

# Identity Management in Millennium

## MPI POC Reference Sheet

Millennium access and training will be provided for the Federal Electronic Health Record (FEHR) prior to go-live. This reference document is being provided for Master Person Index Points of Contact (MPI POCs) to supplement training and for reference when data quality issues are encountered related to patient identity.

### Master Person Index Point of Contact (MPI POC)

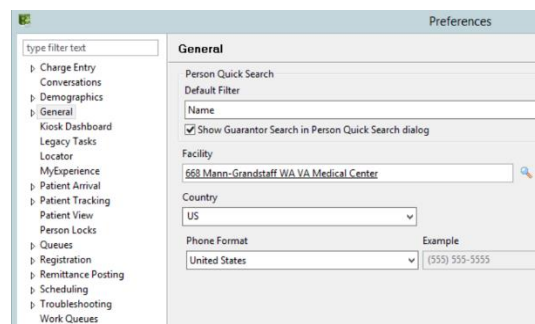
Each facility will require at least 2-3 staff designated as MPI POCs prior to converting to Millennium. MPI POCs are the liaisons between the facility and the VHA Health Care Identity Management Team (HC IdM) and are responsible for reporting patient identity issues in the health record requiring resolution. A listing of the MPI POCs for each VHA facility can be found at: <https://mvitk.iam.va.gov/imdquiWeb/pocMgtRead.action>.

### User Preferences

At first login, you must save your facility within your User Preferences. This will ensure all actions taken in Millennium applications are identified as VA actions, rather than DoD, and VA enterprise systems are updated appropriately.

### To Add Your Facility

1. Log in to P0630 Revenue Cycle at <https://ssoiaccess.valehr.cernerworks.ehr.gov/Citrix/USVADCWeb/>
2. Select '**File**', then '**Preferences**'
3. Select '**General**' from the options on the left
4. Find your facility by typing the station number into the '**Facility**' field and selecting search
5. Select your facility from the search results and click the '**Select**' button
6. Select '**Apply and Close**'

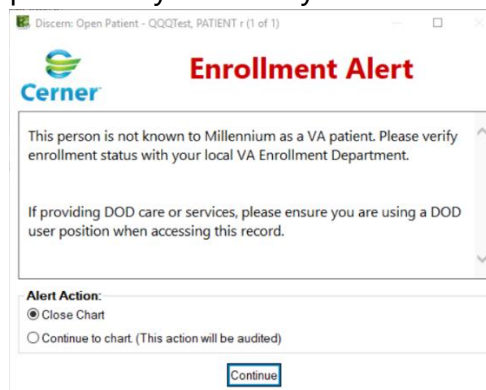


The screenshot shows the 'Preferences' window with the 'General' tab selected. On the left is a tree view with a search bar labeled 'type filter text'. The tree includes categories like 'Charge Entry', 'Conversations', 'Demographics', 'General' (selected), 'Kiosk Dashboard', 'Legacy Tasks', 'Locator', 'MyExperience', 'Patient Arrival', 'Patient Tracking', 'Patient View', 'Person Locks', 'Queues', 'Registration', 'Remittance Posting', 'Scheduling', 'Troubleshooting', and 'Work Queues'. The main panel on the right is titled 'General' and contains the following fields: 'Person Quick Search' (with a 'Default Filter' dropdown), 'Name' (text input), a checked checkbox for 'Show Guarantor Search in Person Quick Search dialog', 'Facility' (text input with '668 Mann-Grandstaff WA VA Medical Center' and a search icon), 'Country' (dropdown menu showing 'US'), 'Phone Format' (dropdown menu showing 'United States'), and an 'Example' field showing '(555) 555-5555'.

## Patient Search

When performing a patient search in Millennium applications, please keep in mind there are many identities known to VA, DoD, and Millennium. This is a shared system. Patient records known at all migrated VA and DoD facilities will be available rather than just those known in your local VistA. Many have similar traits, so it is more important than ever to ensure the correct record is selected. Selecting the wrong patient record can result in encounters placed on the wrong record, administrative and clinical data being overwritten, and could potentially impact patient safety.

