



## Patient Identification and Matching Organizational Goal Checklist



Impact Area	Organizational Goal	Health Information Leadership Initiative(s)
Governance and Leadership:	Executive leadership recognizes and supports that the MPI/EMPI data integrity teams' expertise and performance is directly related to patient care/safety and impacts financial outcomes.	Educate organization's C-suite and executives about the data integrity teams' focus and expertise while connecting their efforts to patient care/safety and the revenue cycle performance.
	Strong governance over patient identification and matching in the organization.	Direct formation of cross-functional governance team to build and maintain a highly functioning and collaborative data integrity team.
	Organization supports HIM's efforts in maintaining processes that support the fundamental need of maintaining one and only one unique patient record for every individual.	Reinforce the goal of "one unique record for every patient" as fundamental within governance structures and taught/reinforced organizationally.
	Executive leadership recognizes and supports the measurement of duplicate creation and duplicate error rates as an operational metric.	Assume responsibility for informing executive leadership on creation and duplicate rates on a monthly basis and include it as part of their reporting dashboard.
	Executive leadership recognizes and supports the critical role HIM plays in oversight and governance of collecting and managing patient generated health data (PGHD) when patients self-register in the patient portal.	Responsible for informing executive leadership on the trends and challenges of PGHD and how data discrepancies can possible affect overall continuity of care, reporting and benchmarking.



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Data Collection	Patient access/registration policies and procedures are comprehensive, apply across various systems and care settings, and include HIM practices.	Direct staff to work in a cross-functional manner with patient access and other key stakeholders to ensure that policies and procedures are up-to-date and relevant to all areas of the organization including claim rejection and reimbursement.
	Accurate collection of patient demographics creates efficiencies and reduces workflow challenges related to coding, billing and reimbursement.	Collaborate with patient access leadership to provide competency training for registrars; focusing on importance of connecting patients to their health record for patient safety and care as well as the healthcare provider's access to the patient's entire current and historical record.
	Patient safety and the effects on the organization's revenue cycle are stressed during training and routinely monitored and reinforced.	Collaborate with patient access leadership and other key stakeholders in the organization to bring awareness around the connection of patient safety, patient identification and matching and the revenue cycle.
	Strong feedback loop with policies and procedures from patient access/registration to HIM are in place to ensure accountability and ongoing training.	Collaborate with patient access leadership to ensure there is a solid working relationship between departments when errors are found that are a result of human error.
	HIM, information technology, patient access/registration and business office work in a formal collaborative structure for cross-functional success.	Formal structure created to work cross-functionally.



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Data Integrity	Duplicate error record rates are measured and reported to executive leadership on a monthly basis.	Direct data integrity teams to create and provide these reports on a monthly basis. Correct and uniform calculation should be reviewed in the technology periodically for accuracy.
	Working the duplicate record error queue on a daily basis is fundamental to data integrity. The principle supports continuity of care, operational and financial performance.	Educates and brings situational awareness around this principle to multiple key stakeholders including executive leadership.
	Data integrity teams are key stakeholders in any implementation, update, conversion, merger/acquisition related to the MPI/EMPI.	Focused teamwork and collaboration with information technology leadership to ensure the data integrity team is included in all projects related to the MPI or EMPI.
	The ability to inextricably link patients across various technology platforms supports and removes barriers to national interoperability efforts.	Educates and brings situational awareness around this principle to multiple key stakeholders including executive leadership.
	Standardized processes for limiting and managing the creation of overlaid records. Notifications or alerts exist at the point of registration when a potential duplicate or overlay situation is identified.	Directs staff to create and maintain standardized process for identifying and reducing overlays. Works with IT leadership in developing notifications within the EHR/registration system for potential duplicates and overlays.
	Time and expertise are applied for careful data analysis prior to ingesting records into the MPI (e.g. merger/acquisition or accountable care organization (ACO) formation). This process fosters data trustworthiness and reduces or eliminates the creation of unnecessary duplicate records.	Focused teamwork and collaboration between HIM, IT and Population Health when ingesting records into the MPI/EMPI.
	Processes and strong interdepartmental controls are in place to timely identify and manage downstream ancillary systems when corrections/updates need to be made.	Focused teamwork and collaboration with IT Leadership to monitor downstream system administrator's accountability for merging and correcting records in a timely manner.
	Interfaces are managed and kept up to date to ensure ADT (Admission, discharge, transfer) and merge transactions are seamlessly and routinely routed to downstream systems.	Focused teamwork and collaboration with IT Leadership for monitoring interfaces to ensure they are up-to-date and routinely routing interface transactions to downstream systems.
	Algorithms perform in a manner that easily and accurately identify potential duplicate records.	Focused teamwork and collaboration with IT Leadership to ensure algorithms in EHRs and third-party add-ons such as advanced patient matching algorithms, are weighted properly and result in accurate patient matching.