Merging Duplicated 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.

The process is as follows:

> **Note** - You must have Systems Administrator rights to access to **Merge Patients**.

- **Merge records** - From **Registration**, perform the merge, see below.

- **Check the patient record for duplicates and errors** - 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** on page **5** for details.

- **Move Docman files** - If you are a **Docman** user, transfer relevant documents to the active patient, see **Moving a Patient's documents in Docman** on page **6** for details.

- **Transfer out the unwanted record** - Once the merge process is complete, you must also make sure the unwanted duplicate record has a registration status of **Transferred Out**. All merges are audited in **Event Log**.

> **Important** - All attachment data including letters, pathology results, ECG, photographs retain the patient's original demographic data. This process should therefore not be used for patients undergoing adoption or witness protection.

> **Note** - Once the merge patient process is complete, it cannot be reversed. Please take extreme caution when selecting patients to merge.
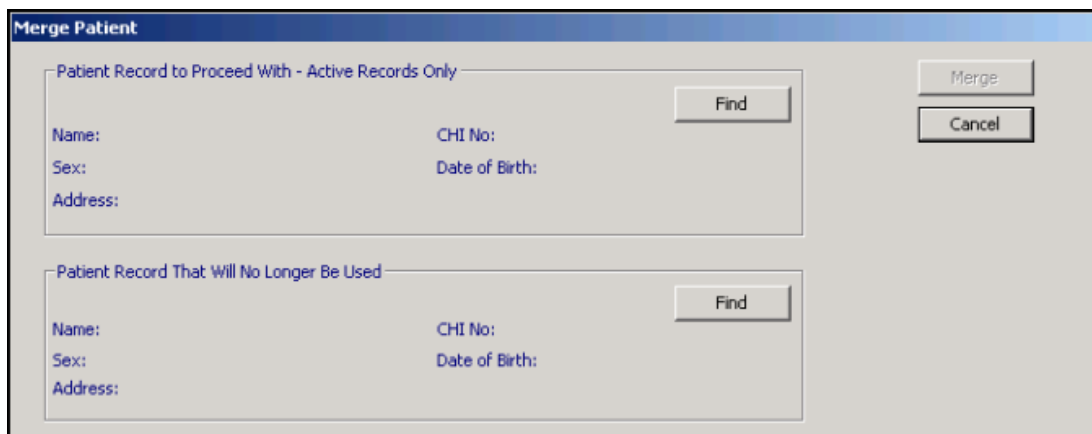
To merge patient records:

1. From the **Vision 3** front screen, select **Registration** -
   Action - **Merge Patients**:
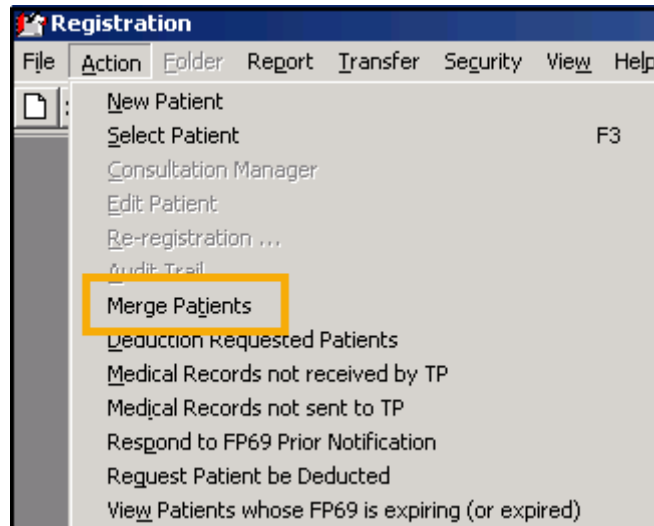
2. The **Merge Patient** screen displays:

   Complete as follows:

   - **Patient Record to Proceed with - Active Records Only** - Select
     Find and select the active patient's record you wish to merge
     data into.

   - **Patient Record That Will No Longer Be Used** - Select **Find** and
     select the patient's record you wish to transfer data from. This is
     usually an inactive record, for example, **Transferred Out** or
     Expired Temporary Resident.

     ⓘ **Important** - Check you have selected the correct patient
     records for your merge.

3. Select **Merge**.

4. If the patient's sex and/or date of birth do not match the following warning displays, '*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 select **Merge** to continue.

   If there is an outstanding **Registration Links** transaction, an existing FP69 transaction or outstanding medical record flag the following message displays, '*The patient merge could not be performed for XX (patient name) because XX (Outstanding transaction details).*' Select **OK** to close. Once the outstanding transactions have been completed you can continue with the merge.

5. The following warning displays, '*You are about to merge two patient records. Care should be taken that you have selected the correct records. All records will be moved from the patient record that you are not proceeding with, and so will no longer be attached to that patient. Are you sure that you want to merge these records?*' providing you are sure, select **Merge**.

6. A second warning displays, '***IMPORTANT - This patient merge cannot be reversed. