.

5.1.1 Matching Probability Weights

When you add a new patient profile to the master index, the new profile is automatically checked for any similarities to profiles that already exist in the database. Matching probability weights between existing profiles and the new profile are then calculated using matching algorithm logic. This weight indicates how closely two profiles match each other. If the matching probability weight for two profiles is above a specific number (defined in the eIndex SPV configuration files), the profiles are considered to be potential duplicates. If the weight between two profiles is high enough, they are assumed to be a match and the existing profile is updated with the new information (for more information, see **Assumed Matches** on page 83).

5.1.2 Merging Profiles

You can merge patient profiles that are found to represent the same patient, and you can merge system records between patient profiles. During a system record merge, you can specify which fields from each record to retain in the final, merged system record. After a patient profile merge, all information from all the system records involved in the merge is stored in the surviving profile. You might need to review the final merge result profile to determine which, if any, system records should be deactivated.

The SBR for the surviving profile is determined by the survivor calculator, taking into account all system records involved in the merge. If you merge two profiles that have duplicate child objects (for example, each profile has an Office address) and the union survivor calculator is used, then the most recently modified of the two child objects is stored in the SBR.

Surviving and Non-surviving Profiles

When you perform a patient profile merge, you are working with two patient profiles. The *non-surviving profile* is the profile that is not retained after the merge. The *surviving profile* is retained after the merge. During a patient profile merge, the system records in the non-surviving profile are transferred to the surviving profile, and the non-surviving profile is given a status of “Merged”. The SBR for the surviving patient profile is recalculated based on the existing system records for that profile along with the newly merged system records. The EUID of the surviving profile is always retained. The information that is discarded during a merge is stored in the transaction table, making it possible to restore the profiles to their original EUIDs if they were merged in error.

System Record Merges

You can merge two system records together only if they originated from the same external system. The system records can belong to the same patient profile or each can belong to a different profile. When the merge includes two different patient profiles, the profile from which the system record is merged is called the *merge from* profile; the patient profile into which the system record is merged is called the *merge to* profile. If you merge the only active system record in one patient profile into a system record in a different patient profile, the merge from profile is deactivated (since there are no active system records remaining, there is nothing from which to create the SBR). During a system record merge, you can select fields from the non-surviving system record to be retained in the surviving system record.

Undoing a Merge

If you merge two patient profiles or system records in error, you can unmerge the profiles or records, moving the information back into the original patient profiles or system records. Any modifications that were made to the surviving patient profile or system record after the merge are retained after the profiles or records are unmerged. If a system record merge caused the “merge from” patient profile to be deactivated, unmerging the system records reactivates that profile.

5.1.3 Assumed Matches

If you add a new patient profile and the master index determines that the patient you are adding already exists in the database, the master index assumes the profiles are a match and updates the existing patient profile. This is known as an *assumed match*. An assumed match only occurs when the probability of a match between the new profile and the existing profile is above the match threshold specified by your system administrator.

5.1.4 Potential Duplicates

Potential duplicates are two patient profiles that possibly represent the same patient. If you add a new patient and the master index determines that the patient you are adding might already exist in the database, the two profiles are listed as potential duplicates of one another. Profiles are listed as potential duplicates if the probability of a match between the two profiles is above the duplicate threshold but below the match threshold. Because patient information is entered from various sources, a patient profile might have several potential duplicates. In this case, it is important to identify the potential duplicates, and to determine whether the profiles represent the same patient.

5.1.5 Handling Potential Duplicates

The Matching Review function allows you to locate any profiles that are similar enough that they could represent the same patient. You can compare potential duplicate profiles side-by-side to determine if they do represent the same patient. Once you have determined whether the profiles are duplicates, you can use one of the following methods to correct the potential duplicate listing.

Merge

If you conclude that the profiles represent the same patient, you need to determine which EUID to retain, and then merge the profiles. For a description of the merge process, see **Merging Profiles** on page 82.

Resolve

If you conclude that two potential duplicate profiles do not represent the same patient, you can mark the profiles as being resolved. Doing this does not change any information for either profile, but it flags them as not being potential duplicates of one another. There are two methods of resolving potential duplicates.

- **Resolve**
  This type of resolution allows the profiles to be listed as potential duplicates again if one of the profiles is updated and, after its potential duplicates are re-evaluated, the profiles still have a matching weight above the duplicate threshold.
- **Resolve Permanently**
  This type of resolution marks the profiles as not being duplicates, and does not allow the pair to be listed as duplicates after any future updates to either record. This is a permanent resolution.

5.1.6 Update Tips

There are special circumstances for updating patient profiles, such as cases where two users update the same profile at the same time, updating the SBR versus updating a system record, and so on.

Concurrent Users

If you have the same patient profile open for editing as another EDM user, only the user who commits their changes first will be able to save their changes. If you try to commit changes after the first user clicks **Commit**, an error message appears and you will be unable to commit your changes. In order to update the profile with your changes, you must reload the profile by performing a search for that profile. You can then edit the profile and commit your changes.

Updating the SBR versus System Records

Every time a system record is updated, the survivor calculator determines whether the new information should be populated into the SBR. This includes updates from the EDM and from local systems. Typically, when you update information in a patient profile, you update the system record, which kicks off the survivor calculator. However, the EDM also allows you update the SBR directly by selecting an “overwrite” check box. Use this capability cautiously, since fields updated in the SBR cannot be overwritten by new information from local systems until the overwrite check box is cleared. You can only update an SBR, or select or clear the overwrite check box, if you have explicit security permissions to do so.

If you add a child object to the SBR, all fields in the new object are automatically locked. If you unlock all the fields in that object, it is removed from the SBR by the survivor calculator.

EDM Overwrite Capabilities

EDM overwrite capabilities allow you to override the survivor calculator’s version of the SBR and update the SBR directly. This is accomplished by selecting the overwrite check box for each field you update in the SBR. If you update an SBR field, the overwrite check box is automatically selected so you can save the changes to the database (if you have SBR update permission).

When you update an SBR from the EDM and select the overwrite check boxes next to the updated fields, the fields are automatically updated in the SBR, regardless of the value specified by the survivor calculator. In addition, those fields become “locked” and cannot be updated by any system messages or the survivor calculator until the overwrite check boxes are cleared. When a field is unlocked, the survivor calculator immediately recalculates the best value for that field based on the system records in the patient profile.

If a field in a child object, such as the Address or Phone object, is locked, then the key field (in this case, Address Type or Phone Type), is automatically locked. When you add a child object (such as a telephone number or address) directly to the SBR, all fields in that object are automatically locked and cannot be overwritten by the survivor calculator.

VIP Updates

In order to view or modify the fields that are masked by a profile’s VIP status, you must have VIP access permissions. If you do not have VIP access permissions, you cannot add or update a child object, such as an address or telephone number, that contains fields affected by the VIP mask.

5.2 Adding a Patient Profile

This section provides the step-by-step instructions you need in order to add patient profiles to the master index database. When you add a patient profile, you are actually creating a system record. The master index calculates the SBR portion of the patient profile when you commit the system record to the database. Adding a patient profile includes the following steps:

- **Step 1: Obtain Information about the Patient** on page 85
- **Step 2: Specify a System and Local ID** on page 86
- **Step 3: Specify Demographic Information** on page 87
- **Step 4: Specify Alias Information** on page 88
- **Step 5: Specify Address Information** on page 89
- **Step 6: Specify Telephone Information** on page 90
- **Step 7: Specify Auxiliary IDs** on page 91
- **Step 8: Add Comments to the Patient Profile** on page 92
- **Step 9: Save the Patient Profile** on page 93

Note: *Steps 4 through 8 are optional, and can be performed in any order. You must specify certain information in steps 2 and 3 in order to add a patient profile to the database, and you must complete* **Step 9: Save the Patient Profile** *on page 93 after you specify patient information.*

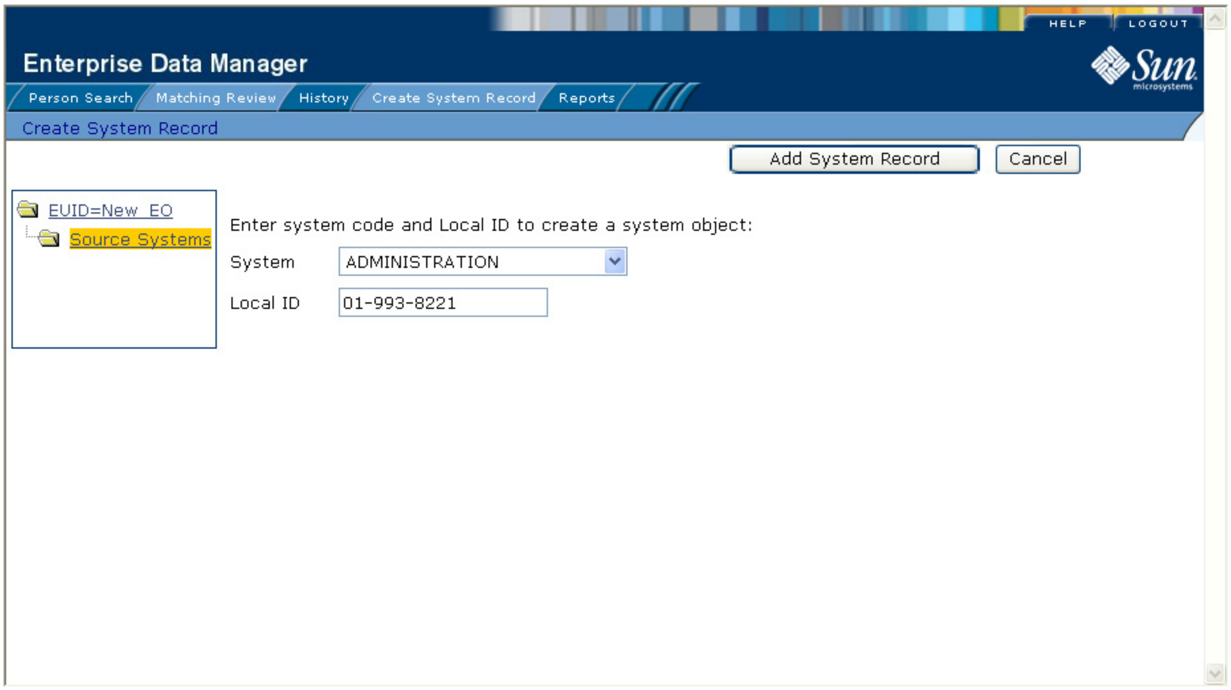
5.2.1 Step 1: Obtain Information about the Patient

Before you begin to add a new patient to the master index, you should obtain certain information about the patient. For example, by default you must enter the patient's first and last names, SSN, date of birth in order to save the patient profile. You should provide as much information as is available for each patient. If necessary, review the descriptions of the fields you encounter while adding a new patient. These descriptions, provided throughout this section, will help you to determine the information you need to specify for each new patient.

5.2.2 Step 2: Specify a System and Local ID

Each patient profile is associated with at least one system record. Before you add demographic data to a patient profile, you must specify the patient's local ID in a specific system. This creates the system record component of the patient profile.

Figure 35 Create System Record - System and Local ID



To specify a system and local ID

1. Complete **"Step 1: Obtain Information about the Patient"**.
2. On the EDM main menu, select **Create System Record**.

   The Create System Record page appears.
3. On the Create System Record page, select the system and enter the local ID for the new patient (for more information, see **About System Fields** on page 87).
4. Click **Add System Record**.

   The page changes to display demographic fields.
5. Continue to **"Step 3: Specify Demographic Information"**.

About System Fields

The fields located on the first page of the Create System Record page allow you to specify system information for the patient you are adding.

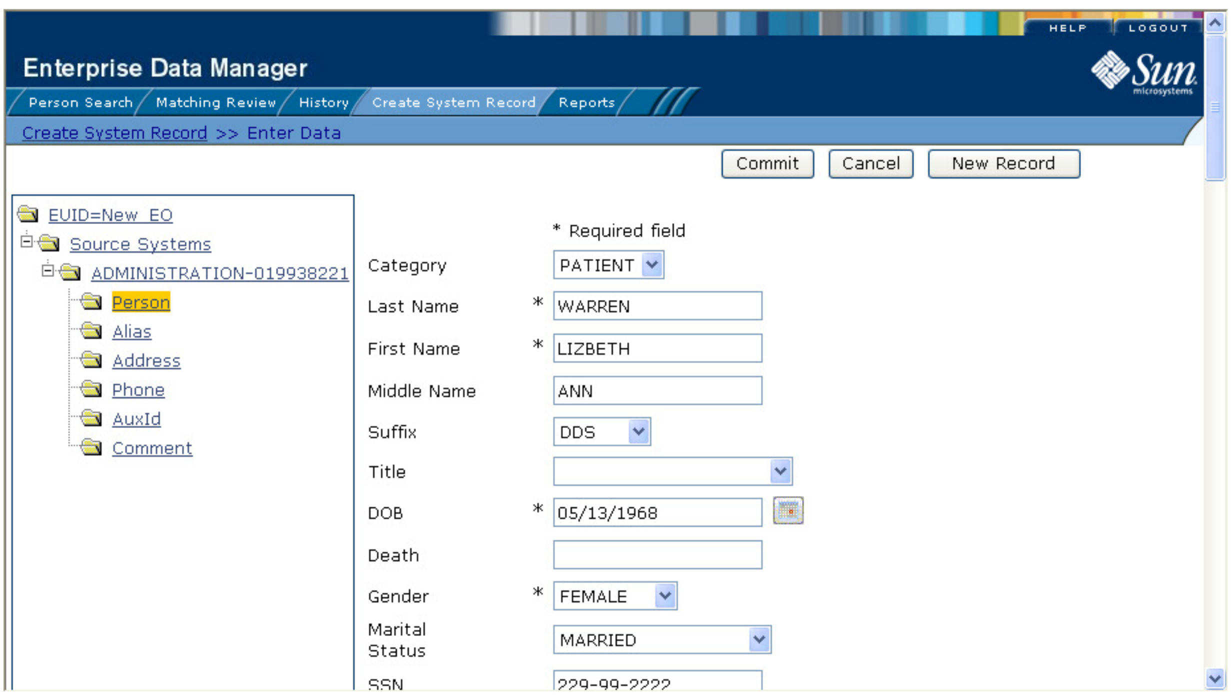
Table 20 System and Local ID Fields

Field	Description
System	The name of the system that assigned a local ID to the patient.
Local ID	The local ID assigned to the patient by the system specified. Note that the name of this field might have been modified for your implementation.

5.2.3 Step 3: Specify Demographic Information

When you add a new patient to the master index, you need to enter certain information such as the patient's name, social security number, and certain demographic information.

Figure 36 Create System Record - Demographic Information



To specify demographic information

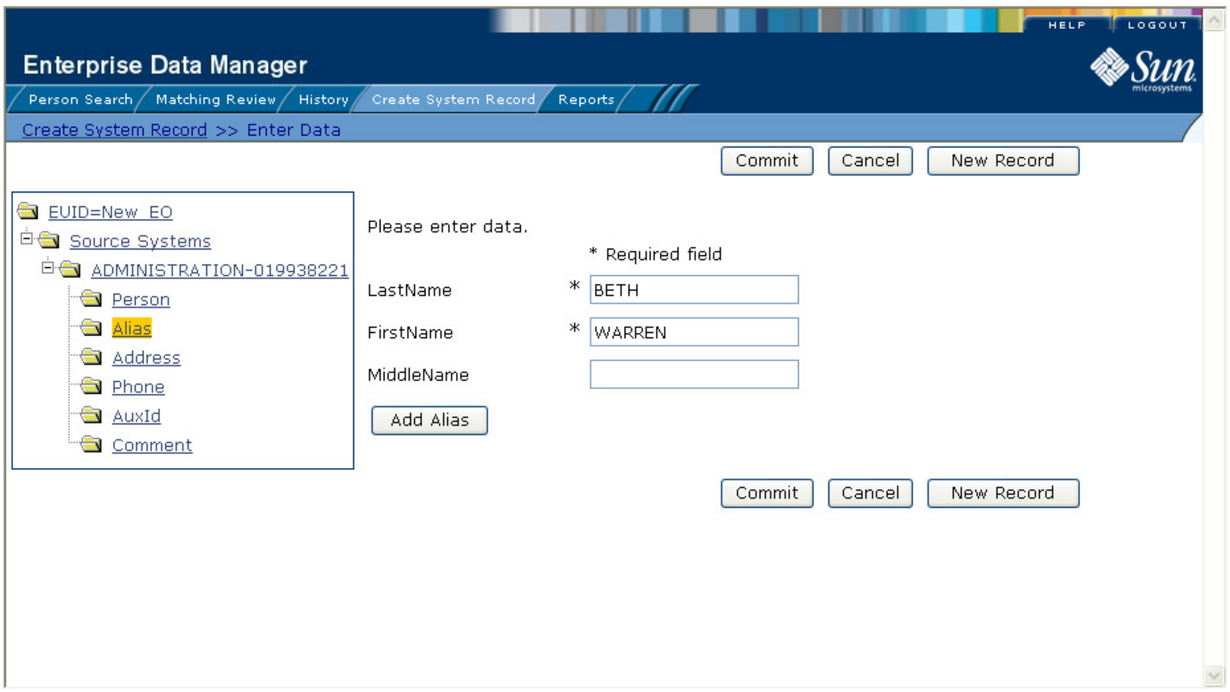
1. Complete **"Step 2: Specify a System and Local ID"**.
2. On the Create System Record page, enter the patient's demographic information (for more information, see **About Demographic Fields** on page 51).
3. Do one of the following:

- To specify additional information about the patient, continue to **"Step 4: Specify Alias Information"**.
- To save the patient profile without specifying additional information, skip to **"Step 9: Save the Patient Profile"**.

5.2.4 Step 4: Specify Alias Information

After you specify the required demographic information for a patient, you can specify any alias names for that patient. Once you add an alias, it appears in the patient profile tree on the left side of the Create System Record page.

Figure 37 Create System Record - Alias Information



To specify alias information

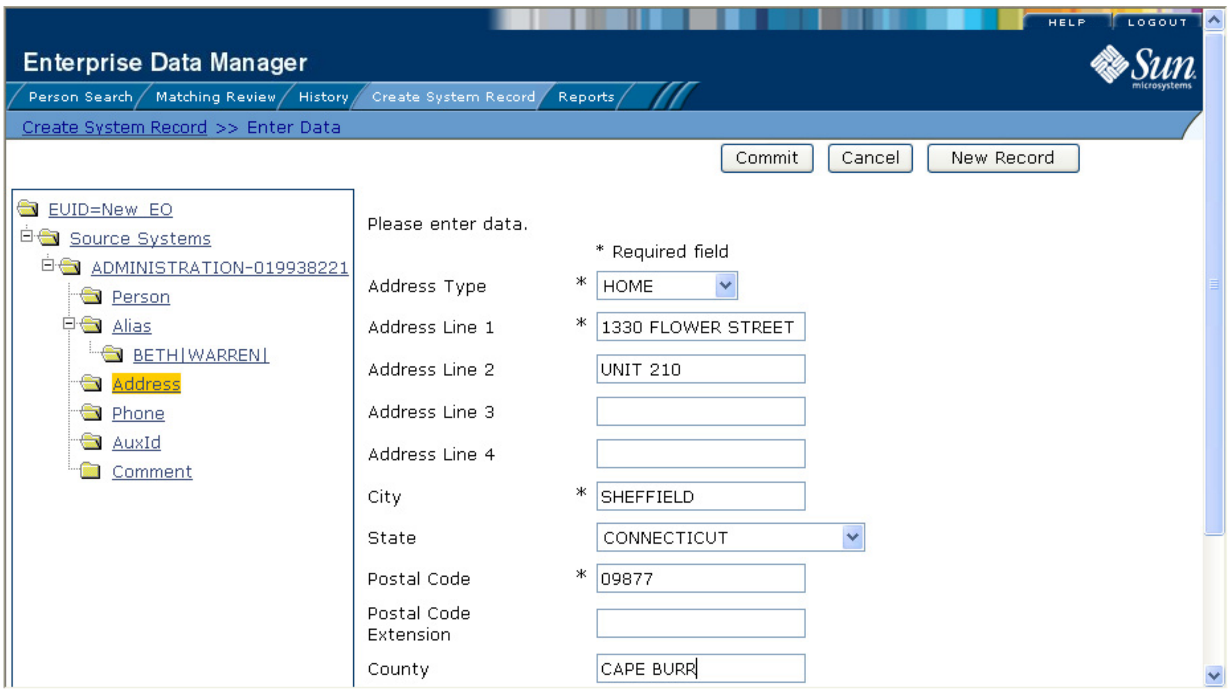
1. Complete **"Step 3: Specify Demographic Information"**.
2. In the EUID tree in the left portion of the Create System Record page, select **Alias**. The page changes to display alias fields.
3. On the Create System Record page, enter the patient's alias information (for more information, see **About Alias Fields** on page 57).
4. In the lower left portion of the page, click **Add Alias**.
5. Repeat steps 3 and 4 for each alias name you want to add.
6. If you add an alias name in error, highlight the alias in the EUID tree, and then click **Remove Alias**. The alias name is removed from the tree.
7. Do one of the following:

- To specify additional information about the patient, continue to **"Step 5: Specify Address Information"**.
- To save the patient profile without specifying additional information, skip to **"Step 9: Save the Patient Profile"**.

5.2.5 Step 5: Specify Address Information

When you add a new patient to the master index, you can specify information about the various addresses associated with a patient, such as their home and business addresses.

Figure 38 Create System Record - Address Information



To specify address information

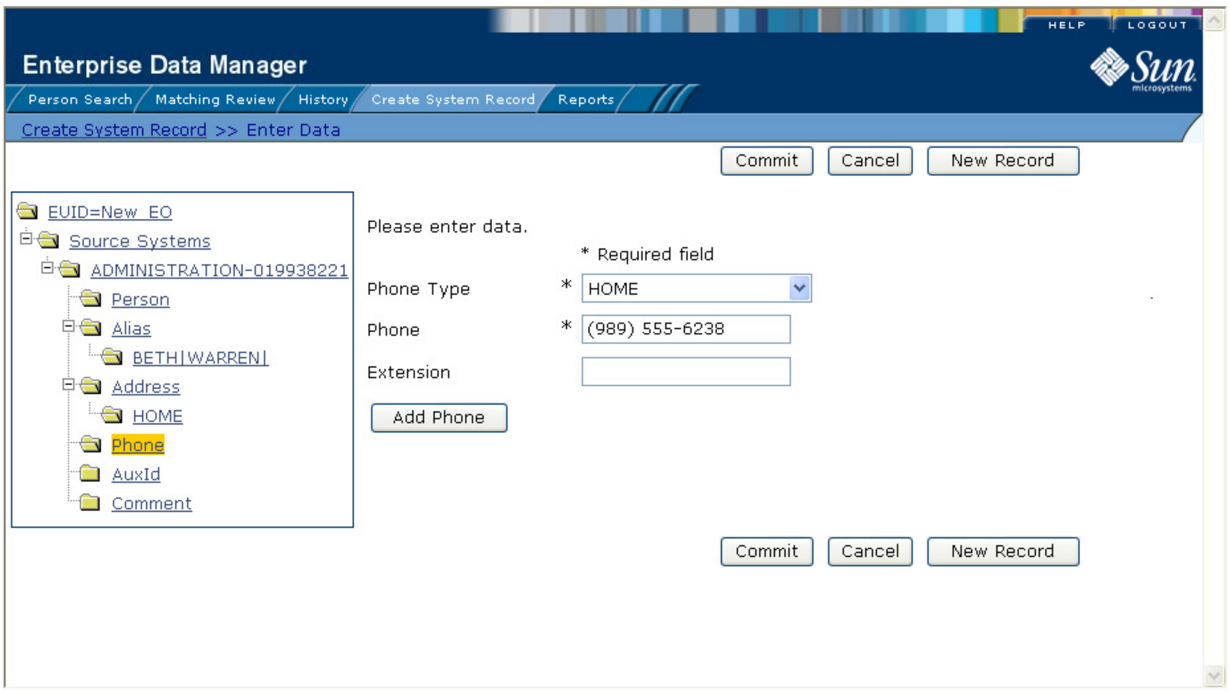
1. Complete **"Step 4: Specify Alias Information"**.
2. In the EUID tree in the left portion of the Create System Record page, select **Address**. The page changes to display address fields.
3. On the Create System Record page, fill in the address fields (for more information, see **About Address Fields** on page 54).
4. In the lower portion of the page, click **Add Address**.
5. Repeat steps 3 and 4 for each address you need to add to the patient profile.
6. If you add an address in error, highlight the address type in the EUID tree, and then click **Remove Address**. The address is removed from the EUID tree.
7. Do one of the following:

- To specify additional information about the patient, continue to **“Step 6: Specify Telephone Information”**.
- To save the patient profile without specifying additional information, skip to **“Step 9: Save the Patient Profile”**.

5.2.6 Step 6: Specify Telephone Information

When you add a new patient to the master index, you can specify information about the various telephone numbers associated with a patient, such as their home, cellular, and business telephone numbers.

Figure 39 Create System Record - Telephone Information



To specify telephone information

1. Complete **“Step 5: Specify Address Information”**.
2. In the EUID tree in the left portion of the Create System Record page, select **Phone**. The page changes to display telephone fields.
3. On the Create System Record page, fill in the telephone fields (for more information, see **About Telephone Fields** on page 56).
4. In the lower portion of the page, click **Add Phone**.
5. Repeat steps 3 and 4 for each telephone number you need to add to the patient profile.
6. If you add a telephone number in error, highlight the telephone type in the EUID tree, and then click **Remove Phone**. The number is removed from the tree.

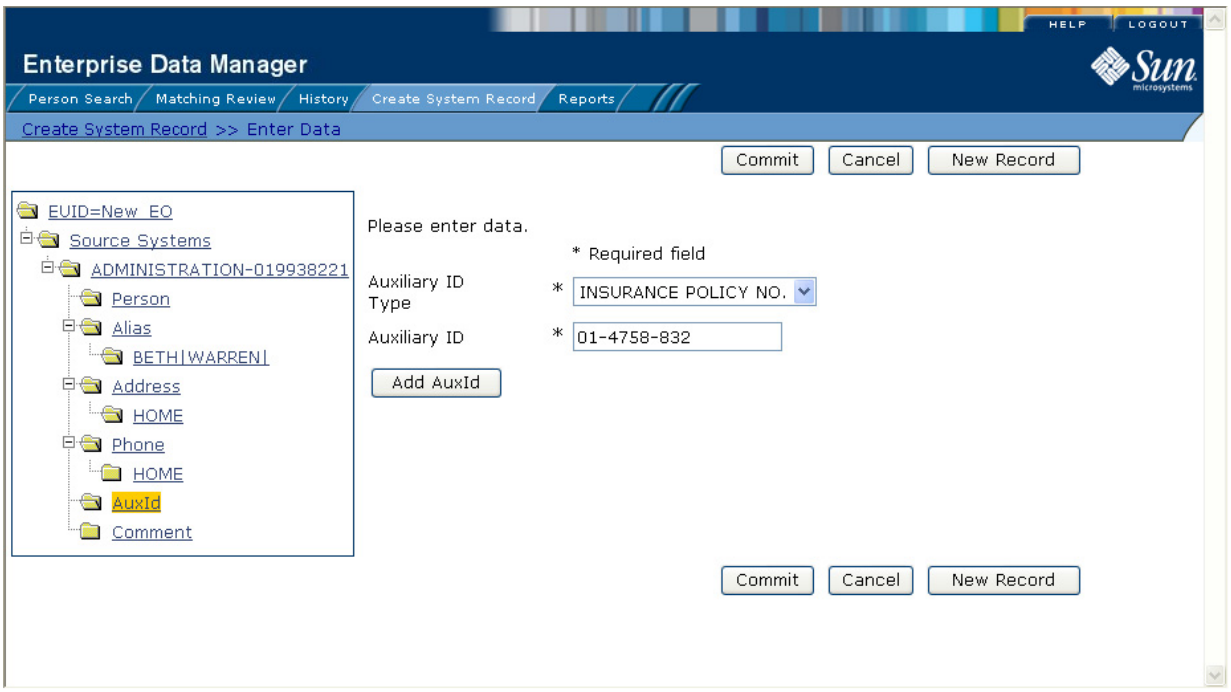
7 Do one of the following:

- To specify additional information about the patient, continue to **"Step 7: Specify Auxiliary IDs"**.
- To save the patient profile without specifying additional information, skip to **"Step 9: Save the Patient Profile"**.

5.2.7 Step 7: Specify Auxiliary IDs

When you add a new patient to the database, you can specify auxiliary IDs for the patient. These IDs do not necessarily uniquely identify the patient profile, and several profiles might have the same ID.

Figure 40 Create System Record - Auxiliary IDs



To specify auxiliary IDs

1. Complete **"Step 6: Specify Telephone Information"**.
2. In the EUID tree in the left portion of the Create System Record page, select **AuxId**. The page changes to display auxiliary ID fields.
3. On the Create System Record page, fill in information about the auxiliary ID (for more information, see **About Auxiliary ID Fields** on page 59).
4. In the lower portion of the page, click **Add AuxId**.
5. Repeat steps 3 and 4 for each auxiliary ID you need to add to the patient profile.
6. If you add an auxiliary ID in error, highlight the auxiliary ID in the EUID tree, and then click **Remove AuxId**. The auxiliary ID is removed from the tree.

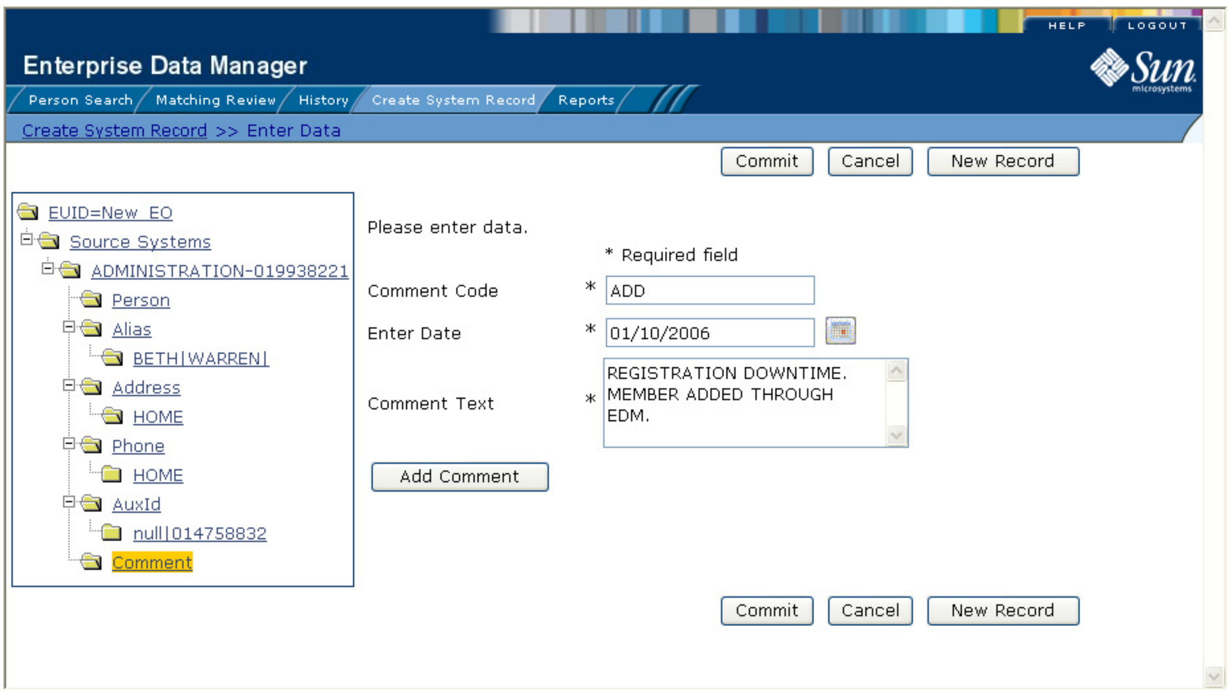
7 Do one of the following:

- To specify additional information about the patient, continue to **"Step 8: Add Comments to the Patient Profile"**.
- To save the patient profile without specifying additional information, skip to **"Step 9: Save the Patient Profile"**.

5.2.8 Step 8: Add Comments to the Patient Profile

When you add a new patient to the master index, you can specify miscellaneous information about the patient or patient profile in the form of free-text comments.

Figure 41 Create System Record - Comment Information



To add comments to the patient profile

1 Complete **"Step 7: Specify Auxiliary IDs"**.

2 In the EUID tree in the left portion of the Create System Record page, select **Comment**. The page changes to display comment fields.

3 On the Create System Record page, fill in the comment fields (for more information, see **About Comment Fields** on page 61).

4 In the lower portion of the page, click **Add Comment**.

5 Repeat steps 3 and 4 for each comment you need to add to the patient profile.

6 If you add a comment in error, highlight the comment code in the EUID tree, and then click **Remove Comment**. The comment is removed from the tree.

7 Continue to **"Step 9: Save the Patient Profile"**.

5.2.9 Step 9: Save the Patient Profile

After you specify all the required information for a patient profile, you must save the profile to the database or the information you entered will be lost.

To save the patient profile

1. Complete **"Step 8: Add Comments to the Patient Profile"**.
2. Click **Commit**.

   A confirmation dialog box appears.

Note: *The confirmation dialog box informs you whether a new profile was added to the database, a new profile was added and it has potential duplicates, or an existing profile was updated with the information you entered.*

3. On the confirmation dialog box, click **OK**.

   The new patient profile is saved to the database.
4. To add another patient profile, click **New Record**, and then repeat the steps beginning with **Step 1: Obtain Information about the Patient** on page 85.

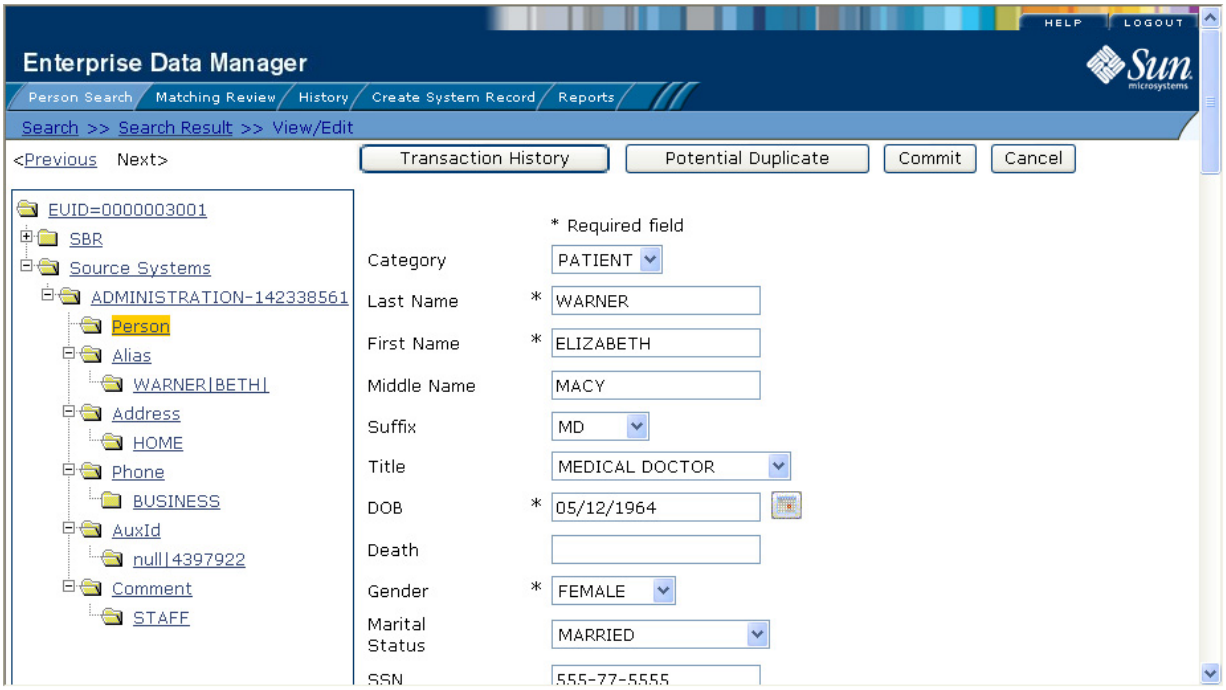
5.3 Maintaining Patient Information

You can maintain information in both the SBR and the system records for a patient profile. The following topics provide step-by-step instructions for maintaining up-to-date and accurate patient information in your database.

5.3.1 Modifying Demographic Information

If a patient's demographic information changes, you can update the patient's information in either the SBR or the affected system record. If you update the system record, then the survivor calculator determines what changes, if any, should be made to the SBR. You must have overwrite permissions to update the SBR directly.

Figure 42 View/Edit Page - Demographic Information



To modify demographic information in a patient profile

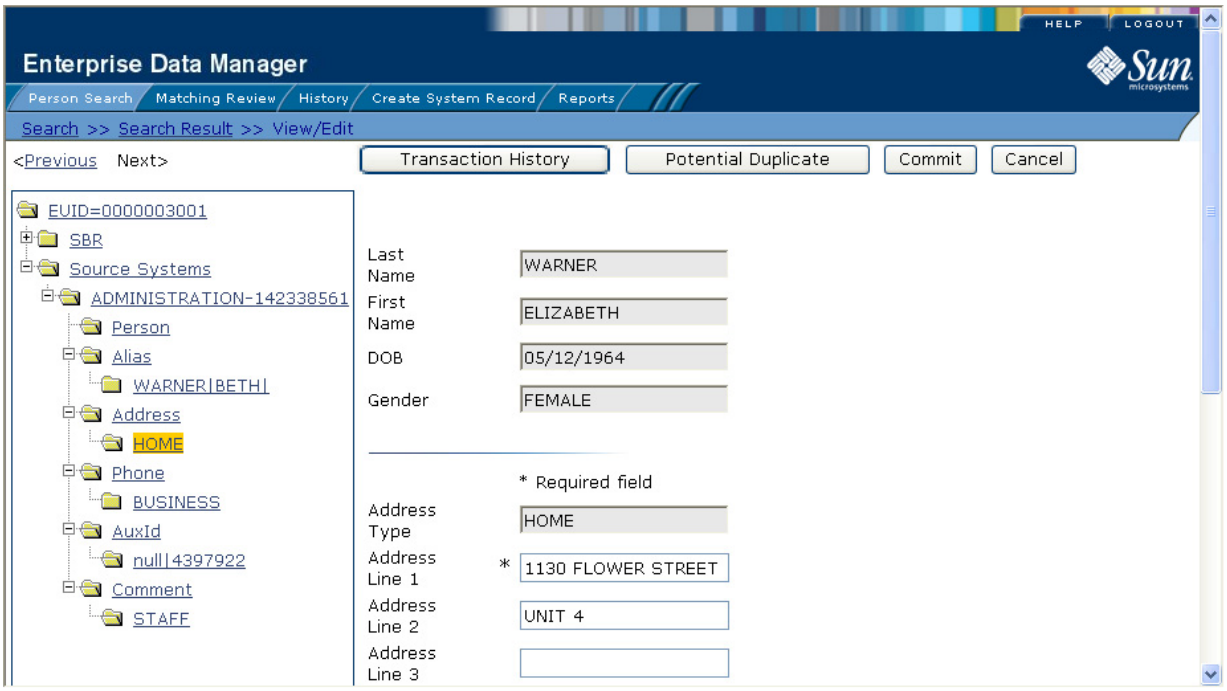
1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Do one of the following:
   - To modify the SBR, select **Person** under **SBR** in the EUID tree in the left portion of the View/Edit page.
   - To modify a system record, select **Person** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Modify the fields in the right portion of the page (for more information, see **About Demographic Fields** on page 51).
4. If you are working in the SBR, select the overwrite check box to the left of the field for each field you modify.
5. When you are done modifying information, click **Commit**.

   The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

5.3.2 Maintaining Address Information

You can add, modify, and delete addresses in a patient profile. If you make any of these modifications to the system record, the survivor calculator determines what changes, if any, should be made to the SBR. You can only modify information in the SBR if you have overwrite permissions.

Figure 43 View/Edit Page - Address Information



Adding Addresses to a Patient Profile

If a patient submits additional address information, you might need to add a new address record to the SBR or to the affected system record. You can only add one address of each address type to each SBR or each system record.

To add an address to a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Do one of the following:
   - To add an address to the SBR, select **Address** under **SBR** in the EUID tree in the left portion of the View/Edit page.
   - To add an address to a system record, select **Address** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Enter the new address information in the fields in the right portion of the page (for more information, see **About Address Fields** on page 54).

4 In the lower left portion of the page, click **Add Address**.

5 Click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Note: *If you added the address to the SBR, all fields in the address record are automatically locked, and will not be updated by incoming system messages until they are unlocked.*

Modifying Address Information

If a patient submits additional address information, you might need to modify an address record in the SBR or the affected system record.

To modify an address in a patient profile

1 Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.

2 Do one of the following:

- To modify the SBR, select **Address** under **SBR** in the EUID tree in the left portion of the View/Edit page.
- To modify a system record, select **Address** under that system record in the EUID tree in the left portion of the View/Edit page.

3 Select the address type of the address to modify.

4 Modify the fields in the right portion of the page (for more information, see **About Address Fields** on page 54).

5 If you are working in the SBR, select the overwrite check box to the left of the field for each field you modify.

6 When you are done modifying information, click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Deleting Addresses from a Patient Profile

If an address for a patient is entered incorrectly, or the patient no longer uses an existing address, you can delete the obsolete address from the affected system record. Once an address is deleted from a patient profile, the deletion cannot be undone.

To delete an address from a patient profile

1 Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.

2 Select **Address** under that system record in the EUID tree in the left portion of the View/Edit page.

3 Under the **Address** node, select the address type of the address you want to remove.

4 In the lower left portion of the page, click **Remove Address**.

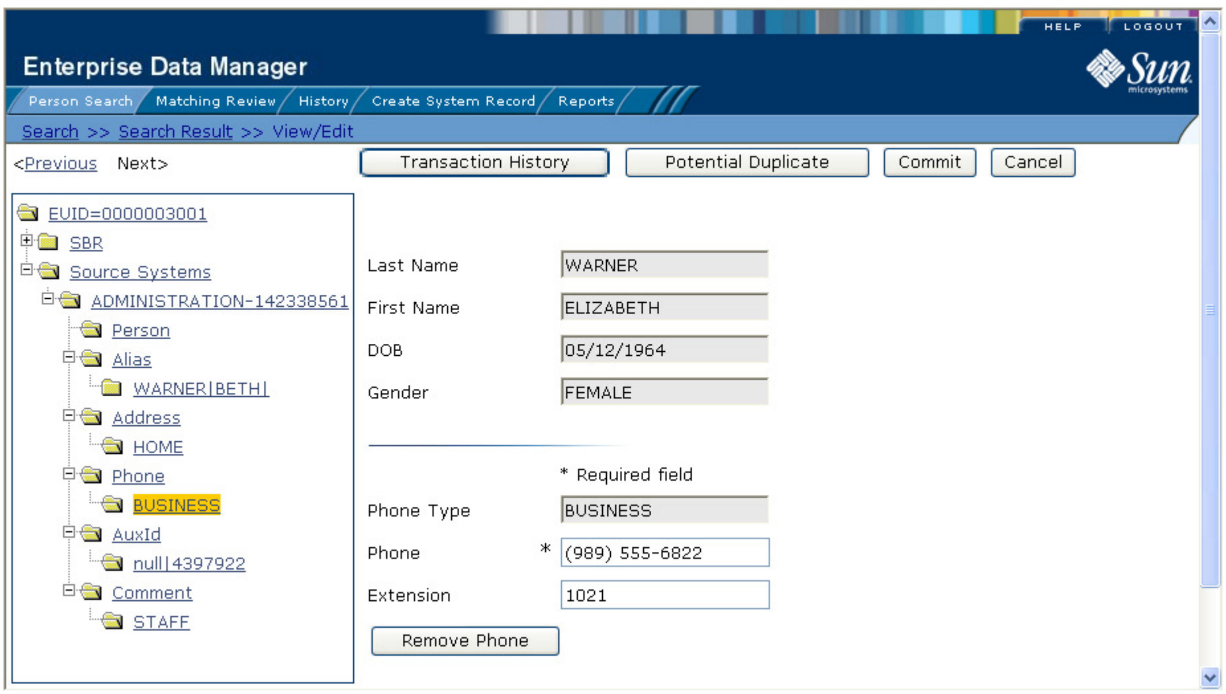
5 Click **Commit**.

The page refreshes, and the SBR is recalculated based on the new information.

5.3.3 Maintaining Telephone Information

You can add, modify, and delete telephone numbers in a patient profile. If you make any of these modifications to the system record, the survivor calculator determines what changes, if any, should be made to the SBR. You can only modify information in the SBR if you have overwrite permissions.

Figure 44 View/Edit Page - Telephone Information



Adding Telephone Numbers to a Patient Profile

If a patient submits additional telephone information, you might need to add a new telephone record to the SBR or to the affected system record. You can only add one telephone number of each phone type to each SBR or each system record.

To add a telephone number to a patient profile

1 Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.

2 Do one of the following:

- To add a telephone number to the SBR, select **Phone** under **SBR** in the EUID tree in the left portion of the View/Edit page.
- To add a telephone number to a system record, select **Phone** under that system record in the EUID tree in the left portion of the View/Edit page.

3 Enter the new telephone information in the fields in the right portion of the page (for more information, see **About Telephone Fields** on page 56).

4 In the lower left portion of the page, click **Add Phone**.

5 Click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Note: *If you added the telephone number to the SBR, all fields in the telephone record are automatically locked, and will not be updated by incoming system messages until they are unlocked.*

Modifying Telephone Information

If a patient changes telephone numbers, you can update those numbers in the SBR or the affected system record.

To modify a telephone number in a patient profile

1 Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.

2 Do one of the following:

- To modify the SBR, select **Phone** under **SBR** in the EUID tree in the left portion of the View/Edit page.
- To modify a system record, select **Phone** under that system record in the EUID tree in the left portion of the View/Edit page.

3 Select the phone type of the telephone number to be modified.

4 Modify the fields in the right portion of the page (for more information, see **About Telephone Fields** on page 56).

5 If you are working in the SBR, select the overwrite check box to the left of the field for each field you modify.

6 When you are done modifying information, click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Deleting Telephone Numbers from a Patient Profile

If a telephone number for a patient is entered incorrectly, or the patient no longer uses an existing number, you can delete the obsolete number from the affected system record. Once a telephone number is deleted from a patient profile, the deletion cannot be undone.

To delete a telephone number from a patient profile

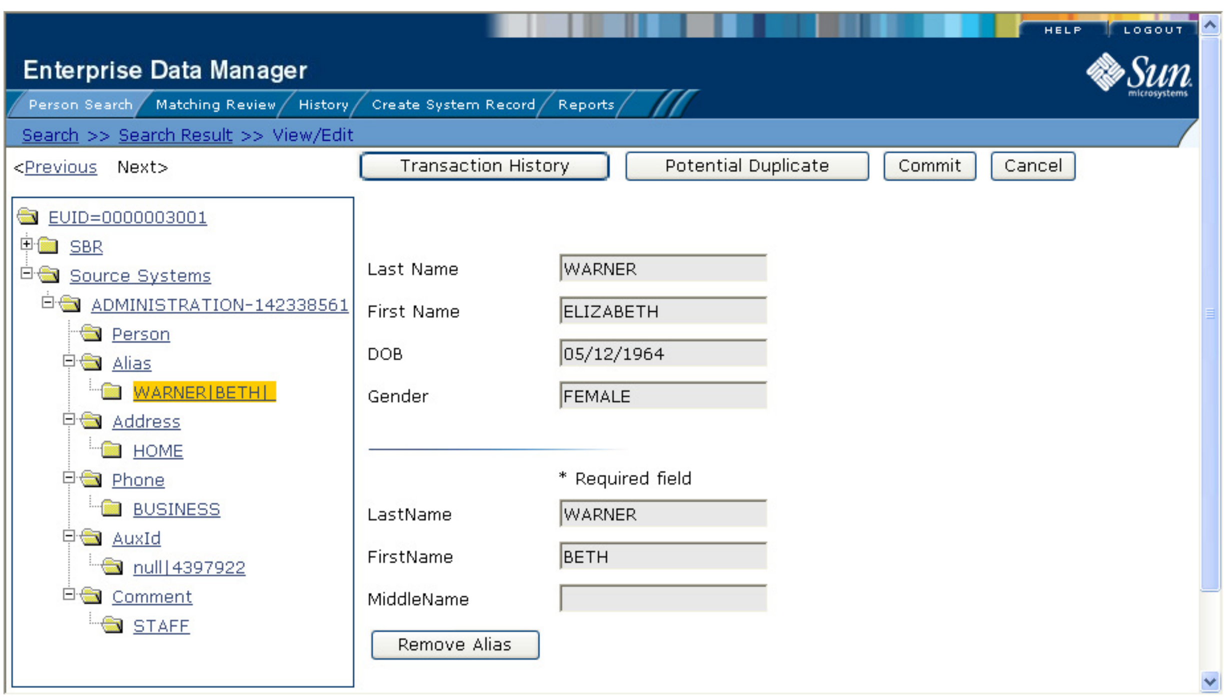
1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Select **Phone** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Under the **Phone** node, select the phone type of the telephone number you want to remove.
4. In the lower left portion of the page, click **Remove Phone**.
5. Click **Commit**.

   The page refreshes, and the SBR is recalculated based on the new information.

5.3.4 Maintaining Alias Information

You can add, modify, and delete alias names in a patient profile. If you make any of these modifications to the system record, the survivor calculator determines what changes, if any, should be made to the SBR. You can only modify information in the SBR if you have overwrite permissions.

Figure 45 View/Edit Page - Alias Information



Adding an Alias to a Patient Profile

If you find that a patient is known by a name other than those recorded in the master index, you can add the name as an alias to the patient's profile, either to the SBR or the affected system record.

To add an alias to a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Do one of the following:
   - To add an alias to the SBR, select **Alias** under **SBR** in the EUID tree in the left portion of the View/Edit page.
   - To add an alias to a system record, select **Alias** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Enter the new alias information in the fields in the right portion of the page (for more information, see **About Alias Fields** on page 57).
4. In the lower left portion of the page, click **Add Alias**.
5. Click **Commit**.

   The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Note: *If you added the alias name to the SBR, all fields in the alias record are automatically locked, and will not be updated by incoming system messages until they are unlocked.*

Modifying a Patient's Alias Information

If an alias was entered in error for a patient profile, you can modify the alias in the SBR or the affected system record.

To modify an alias in a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Do one of the following:
   - To modify the SBR, select **Alias** under **SBR** in the EUID tree in the left portion of the View/Edit page.
   - To modify a system record, select **Alias** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Select the alias folder containing the alias information you want to modify.
4. Modify the fields in the right portion of the page (for more information, see **About Alias Fields** on page 57).

5. If you are working in the SBR, select the overwrite check box to the left of the field for each field you modify.
6. When you are done modifying information, click **Commit**.

   The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Deleting an Alias from a Patient Profile

If an existing alias name for a patient is no longer valid or was entered in error, you can delete the obsolete alias from the affected system record. Once an alias is deleted from a patient profile, the deletion cannot be undone.

To delete an alias from a patient profile

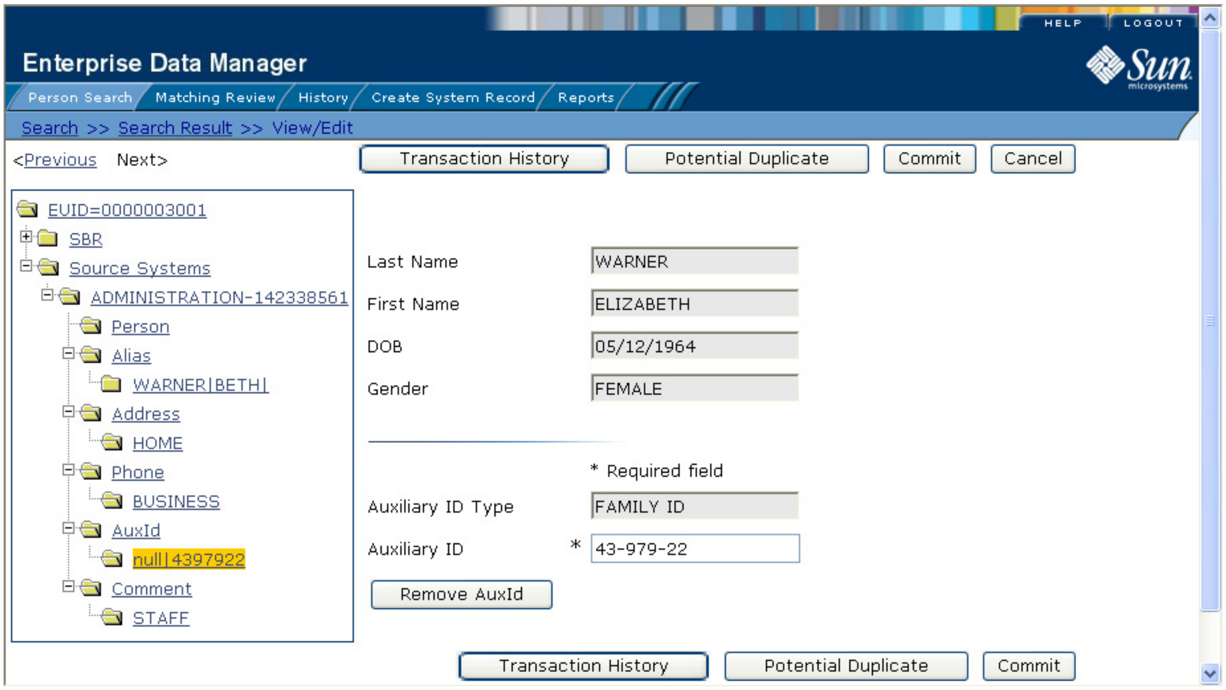
1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Select **Alias** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Under the **Alias** node, select the alias you want to remove.
4. In the lower left portion of the page, click **Remove Alias**.
5. Click **Commit**.

   The page refreshes, and the SBR is recalculated based on the new information.

5.3.5 Maintaining Auxiliary ID Information

You can add, modify, and delete auxiliary IDs in a patient profile. If you make any of these modifications to the system record, the survivor calculator determines what changes, if any, should be made to the SBR. You can only modify information in the SBR if you have overwrite permissions.

Figure 46 View/Edit Page - Auxiliary ID Information



Adding an Auxiliary ID to a Patient Profile

Once you have saved a patient profile, you can add auxiliary IDs to that profile either in the SBR or the affected system record. You can add multiple IDs of the same type to a patient profile. If you add the ID to a system record, then the survivor calculator determines what changes, if any, should be made to the SBR.

To add an auxiliary ID to a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Do one of the following:
   - To add an auxiliary ID to the SBR, select **AuxId** under **SBR** in the EUID tree in the left portion of the View/Edit page.
   - To add an auxiliary ID to a system record, select **AuxId** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Enter the new auxiliary ID information in the fields in the right portion of the page (for more information, see **About Auxiliary ID Fields** on page 59).
4. In the lower left portion of the page, click **Add AuxId**.
5. Click **Commit**.

   The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Note: *If you added the auxiliary ID to the SBR, all fields in the auxiliary ID record are automatically locked, and will not be updated by incoming system messages until they are unlocked.*

Modifying Auxiliary ID Information

If an auxiliary ID was entered in error for a patient profile, you can modify the ID in the SBR or the affected system record.

