Documentation Review Following Client Merge

Check with your Organization's Documentation policy regarding regional documentation process.

In the survivor client record, view subject summary – if the record contains more than one investigation, review which Investigation ID to retain:

- If some or all of the details of both investigations are the same, there is no need to make changes to the investigation to be retained. If there are changes, make the relevant documentation changes to ensure the record is accurate and up-to-date. Ensure that the earliest "report received" date is retained.
- See **Delete an Investigation** – QRC – "Points to Remember" for guidance on which investigation to keep. NOTE: medications, exposures, lab results recorded with the investigation in context <u>cannot</u> be deleted. If this is not the investigation to be retained, but cannot be deleted, change the classification of this investigation to "Case - not a Case".

1. View Subject Summary -> do Lab 'UNLINK' from Investigation to be discarded (**Unlink/Link an Investigation** – QRC, page 2).

2. Do Lab 'LINK' TO Investigation to be retained (**Unlink/Link an Investigation** - *QRC,* page 3).

3. Return to Subject Summary – click on Investigation ID to be discarded -> Left Hand Nav - Notes – move from Investigation to be discarded to Investigation to be retained (see **Clinical Notes -** QRC page 4).

4. Return to Subject Summary –> click on Investigation ID to be discarded -> LHN –> Intervention – click Intervention Summary –> click on Intervention hyperlink (in Interventions factory table) and take a screen shot of this entire intervention, so you can recreate it in Investigation to be retained. (see **Intervention QRC**)

5. Return to Subject summary –> click on Investigation to be retained

6. Click on Intervention Summary –> "Create Intervention" – add all content from Investigation to be discarded intervention screenshot – remember correct dates, workgroup, user, etc. Transcribe "comment" , click ADD, Click Save (see **Risk factors** and **Signs and Symptoms** (Investigation elements) **QRC**)

Date	Comments	Recorded By
2019 Nov 14	(November 13 Comment transcribed from merged away Client ID 774, Investigation Intervention): Contact to local community PHO to contact client regarding lab results. Recorded by Robert Desrosiers.	Hawryluk, Melody

7. Return to Subject summary, follow steps 4 – 6 to transcribe and discard any risk factors and/or signs and symptoms from the Investigation to be discarded to the Investigation to be retained.

8. Return to Subject summary – click on Investigation ID to be discarded – review that all content from this investigation has been moved to Investigation to be retained.

Reason for Deletion:
[Other ▾] [Delete]
Enter Reason if 'Other':
[Intervention details transcribed to Inv ID# xxx r/t client record merge.]

9. Click on Intervention Summary hyperlink -> click on Intervention hyperlink in the Interventions Factory Table -> above Intervention Details, click Reason for Deletion – click "other" add info, Click Delete, click OK. Message displayed "Intervention successfully deleted"

10. Return to the Subject Summary -> click on Investigation ID to be discarded and do a final review that this investigation can be deleted. Scroll to the top of page and under "Reason for deletion of investigation" select "Other" and enter reason:

Reason for deletion of investigation
[Other ▾] [Delete Investigation] [Cancel]
Enter Reason if "Other"
[Investigation details transferred to Inv ID xxx r/t client record merge.]

11. Click "Delete Investigation" – click OK. Yellow banner indicates "Investigation has been successfully deleted"

12. Return to subject summary, confirm that Investigation has been deleted; all labs, interventions, notes, risk factors, signs and symptoms have been associated with Investigation to be retained. IMPORTANT: Ensure that the Investigation to be retained has the earliest "Report date (Received)" – if the discarded Investigation had an earlier report received date, use this date on the Investigation to be retained.