

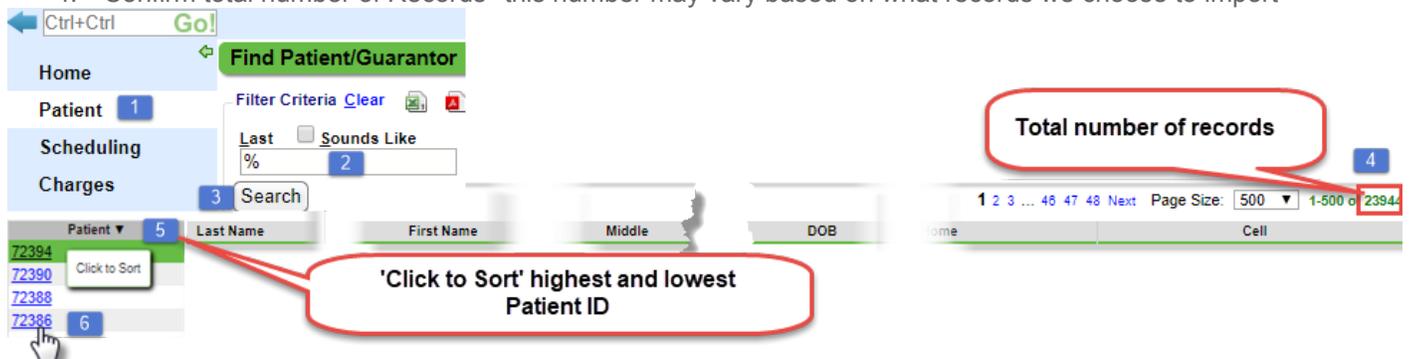
CATEGORY: DEMOGRAPHIC CONVERSION ACCURACY

One of the keys to a successful demographic data conversion is a review for accuracy. Review at least 20-30 patients using this checklist. This is a time sensitive process, please review within 24 hours. This document is useful for both a *test* conversion and *final* conversion.

Once the data has been reviewed and any issues have been corrected, the final data conversion will take place shortly before go-live. Keep in mind, if you are using your old system in the interim you must keep a manual log of all new patients, appointments and demographic updates. The logged data will need to be added to your new PM manually *after* the final sign off.

Open the legacy PM and your new PM. If possible, also have open the final conversion file. You will compare data from legacy and the file to what has been imported. In other words, if it was in the legacy, we expect to see it in our new PM *if* it was imported.

1. In the sidebar > Click Patient
2. Use '%' sign in the 'Last' name field to display all records
3. Click [Search]
4. Confirm total number of Records *this number may vary based on what records we choose to import



5. Click column title to sort > confirm highest and lowest number
6. Click on Patient ID to go to the Patient Dashboard

Number of Records (4-5)

- Did we convert the correct number of records?
- Is the highest and lowest number correct?

Patient Checklist

Click to expand the Demographics to review

- Patient ID/ Chart Number *Patient ID and/ or Chart number should match legacy PM system.
- Name (first name, last name, middle)
- Date of Birth
- Address
- Phone
- Gender
- Referring Provider (If imported)

Guarantor Checklist

Name/Employer	DOB	Phone(s)	Relationship
TEST TEST 12554 MAIN ST, H	02/13/1972 47 years Gender: F	H: C:	Spouse

- Name, Date of Birth, Address and Phone
- Patient to Guarantor relationship
- All dependents are linked to the correct Guarantor

Insurance Checklist (if applicable)

Insurance	Status	Role	Policy	Relationship
BCBS MD (BCBSMD)	DEFAULT	PRIMARY	1235448996	CHILD

- Policyholder & Relationship
- Profile (Primary correctly built and defaults set)
- Verify Policy IDs, copay (if applicable)

Duplicate Patient

If this is a Test conversion, identify duplicate patient and Merge them in your *current PM*. If this is a Final conversion and there are still duplicates, speak to your Client Manager or conversion engineer for next steps

- Click Admin > Merge Patients
- Filter Criteria allows the user to filter by various options
- Export Icon allow user to send list to a CSV or PDF

Reports

Libraries

Admin

Admin Functions

Delete Person

Merge Patients

Merge Patients

Export to CSV Export to PDF

Filter Criteria Clear

First Name	Last Name	Date Of Birth	Social Security	Address	Zip	Last Name	First Name	Exclude Records with blank Last Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

Search

Merge Matching Patients are grouped together by color

Patient ID		Last Name	First Name	DOB	SSN	Address
70716	<input type="checkbox"/>	Smith	Bob	01/16/1974		1181
66846	<input type="checkbox"/>	Smith	Bob	01/16/1974		
63896	<input type="checkbox"/>	SMITH	CHRISTIE	12/15/1989		
54149	<input type="checkbox"/>			12/15/1989		
56982	<input type="checkbox"/>			07/12/1969		
54179	<input type="checkbox"/>			07/12/1969		