To modify an auxiliary ID in a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Do one of the following:
   - To modify the SBR, select **AuxId** under **SBR** in the EUID tree in the left portion of the View/Edit page.
   - To modify a system record, select **AuxId** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Select the ID type of the auxiliary ID you want to modify.
4. Modify the fields in the right portion of the page (for more information, see **About Auxiliary ID Fields** on page 59).
5. If you are working in the SBR, select the overwrite check box to the left of the field for each field you modify.
6. When you are done modifying information, click **Commit**.

   The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Deleting an Auxiliary ID from a Patient Profile

If an existing auxiliary ID for a patient is no longer valid or was entered in error, you can delete the obsolete ID from the affected system record. Once an auxiliary ID is deleted from a patient profile, the deletion cannot be undone.

To delete an auxiliary ID from a patient profile

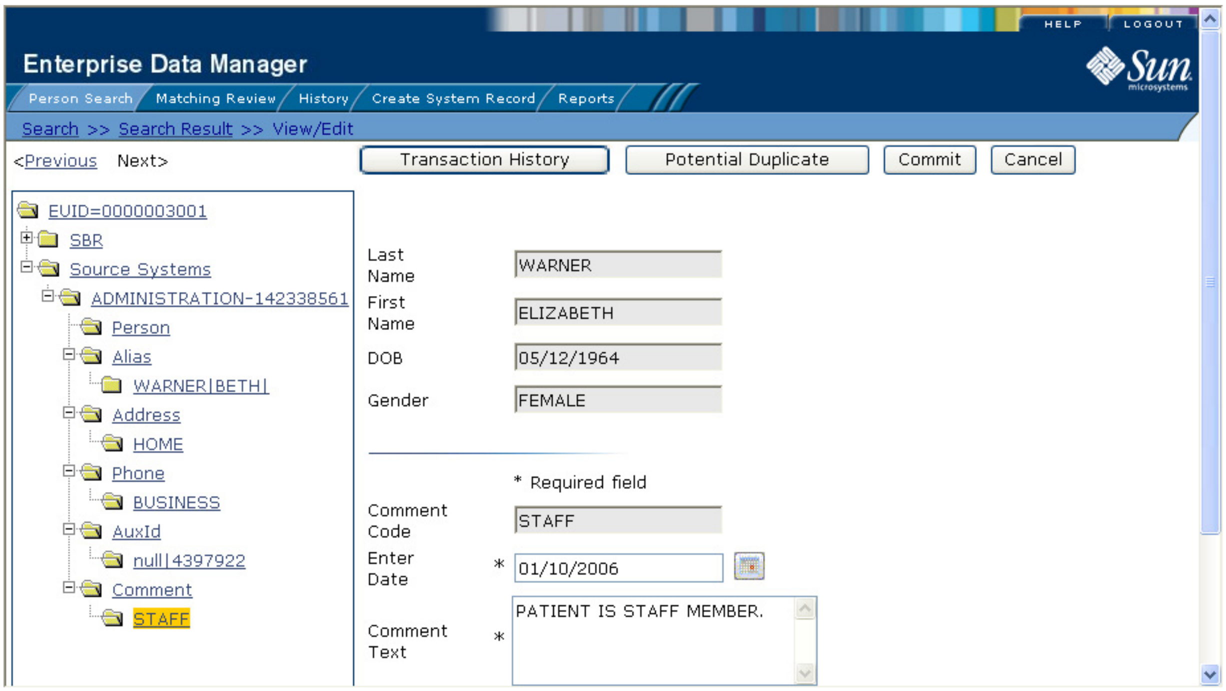
1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Select **AuxId** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Under the **AuxId** node, select the auxiliary ID you want to remove.
4. In the lower left portion of the page, click **Remove AuxId**.
5. Click **Commit**.

   The page refreshes, and the SBR is recalculated based on the new information.

5.3.6 Maintaining Comment Information

You can add, modify, and delete comments in a patient profile. If you make any of these modifications to the system record, the survivor calculator determines what changes, if any, should be made to the SBR. You can only modify information in the SBR if you have overwrite permissions.

Figure 47 View/Edit Page - Comment Information



Adding a Comment to a Patient Profile

If you need to record additional information about a patient, you can add a comment to the patient's profile, either in the SBR or a system record. Comments can include any information that you feel is relevant for the patient profile, such as a reason for deactivating a profile, notes about possible duplicate profiles, and so on.

To add a comment to a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. Do one of the following:
   - To add a comment to the SBR, select **Comment** under **SBR** in the EUID tree in the left portion of the View/Edit page.
   - To add a comment to a system record, select **Comment** under that system record in the EUID tree in the left portion of the View/Edit page.
3. Enter the new comment information in the fields in the right portion of the page (for more information, see **About Comment Fields** on page 61).

4 In the lower left portion of the page, click **Add Comment**.

5 Click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Note: *If you added the comment to the SBR, all fields in the comment record are automatically locked, and will not be updated by incoming system messages until they are unlocked.*

Modifying a Comment in a Patient Profile

You can modify existing comments in the SBR and in the system records of a patient profile.

To modify a comment in a patient profile

1 Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.

2 Do one of the following:

- To modify the SBR, select **Comment** under **SBR** in the EUID tree in the left portion of the View/Edit page.
- To modify a system record, select **Comment** under that system record in the EUID tree in the left portion of the View/Edit page.

3 Select the comment code of the comment you want to modify.

4 Modify the fields in the right portion of the page (for more information, see **About Comment Fields** on page 61).

5 If you are working in the SBR, select the overwrite check box to the left of the field for each field you modify.

6 When you are done modifying information, click **Commit**.

The page refreshes, and, if you modified a system record, the SBR is recalculated based on the new information.

Deleting a Comment from a Patient Profile

Once you have added a comment to a patient profile, you can delete the comment from the affected system record if it is no longer useful or accurate. Once a comment is deleted from a patient profile, the deletion cannot be undone.

To delete a comment from a patient profile

1 Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.

2 Select **Comment** under that system record in the EUID tree in the left portion of the View/Edit page.

3 Under the **Comment** node, select the comment code of the comment you want to remove.

4 In the lower left portion of the page, click **Remove Comment**.

5 Click **Commit**.

The page refreshes, and the SBR is recalculated based on the new information.

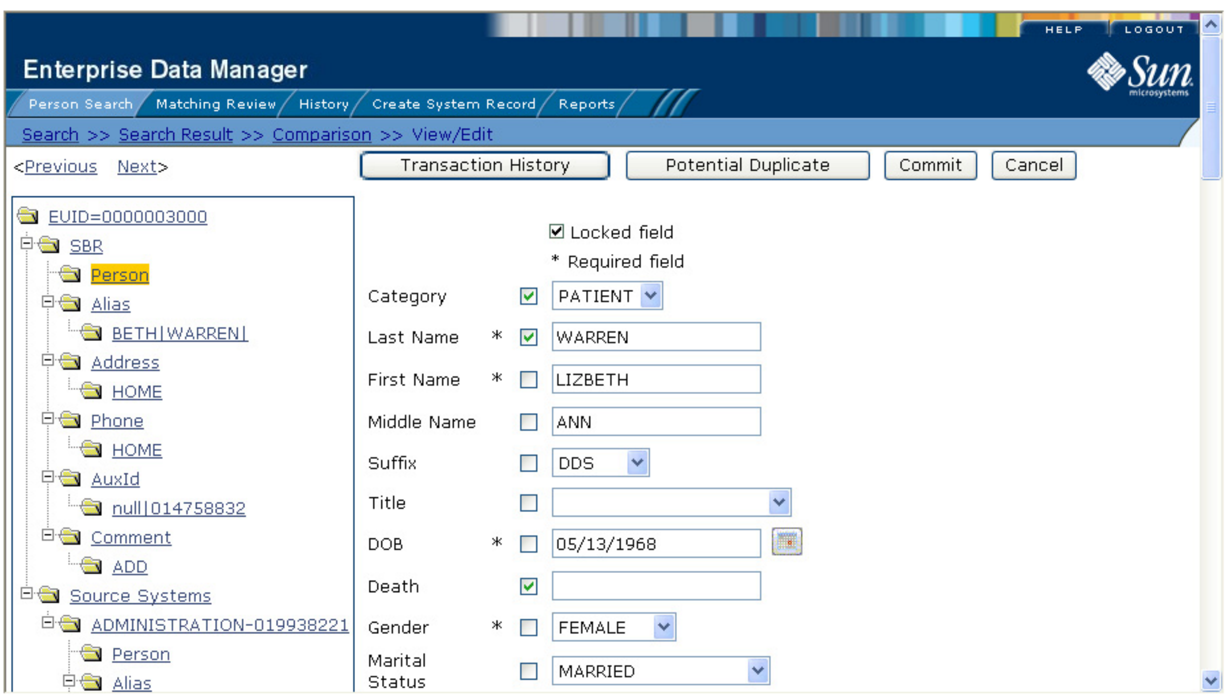
5.3.7 Locking and Unlocking SBR Fields

Unless a field in an SBR is locked for overwrite, the value for that field is recalculated by the survivor calculator each time the patient profile is updated. If you determine that a value in the SBR is the most accurate data and should not be updated, you can lock the field. If you unlock a locked field, the value of that field is automatically recalculated by the survivor calculator as soon as the unlock action is committed.

Locking an SBR Field

When you lock a field in an SBR, that field can only be updated through the EDM by a user who has overwrite permissions. Locking a field in the SBR removes the survivor calculator from the update process for that field, and any updates made to or by system records will not update the locked fields in the SBR.

Figure 48 Locked fields in an SBR



To lock a field in the SBR

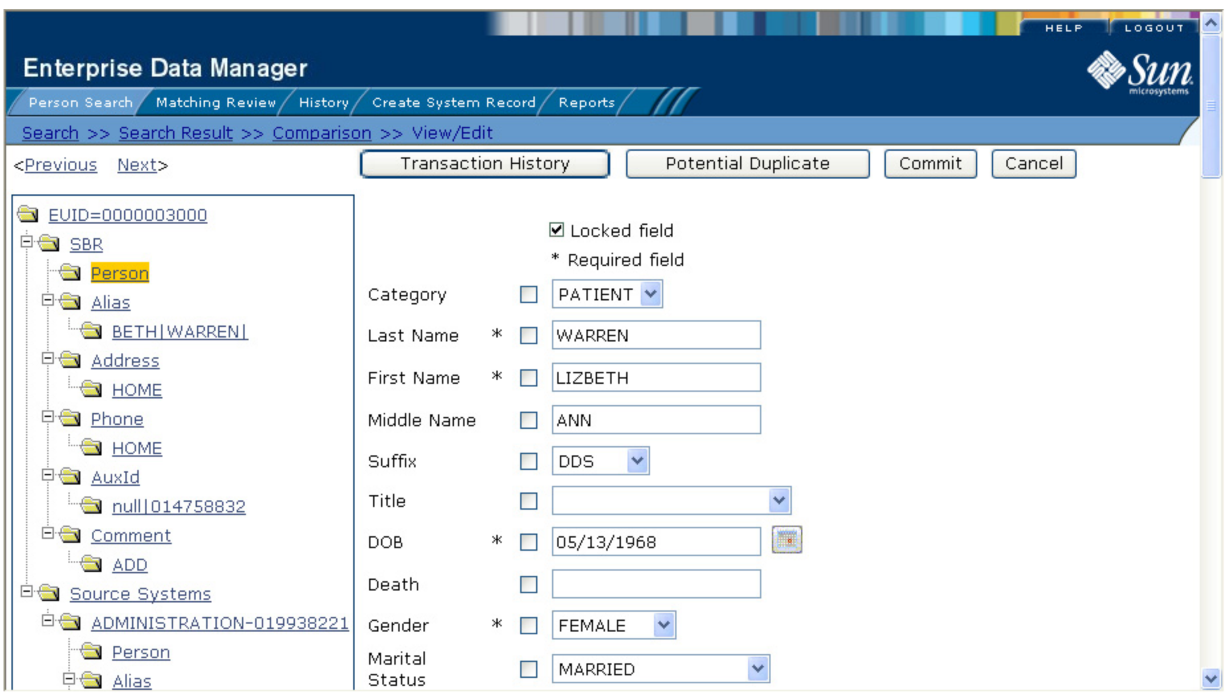
1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile containing the field you want to lock on the View/Edit page.
2. In the EUID tree, select the component in the SBR containing the field you want to lock.
3. If necessary, update the value of the field to be locked.
4. Select the overwrite check box to the left of the field.
5. Click **Commit**.

   The field is now locked and cannot be edited by updates to system records until the lock is removed.

Unlocking an SBR Field

Once you unlock a field for overwrite in an SBR, the SBR is recalculated by the survivor calculator and the field can be updated by changes made to system records. If you added a child object to an SBR and then unlock all fields in the new object, that object is removed from the SBR by the survivor calculator.

Figure 49 Unlocked Fields in an SBR



To unlock an SBR field

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile containing the field you want to unlock on the View/Edit page.
2. In the EUID tree, select the object in the SBR that contains the field you want to unlock.
3. Clear the overwrite check box to the left of the field you want to unlock.
4. Click **Commit**.

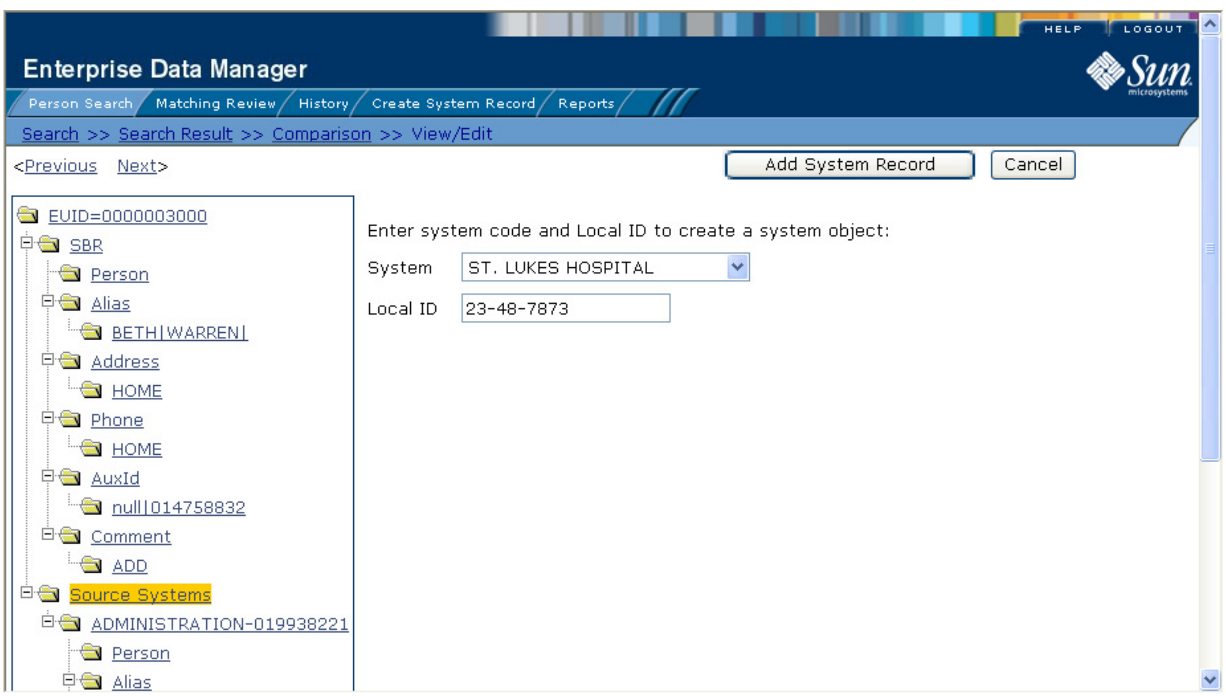
   The field is now unlocked and can be edited by updates to system records. The SBR is recalculated by the survivor calculator.

5.3.8 Maintaining System Record Information

You can add, modify, deactivate, and reactivate system records in a patient profile. If you make any of these modifications, the survivor calculator determines what changes, if any, should be made to the SBR.

For instructions on modifying specific information in a system record, see the preceding sections, which describe how to maintain various types of information in a patient profile.

Figure 50 View/Edit Page - System Records



Adding a System Record to a Patient Profile

If you find a patient has local IDs in addition to those already recorded in the master index, you can add the local IDs to the patient's profile by adding a system record to the profile. To add a local ID to a patient profile, you need to specify information such as the system that assigned the local ID, certain demographic information, and the local ID itself. When you add a system record to a patient profile, the survivor calculator determines what changes, if any, should be made to the SBR.

You cannot add a new local ID and system pair to a patient profile if that same local ID and system pair already exists in another patient profile.

To add a system record to a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. In the EUID tree in the left portion of the page, select **Source Systems**.
3. Follow **"Step 2: Specify a System and Local ID"** through **"Step 9: Save the Patient Profile"** under **Adding a Patient Profile** on page 85.

   When you commit the changes, the page refreshes and the SBR is recalculated based on the new information.

Note: *You only need to enter required fields in order to save the new system record. Required fields are indicated by an asterisk (*).*

Deactivating a System Record

If an existing local ID for a patient becomes obsolete, you can deactivate the system record with that local ID for the patient profile. A patient profile must have at least one active local ID; if you deactivate a patient's last active system record, the entire profile is deactivated. When you deactivate a system record from a patient profile, the survivor calculator determines what changes, if any, should be made to the SBR.

To deactivate a system record

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. In the EUID tree in the left portion of the page, expand **Source Systems**, and then select the system and local ID of the system record you want to deactivate.
3. Click **Deactivate <*system-ID*>**, where ***system*** is the system name and ***ID*** is the local ID number for the system record you want to deactivate.
4. Click **Commit**.

   The page refreshes and the SBR is recalculated based on the new information.

Reactivating a System Record

If a system record was deactivated in error or is no longer inactive, you can easily reactivate the system record.

