Department of Health Information Management POLICY AND PROCEDURE

POLICY NUMBER: 796
VERSION: 1

SUBJECT: Administrative Lock up Charts

PURPOSE: To place a request to merge on a patient's file when it is identified that the patient has multiple medical record numbers so that the physical chart and MRUN can be merged.

PROCEDURE:

Upon verification of multiple numbers the merge process is instituted to avoid continued use of the incorrect number which would impact continuity of patient care.

RESPONSIBILITY:

Patient Financial Services:

Upon identifying or suspecting that a patient has multiple record numbers, enter a merge request in the electronic database. Merge from the highest or most recently issued number, to the lowest or first issued number.

HIM Supervisor:

Obtain the Outstanding Merge Request Report.
Identify via MRC – Find Chart whether the patient is in house or if the chart is incomplete, these cases are not merged until the patient is discharged and the chart is completed. Define a pull list per established procedure. Forward to Chart Files for pulling.
Verify whether or not the patients are the same by reviewing all demographic information, visit information, and signatures. If definite determination cannot be made by demographic information, diagnosis information may also have to be verified.
Indicate on the Outstanding Merge Report if the request is appropriate for merging. Notify via E-mail, the Finance, Scheduling, Lab, Radiology, and Billing departments.

Patient Financial Services:

Upon receipt of notification, verify if either number has an open parent account(s) And/or appointment(s) scheduled. If so, one of the open parent accounts must be discharged and any appointments scheduled on the erroneous number must be

deleted and scheduled to the correct number.

Patient Accounting:

Upon receipt of notification, start inquiry into multiple accounts to prevent double billing.

HIM Supervisor:

One week following notification, return charts in the computer. Merge the medical record numbers in the computer or cancel the merge request for numbers identified as different patients. If patient has different social security numbers the merge cannot be completed. Go to MRI and delete both SSN since confirmation of which one is correct cannot be determined. Assign visits to appropriate volume.
Forward charts to assigned Chart Files staff for physical merge.
Print Merged Chart Transcription report and send to Clerical staff at offsite clinics.

Chart Files:

Merge chart documents in established order, line through each incorrect medical record number and write in black ink the correct number and AKA if one. Make new Jacket if necessary. Place chart on return shelf to be re-filed.

Approved By: Sharon Nolan (MEDICAL RECORDS DIRECTOR II)	
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Supersedes:	