

For health system data, analytics, and AI leaders

10 steps to reduce duplicate patient records

Practical steps for cleaner, more accurate patient data

Executive summary

45% of large hospitals say they can't reliably identify the same patient across every system they run, according to the U.S. Government Accountability Office. Every one of those failures starts the same way: a patient shows up under a slightly different name, address, or phone number, and a system built for exact matches treats them as two different people. That mismatch then multiplies across the EHR, the CRM, and any analytics or AI model built on top of it.

This guide gives data, analytics, and AI leaders 10 concrete steps to cut duplicate patient records at the source, not just clean them up after the fact. Work through them in order, or start wherever your team already is.

- 1 Agree on one definition of a duplicate.**
Get IT, HIM, and compliance aligned on what counts as a duplicate versus a true match, including the same patient under a different name, address, or phone number.
- 2 Audit before you act.**
Run a baseline count of your current duplicate and overlap rate across major systems. It's hard to shrink a number nobody has measured.
- 3 Fix the entry points, not just the queue.**
Registration, scheduling, and the call center are where most duplicate records are born. Tighten validation at entry before a new record saves.
- 4 Move beyond exact-match rules.**
Exact-match rules miss the misspellings and phone turnover that create most duplicates. Referential matching connects records even when an attribute has changed.
- 5 Give stewards a confidence score, not just a merge button.**
A steward who only sees match or no match has to guess at the close calls. Confidence visibility turns guesswork into a defensible decision.
- 6 Automate the obvious matches.**
Save manual reconciliation for real exceptions. Automating the easy matches frees stewards to spend time where judgment actually matters.
- 7 Extend matching past the EHR.**
A patient matched inside the EHR can still show up as three different people across the CRM and the call center. Matching has to span every system.
- 8 Set a target and measure every quarter.**
A duplicate-reduction effort without a target accuracy threshold drifts. Put a number on it and treat a missed target as a signal to investigate.
- 9 Report the number leadership already tracks.**
Duplicate rate on its own reads as an IT metric. Tied to denied claims or patient experience, it becomes something leadership will act on.
- 10 Revisit the approach every time something changes.**
A single acquisition can introduce thousands of new patient records overnight. Build a recurring review into the governance calendar.

Why this matters

Cross-organization patient match rates can fall to roughly 50%, according to Pew Charitable Trusts research on patient matching. Nearly 90% of consumers who switched healthcare providers said the organization was hard to do business with, according to the American Hospital Association. Every duplicate record is a small version of that same failure to recognize someone, and every AI model trained on that data inherits the error.

CASE STUDY

Proven in the field

Northwell Health cut its potential-match queue by 87% by putting referential matching to work as the foundation beneath its identity data.



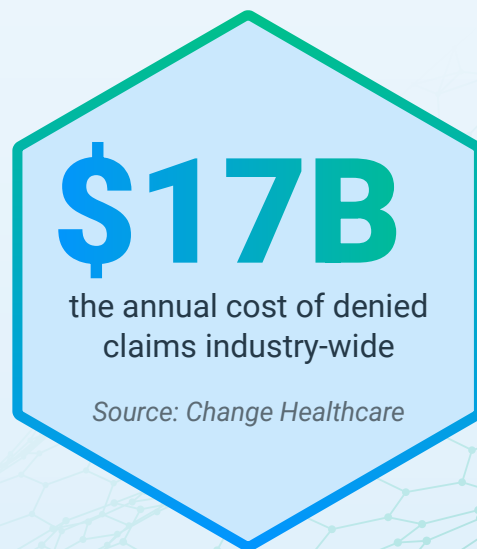
Ten steps are a lot easier to execute when the matching underneath them actually holds up.

Turn these steps into results

**Same patient. Different name. Different address.
Different phone. Verato still knows it's them.**

Most legacy matching tools rely on probabilistic guesses that need constant retuning as data drifts. Verato Referential Matching® connects identities using curated reference data instead, so records still match even when a name, address, or phone number has changed or doesn't line up exactly. It delivers up to 98% identity resolution accuracy and 24% more accurate than traditional or algorithm-only matching approaches.

It's why more than 100 healthcare organizations trust Verato to build the identity foundation their duplicate-reduction work runs on.



Ready to see your real duplicate rate? Talk to Verato.



Verato®, the identity intelligence company, solves the critical challenge of Knowing Who Is Who™. Proven in healthcare and trusted everywhere, Verato MDM Cloud™ unifies, enriches, and manages identities with unmatched accuracy — powering better experiences, improved outcomes, business growth, and AI-native efficiency across identity-driven business processes.

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