To reactivate a system record

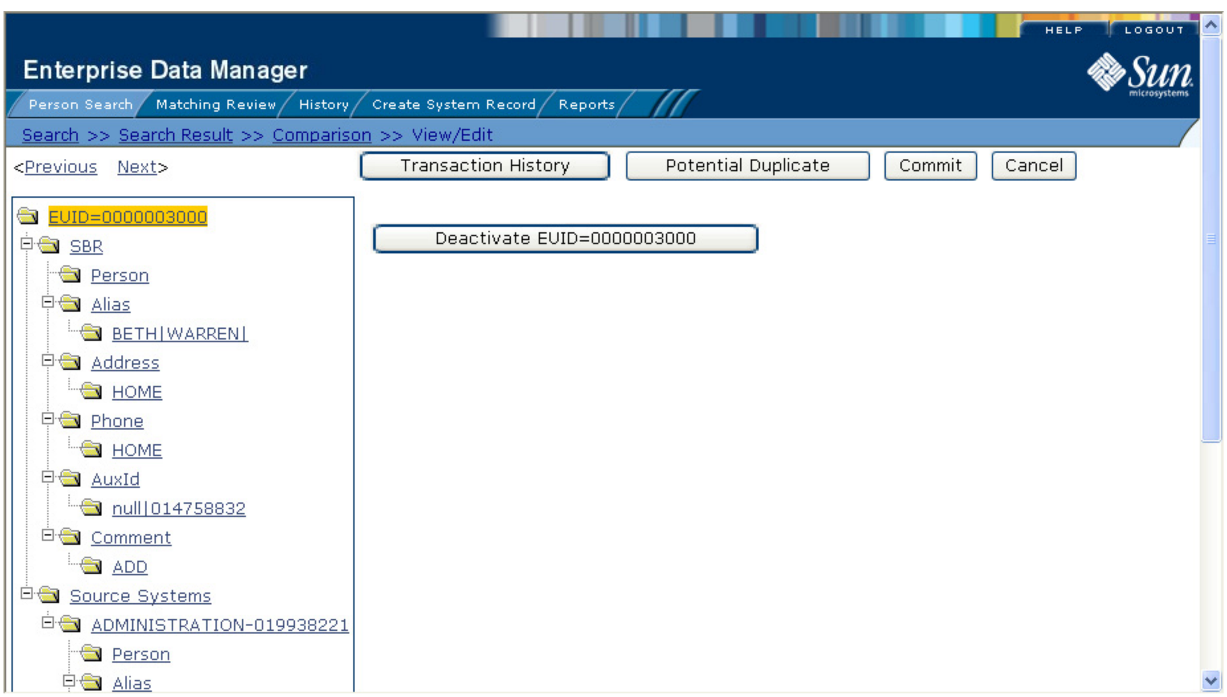
1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to modify on the View/Edit page.
2. In the EUID tree in the left portion of the page, expand **Source Systems**, and then select the system and local ID of the system record you want to reactivate.
3. Click **Activate <*system-ID*>**, where ***system*** is the system name and ***ID*** is the local ID number for the system record you want to reactivate.
4. Click **Commit**.

   The page refreshes and the SBR is recalculated based on the new information.

5.3.9 Changing Patient Profile Status

You can change the status of a patient profile from active to inactive, or from inactive to active. Deactivating a patient profile deactivates all system records associated with that profile and removes the potential duplicate listings for that profile. Reactivating a profile causes the potential duplicates for the profile to be recalculated.

Figure 51 View/Edit Page - Deactivate



Deactivating a Patient Profile

If a patient profile is no longer active, you cannot delete the patient profile, but you can deactivate that patient profile. Deactivated profiles cannot be modified, and in some cases, cannot be viewed. If you deactivate a profile in error, you can reactivate it if needed.

To deactivate a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to update on the View/Edit page.
2. In the EUID tree in the left portion of the page, highlight the EUID number of the patient profile.
3. Click **Deactivate EUID=<*EUID_number*>**, where **<*EUID_number*>** is the EUID of the patient profile to deactivate.
4. In the upper right section of the page, click **Commit**.

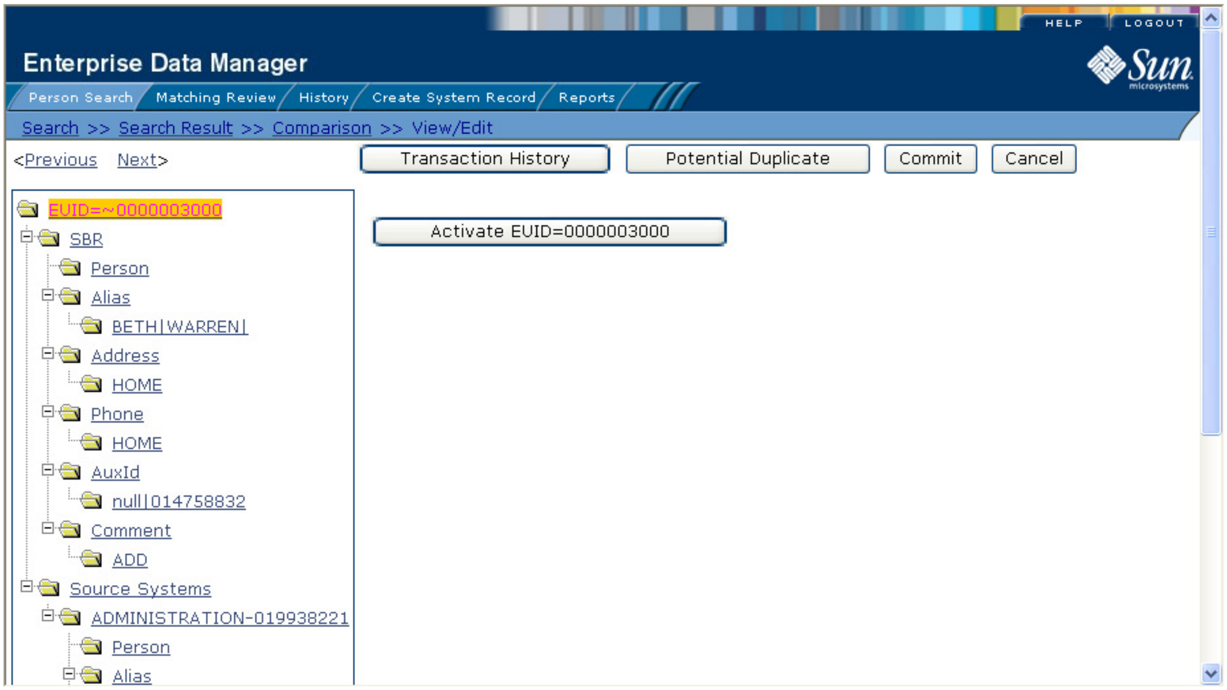
   The profile is deactivated in the database, and the EUID appears in fuchsia with a tilde (~) next to it.

Reactivating a Patient Profile

If a patient profile is deactivated in error, or becomes active again, you can reactivate that profile. Reactivating a profile returns the profile to its status just prior to when it was deactivated.

Important: *When you reactivate a patient profile, all system records associated with that profile are changed to active status, regardless of their prior status. Review each system record to verify that its status is correct after the reactivation.*

Figure 52 View/Edit Page - Reactivate



To reactivate a patient profile

1. Using one of the search methods described in **Searching for Patient Profiles** on page 32, display the patient profile you want to update on the View/Edit page.
2. In the EUID tree in the left portion of the page, highlight the EUID number of the patient profile.
3. Click **Activate EUID=<*EUID_number*>**, where **<*EUID_number*>** is the EUID of the patient profile to deactivate.
4. In the upper right section of the page, click **Commit**.

   The profile is reactivated in the database, the EUID typeface changes from fuchsia to black, and the tilde (~) is removed.

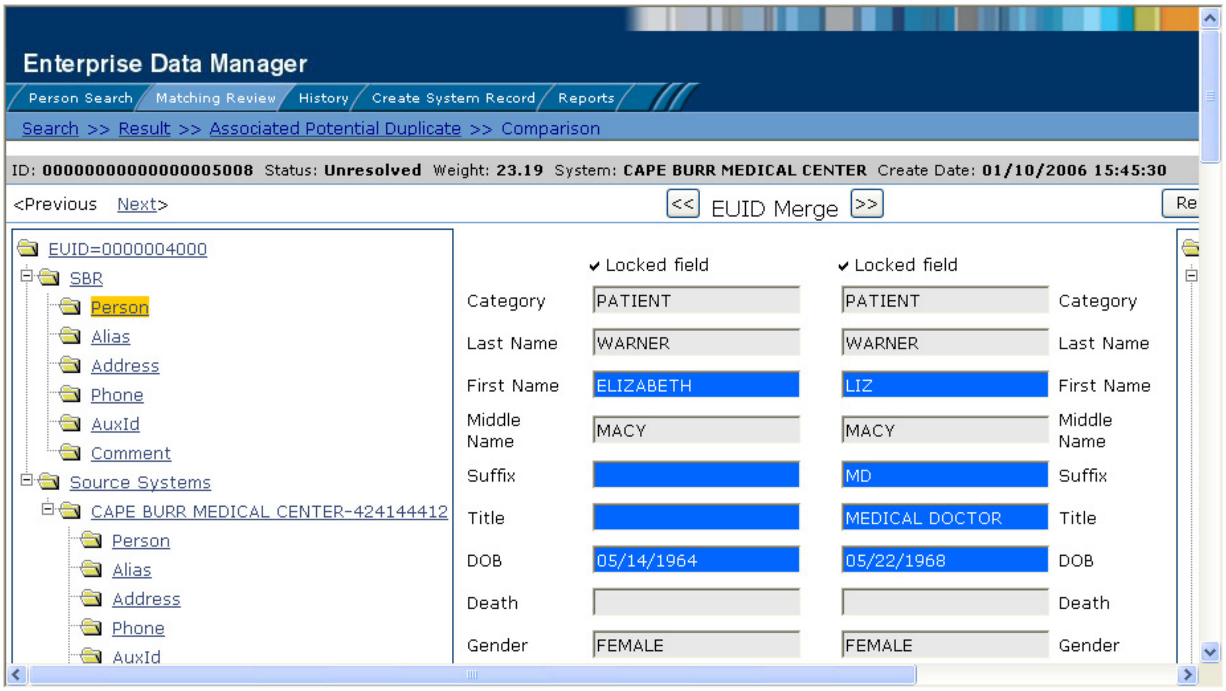
5.3.10 Working with Potential Duplicates

The Matching Review function of the EDM allows you to view any patient profiles that are marked as potential duplicates of each other by the master index. You can view potential duplicates that are resolved, but not those that are merged. This section provides instructions for finding and viewing potential duplicate profiles and then fixing the potential duplication by either merging or resolving the two profiles.

Finding Potential Duplicates

You can easily find and compare potential duplicate profiles using the EDM. Potential duplicate profiles are determined based on the matching probability weight that indicates how closely two profiles match.

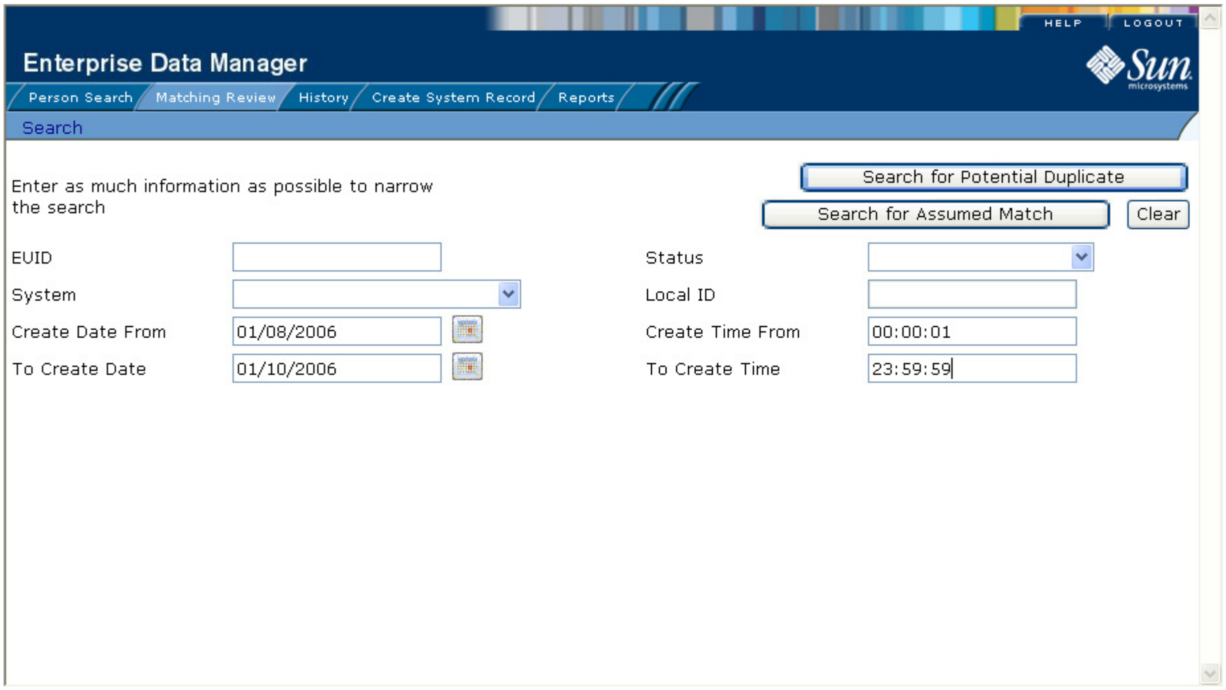
Figure 53 Potential Duplicate Comparison Page



To find potential duplicates

1. Obtain information about the patient whose potential duplicates you want to view, such as a system in which they are registered or the login ID of the user who created the patient profile.
2. On the EDM, select **Matching Review**. The Matching Review Search page appears.

Figure 54 Matching Review Search Page



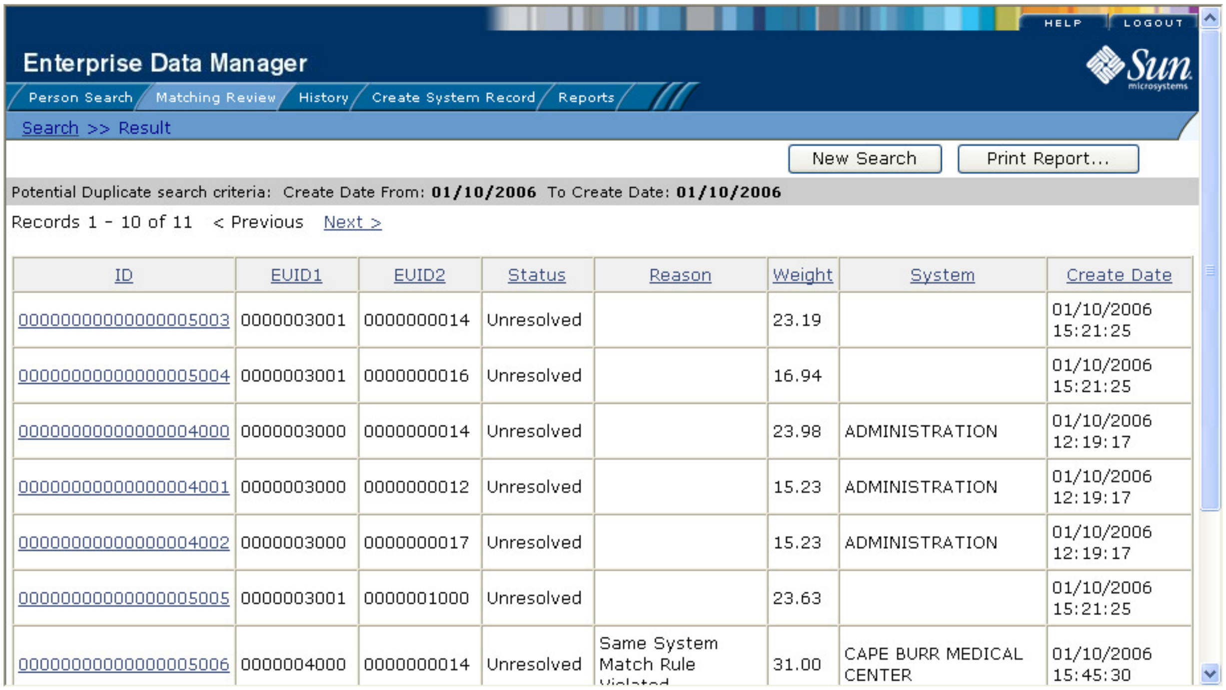
3 On the Matching Review Search page, enter your search criteria (for more information, see **About Matching Review Search Fields** on page 117).

4 In the upper portion of the page, click **Search for Potential Duplicate**.

If more than one potential duplicate pair matches the search, the Potential Duplicate Result page appears (for more information, see **About Potential Duplicate Results Fields** on page 118).

If only one potential duplicate pair matches the search, the Comparison page appears. Skip to step 8.

Figure 55 Potential Duplicate Search Results List

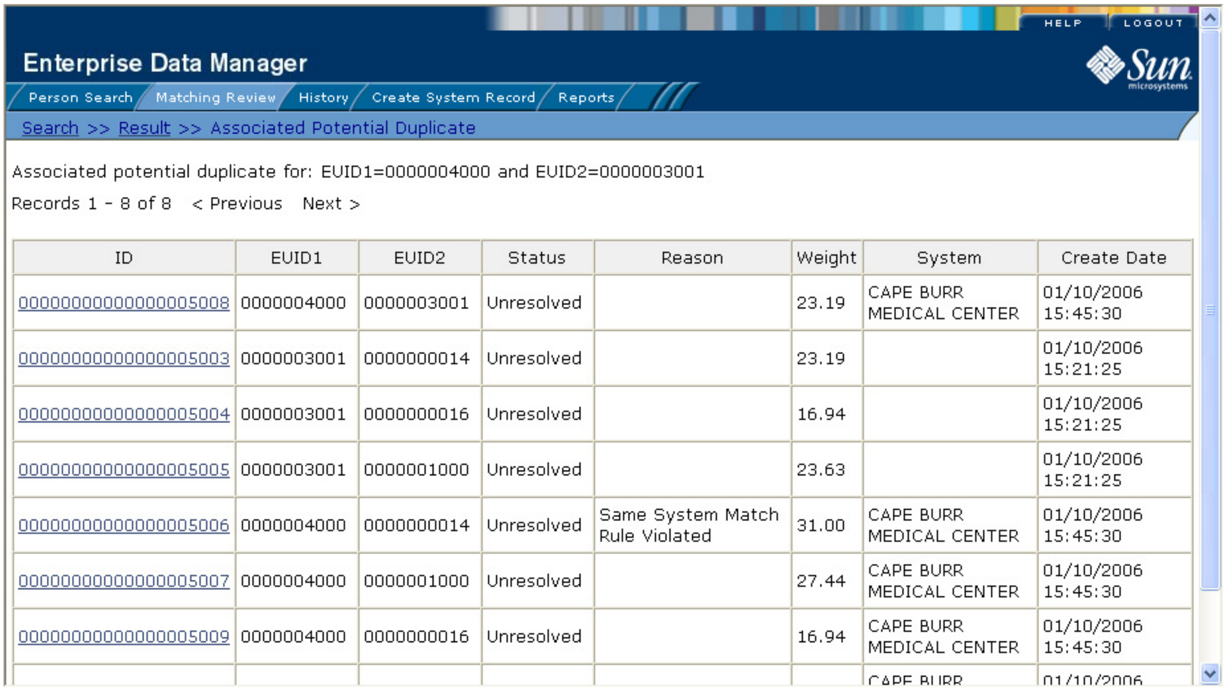


5 In the Results list, click the ID of the pair of potential duplicate profiles you want to compare.

6 Do one of the following:

- If the profiles you selected have additional potential duplicates, then the Associated Records page appears. Continue to step 8.
- If the profiles do not have additional duplicates, the Comparison page appears with the two profiles displayed side-by-side (see Figure 53). Skip to step 9.