- The Veterans Health ID (VHIC) card should be scanned to search when available.
- Searching by VA ICN or two or more traits (last name and SSN or last name and date of birth) should always be used when performing an enterprise search to reduce the chances of improper selection.
- The search will return results from all records that exist in Millennium.
  - If the patient is returned but a VA ICN is not present in the search results, do **not** select the record. Records without a VA ICN are not VA records and will only contain DoD data. VA enrollment, eligibility and insurance data will not be available. Contact Enrollment and request they proceed with the instructions in the next section, Missing VA ICN When Selecting a Record, to add the VA record to Millennium.
  - If the user proceeds to select a record without a VA ICN present, the below error should display instructing the user to close the chart and enroll the patient at your facility.



- If no record is found, **stop**. Contact Enrollment and request they enroll the patient by following the instructions in the next section, Missing VA ICN When Selecting a Record, to add the VA record to Millennium.
- **Note:** All instances of wrong patient selection should be reported to the facility MPI POC to ensure no encounters or clinical entries need moved to the appropriate patient record. If traits were updated on the record, report the overwrite to the Health Care Identity Management Team (HC IdM) by logging a **Potential Catastrophic Edit Request** to ensure other downstream systems were not updated.

## Missing VA ICN When Selecting a Record:

- In the event the VA ICN is not present when a record is returned for selection:
  - Do not select and open the record. The record was added by DoD and will not have VA data.
  - Enrollment staff should confirm enrollment by viewing the patient record in VES and confirming your facility is listed under the facility tab. The facility tab in VES provides a list of all sites where the person is enrolled.
    1. If your facility is listed, they are enrolled at your site. Enrollment can add them to Millennium by performing an external search in Revenue Cycle.
    2. If your facility is not listed, verify enrollment data is current and select the Preferred Facility dropdown to select your site from the list and save. This will establish the patient record in both VistA and Millennium. Restore the Preferred Facility field back to the original value if changed.
    3. If the person is not found in VES, they have never been enrolled as a patient in VA and will need to be registered. This will add the record to VistA and Millennium.
  - After confirming the patient is enrolled at your facility, perform a new search in **Revenue Cycle** and confirm the VA ICN is now listed in the search results, indicating the record has now been added by VA.
    - **Note:** Always ensure the patient is enrolled at your facility before performing an external search to ensure current VA enrollment/eligibility data is returned and prevent invalid eligibility and billing determinations.
    - **Note:** Before a DoD encounter is sent to VA, ensure the VA ICN is listed on the health record. This indicates the patient is enrolled as a VA patient in Millennium and the order/consult/referral can be processed by VA. If VA ICN is not listed, contact Enrollment.

## External Search

- External search should **NEVER** be used. In the future, this button will be restricted to MPI POCs to only be used in the event a system error occurs which delays the record from automatically being added after enrollment is completed. The MPI POC will ensure the patient is registered at your facility and has a known enterprise registration record in VHA Enrollment System with your facility listed, before pulling a record in via External Search if the record fails to be listed in Millennium.
- External searches performed on records not listed in Millennium may result in partial health records added without the current VA enrollment, eligibility, service, financial, or insurance data necessary to deliver care or service. This results in dropped orders, inaccurate eligibility and billing determinations, and other clinical implications related to missing or incomplete administrative and clinical data. Records should only be added through VES Registration.

## Patient Retrieves & the Compare Screen

Each time a patient record is selected in Revenue Cycle, the system will query VA and DOD to check for updates. Most patient traits are now updated in real time, however VA Insurance Plans (VHAPS) do rely on a Revenue Cycle retrieve to be updated. If updates are returned during a retrieve, you will be presented with a compare screen to accept or reject the enterprise updates. A side-by-side comparison will be presented with the left column consisting of the traits returned from VA and DOD and the right column reflecting what is stored in Millennium. Review each trait and select the appropriate value to be retained from the left or right column and click '**Update**' to continue.

