### VERSION HISTORY

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1 BUSINESS USE CASE 113: MERGE-PURGE

1.1 BRIEF DESCRIPTION

This business use case will allow a user to merge duplicate person records and designate a primary person record in the Master Person Index (MPI). A person record is selected to be the primary record that the duplicate records are merged into. When the records are merged, the non-demographic information from the duplicate recorded is copied and pasted to the primary person record. The duplicate record is flagged as a duplicate so that when the duplicate Medical Record Number is used to search the MPI, the search points from the duplicate record to the primary person record. The duplicate person record is not deleted or purged but retained for history. When Electronic Lab Results are returned to the duplicate person record, those results are automatically linked to the primary person record. The MPI search will retrieve merged person records along with the primary person.

Duplicate records are created when the demographic information required to locate the person in the MPI is not available. Searching the MPI usually includes looking for person records based on last name, first name, sex, date of birth, social security number (SSN). Other values can be used to enhance a search of the MPI. When the demographic information is insufficient, the user enrolling/registering the person will add a new person record. Duplicate person records are also created due to name changes (marriage, divorce, adoption, etc) and change to social security number (identity theft, etc).

1.2 ACTORS

Health Department
Contracted Service
Health Care Worker (HCW)

1.3 ACTIVITY DIAGRAM
1.4 FLOW OF EVENTS

1.4.1 Pre-Conditions

1.4.1.1 The user must have proper security rights to enter and view information.

1.4.1.2 Duplicate person records exist in the Master Person Index (MPI)

1.4.1.3 The user must have proper security to merge combine the clinical information from two person records into the primary person record.

1.4.1.4 Based on Policy and Procedure, analysis has been performed to identify the primary person record and the duplicate person record(s) to merge into the primary person record.

1.4.2 Triggering Event(s)

1.4.2.1 Search of MPI retrieves multiple person records that have duplicate demographic information. MPI records can be duplicates if some of the following demographic information exists in multiple person records: SSN, Date of Birth, INS number, address, driver license number, etc.

1.4.3 Basic Flow

1.4.3.1 The user searches the MPI to retrieve the primary person record.

1.4.3.2 The system retrieves the person records that match the search criteria.

1.4.3.3 The user selects the person record that will be designated as the primary person record.

1.4.3.4 With the primary person record designated, the system displays the MPI search screen.

1.4.3.5 The user searches the MPI to retrieve the duplicate person record.

1.4.3.6 The system retrieves the person record(s) that match the search criteria.

1.4.3.7 The user selects the duplicate person record to merge into the primary person record.

1.4.3.8 The system displays a warning message indicating that by selecting the confirmation, the two person records will be merged.

1.4.3.9 The user selects the confirmation to merge the non-demographic information from the duplicate person record into the primary person record.

1.4.3.10 The system displays a confirmation message indicating that the duplicate person record has been merged into the primary person record.

1.4.4 Alternative Flows
1.4.5 Post Conditions

1.4.5.1 Merge-Purge executed with multiple records for the same person or patient combined into one record or reference to a primary record

1.4.6 Relationships

1.5 REQUIREMENTS

1.5.1 Functional Capabilities

1.5.2 Business Rules

1.5.3 Supplemental Requirements

1.6 SOURCES

1.7 ISSUES

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