**Issues for the RCHC Data Standards and Integrity Council**

**July 12, 2021 Meeting**

Version 1, By Ben Fouts MPH, RCHC Data Analyst

1. **Protocol for matching PHP patients to EHR patients**

Reports: QIP Quality Measures

Issue: Describe the proposed Relevant protocol for matching Partnership HealthPlan patients to EHR patients.

Description: An RCHC pilot project will begin making the Partnership HealthPlan monthly enrollment lists available to health centers in Relevant. The goal is to maximize the number of matches and to maximize the accuracy of those matches.

Not every patient on the Partnership HealthPlan list will have been seen at the health center, so a 100% match is not expected. There are additional challenges because of differences in the spelling of names, date of birth, and CIN between Partnership and known patients in the health center’s EHR.

The pilot program involves health centers based in Sonoma County using Relevant. There is a Transformer developed by Relevant that matches patients and will be explained below so everybody on the Data Standards and Integrity Council understands. Some health centers outside of Sonoma County have other ways of matching Partnership patients to their own patients and no recommendations are being made right now to change those procedures. Hopefully, over time, we can get a “best practice” SQL code for health centers who want to use the Relevant matching Transformer.

The general procedure is that the monthly enrollment list will be loaded into the health center’s instance of Relevant and matched there. If Partnership data is needed on the RCHC aggregate level, it will rely on the matching from the health centers.

The matching procedure shown in the table on the next page was developed by Relevant. An attempt is made to match patients from the PHP membership list to the EHR patient list for each of the priorities. Then, for each Partnership patient, the EHR patient with the lowest priority number is selected as the “best” match.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Priority | Last name | First name | Date of birth | CIN |
| 1 | Exactly | First 6 letters | Exactly |  |
| 2 | First letter and last part of name | Last part of name | Exactly |  |
| 3 | Last part of name | First 6 letters | Exactly |  |
| 4 | First two letters | First 6 letters | Exactly | Exactly |
| 5 | Exactly | First 3 letters | Exactly |  |
| 6 | Last part of name | First 3 letters | Exactly |  |
| 7 | First 4 letters | First 4 letters | Exactly |  |
| 8 | First letter and last part of name | Last part of name | Month and year of birth |  |
| 9 | First letter and last part of name | Last part of name | Day of month and year of birth |  |
| 10 |  |  |  | Exactly |
| 11 | First 5 letters | First 4 letters | Month and year of birth |  |
| 12 | First letter and last part of name | Last part of name | Month and year of birth |  |
| 13 | Match to first name: First letter and last part of name | Match to last name: Last part of name | Day of month and year of birth |  |
| 14 | Match to first name: First 5 letters | Match to last name: First 4 letters | Day of month and year of birth |  |
| 15 |  | First 6 letters | Exactly | First 8 numbers or letters |