- If you are unsure which trait to retain for a field, select to retain the existing value in Millennium displayed in the right column of the Compare Screen. Once all fields have been reviewed, select '**Update**'. This ensures insurance and eligibility data will be updated.
- In the event the record returned appears to belong to another individual, select '**Not A Match**'.
  1. **Note:** Selecting '**Not a Match**' will prevent any updates from occurring, including VHAPS, so should only be used in the event the wrong record is selected. The user will be directed to the record without updates applied and will need to close the record.
- If any of the 3 systems queried fails to respond during a patient retrieve, you will receive a message to proceed with the data available in the record. Select '**Close**' to exit the pop-up window.
- Links for '**Retaining all Cerner Values**' or '**Retaining all Enterprise Values**' should not be used. The radio buttons will be defaulted to retain what is available on the enterprise system unless the incoming update is blank. In the event a blank value is received the radio button will default to keep what is stored in Millennium. In most instances, this should be accurate and just needs to be validated.

| External Sources                 |             | Cerner   |
|----------------------------------|-------------|--|
| Retain all External values       |             | Retain all Cerner values   |
| <b>Identifiers</b>               |             |  |
| DoD ID                           | 2109993525  | 2109993525   |
| SSN                              | XXX-XX-3432 | XXX-XX-3432  |
| <b>Names</b>                     |             |  |
| Last                             | TEST        | TEST   |
| First                            | TEST        | TEST   |
| <b>Other Demographic Details</b> |             |  |
| Gender                           | Male        | Male   |
| Birth Date                       | 01/07/2015  | 01/07/2015   |
| Restricted Display               | (blank)     | No   |
| <b>Addresses and Phones</b>      |             |  |
| Mailing Address                  | (blank)     | Address Line 1: 1 S MAIN ST<br>Address Line 2:<br>Address Line 3:<br>Address Line 4:<br>City: SEATTLE<br>State: WA<br>Country:<br>Zip Code: 981042513<br>Country: US<br>Address Status:<br>Begin Date: 02/17/2021<br>End Date: |

Update Not a Match

- Enterprise systems will be checked for updates once every 10 hours. You can manually reset the 10-hour timer to pull in fresh data if needed by completing the steps in the [Manual MPI Retrieval instructional document](#).

## Trait Difference in the Federal EHR

Some primary identity traits (Name, SSN, DOB) displayed in the Federal EHR are populated from DoD DEERS. VA traits are shared from VA to DoD in real-time, and for most patients those traits will be the same. There are sometimes differences in the traits known to VA and DoD for individuals, which will result in differences between a person's VistA and Federal EHRs. While multiple efforts are under way to reduce differences, some will remain due to policy or personal preference.

**Extra steps should be taken to validate the traits in the Federal EHR to prevent delays in care. Staff should request the DoD ID card in addition to the VHIC or Photo ID to authenticate the person's identity rather than delaying service.** In the event the difference is preventing the patient from receiving care or service, staff must report the difference to their MPI POC to determine which systems need updated and ensure both VA & DoD reflect the correct traits.

- Updating VA Traits:** The process for updating identity traits in VHA applications has not changed. In the event a VA trait needs updated, facility staff must obtain the proper verification and contact their MPI POC. Please correct typos or misspellings in VistA. If the MPI enterprise record fails to update or a legal trait change is reported, please log a request in MPI Toolkit. See Identity Management Fact Sheet [Identity Trait Changes](#) for correcting or updating patient identity traits.

- **Updating DoD Traits:** Upon confirming the VA trait in VistA/MPI is accurate but needs updated in DEERS and the Federal EHR, the MPI POC should take the following steps:
  - Locate the record in MPI Toolkit.
  - On the Correlations tab, compare the VA traits listed on Primary View to the DoD traits listed on the 200DoD DEERS correlation.
  - Select the hyperlink for the 200DoD Department of Defense DEERS correlation.
  - Select the **PDWS Tab** to view the field: **CAN VA UPDATE DOD AND EHR DATA:**
    - If the field lists **VA MPI IS ALLOWED TO UPDATE:** Log a Cerner-MPI Data Discrepancy request in MPI Toolkit to push an update to DEERS and the Federal EHR. This will ensure the VA traits are synced to the EHR.
    - If the field lists **VA IS NOT ALLOWED TO UPDATE:** The person has a current affiliation with DoD and will need to contact their Service Branch Personnel or Payroll office to request their DoD traits be updated. Veterans can [contact DMDC](#) if they are unsure where to go to update their DoD record..
      - **Note:** For urgent requests that are delaying care, please log a **Cerner-MPI Data Discrepancy** request in MPI Toolkit. Provide the update needed made and why care can't be rendered. In emergencies HC IdM will work with DoD to update DEERS and the EHR, however, the update will be temporary and not retained permanently until the Service Branch personnel or payroll system is updated.
      - **Note:** Please do not recommend patients with a DoD ID card go to RAPIDS to update their ID until their DoD personnel/payroll system has been updated. Edits applied at a RAPIDS station will not be permanently retained unless updated in the DoD payroll/personnel system first.
- **Birth Sex:** The Birth Sex in the Federal EHR is managed independently currently. Updates to the birth sex field should still be reported to the MPI POC to be requested in MPI Toolkit. This will ensure updates are applied in all VA systems where the patient is known. See **Identity Management Fact Sheet** [Identity Trait Changes](#) and [VHA Directive 1906](#) for additional information on documenting or restoring the Birth Sex as reflected on the original birth certificate.
- **Administrative Sex:** The Administrative Sex field in the Federal EHR will be populated from VA MPI unless the person has an active affiliation with DoD (puts on a uniform). In the event they are active duty, reserve, or National Guard the field will be populated with the DoD DEERS value. The VA Administrative Sex will reflect the current legal gender in the event an amendment request has been processed, otherwise populated with the VA Birth Sex. See Identity Management Fact Sheet [Identity Trait Changes](#) and

