Guidance for Temporary and Permanent Record Matching and Documentation for LHD

**Purpose:** This document provides details on the match function in Virtual Health (VH) and best practice guidance on how to document on a member when both a temporary and permanent record exist.

**Match versus Merge:**

1. VH does not have a solution for merging two separate records into one final record. True merging capabilities are being solutioned and are expected in the upcoming months.
2. VH does have matching capabilities to associate active enrollment with a permanent record which is triggered by the creation of the temporary record.
3. This matching process can take up to 24 hours to be reflected in VH.
4. Matched records do not merge together into one chart and therefore there will be a temporary and permanent chart until the merge function is active.
5. Temporary records do not receive claims data, ADT feeds, CM/TC/MIIS updates, etc.,

**Documentation Guidance:**

1. **The Care Manager must search in VH to see if a permanent record exists before documenting in the temporary member record.**
2. If a permanent record has been created:
   a. Make a note in the member profile (see image 1 on pg. 2 of this document) in the temporary and permanent records stating that the member has two records and that the temporary record will contain the documentation.
      i. This will create a note on the member inbox easily identifying that the member has two charts (see image 2 on pg. 2 of this document).
3. Because the temporary record will not receive claim or score updates, it is expected that the Care Manager will check the permanent record claims and scores each time an interaction is planned with the member and document any pertinent claims information or score changes noted from the permanent record.
4. Each agency will be responsible for tracking members with temporary records that will need to be merged
5. Once merging capabilities are functional, you will submit a ticket to Service Now asking that the two records be merged.
Reference Images

Image 1. (Member Profile Screen):

Image 2. (Ibox View):

Test, Test

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<thead>
<tr>
<th>Sex:</th>
<th>Female</th>
</tr>
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<tbody>
<tr>
<td>Gender Identity</td>
<td>N/A</td>
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<tr>
<td>Date of Birth</td>
<td>11/08/1977</td>
</tr>
<tr>
<td>Age</td>
<td>41 y.o.</td>
</tr>
<tr>
<td>Preferred Phone</td>
<td>878-787-8778</td>
</tr>
<tr>
<td>Address</td>
<td>Unknown, Unknown, North Carolina 07044</td>
</tr>
<tr>
<td>Language</td>
<td>Unknown</td>
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<tr>
<td>County</td>
<td>Orange</td>
</tr>
<tr>
<td>Service Area</td>
<td>N/A</td>
</tr>
<tr>
<td>Care Team</td>
<td>Marshall, Jennifer (Primary); Test Provider, Test (PCP); Coates, Lori (Quality Management Specialist); White, Avera (Quality Management Specialist)</td>
</tr>
<tr>
<td>Notes</td>
<td>Likes to be called George</td>
</tr>
</tbody>
</table>

Pregnancy Due Date: -

Medicaid #: N/A

Dual Eligible: No

Medicare #: N/A

Eligibility Date: N/A

Termination Date: N/A

Plan Name: N/A

Managed Status: Managed

Risk: Engagement Level - High

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