IIS Joint Development and Implementation (JDI) Project Summary – Patient Matching, DRAFT V3.1

This summary outlines the basic information needed for a joint development and Implementation (JDI) project supported by AIRA and IIS programs, IIS vendors/implementers, and invested partners.

AIRA's primary objective for the JDI strategy is to develop and implement collaborative projects and services. For these projects, AIRA will provide, at minimum, project management and administrative support as needed. Project management will include leadership to address additional resource needs as feasible. Further project funding and in-kind support will be provided by participating parties as dictated by the project selected.

Basic Project Information	
Project Title	Evaluation of Third-Party Patient Matching/Identity Management Tools for consideration of adoption
Project Type *See project type list for definitions*	Tool: An application which *assists* an IIS in meeting a functional standard Tools or Operational and/or Technical Guidance: Crafting of requirements, recommendations, and reference materials for development and/or implementation
Project Description and Output *A brief overview of the project*	This project would focus on the development evaluation of available modular third-party tools and consensus-based guidance for patient matching. This effort could present options to greatly improve the quality of data in IIS by uniformly resolving duplicate records. Output: Summary evaluation of third party tools, recommendations for implementation, and possible implementation support.
Background or Context *A summary of the problem(s) that the project is trying to solve*	Record de-duplication is one of the core functionalities and challenges for IIS, one which could benefit from collective analysis and documentation. Aside from expert panel outputs for best practices and test cases, no standards currently exist across the IIS community to support patient deduplication. Standardized patient merging guidance and subsequent modular tool development would be very useful, particularly if it were created with a platform-agnostic approach.
Existing Standards or Guidance to Support the Project	Guidance from the 2012 Expert Panel MIROW Record Consolidation Chapter (pending)
Existing Test Data or Testing Tools to Support the Project	• Test deck from the 2012 Expert Panel • Test data from ONC Patient Matching Challenge
Related Projects *Projects already in motion that may affect this project, and their anticipated impact*	MIROW Record Consolidation is focused on the resolution of records once a match has been found. ONC is currently conducting a "Patient Matching Challenge," and has test decks and that may be able to be leveraged in this process. AIRA has requested information on the date these resources may be available following the challenge.
Potential Participating Parties	All IIS and IIS Vendors
Potential Additional Stakeholders	External efforts such as the Sequoia Project's framework and practical guidance for Patient Matching or ONC's Patient Matching Challenge resources may offer both additional partners and useful information to leverage in this evaluation.
Potential Platforms/Systems Benefiting from Project	All IIS and IIS Vendors

Strengths of Selection as a JDI Project *A list of the reasons this project would be a stronger project if completed collaboratively rather than if completed by individual programs*	• ~~Expert panel information from 2012 could serve as a good jumping off point for guidelines and tools.~~ • ~~Efforts across the broader healthcare community (Sequoia project, etc.) may also provide resources information toward this effort.~~ • This challenge is common and universal for all IIS. • ~~Deployment of common guidance and/or a common tool would serve a practical purpose as well as uniformity of practice across the IIS network.~~ Evaluation of third-party tools could serve as a building block toward more work in the area of patient deduplication. • ~~If it was determined that strong third-party tools exist, highlighting a~~A modular tool or tools could represent significant cost saving potential~~s~~ for the IIS community.~~.~~ •
Challenges of Selection as a JDI Project *A list of the reasons this project would be a challenge as a collaborative project rather than if completed by individual programs*	• Deduplication is a challenging issue without good standards to leverage. • Resources are limited to apply to the implementation of the output of this project. • Current practices are extremely varied, so consensus guidance would be challenging to create simply because of the diversity of perspectives and experience. • HHS may be looking at this issue in the coming years, and may offer more comprehensive solutions/guidance. • This effort may not point to one tool, but instead will help develop a process and structure to assist programs in determining a strategy or tool for their unique needs
Perceived Funding Needs *How resource-intensive is this project likely to be?*	~~High~~Medium (note: future steps in this project area will likely be much more resource intensive)
Potential Resources Available *Including financial resources and in-kind support*	~~Unknown~~ Expert panel information from 2012 could serve as a good jumping off point for guidelines and tools. • Efforts across the broader healthcare community (Sequoia ~~Pp~~roject, ONC, etc.) may also provide information toward this effort. •
High-Level Project Risks *Including financial, legal, contractual, or other*	This is a small piece of a much larger need across the community, and funds may not be forthcoming for future components of this project. Resources to develop internal deduplication functions within an IIS platform may not be easily redirected to third-party solutions, even if they are found. The output of this effort may point to further strategy development rather than a "shrink-wrapped" solution.
Anticipated High-Level Timeline	Note: Some activities may run simultaneously - • Conduct a landscape analysis of available third-party patient matching tools (commercial, open source, public domain, etc.) in use by IIS and by similar partners outside the IIS industry (3 months) • Develop criteria by which to evaluate third party tools (2 months) • Conduct an evaluation and draft summary document outlining results of findings (3 months) • Circulate summary evaluation for comment (1 month) • Finalize and publish (1 month)
Anticipated Project Disposition *Will project outputs be available to other IIS programs? Will there be costs or licensing fees?*	Outputs and lessons learned from this evaluation would be available to all IIS and IIS vendors at no cost; however, implementing a third-party solution would likely have associated costs. ~~s~~

Perceived Need/Urgency *Is this a high priority for the community?*	☐-X High	☐X Medium	☐ Low
Viability as a Joint Development Project	X High	☐ Medium	☐ Low

Additional Information
Use this space to provide any additional information about the project not addressed above.
This project may have a particular sense of urgency for many IIS across the community who are actively evaluating needed development of their patient matching functionality.