[VHA Directive 1906](#) for additional information on requesting a legal change or restoring previously changed traits.

- **Date of Death (DOD):** The date of death can be edited in Revenue Cycle once verified from an approved source, per VHA Directive 1906. Any death reported to the facility should be reported to the Survivor's Assistance & Memorial Support Officer (formerly Decedent Affairs) to ensure proper validation before updating the patient record. If you find an invalid date of death needs corrected or removed, please log a *Cerner-MPI Date of Death Discrepancy* Request. The DOD will be verified and corrected across all systems to ensure it doesn't get repopulated.
  - **Note:** A date of death removed will continue to repopulate in the Federal EHR until the enterprise VA MPI patient record is updated. Adding or removing a date of death will also require updating/restoring of clinical data. Please see further information referenced in the [Date of Death Guidelines](#), located on HC IdM's SharePoint site.
- **Contact Information:** VA contact information is displayed in the Federal EHR. Edits to contact information (Address, Phone, and Email) should be made in Revenue Cycle Registration and will be shared back to VA and DoD systems. In the event your edit is not retained, please report the discrepancy to: [AddressManagement@va.gov](mailto:AddressManagement@va.gov) to ensure updates were applied to all source systems as expected.
- Patients with a current affiliation to DoD may need to request updates to both their DoD and VA records for the changes to be reflected in the Federal EHR.

## Identity Trait Updates

- **Corrections** (typos and misspellings) to the Name, SSN, DOB, Birth Sex, MMN and POB should continue to be reported to the MPI POC to maintain VA enterprise systems. Corrections can still be made in VistA or by submitting a Person Verification Task once proper documentation has been obtained. In the event the update is not retained in VA applications, please log a *Person Verification Task* to update the VA enterprise patient record. If updates are not reflected in the Federal EHR, please log a *MPI-Cerner Trait Discrepancy* Request (See section above, Trait Differences in the Federal EHR.)
- **Legal changes** to the Name, SSN or Birth Sex will continue to require a Privacy Act Amendment Request be submitted to HC IdM via MPI Toolkit to ensure VA enterprise systems are updated. This will ensure all enterprise systems are updated appropriately and VistA and Millennium EHRs remain in sync for the patient. Please refer to the Identity Management Fact Sheet [Identity Trait Changes](#) and [VHA Directive 1906](#) for additional information on the process to correct or change identity traits.
- Patients with a current affiliation to DoD may need to request updates to both their DoD and VA records for the changes to be reflected in the Federal EHR. In the event a trait change is processed, and the update is not reflected in the Federal EHR, the MPI POC will be advised by HC IdM to instruct the patient to update their DoD personnel record. (See section above: **Trait Differences in the FEHR**)

