DPA - Pre-Merge/Post-Merge Review of Investigation(s) - WS	**Name of Activity:** Duplicate Client records with investigation data – **DPA Pre-Merge/Post-Merge IOM review** **Role performing Activity:** **Designated Panorama Administrator (DPA)**		
Panorama – IOM WORK STANDARD	**Location:**	**Department:**	
	Document Owner:		
	Date Prepared: Oct 2018	**Last Revision:** Mar 2022	**Date Approved:**

SEE Duplicate Client Management User Guide and Manage Duplicate Investigations User Guide

1.	**User is logged into Panorama with a DPA role. Investigation module open.** **Receive from a DIA: client ID#s for duplicate client records that have associated IOM data** ➢ Set first client ID # into context **LHN> Investigation> Subject Summary** ➢ Review any investigation data recorded - repeat for each duplicate client record including; • Document Management • Investigations/intervention notes (notes are not included in profile report – may need to screen shot separately to ensure QA post merge) • UDFs
2.	**PRINT or SAVE A COPY OF THE KEY INVESTIGATION DATA FOR QUALITY CHECK POST MERGE** **Print a profile report on each investigation ID# involved in the merge** **LHN> Reporting and Analysis > Standard Reports** >Select Report Type page opens ➢ Open Case Reports ➢ IOM001 Investigation Profile Report ***NOTE: If the profile report data fields are blank – you may not be listed as a resp org;*** ***LHN> Investigation > Investigation Details > Resp Org / Investigator*** ➢ *Select your Org in the Responsible Organization drop down list, Select 'workgroup' and todays date.* ➢ *Click Add Organization then save.* ➢ *Once Profile report is printed, return to resp org page and delete your org from the list.* **2. Print or save a copy of any UDFs** **LHN> Investigation > Investigation Details > Links and Attachments** **3. Print or save a copy of any lab reports/contact lists/ etc uploaded** **LHN> Document Management> Context Documents**

3.	**<u>Confirm the DIA assigned ‘Destination Record’ is appropriate</u>** **<u>FLAG INVESTIGATIONS</u>** The DIA will have chosen which record is to become the destination record based on available info in the immunization module. This is indicated by which record remains ‘Active’, the duplicates will have been changed to ‘Inactive’ by the DIA prior to sending to the DPA. * If there is a FLAG CASE/INVESTIGATION on a client record, it is preferred that record become the destination record. **If an inactive pre-merge record has a flag investigation, alert the DIA that it needs to be the destination record instead of the one they had selected.**
4.	**<u>Send the Client ID#s back to the DIA as ‘Ready to merge’</u>** ➢ Confirm which record (client ID#) will become the destination.
5.	**<u>QUALITY CHECK</u>** **<u>Receive notification from the DIA that the merge is complete</u>** ➢ Compare the printed/saved investigation profile report, intervention/investigator notes, lab, UDF to the merged record and confirm accuracy ➢ Manually combine any duplicate data
6.	**<u>Duplicate investigations - See Manage Duplicate Investigation User Guide</u>** ➢ Change the classification of one to ‘duplicate’ (once classification becomes available), in the interim use classification of ‘not a case’ for one of the duplicate investigations.