A Quick Guide to Merging Patient Records

Merge Patient Record is a Registration tool, which enables you to merge duplicate records. The facility allows you to move clinical data from a duplicate record (which is usually inactive) to an existing active record. Please note the following:

- You need the relevant Security rights to merge patient records. See Allow Staff to Merge Patients in the Security section of the on-screen help.
- Once the merge process is complete, you must check the active patient record for duplicate data. See Checking the Recently Merged Active Record for Duplicate or Erroneous Information (page 4).
- Once the merge process is complete, you must also make sure the unwanted duplicate record has a registration status of Transferred Out and that you change the patient's Surname to avoid the patient being selected by accident.

How to Complete a Patient Merge

To merge patient records:

⚠️ Important - Once the merge patient process is complete, it CANNOT be reversed. Please take extreme caution when selecting patients to merge.

1. In the Registration Module, go to Action – Merge Patients.

   Action - Merge Patient
2. The Merge Patient screen is displayed.

3. In the Patient Record to Proceed with – Active Records Only section, click Find and select the active patient’s record you wish to merge data into.

4. Next, in the Patient Record That Will No Longer Be Used section, click Find and select the patient’s record you wish to transfer data from. This is usually an inactive record eg Transferred Out/Expired Temporary Resident.

5. When you have selected both patient records, check again to ensure you have the correct patients for your merge.

6. Click Merge to continue.

7. If the patient’s sex and/or date of birth do not match you will be prompted: “Warning! The patients’ dates or birth and sexes do not match. Are you sure that these are the correct patients?” Check the patient’s details and if correct click Merge to continue.

8. If there is an outstanding Registration Links transaction, an existing FP69 transaction or outstanding medical record flag you will be prompted: “The patient merge could not be performed for XX (patient name) because XX (Outstanding transaction details).” Click OK to close. Once the outstanding transactions have been completed you can continue with the merge.
9. You will see the following prompt when you are about to merge the two patient records.

![Patient Merge - Warning]

**Patient Merge - 1st Warning**

10. Click **Merge** to continue.

11. You are prompted: 

   "**IMPORTANT – This patient merge cannot be reversed. Are you still sure that you want to proceed?**"

   ![Patient Merge - Warning]

**Patient Merge - 2nd Warning**

12. Click **Merge** to continue.

13. The records will now be merged; a progress bar will be displayed on the right of the Merge Patient screen.

![Merge Patient]

**Merge Clinical Data**

14. During this process, if one of the records to be merged is in use, you will be prompted: 

   "The merge could not proceed because the patient XX (patients name are shown here) is locked by XX (details of user, workstation and time are shown here)".

15. Click **OK** to close, you are returned to the Merge Patient screen. When the records are closed, the merge can proceed.
16. Once the Patient Merge is complete you are warned that the merge has completed successfully:

![Patient Merge Completed Warning]

**Patient Merge Completed**

17. Click **Yes** to open the active record in Consultation Manager.

**Note** - If the patient who will no longer be used has appointments, pending the following warning will be displayed: "Warning: there are X (number of appointments displayed) pending appointments for this patient." These appointments will need to be cancelled and remade with the merged record details.

18. Check the patient’s record to ensure all the data has transferred successfully. When completed close the patient record.

19. Next, check the Registration status of the duplicate record. You must ensure this record has the registration status of transferred out, to prevent data being added to it. You may need to security deduct the patient if they are a permanent patient. For more information on Security Deductions, please refer to the on-screen help.

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### Checking the Recently Merged Active Record for Duplicate or Erroneous Information

Following a successful merge, it is essential that the active patient record is checked for duplicate or erroneous information. This **MUST** be done before the record is transmitted to any other agency (ie GP2GP/Summary Care Record/Emergency Care Summary).

1. After the merge has completed and you have opted to view the merged patient record, you are prompted: "This patient record has been merged, but the clinical data has not been checked. You should check the clinical data before using this record."

2. Click **OK** to open the patient record and complete a review of the data.
Note - There may be duplicated or erroneous entries; it is important to check Therapy, Repeat Medication to ensure that repeat masters have not been added to the patient record that are no longer required for the patient. All data areas MUST be checked in particular, History, Problems and Allergies. Delete any data entries that have been duplicated.

3. This message is presented each time the patient is selected until the record has been checked.

4. Click OK to open the patient record and complete a review of the data.

5. When checking is completed, reselect the patient. The Patient record has been merged window will open. You will be prompted: "Don’t show this message again for this patient", tick the box and then click OK to finish. This confirms the record has been checked, and stops the Merged Record message appearing.

Moving a Patient's documents in Docman

The Patient Merge program moves the clinical data from one patient’s journal to another and this includes attachments. However, it does not move the actual documents from Docman.

1. Log into Docman.

2. To check if the duplicate patient has documents that require moving, select the patient in Consultation Manager.

3. Choose Documents from the floating toolbar.

4. The patient's documents are displayed.
5. Click **Selected Documents** from the menu and choose **Select Mode**.

6. This puts a box in front of all the documents where you can select individual documents or click **Selected Documents** and choose **Select All**.

7. Choose **Selected Documents** again and select **Move**.

8. The following warning will appear, click **Yes** to continue.

9. The Docman selection screen is displayed, highlight **Patients** and click **Select**.

10. Enter your patient details as normal.

11. A confirmation message appears when the documents have been moved.

### Changing the Patient's Surname

To avoid the duplicate patient being selected by accident we recommend that you change the patient's name in Registration.

1. Select the duplicate patient in **Registration**.

2. Type in a new Surname of ZZ - followed by the patient's real Surname eg ZZADAM and click **OK**.
3. You are prompted to confirm that you wish to update the Previous Surname, click **Yes**.

![Previous Surname prompt]

4. Click **OK** to save the changes.