## Duplicate Patient Records

- **Millennium Duplicate Records:** Multiple records for the same patient identified in the Federal EHR in any Millennium application must be reported by staff to the MPI POC to log a *Cerner Duplicate* request in MPI Toolkit. This includes real and test records appearing to belong to the same identity. Duplicate records will not be merged locally in the Federal EHR by facility staff. Instead, duplicates must be merged in MPI & DEERS first to ensure all enterprise systems, including the Federal EHR, are updated and remain in sync. This includes reporting multiple MRNs or EDIPs for a patient in the EHR. Records will only be combined directly in Millennium by VA or DoD Identity Management staff after confirming no duplicate records exist in VA & DoD enterprise systems.
- **VistA Duplicate Records:** Until all sites are deployed, a patient record will continue to be added and maintained in VistA to ensure clinical data is shared between VistA and Millennium EHRs for the patient. Duplicate records must be merged in VistA by facility staff *prior* to deploying the Federal EHR and until all sites are deployed. Reminders will be communicated to complete this work prior to migration. The national or enterprise VA identity team will communicate a reminder to complete local VistA duplicate merges prior to the VistA migration to the Federal HER. Duplicate VistA records will result in clinical data on the “From” record not being present in the Federal EHR. Pending local duplicate merges are listed on your IdM Toolkit homepage and within the Patient Merge menu in VistA. If you need assistance with the Patient Merge software, please log a ticket in [Service Now](#) for the Patient Merge software for assignment group *SPM.Health.HI.HIG* (formerly *PLM.HEALTH.HealthCareAdmin*). You can also call the VA Enterprise Service Desk at 855-673-4357 to request a ticket be logged.
- **VA MPI Duplicate Records:** Multiple records identified in any VHA applications for the same person (having multiple ICNs on VA MPI) must be reported in MPI Toolkit using the *Potential Duplicate* request type.
- **DoD DEERS Duplicate Records:** Multiple records identified in DoD systems for the same person, (having multiple EDIPs in DEERS) must be reported in MPI Toolkit using the *Cerner-MPI EDIPI Issue* request type. Those determined to need action in DEERS will be communicated with the DMDC Data Quality team for resolution.

## Moving and Merging Encounters

If an encounter has been placed on the wrong patient record, or duplicate encounters are identified within a patient’s record, it must be moved or combined using the Combine Menu. Access will be granted after training is completed by those in a MPI POC or appropriate designee role per facility. Facility MPI POCs or designees are responsible for moving and merging of encounters and may be contacted by HC IdM and Millennium (Oracle Cerner) Help Desk to request encounters be moved. The steps to moving an encounter are:



1. Access the **Combine Menu** from the App Bar.
2. Select **Move Encounter** Option.
3. Enter Person Info and Encounter Info and select the **Move** button.

## Test Records

- **VistA Test Records:** Test records added to Production VistA are for application testing within VHA and will not be available with Millennium or DoD DEERS. Prior to creating new VistA test records in Production, please search for existing test records to determine if one can be used. Any testing that can be performed in the local test VistA must be. Test records entered in Production VistA require a last name prefaced with ZZ and the SSN beginning with 5 leading zeros (per VHA Directive 1906). Test records are never to be entered in VistA without these two indicators. Any needing to deviate from the standard format in order for the record to be shared with enterprise VHA applications beyond VistA must be approved by HC IdM.
- **FEHR Test Records:** Test records are never to be registered directly in Millennium. Requests for joint test records that need to be known to Production Millennium applications must go through the **Test Patients in Production Work Group** for approval and creation within VA MPI, DoD DEERS, and Millennium. To request a test record known in Millennium please complete the required form [20231004 Test Patient in Production Work Group Intake Form NEW.rtf](#) and submit to the contacts listed within the form. VHA Directive 1906 is currently being updated to include the process for requesting FEHR test records.
- As a facility prepares for migration/deployment to Millennium, three lab test records are provided and available for each facility's use. These records are to be used for lab validation testing and will be in the format provided below. If you are unable to locate your facility's lab test records within the local system, please contact the HC IdM SMEs via mail group VHA 105HIG Health Info Gov DQ HC IDM SME <[VHA19HDIHCIdMSMEs@va.gov](mailto:VHA19HDIHCIdMSMEs@va.gov)>.

