

Care360® Labs & Meds 2013.2 Resolving Data, Patients, and Activities

When a new result or a transcribed encounter note cannot be matched to a patient, the clinical data is added to the *Unassigned Clinical Data* list. This document explains how to resolve unassigned clinical data and duplicate patients, and how to move clinical activities between charts.

Access and Review Unassigned Clinical Data

- From the *Message Center* tab, click *Quick View*.
- In the alerts area, click the *Resolve* link next to the message *You have unassigned clinical data*.
- On the unassigned clinical data page, click the *Labs* or *Encounter Notes* tab, and then do any of the following:
 - To review the summary for the patient temporarily associated with the result or note, click the patient's name.
 - To review additional patient information, such as date of birth (DOB) or Social Security Number (SSN), position the mouse pointer over in the *Patient Name* column.
 - To review details of a result, click the result's *Requisition Number*.
 - To review the detail of a note, click the *Description* of that note.

Resolve an Unassigned Result or Encounter Note

- Access the unassigned clinical data page.
- Click *Resolve* in the *Actions* column for a note or result.
- Do one of the following:
 - To associate a result or note to a patient in your organization, select the option button next to a patient, then click *Ok*.
 - To add a new patient to your organization using the data included with a result, click *Add as New Patient*.

Note: If you inadvertently associate an unassigned result or encounter note with the wrong patient, you can manually associate the result to a different patient by using the *Move Clinical Activities* feature.

Access and Resolve Duplicate Patients

- From the *Message Center* tab, click *Quick View*.
- In the alerts area, click the *Resolve* link next to the message *You have duplicate patients*.

Patient Name	SSN	PID	DOB	Address	Actions
A.A.			10/14/1980		View Matches / Add As New
A.A.	02/17/1941	4448	Arthur		View Matches / Add As New
A.A.			10/14/1980		View Matches / Add As New
A.A.	02/17/1941	4140	Arthur		View Matches / Add As New
A.A.			10/14/1980		View Matches / Add As New
A.A.	02/17/1941	4140	Arthur		View Matches / Add As New

- In the *Duplicate Patients* list, locate the patient whose record you want to resolve, and then do one of the following:
 - To review the patient's summary prior to taking any further action, click the *Patient Name*.
 - To merge the patient with another patient record, click *View Matches* in the *Actions* column for the patient who is the best match. Then proceed to step 4.
 - To add the patient as a new patient, click *Add As New*.

- Select the check box next to two or more patients whose records you want to merge, and then click *Continue*.

Merge	Name	SSN	PID	DOB	Address
<input checked="" type="checkbox"/>	A.A.	515155151			9999 Pastory Estate, St. John, VI 83070
<input checked="" type="checkbox"/>	A.A.	515155151			9999 Pastory Estate, St. John, VI 83070
<input type="checkbox"/>	S.J.	777777777			9999 Invergordon, Scottsdale, AZ 85250

- Select the option button next to the patient whose record you want to be used as the *Primary* record, and then click *Merge*.

Primary	Name	SSN	PID	DOB	Address	Remove
<input type="radio"/>	S.J.	777777777		01/18/1961	9999 Invergordon, Scottsdale, AZ 85250	Remove
<input checked="" type="radio"/>	A.A.	515155151		10/27/1980	9999 Pastory Estate, St. John, VI 83070	Remove

Move Clinical Activities

- In the information bar, click *Admin > Move Clinical Activities*.
- At *Find a Patient*, type values in one or more of the boxes to locate a source patient, whose activities you will move.
- Click *Search*.
- In the *Patient Search Results* list, select the option button next to the desired source patient, and then click *Source Patient*.
- Repeat steps 2 and 3 to locate the target patient (the patient whose chart will receive the clinical activities you move).
- In the *Patient Search Results* list, select the option button next to the desired target patient, and then click *Target Patient*.
- Click *Continue*.

Report ID	Document Type	Category	Collected Date	Accession Number	Lab ID	Ordered By	Ordered Status
	Winter.jpg		05/11/2009				

- From the move and confirm page, click the tabs and select the check box next to each clinical activity that you want to move to the target patient, and then click *Move*.
- Repeat step 8 for each clinical activity you want to move, and then click *Confirm*.

Note: Finalized notes cannot be moved. If a note was recorded in error for a patient, you can mark the finalized note erroneous in that patient's chart.

For help, contact the Help Desk at 1-800-697-9302.