PATIENT MERGE

💡 **NOTES**

In the instance that you have a duplicate patient account, it is strongly recommended that you merge the account so that you do not have separate charts, where information can be misplaced or lost.

🖥️ **GO TO**

To perform a merge, go to:

Administration → Patient Merge

≡ **STEPS**

1. Enter as much demographic information as possible and click 'Search'.
2. The system will now generate any potential matches the system finds for duplication. You will notice that it has populated a "Primary Patient Record" as well as a "Secondary Patient Record." Each duplicate account will show twice, once under each column.
3. Designate one as the primary account. This will be the one that has the most recent/up-to-date demographic importation. This is due to the fact that although ALL data (clinically and/or billing) will be merged to one account, the only demographic information that will be used going forward is the account that is listed as Primary.
4. After designating your primary and secondary accounts, verify that the patient is a duplicate by verifying the data.

⚠️ **Patient merge cannot be undone! Please check all patient data carefully.**

Primary Patient Record						Secondary Patient Record				
	Account #	First Name	Last Name	Birthday	SSN		Account #	First Name	Last Name	Birthday	SSN
○	6053804	Christina	Test	1986-01-01	123456789	○	6053804	Christina	Test	1986-01-01	123456789
○	5974150	Christina	Test	1986-01-01	999999999	○	5974150	Christina	Test	1986-01-01	999999999

[Show Record]

Patient merge cannot be undone. Please check patient data carefully.

PERSONAL INFORMATION

Primary Patient Records

Prefix:	
First Name:	Christina
Last Name:	Test
Middle Name:	
Suffix:	
SSN:	123456789
Sex:	female
DOB:	01/01/1986
Marital Status:	
Employment Status:	
Occupation:	
Created Date:	10/18/2018
Active:	1
Photo:	

Secondary Patient Records

Prefix:	
First Name:	Christina
Last Name:	Test
Middle Name:	
Suffix:	
SSN:	999999999
Sex:	female
DOB:	01/01/1986
Marital Status:	
Employment Status:	
Occupation:	
Created Date:	08/17/2018
Active:	1
Photo:	

EMR NOTES

Primary Patient Records

Primary record has 0 note(s).

0 secondary record note(s) will be merged

to primary notes.

Secondary Patient Records

0 secondary record note(s) will be merged

to primary notes.

DOCUMENTS

Primary Patient Records

Secondary Patient Records