

# Monterey County Behavioral Health, Quality Improvement

RE:	Master Patient Indexing (MPI) Search added to Admission
FORM REFERENCE	AVATAR Admission Form
EFFECTIVE	February 26, 2021

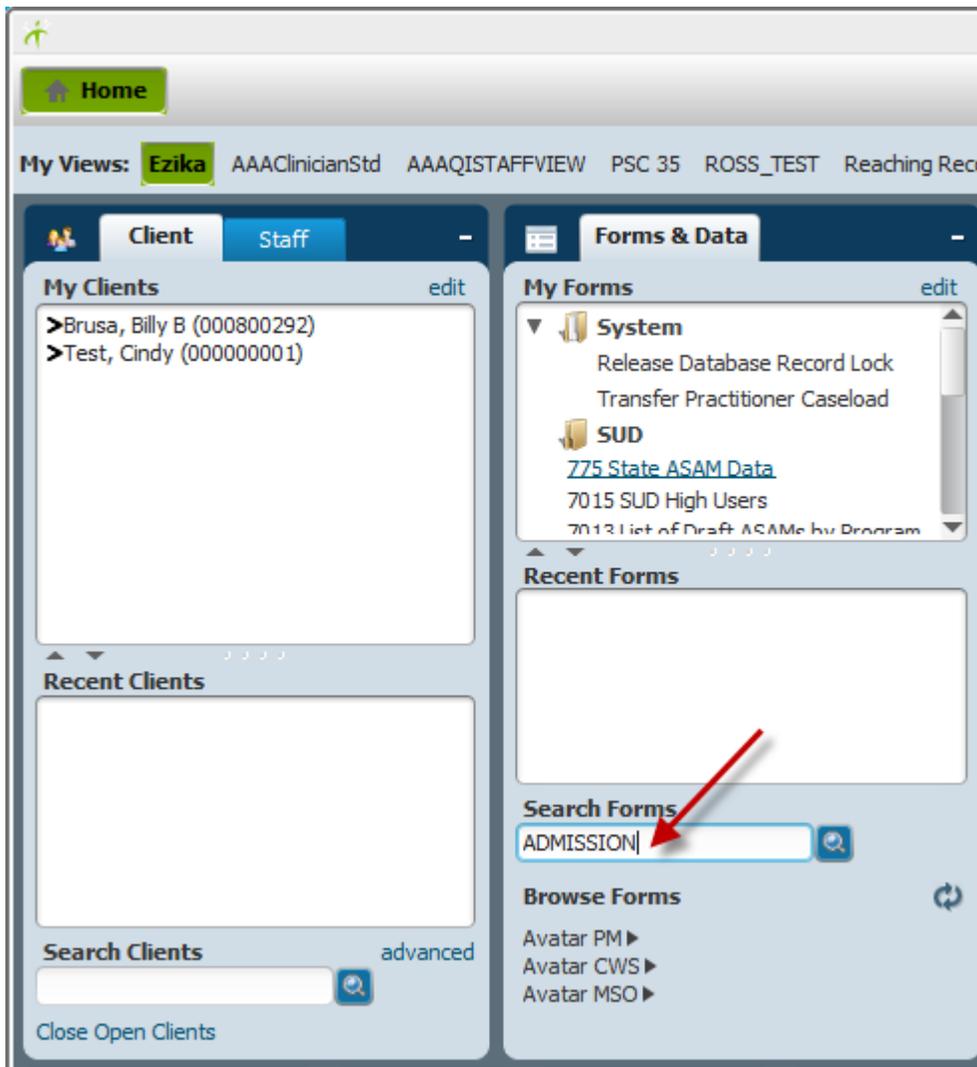
February 19, 2021

In order to ensure a complete record, avoid the creation of duplicate records within Avatar for the same client, and facilitate care to clients within Monterey County Health Department facilities (both owned and contracted) and the Natividad Medical Center, Monterey County Health Department will be introducing the use of the Master Patient Indexing (MPI) search function to the Admission form in Avatar.

With this enhanced functionality, Avatar will search Monterey County Behavioral Health, Monterey County Health Department clinics, and Natividad Medical Center to see if a matching client record exists. This process will avoid the creation of duplicate records within Avatar for the same client.

## PROCEDURES

1. In the forms and data widget. Search for “Admission” (select the option in the PM menu)



2. Double click to open the form and begin the search for the client

Name	Menu Path
Admission	Avatar PM / Client Management / Episode Management

3. Enter at minimum 3 items of client information (see example in image) and click search. This will search the Master Patient Index database for the client's demographic information. The information from the Master Patient Index is demographic information from Avatar (MCBH system), Meditech (NMC system) and/or EPIC (Clinic Services system). The goal is to minimize the number of duplicate medical records for a client as well as collecting the most complete information.

The screenshot shows the 'Select Client' application window. The window title is 'Select Client'. The main area contains several input fields: 'Last Name' (SMITH), 'First Name' (TEST), 'Sex' (Male), 'Social Security #' (two dashes), 'Date of Birth' (calendar icon), 'Alias', 'Assigned ID', 'Alias (Additional Text)', and 'Alias (Additional Text)'. A red arrow points to a 'Search' button. A 'Search Results' dialog box is open in the center, displaying 'No matches found.' and an 'OK' button. Below the dialog box is a pink text box that reads 'Possible matches identified by the system will be displayed in this area'. At the bottom of the window are 'Select', 'New Client', and 'Cancel' buttons.

4. There will be 3 possible scenarios

**Scenario 1: Client has an established medical record with Monterey County Behavioral Health**

- In the return results, the ID column shows a PATIENT ID number
- Double click to select the client that matched your search. This will open the admission form and default the demographic information that is currently in the master patient index into the admission form. Complete the admission form.

Select Client

Select Client
✕

Last Name

First Name

Sex

Social Security #

Date of Birth

Alias

Assigned ID

Alias (Additional Text)

Alias (Additional Text)

S...	Name	ID	Client's H...	Date Of B...	Sex	Client's H...
75	TEST,CINDY	1	888-888-1234	05/12/2004	Female	888-888-1234
		721891	831-236-4185	04/16/1959	Female	831-236-4185
				04/11/2005	F	
				06/19/1959	F	
				04/27/2005	F	
				11/23/1962	F	

Record in Avatar

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**Scenario 2: Client may have a record within Master Patient Index database but not in Avatar**

- a) Clients that are not in Avatar but from Meditech (NMC system) and/or EPIC (Clinic Services system) will not have an ID. The goal is to minimize the number of duplicate medical records for a client as well as collecting the most complete information for the client during the process of registration.
- b) Select the row that matches the client information and DOUBLE CLICK THE ROW to assign a MR Number.

S...	Name	ID	Client's H...	Date Of B...	Sex	Client's H...
75	TEST,CINDY	1	888-888-1234	05/12/2004	Female	888-888-1234
0		721891	831-236-4185	04/16/1959	Female	831-236-4185
				04/11/2005	F	
				06/19/1959	F	
				04/27/2005	F	
	TEST,CINDY			11/23/1962	F	

No Avatar ID #

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- c) Select “Yes” for AVATAR to auto assign the clients Patient Identification Number (PATID) and continue to complete the admission for the client. Demographic information found in the MPI will auto populate into the admission form.



### Scenario 3: Client data was NOT FOUND in the MPI search

- a) Click the “New Client” button to create a new PATID in Avatar since they were not found in Avatar or the MPI database.
- b) Select “Yes” for AVATAR to auto assign the clients PATID and continue to complete the admission for the client.