Figure 56 Associated Records List



7 On the Associated Records page, click the ID of the pair of profiles you want to compare. The Comparison page appears with any differences between the two profiles highlighted in blue (see Figure 53).

Note: *If there is more than one page of results on the Associated Records, click* **Next** *to view the next page.*

8 To compare additional SBR information for each profile, do any of the following:

- To compare address information, expand the **Address** row under **SBR**, and then select an address type in both the right and left EUID trees.
- To compare telephone information, expand the **Phone** row under **SBR**, and then select a telephone type in both the right and left EUID trees.
- To compare alias information, expand the **Alias** row under **SBR**, and then select an alias name in both the right and left EUID trees.
- To compare auxiliary ID information, expand the **AuxId** row under **SBR**, and then select an auxiliary ID type in both the right and left EUID trees.
- To compare comment information, expand the **Comment** row under **SBR**, and then select a comment code in both the right and left EUID trees.

For information about the fields displayed on this page, see the field descriptions listed in **Viewing Patient Profiles** on page 49.

9 To compare information contained in the system records of each profile, do any of the following:

- To compare address information, expand the **Address** row under the right and left system records, and then select an address type in each.
- To compare telephone information, expand the **Phone** row under the right and left system records, and then select a telephone type in each.
- To compare alias information, expand the **Alias** row under the right and left system records, and then select the alias name you want to view in each.
- To compare auxiliary ID information, expand the **AuxId** row under the right and left system records, and then select an auxiliary ID type in each.
- To compare comment information, expand the **Comment** row under the right and left system records, and then select a comment code in each.

For information about the fields displayed on this page, see the field descriptions listed in **Viewing Patient Profiles** on page 49.

Note: *If you select different types of data for each side, the differences between the two profiles are no longer highlighted (for example, if you choose SBR address data on one side and system record address data on the other; or if you choose SBR address data on one side and SBR phone data on the other).*

10 To view the following entry in the potential duplicate results list, click **Next>**.

11 To view the previous entry in the potential duplicate results list, click **<Previous**.

12 To return to the potential duplicates results list, click **Result**.

About Matching Review Search Fields

The fields located on the Matching Review Search page allow you to specify information about the potential duplicate or assumed match profiles you want to view.

Table 21 Matching Review Search Fields

In this field ...	type or select ...
EUID	The enterprise-wide unique identification number of one of the profiles you want to view.
Status	The potential duplicate status of the profiles you want to view. Possible values for this field are **Unresolved**, **Resolved**, or **Permanently Resolved**.
System	The system with which the patient profile that caused the potential duplicate flag is associated (such as a registration system).
Local ID	The local ID associated with the patient profile in the specified system. The name of this field might be different for your implementation.
Create Date From	A beginning create date for the profiles you want to view. The query is performed for transactions that were created between the **Create Date From** (and **Create Time From**) and the **To Create Date** (and **To Create Time**).

Table 21 Matching Review Search Fields

In this field ...	type or select ...
Create Time From	The beginning create time for the profiles you want to view (using 24-hour notation). If no time is entered, the default value is 00:01 (12:01 A.M.).
To Create Date	The ending create date for the profiles you want to view.
To Create Time	The ending create time for the profiles you want to view (using 24-hour notation). If no time is entered, the default value is 24:00.

About Potential Duplicate Results Fields

The fields located in the potential duplicate results list help you to identify a potential duplicate pair to display on the Comparison page.

Table 22 Potential Duplicate Results Fields

This field ...	displays this information ...
ID	The potential duplicate ID of the transaction that caused the potential duplicate pair.
EUID1	The enterprise-wide unique identification number of the patient profile whose addition to the database created the potential duplicate listing.
EUID2	The enterprise-wide unique identification number of the profile that was flagged as a potential duplicate with the profile identified by the EUID1.
Status	The potential duplicate status of the potential duplicate pair.
Reason	The reason that the profiles were listed as potential duplicates.
Weight	The matching probability weight between the two profiles in each row.
System	The system with which the patient profile identified by EUID1 is associated.
Create Date	The date and time that the transaction that caused the potential duplicate listing occurred.

Merging Potential Duplicates

When you compare two potential duplicate profiles, you might find that the patient profiles represent the same patient, or that a system record from one profile actually belongs in the other profile. You can perform either a patient profile merge or a system record merge to correct this. When you merge two profiles, the SBR of the surviving profile(s) is automatically recalculated based on the system records involved in the merge.

To combine patient profiles

1. Compare two potential duplicate profiles, as described in **Finding Potential Duplicates** on page 113.
2. Determine which of the two profiles you want to keep, and then click the **EUID Merge** arrows pointing toward that profile.

   The merge result profile appears, allowing you to view the profile that will be saved after the merge.
3. Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

To combine system records

1. Compare the system records from two potential duplicate profiles, as described in **Finding Potential Duplicates** on page 113.
2. Determine which of the two system records you want to keep.
3. Highlight both system records to be merged, and then click the **LID Merge** arrows pointing toward the system record you want to keep.
4. To retain any fields from the non-surviving system record, select the option button next to each field you want to keep.
5. To specify which child objects to retain, do the following for each type of child object:
   - Display the child objects to determine which to retain and which to remove.
   - For each child object you do not want to save in the new system record, click **Remove <*child_type*>** beneath that child object (where <*child_type*> is the type of child object to remove).

Important: *If you do not specify which child objects to retain, the master index chooses for you; however, the EDM can be configured such that you must select which child objects to retain for certain object types (see your system administrator for more information about how your EDM is configured).*
If specifying child objects to retain is optional and you do not manually select the child objects, the default is to retain all child objects from both profiles of a unique type. If there are any child objects of the same type, the default is to retain only the child object of the surviving system record. For example, if one system record has an office address and the other has a home address, both addresses are retained; but if both system records have a home address, the address of the surviving system record is retained.

6. In the upper portion of the page, click **Merge**.

   The merge result record appears, allowing you to view the information that will be saved in the SBR after the merge.
7. Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

Resolving Potential Duplicates

When you compare two potential duplicate profiles and determine that they do not represent the same patient, you can resolve the two profiles to flag the profiles as not being potential duplicates. There are two types of resolution. *Resolve* removes a potential duplicate flag, but if one of the resolved profiles is updated the records might be listed as potential duplicates again. *Resolve Permanently* flags the two profiles as being permanently resolved.

To resolve two potential duplicate profiles

1. Compare two potential duplicate profiles, as described in **Finding Potential Duplicates** on page 113.
2. Do one of the following:
   - To flag the potential duplicate profiles as resolved but still allow the potential duplicate listing to be reinstated in the future, click **Resolved** on the Comparison page.
   - To flag the potential duplicate profiles as resolved and never allow the potential duplicate listing to be reinstated, click **Resolve Permanently** on the Comparison page.
3. On the confirmation dialog box, click **OK**.

   The status of the potential duplicate entry is changed to Resolved, and the profiles are no longer regarded as possible duplicates of one another.

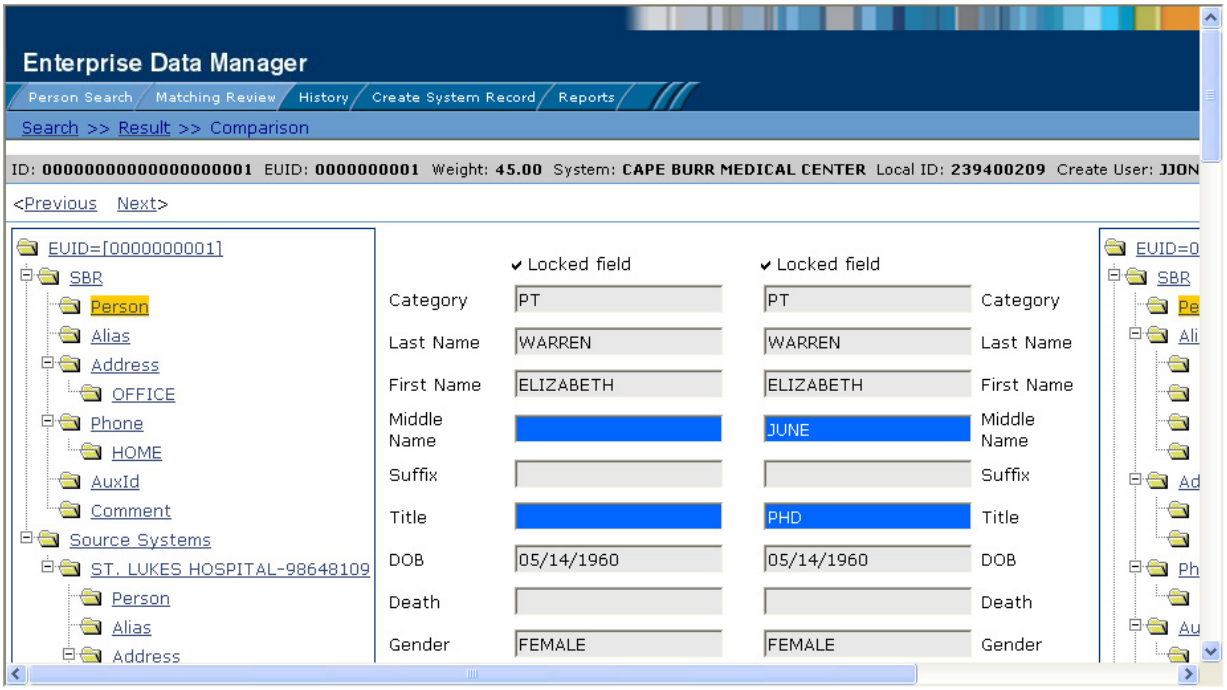
5.3.11 Working with Assumed Matches

The Matching Review function of the EDM allows you to view any patient profiles that were automatically updated by the master index as a result of an assumed match. You can reverse the assumed match if necessary. This section provides instructions for finding profiles updated by an assumed match and then reversing the update if necessary.

Finding Assumed Matches

You can easily find patient profiles that were updated by an assumed match using the Matching Review function of the EDM. When you search for assumed matches, you can select a patient profile to view from a results list.

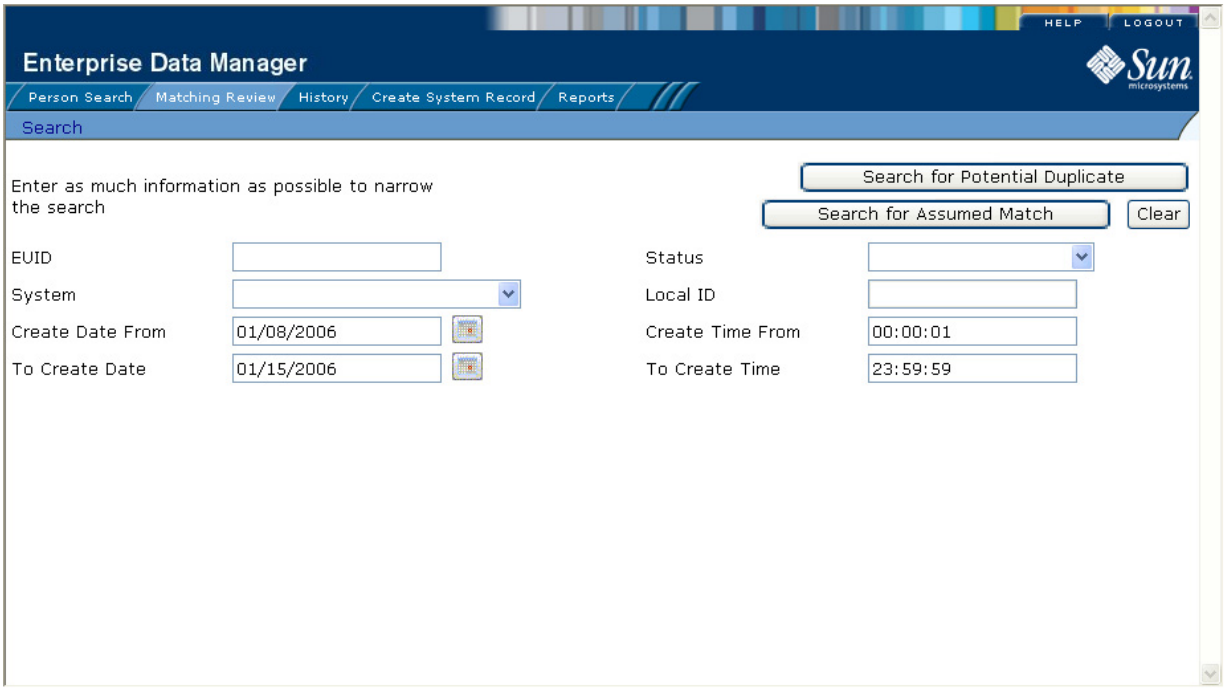
Figure 57 Assumed Match Page



To find assumed matches

1. Obtain information about the patient profile you want to view, such as their EUID, a system in which they are registered, or the login ID of the user who added the record that caused the update.
2. On the EDM, select **Matching Review**. The Matching Review Search page appears.

Figure 58 Matching Review Search Page

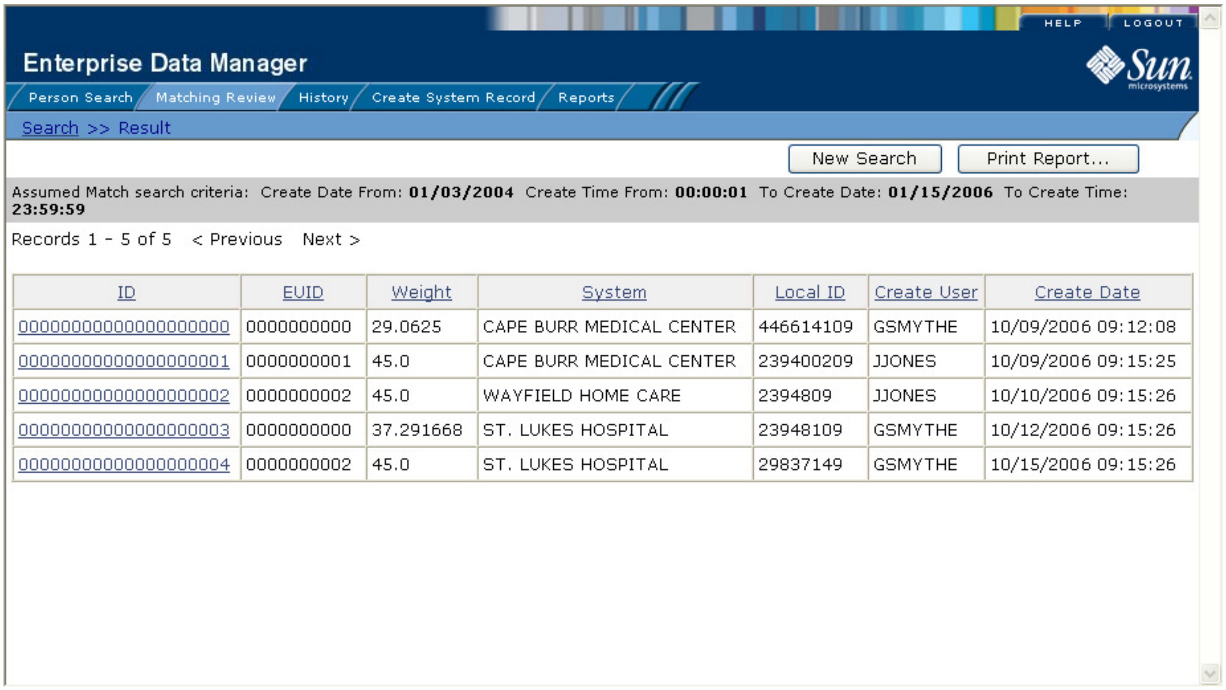


3 On the Matching Review Search page, enter the search criteria (for more information, see **About Matching Review Search Fields** on page 117).

4 In the upper portion of the page, click **Search for Assumed Match**. One of the following occurs:

- If more than one profile matches the search criteria, the Assumed Match Result page appears (for more information, see **About Assumed Match Results Fields** on page 123). Continue to step 5.
- If only one profile matches the search criteria, the Assumed Match page appears with a comparison of the two profiles that were combined with the differences between the two profiles highlighted in blue. Skip to step 6.

Figure 59 Assumed Match Results List



5 In the Results list, click the ID of the assumed match profile you want to view.

The Assumed Match page appears with the demographic information of the SBR displayed.

6 To view additional information about the patient, review the instructions provided under **Viewing Patient Profiles** on page 49.

7 To view the following entry in the assumed match results list, click **Next>**.

8 To view the previous entry in the assumed match results list, click **<Previous**.

9 To return to the assumed match results list, click **Result**.

About Assumed Match Results Fields

The fields located in the assumed match results list help you to identify an assumed match transaction to display on the Comparison page.

Table 23 Assumed Match Results Fields

This field ...	displays this information ...
ID	The assumed match ID of the transaction that caused the assumed match.
EUID	The enterprise-wide unique identification number of the patient profile that was updated by the assumed match.
Weight	The matching probability weight between the updated profile and the record that caused the assumed match.

Table 23 Assumed Match Results Fields

This field ...	displays this information ...
System	The system with which the record that caused the assumed match is associated.
Local ID	The local ID in the above system for the record that caused the assumed match. The name of this field might be different for your implementation.
Create User	The login ID of the user who added the profile that created the assumed match.
Create Date	The date and time the transaction that caused the assumed match occurred.

Reversing an Assumed Match

If you find that an assumed match was made in error, you can reverse the assumed match. This process returns the updated patient profile to its status just prior to the assumed match update, creates a new patient profile for the record that caused the assumed match, and recalculates the SBR for the existing profile.

To reverse an assumed match

1. View the assumed match profile, as described in **Finding Assumed Matches** on page 120.
2. In the upper portion of the page, click **Undo Assumed Match**.

   A confirmation dialog box appears, providing the EUID number of the new profile that will be created as a result of reversing the match.
3. On the confirmation dialog box, click **OK**.

   The assumed match is undone, the updated profile is returned to its state prior to the assumed match, and a new patient profile is created for the system record that caused the assumed match. Any changes that were made after the assumed match but before reversing the assumed match are retained.

