TIPS FOR LOCATING PATIENTS

TIPS FOR LOCATING PATIENTS IN THE INVISION PIDX

Before assigning a new number to a patient, an exhaustive search of the PIDX should occur. To that end, the following information must be requested from the patient:

- Complete name, including all previous names used by the patient
- Date of birth (DOB)
- Sex
- Race
  - **A** American Indian or Alaska Native
  - **B** Black or African American
  - **C** Caucasian/White
  - **I** Native Hawaiian or other Pacific Islander
  - **R** Asian
  - **S** Hispanic or Latino
  - **U** Unknown
- Place of birth
- Mother's full maiden name (last name and first name) even if she is deceased
- Marital Status
- Address
- Confirm prior history at UTMB (patients should be asked if they have been previously seen at UTMB).

Tips for entering the patient's name:

- If a patient's first or last name can be spelled in different ways (e.g. Reed vs. Reid, Gonzalez vs. Gonzales, Marianna vs. Maryana) then enter both spellings
- Search previous last names used (e.g. maiden names, previous married names, name at birth, double last names)
- Enter first name, middle name, and date of birth
- For patients with common names (e.g. Maria Garcia) call HIM at 409.772.1744 before adding the patient to the PIDX. HIM has access to a special pathway in Invision to locate these patients
- If your patient cannot be located in the PIDX, omit the patient's DOB to access a larger candidate pool
- If an "A" is listed under the XREF column within your candidate list, click on the patient in question to retrieve the patient's current information. The "A" denotes the patient has an alias name
- When either of these messages are received, "*No Patients found – No Soundex Match*" or "*Add more patient information - No patients are in the table*," reenter the patient information with the last name, the first initial of the first name with an asterisk, and sex; a candidate list will appear
- If the error message "*The social security number entered is not unique*" is received, the patient is already in the PIDX or another patient is in the PIDX with that same social security number
- Hyphenated names such as Moore-White are entered as one continuous word, for example, MooreWhite
- Names with periods such as St. James are entered without the period, such as StJames

- Names with apostrophes such as O'Connor are entered as OConner
- Names with "Mc" or "Mac" as the first part of the name are entered as one continuous name; such as Mc Donald is entered as Mcdonald
- Names with an accent mark (~), such as Pińa are entered without the mark~
- Enter variations for a patient's first name, e.g. Margaret vs. Maggie; William vs. Bill
- Enter the patient's middle name as his/her first name (in case the patient uses their middle name as their first name)
- Prefixes are not maintained in the PIDX/EPI and should not be used (e.g. Father, Sister, Doctor)
- Use the separate "name suffix" field for populating suffix (e.g. Jr, Sr, III)
- Enter the wrong sex for the patient to see if the patient can be located
- Remember - the MPI does not accept hyphens, dashes and other symbols
- Adding a space can result in the inability to locate the patient in the MPI
- Even if an insurance company has a name listed with a hyphen or space, do not enter the name into the MPI with these symbols
- **If a patient still cannot be located in the PIDX, use MYUTMB EPI or Epic to access a larger candidate list**

TIP FOR LOCATING PATIENTS IN MYUTMB

- For patients with unisex names, enter the patient's last name, first name and gender under the patient look up function

TIPS FOR LOCATING PATIENTS IN EPIC

(Note: When searching for patients in Epic using any of the following tips, within the Patient Select box any tab can be selected to arrange the information in ascending or descending order)

- Search for patient by full name, (Doe, John) and by last name and initial of first name with the DOB, (Doe, J – 010145)

- Search for patient using first 3 letters of both the last and first name, (Doe, Joh). This helps locate patients with double last or first names, patients with misspelled names, and patients entered with incorrect DOB or sex

- Search for patient using DOB (may enter in either of these formats – 01011945 or 010145). This helps locate patients with common names, infants and babies (since infants/babies may still be listed as Baby Boy/Girl

- If a patient is found with a 7 digit number that begins with an "E" (e.g. <E1234567>) this means the patient is already in the PIDX but that no UH# has been assigned

UH NUMBER ALPHABETICAL SUFFIX KEY

Suffix	Explanation
A, B, C, D, E, F, G, H, I, J, K, L*, M, N, O, P, Q, S	Patient medical record numbers
T, U, V, W, Z	Numbers not used
R	Reference lab – number issued to Specimens – no medical record exists
X	Institution numbers used for billing purposes. A number assigned to an entity responsible for payment for services provided to a group of patients. No medical record exists
Y	Numbers assigned to Shriners Burns Hospital patients

* Some L UH#s were assigned to acquired St. Mary's Hospital medical records