### Lab Test Record Format:

Last Name: QQQVALV

First Name: <VA Medical Facility Prefix>

Middle Name: ADOLESCENT, FEMALE, MALE

Date of Birth: Will be 1/1/1900 with ADOLESCENT birth year varying to be under 18 years of age

Other Demographics: This is at the discretion of the facility leveraging the patient for their testing as well as the Cerner team. Flexibility to ensure proper age ranges, gender, and other demographics are supported

Naming Example: QQQVALV, SPO ADOLESCENT; QQQVALV, SPO FEMALE; QQQVALV, SPO MALE

## Reporting Potential Patient Safety Issues

Please report potential patient safety issues via the Joint Patient Safety Reporting system at [Joint Patient Safety Reporting \(disa.mil\)](https://disa.mil).

## FAQ

### **Q. I cannot find a patient record in the Federal EHR.**

**A.** Verify the person was registered as a VHA patient in VHA Enrollment System (VES) and your facility is listed within the Facilities tab of VES. This indicates they have been enrolled for healthcare or a transfer enrollment completed at your site. This is required for VA administrative and clinical data from all facilities where the patient is known to be available in Millennium. Try searching again with multiple traits or another primary identifier (SSN, VA ICN or EDIPI). If the record is still not returned, **stop**, and verify enrollment.

If the person has a record known to VistA and you have confirmed your facility is listed in VES, follow the steps in the Patient Search section above to complete an external search to pull the existing record into Millennium. If the person still isn't returned by an external patient search, please verify the record has a single active 200DoD DEERS correlation listed on the record in MPI Toolkit. If the record is missing the 200DoD correlation or has multiple active, please log a *Cerner-MPI EDIPI Issue Request* in IdM Toolkit.

### **Q. I need to add a new patient to Millennium.**

**A.** Patients must still be enrolled at each facility using VES. If known to VES, then a transfer enrollment is completed to add a new facility and update patient information. Patient records will be added in both VistA and Millennium until all sites have transitioned. After enrolling the patient in VES, the record will automatically be available to access in Millennium applications. This includes all patient types (Veteran, Employee, Caregiver, etc.)

### **Q. I can't see the External Search button.**

**A.** External Search should never be used. This button will be restricted MPI POCs to only be used in the event a system error occurs which delays the record from automatically being added after enrollment is completed at the facility.

### **Q. I need to move an encounter from the wrong patient record to the correct one.**

**A.** See Section above, Moving or Merging Encounters.

### **Q. There is a discrepancy in the contact information (address, email, phone).**

**A.** See section above, Trait Differences in the Federal EHR.

**Q. I need to report an issue with a trait or identifier (EDIPI, ICN, VHIC ID, MRN) in the Federal EHR.**

A. The following VA MPI Toolkit Request Types have been established to assist with reporting data quality issues within the Federal EHR. All are given urgent priority by HC IdM and staff have been advised to report data quality issues to their MPI POC to be escalated per the above guidelines.

- **Cerner-MPI EDIPI Issue:** The record is missing a DoD ID (EDIPI), has multiple, or is displaying the wrong EDIPI and impacting record availability in Millennium.
- **Cerner-MPI Data Discrepancy:** Identity traits in Millennium do not match those in VA MPI/VistA/CPRS/VES (Only report those directly impacting care or when an overwrite has occurred.)
- **Cerner-MPI Date of Death Discrepancy:** There is a discrepancy in the date of death listed in the Federal EHR and the value needs to be added, updated, or removed across enterprise systems.
- **Cerner Duplicate:** Potential duplicate patient records identified in the Federal EHR and any Millennium applications
- **Potential Duplicate:** Potential duplicate records identified in VA MPI, VistA, VES, and other VA applications.

**Q. I need to register a patient that is unknown/unconscious and am unable to confirm the identity.**

A. The [Emergency Department Registration Tip Sheet – Adding and Modifying Unknown or Unconscious Patients](#) shows how to add an unknown or unconscious patient within FirstNet, ensuring that the Urgent Care and Emergency Department can perform a Quick Registration for the patient. It also shows how to update the unknown patient's identity traits after the Quick Registration has been performed and the patient has been identified.

**Note:** Adding of records using this process should only be used for unknown/unconscious patients requiring treatment before their identity can be obtained. All registrations otherwise must be done in VHA Enrollment System to ensure existing VA and DoD clinical data is available in the EHR.

**For additional questions related to MPI POC functions or identity issues within the Federal EHR, please log a request in VA MPI Toolkit or contact the Health Care Identity Management Team via [email](#).**