5.3.12 Combining Patient Information

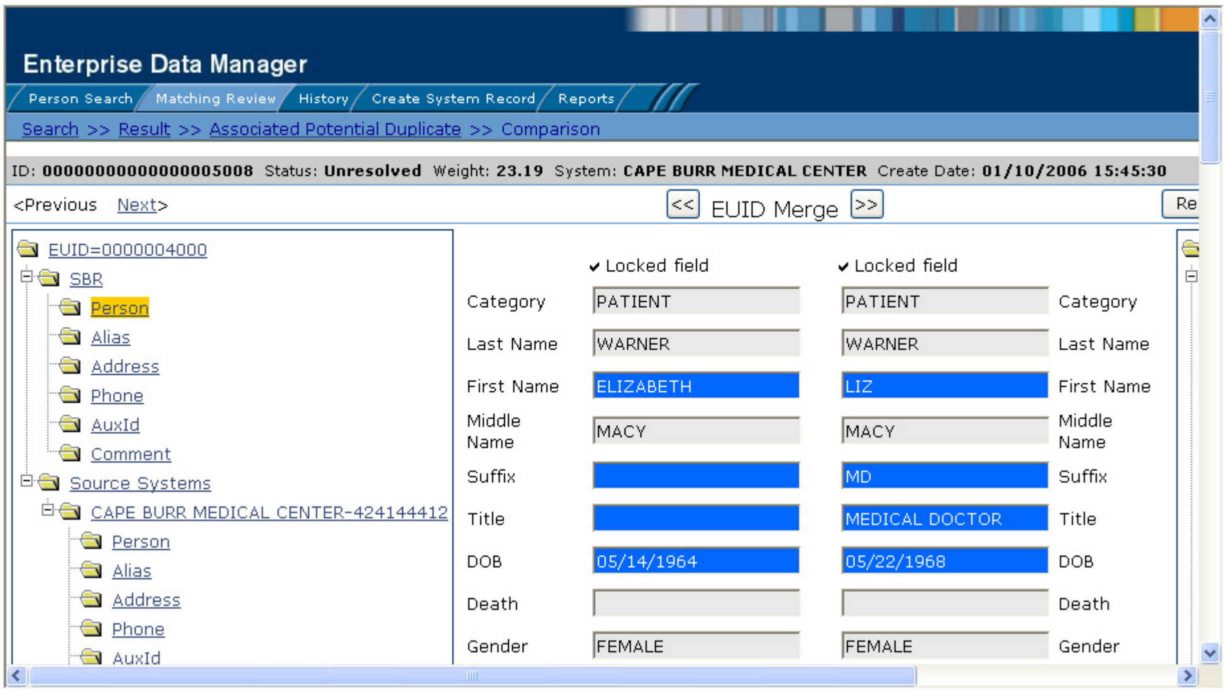
When you determine that two patient profiles represent the same patient, you can merge the profiles to form one profile that contains the patient's most current information. You can also merge system records within one profile or from one profile to another. The resulting profile is called the Merge Result Record. The SBR for the surviving profile(s) is automatically recalculated based on the system records involved in the merge.

You can display the patient profiles to merge using the Person Search function or the Matching Review function. This section describes how to merge records using the Person Search function. For information about merging records using the Matching Review function, see **Merging Potential Duplicates** on page 118.

Merging Patient Profiles

When you merge patient profiles, all of the system records associated with the non-surviving patient profile are transferred to the surviving patient profile. The non-surviving profile is given a status of merged, and is no longer active. The SBR of the surviving profile is recalculated based on the new system records that were added to the profile due to the merge. After merging two profiles, review the system records in the active profile to determine whether any of them should be deactivated.

Figure 60 Comparison Page - Merging Patient Profiles



To merge patient profiles

1. Perform a search for the patient profiles you want to merge using any of the search procedures described in **Searching for Patient Profiles** on page 32.
2. Select the check boxes to the left of the two profiles you want to merge in the results list.
3. In the first cell of the results table, click **Compare Records**.

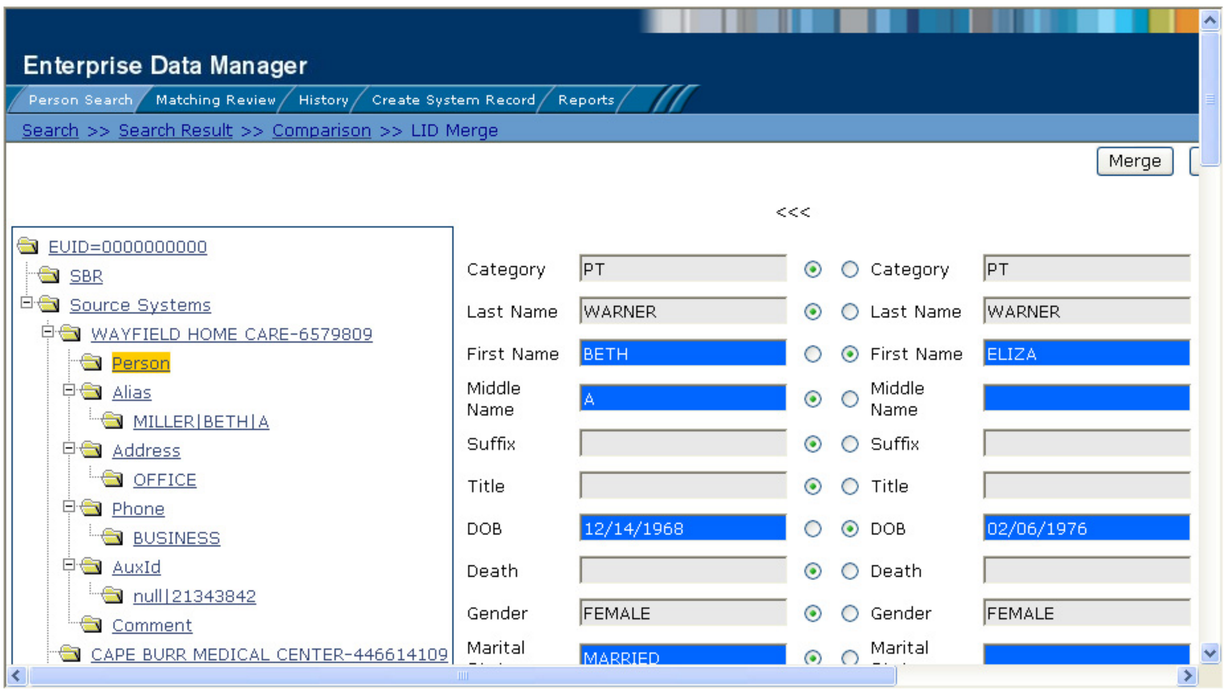
   The Comparison page appears.
4. Determine which of the two profiles you want to keep, and then click the **EUID Merge** arrows pointing toward that profile.

   The merge result profile appears, allowing you to view the profile that will be saved after the merge.
5. Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

Merging System Records

You can merge a system record from one patient profile into a system record from another patient profile or you can merge two system records in one profile, as long as both system records originated from the same system. You can also specify which, if any, information to save from the non-surviving system record. When you merge system records, the non-surviving system record is transferred into the patient profile of the surviving system record, and is given a status of merged. The SBR of the surviving profile is automatically recalculated.

Figure 61 Merging System Records



To merge system records

1. Perform a search for the patient profiles whose system records you want to merge using any of the search procedures described in **Searching for Patient Profiles** on page 32.
2. Select the check boxes to the left of the two profiles containing the system records you want to merge.
3. In the first cell of the results table, click **Compare Records**.

   The Comparison page appears with the differences between the two records highlighted in blue.
4. Determine which system record you want to keep, and highlight the Person object of those system records in the EUID trees.

   Two LID Merge arrow buttons appear at the top of the page.

5 Click the **LID Merge** arrows pointing toward the profile containing the system record that will be kept.

6 To retain any fields from the non-surviving system record, select the Person objects in the system objects to merge, and then select the option button next to each field you want to keep.

7 To specify which child objects of the two system objects to retain, do the following for each type of child object:

- Display the child objects to determine which to retain and which to remove.
- For each child object you do not want to save in the new system record, click **Remove <*child_type*>** beneath that child object (where <*child_type*> is the type of child object to remove).

Important: *If you do not specify which child objects to retain, the master index chooses for you; however, the EDM can be configured such that you must select which child objects to retain for certain object types (see your system administrator for more information about how your EDM is configured).*
If specifying child objects to retain is optional and you do not manually select the child objects, the default is to retain all child objects from both profiles of a unique type. If there are any child objects of the same type, the default is to retain only the child object of the surviving system record. For example, if one system record has an office address and the other has a home address, both addresses are retained; but if both system records have a home address, the address of the surviving system record is retained.

8 In the upper portion of the page, click **Merge**.

The merge result record appears, allowing you to view the information that will be saved in the SBR after the merge.

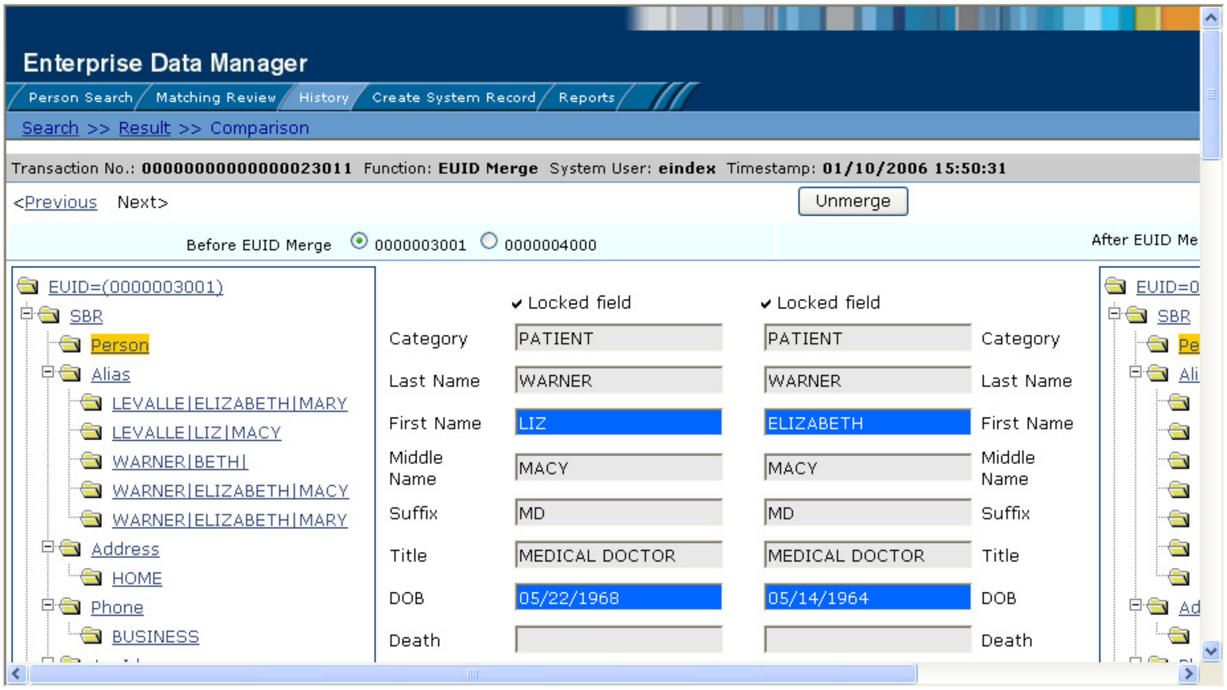
9 Click **Confirm** to finalize the merge, or **Cancel** to return to the Comparison page and review the profiles again.

After you merge two system records, the surviving system record is updated, and the non-surviving system record is transferred to the “merge to” patient profile and is marked as merged. The SBRs for both patient profiles involved in the merge are recalculated. If the “merge from” patient profile no longer has any system records, it is deactivated.

5.3.13 Unmerging Patient Information

If two patient profiles or system records are merged in error, you can unmerge the profiles or system records. The unmerge function is accessed from the Transaction History window.

Figure 62 Unmerge Page



Unmerging Patient Profiles

If two patient profiles are merged in error, the profiles can easily be separated by unmerging the two profiles. When you unmerge two patient profiles, the information is returned to the original profiles, the system records are returned to their original profiles, and any changes that were made after the merge are retained. Any system records that were added while the profiles were merged are associated with the profile that was active at the time.

To unmerge two merged patient profiles

1. Obtain information about the patient profile that is still active after the merge process, such as the EUID, the system that caused the merge, and so on.
2. Perform a search for the merge transaction, as described in **Viewing a Transaction History** on page 62. (You can also access the Transaction History Search Result page by displaying the active profile on the View/Edit page, and then clicking **Transaction History**.)
3. From the Results list, select the merge transaction you want to unmerge. This must be the most recent merge transaction for the profile, and must have a function of **EUID Merge**.

   The Transaction History page appears.

Note: *The profiles that appear on the Transaction History page display the information contained in the surviving patient profile before and after the merge occurred. Select* *the option button next to the second EUID in the upper portion of the window to view a before image of the non-surviving profile.*

4 In the upper portion of the page, click **Unmerge**.

The page changes to display side-by-side images of how the records will appear after they are unmerged.

5 Do one of the following:

- To finalize the unmerge, click **Confirm** in the upper portion of the page.
- To cancel the unmerge and return to the Transaction Comparison page, click **Cancel** in the upper portion of the page.

Unmerging System Records

If two system records are merged in error, the records can easily be separated by unmerging the two system records. When system records are unmerged, the system record that became inactive is reactivated and, if the system record was merged from a different patient profile, it is returned to its original profile. The SBR is recalculated for all affected patient profiles. Any changes made to the surviving system record following the merge are retained after the unmerge transaction.

To unmerge two merged system records

1 Obtain information about either patient profile involved in the merge, such as the EUID, the system that caused the merge, and so on.

2 Perform a search for the merge transaction, as described in **Viewing a Transaction History** on page 62. (You can also access the Transaction History Search Result page by displaying the active profile on the View/Edit page, and then clicking **Transaction History**.)

3 From the Results list, select the merge transaction you want to unmerge. This must be the most recent merge transaction for the system record, and has a function of **System Record Merge**.

The Transaction History page appears.

Note: *The profiles that appear on the Transaction History page display the information contained in the patient profile into which the system record was merged both before and after the merge occurred.*

4 In the upper portion of the page, click **Unmerge**.

The page changes to display side-by-side images of how the records will appear after they are unmerged.

5 Do one of the following:

- To finalize the unmerge, click **Confirm** in the upper portion of the page.
- To cancel the unmerge and return to the Transaction Comparison page, click **Cancel** in the upper portion of the page.

Chapter 6

Generating Reports

You can run reports about the data stored in the master index database from the EDM. The reports can also be run from a command line, but this chapter only presents the background information and the step-by-step instructions you need to run the reports from the EDM. For more information about command line reports, see the *Sun SeeBeyond eView Studio Reporting Guid*e.

What's in This Chapter

6.1 Reports Overview

eIndex SPV provides a set of production, activity, and search result reports that can be generated from the EDM. The production reports provide information about the current state of the data in the master index, helping you monitor stored data and determine how that data needs to be updated. This information also helps verify that the matching logic and weight thresholds are defined correctly. Activity reports provide statistical information for transactions over specific periods of time. Search result reports allow you to print a list of profiles in a search result set.

6.1.1 Production Reports

Production reports provide information about the transactions that are processed through the master index database. These reports provide lists of potential duplicate profiles, merge transactions, unmerge transactions, assumed matches, updates, and deactivated profiles for a specified time period. The information you find in these reports provides valuable information about how data is being processed with the current configuration. In addition to running the production reports daily, you should run them against any data that has been loaded from existing systems into the master index database in batch format.

Production reports can be run for the current day, the previous day, or for a date range you specify. If you run your daily reports in the evening, you should run the current day's reports. If you run your daily reports in the morning, you should run the previous day's reports. For samples of the production reports, see appendix A of the *Sun SeeBeyond eView Studio Reporting Guide*.

- **Assumed Match Report** - This report displays information about any profiles that were automatically updated by incoming data during the specified time period. The information in this report, in combination with data from the potential duplicate report, helps you determine whether the matching threshold for assumed matches is accurate. You should review this report daily to ensure that no assumed matches were made in error.
- **Deactivated Record Report** - This report displays a list of all profiles that were deactivated during the specified time period. Review this report daily to ensure that no profiles were deactivated in error. eIndex SPV provides the ability to reactivate any deactivated profile.
- **Potential Duplicate Report** - This report displays information about patient profiles that were marked as potential duplicates of one another during the specified time period. The information provided in this report can help you determine whether the matching threshold and the duplicate threshold are configured accurately. Review this report daily to ensure potential duplicates are managed in a timely manner, and use this report as a work list when processing potential duplicates.
- **Merge Transaction Report** - This report displays a list of all enterprise records that were merged during the specified time period. Review this report daily to ensure that no profiles were merged in error. eIndex SPV provides the ability to unmerge any merged profiles.
- **UnMerge Transaction Report** - This report displays a list of all enterprise records that were unmerged during the specified time period.
- **Update Report** - This report displays patient profiles whose information was updated during the specified time period. Review this report daily to verify the updates made in a given day. This report can help explain why a resolved potential duplicate listing was reinstated to the potential duplicate list.

6.1.2 Activity Reports

Activity reports should be run weekly, monthly, and yearly to obtain statistical data about the transactions that are processed through the master index database. These reports give the number of each type of transaction performed for the specified week, month, or year. They also provide cumulative information for the week, month, or year to date. The information you find in these reports helps analyze the condition of the data by giving you the number of potential duplicates created, the number of assumed matches, and so on.

- **Weekly Activity Report** - This report displays a summary of transactions that occurred against the database on each day for the specified calendar week (always Sunday through Saturday). The information provided in this summary includes the number of each of the following transactions performed each day.
    - Add
    - Update
    - EUID Deactivate
    - EUID Merge

- EUID Unmerge
- LID Merge
- LID Unmerge
- LID Transfer

- **Monthly Activity Report** - This report displays a summary of transactions that occurred against the database during the specified month. You can run this report for any calendar month. The information provided in this summary includes the number of each of the following transactions that were performed for the month:
    - Add
    - EUID Deactivate
    - EUID Merge
    - EUID Unmerge
    - LID Merge
    - LID Unmerge
    - Unresolved Potential Duplicates
    - Resolved Potential Duplicates
- **Yearly Activity Report** - This report displays a summary of transactions that occurred against the database for the specified calendar year. You can run this report for any calendar year. The information provided in this report includes a summary of each transaction listed for the monthly activity report above.

