

## Regional PHIMS Client Files Merge Request or Overlay of Client Records Process

### Background & Rationale:

- The Manitoba Health Surveillance Unit (MHSU) contacts regions when duplicate Public Health Information Management System (PHIMS) client files are found that are believed to be the same person. The PHIMS Team also contacts regions when two client records are tied to the same Personal Health Identification Number (PHIN) for a period of time. Either MHSU or PHIMS Team asks regions to follow up with the client/s to determine if these client files are the same person or different.
- Within the WRHA, the MHSU and PHIMS Team requests were previously actioned by the Central WRHA COVID Distribution Team / COVID PHNs at 490 Hargrave. These teams have since been disbanded as we shift back to pre-pandemic services. As such, these duplicate PHIMS client files from MHSU and overlay of client records from the PHIMS Team still require follow-up and action.
- Possible duplicate client files or overlay of client records may also occur with general Communicable Disease (CD) files since their management in PHIMS in the Fall 2021 or noted via PHNs themselves.

### Effective April 1, 2022 until further notice:

#### **CD Admin Role:**

- Merge Request email received via MHSU & forwarded onto CDC.

#### **CDC Role:**

- Overlay of client records email received via PHIMS Team.
- Check PHIMS to see if a regional Investigator PHN was assigned and/or via the Notes tab.
- Forward the MHSU merge request or PHIMS' overlay of client records email to the identified PHN if available or to the Community Area (CA) in which the client resides.

#### **PHN Role:**

\*A Door Step Visit is warranted if unable to reach/verify by telephone (Coordinate with the client's CA office if the tasked PHN works in a different CA).

- Author a Note in the correct PHIMS client file re: same person confirmation re: Client ID # \_\_\_\_\_ & Client ID # \_\_\_\_\_.
- Author a Note in the correct PHIMS client file that the merge request form has been emailed to Shared Health Service Desk & add a snipped image of same.
- [1.0c Request to Merge Client](#)  
*Form Comments example: Spoke with client, Client #2 confirmed to be same as Client #1 with case INV ID# \_\_\_\_\_.*
- Scan and email the form to [servicedesk@sharedhealthmb.ca](mailto:servicedesk@sharedhealthmb.ca) and Cc CDC, & the MHSU staff who the merge request originated from (if applicable)
- MHSU will notify the primary investigator/merge requestor to review the merged client record once the request is complete.
- RE: Overlay of client records in PHIMS-
  - Author a Note in the correct PHIMS client file re: validation of Client ID # \_\_\_\_\_ with INV ID/s # \_\_\_\_\_.
  - Email CDC & PHIMS Team member who the email originated from re: follow-up outcome/s.
  - Additional guidance will be provided via the PHIMS Team & CDC as needed.

**Links:** <https://phimbs.ca/resources/training-support-tools/#67-69-1-0-managing-client-records>  
[1.0d Documentation Review Post Client Merge](#)