6.1.3 Search Result Reports

In addition to viewing a search result list on an EDM window, you can create and print a search result report. This allows you to view a complete list of all profiles in a result set rather than viewing them one page at a time. You can generate search result reports for general, transaction history, assumed match, potential duplicate, and audit log search results. These reports are accessed from the Search Results page for the search you performed. Search result reports can be viewed online or sent to a printer of your choice. The fields that appear on the reports depend on the fields that appear on the Results page for the type of search you performed.

6.1.4 Configuring Reports

The report files are configured by the Enterprise Data Manager configuration file in the Enterprise Designer. For detailed information and instructions on configuring the reports, see chapter 3 of the *Sun SeeBeyond eView Studio Reporting Guide* or chapter 9 of the *Sun SeeBeyond eView Studio Configuration Guide*.

6.1.5 Masked Data

Though the EDM can be configured to hide certain fields from users who do not have the appropriate security permissions, reports generated from the EDM will display the hidden data if those fields are configured to appear on the reports. Be sure to only give access to users who should be able to view this information, or do not include hidden fields in the reports.

6.2 Running EDM Reports

Reports are run from the Reports page of the EDM and from various Search Result pages. You must have the appropriate security permissions to run the production, activity, and search reports from the EDM.

6.2.1 Running Production and Activity Reports

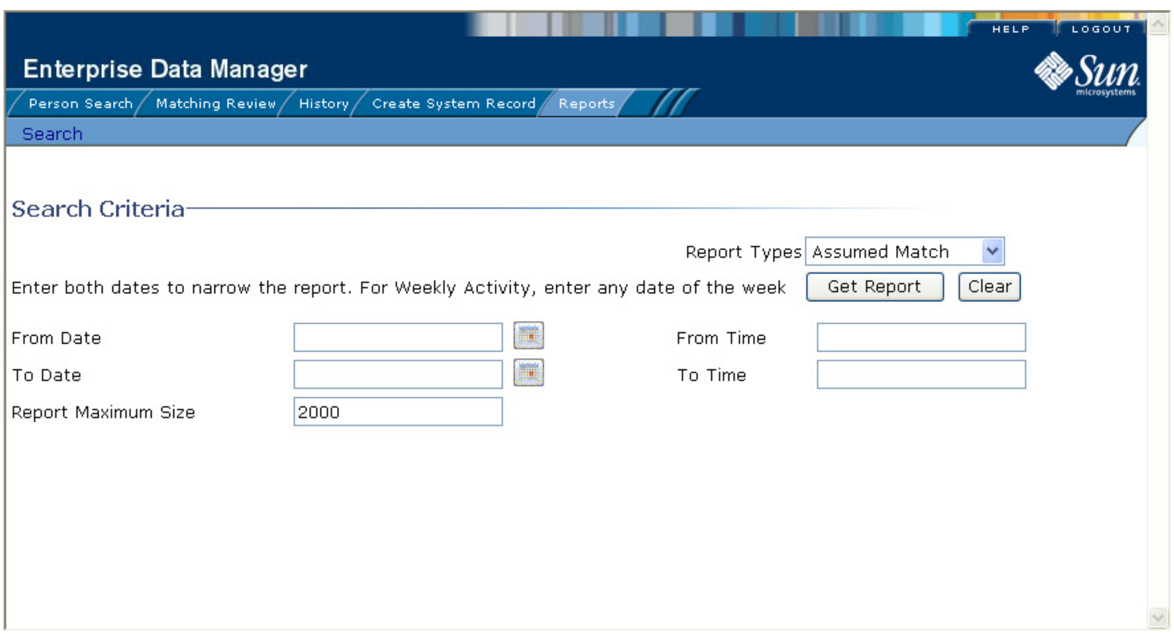
To run production and activity reports, you need to specify a time period for the reports. Both types of report are run from the Reports page on the EDM.

To run reports from the EDM

1. Log in to the EDM, and then click the Reports tab.

   The Reports Search page appears (see Figure 63).

Figure 63 Reports Search Page

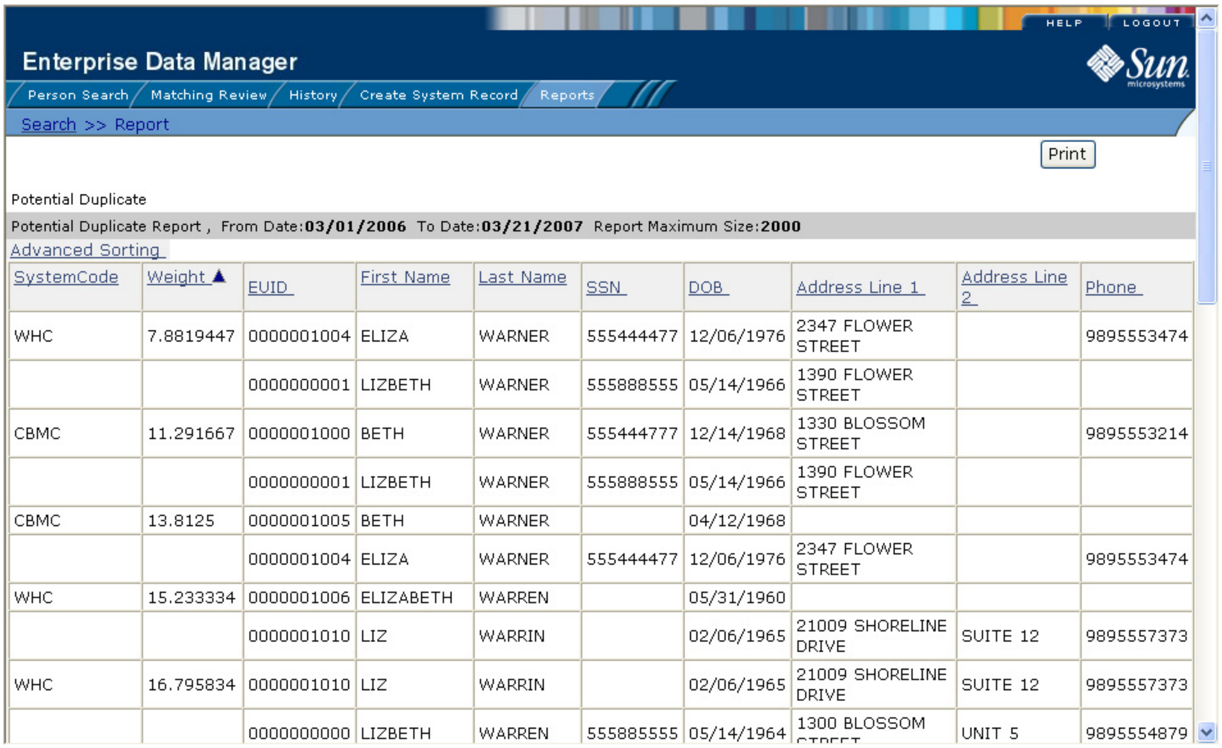


2 On the Reports Search page, select the type of report to run from the **Report Types** list, and then fill in the search criteria (see **About Report Search Fields** on page 135).

3 Click **Get Report**.

The selected report appears (see Figure 64).

Figure 64 Potential Duplicate Report Sample



SystemCode	Weight ▲	EUID	First Name	Last Name	SSN	DOB	Address Line 1	Address Line 2	Phone
WHC	7.8819447	0000001004	ELIZA	WARNER	555444477	12/06/1976	2347 FLOWER STREET		9895553474
		0000000001	LIZBETH	WARNER	555888555	05/14/1966	1390 FLOWER STREET		
CBMC	11.291667	0000001000	BETH	WARNER	555444777	12/14/1968	1330 BLOSSOM STREET		9895553214
		0000000001	LIZBETH	WARNER	555888555	05/14/1966	1390 FLOWER STREET		
CBMC	13.8125	0000001005	BETH	WARNER		04/12/1968			
		0000001004	ELIZA	WARNER	555444477	12/06/1976	2347 FLOWER STREET		9895553474
WHC	15.233334	0000001006	ELIZABETH	WARREN		05/31/1960			
		0000001010	LIZ	WARRIN		02/06/1965	21009 SHORELINE DRIVE	SUITE 12	9895557373
WHC	16.795834	0000001010	LIZ	WARRIN		02/06/1965	21009 SHORELINE DRIVE	SUITE 12	9895557373
		0000000000	LIZBETH	WARREN	555885555	05/14/1964	1300 BLOSSOM	UNIT 5	9895554879

4 To sort the report by a single column, click that column name.

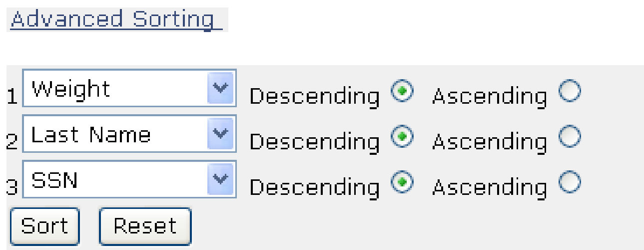
5 To change whether the column is sorted by ascending or descending order, click again on the column.

6 To sort by multiple columns, do the following:

A Click **Advanced Sorting**.

The advanced sorting fields appear.

Figure 65 Advanced Sorting for Reports



B In the first field, select the name of the primary sorting column, and then select **Descending** or **Ascending** for the sort order.

C Repeat the above step for the second and third sorting columns, if any.

D Click **Sort**.

7 To print the report, click **Print** in the upper right portion of the window.

About Report Search Fields

The fields on the Report Search page let you specify a date range for each report. For Potential Duplicate reports, you can also specify the status of the potential duplicates returned by the search. For the Weekly Activity Report, you only need to enter one date; the report will automatically display information for the calendar week containing that date.

Table 24 Report Search Fields

In this field ...	type or select ...
From Date	The start date for the report. The report will retrieve transactions that occurred beginning on this date through the date specified in the **To Date** field.
From Time	The start time for the report, in the format **HHmmss**.
To Date	The end date for the report.
To Time	The end time for the report, in the format **HHmmss**.
Report Maximum Size	For Potential Duplicate and Assumed Match reports only, the number of records to display for the report. This allows you to limit the size of the report.
Status	For Potential Duplicate reports only, the status of the potential duplicate pairs to retrieve. You can specify all statuses by leaving this field blank, or you can select Resolved, Unresolved, or Permanently Resolved. This field is not visible for any other type of report.

6.2.2 Running Search Result Reports

Search Result reports are run from the Search Results page that appears after you perform a general, transaction history, assumed match, potential duplicate, or audit log search.

To run a Search Result report

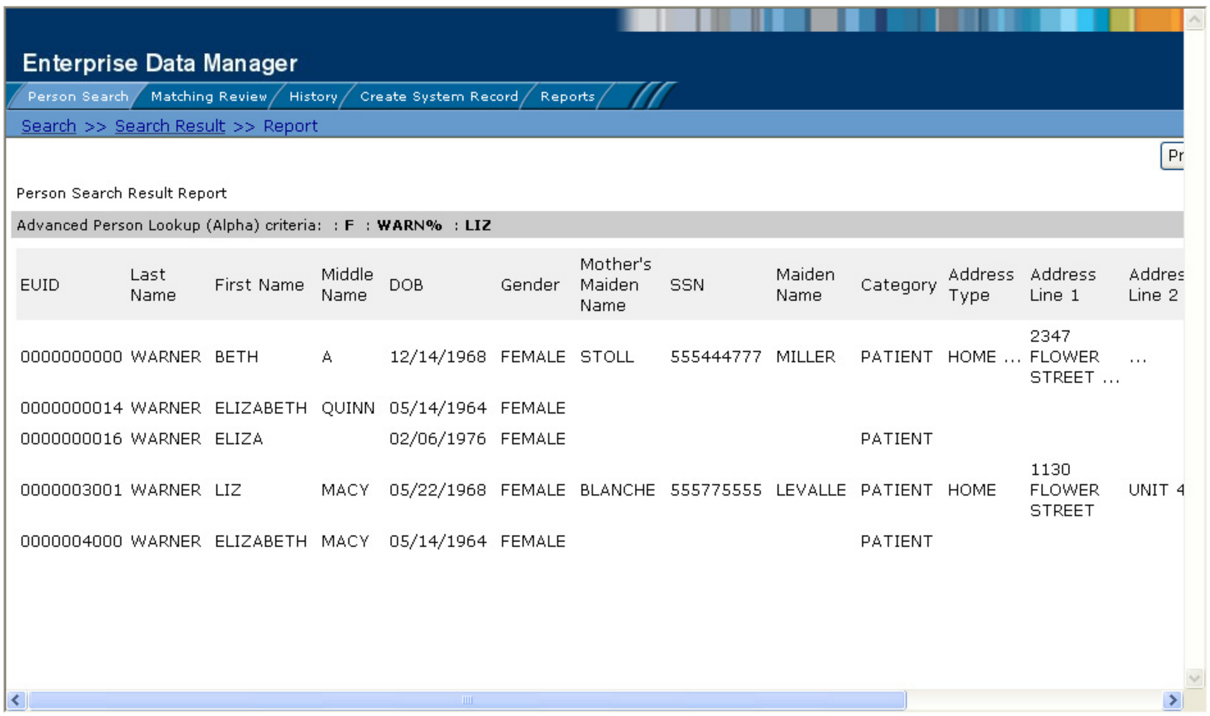
1 Perform any type of search, as described in **Chapter 3**, **“Searching for Patient Profiles”**.

Note: *You cannot print a search result report for a search that results in only one matching profile since the Results page does not appear in that case; the View/Edit page appears instead.*

2 On the search results page, click **Print Report...** in the upper right section of the page.

The Search Result Report page appears (see Figure 66).

Figure 66 Search Result Report Page



3 To print the report, click **Print** in the upper right section of the page.

Glossary

alias
An alternative name by which a patient may be known, such as a nickname or maiden name.

alphanumeric search
A type of search that looks for profiles that precisely match the specified criteria. This type of search does not allow for misspellings or data entry errors, but does allow the use of wildcard characters.

assumed match
When the matching weight between two profiles is at or above a weight you specify and the profiles are from two different systems, (depending on the configuration of matching parameters) the objects are considered an assumed match and are automatically combined.

auxiliary ID
An identification code that may be assigned to several patients in the database. For example, if a family uses a single insurance policy, each family member is assigned the same identification code for that account or policy.

Blocking Query
Also known as a blocker query, this is used during matching to search the database for possible matches to a new or updated record. Blocking queries can also be used for searches done from the EDM.This query makes multiple passes against the database using different combinations of criteria, which are defined in the Candidate Select file.

Candidate Select file
The eIndex SPV configuration file that defines the queries you can perform from the Enterprise Data Manager (EDM) and the queries that are performed for matching.

candidate selection
The process of performing the blocking query for match processing. See *Blocking Query.*

candidate selection pool
The group of possible matching records returned by the blocking query. These records are weighed against the new or updated record to determine the probability of a match.

comment
Free-text information that you can associate with a patient profile to insert any data you choose about the patient.

deactivate
When you deactivate a patient profile or system record, that profile or record is no longer active and cannot be modified or merged.

duplicate threshold
The matching probability weight at or above which two records are considered to potentially represent the same person. See also *matching threshold*.

EDM
See *Enterprise Data Manager*.

Enterprise Data Manager
The web-based interface that allows monitoring and manual control of the master index database. The configuration of the EDM is stored in the Enterprise Data Manager file. Also known as the EDM.

enterprise object
See *patient profile*.

EUID
The enterprise-wide unique identification number assigned to each patient profile in the master index. This number is used to cross-reference patient profiles and to uniquely identify each patient throughout your organization.

LID
See *local ID*.

local ID
A unique identification code assigned to a patient in a specific local system. A patient profile may have several local IDs in different systems. The combination of a local ID and system constitutes a unique identifier for a system record. The name of the local ID field is configurable on the EDM, and might have been modified for your implementation.

main menu
The uppermost menu on the EDM pages. You can access all of the primary functions of the master index from this menu.

master patient index
A database application that centralizes and cross-references information about the patients in a healthcare organization.

match string
The data string that is sent to the match engine for probabilistic weighting. This string is defined by the match system object defined in the Match Field file and must match the string defined in the match engine configuration files.

matching probability weight
An indicator of how closely two records match one another. The weight is generated using matching algorithm logic, and is used to determine whether two records represent the same patient. See also *duplicate threshold* and *matching threshold*.

matching threshold
The lowest matching probability weight at which two records can be considered a match of one another. See also *duplicate threshold* and *matching probability weight*.

matching weight *or* match weight
See *matching probability weight*.

merge
To join two patient profiles or system records that represent the same person into one patient profile.

merge history
A tree structure that displays a history of the profiles that have been merged together to form the selected patient profile.

merged profile
See *non-surviving profile*.

non-surviving profile
A patient profile that is no longer active because it has been merged into another patient profile. Also called a *merged profile*.

object
A component of a patient profile, such as a person object, which contains all of the demographic data about a person, or an address object, which contains information about a specific address type for a person.

page
The portion of the browser window that displays the information for a specific function. For example, the Search page displays search criteria fields and is accessed by clicking the Person Search function.

patient profile
A set of information that describes characteristics of one patient. A profile includes demographic and identification information about a patient and contains a single best record and one or more system records.

phonetic search
A search that returns phonetic variations of the entered search criteria, allowing room for misspellings and typographic errors.

potential duplicates
Two different patient profiles that have a high probability of representing the same patient. The probability is determined using matching algorithm logic.

probabilistic weighting

A process during which two records are compared for similarities and differences, and a matching probability weight is assigned based on the fields in the match string. The higher the weight, the higher the likelihood that two records match.

probability weight

See *matching probability weight*.

SBR

See *single best record*.

single best record

Also known as the SBR, this is the best representation of a patient's information. The SBR is populated with information from all source systems based on the survivor strategies defined for each field and child object. It is a part of a patient profile and is recalculated each time a system record is updated.

survivor calculator

The logic that determines which field values or child objects from the available source systems are used to populate the SBR.

survivorship

Refers to the logic that determines which field values are used to populate the SBR. The survivor calculator defines survivorship.

system

A computer application within an organization where information is entered about patients and that shares information with eIndex (such as a registration system). Also known as a source system, local system, or external system.

system record

A component of a patient profile that contains the patient's information as it appears in an external system. The information in a patient's SBR is a combination of data from each system record in that profile.

tab

A heading on an application window that, when clicked, displays a different type of information. For example, click the Create System Record tab to display the Create System Record page.

Threshold file

An eIndex SPV configuration file that specifies duplicate and match thresholds, EUID generator parameters, and which blocking query defined in the Candidate Select file to use for matching.

transaction history

A stored history of a patient's profile. This history displays changes made to a patient's information as well as merges, unmerges, and so on.

unmerge

To separate two previously merged patient profiles or system records. When you perform an unmerge, each profile or system record is returned to its status prior to the merge.

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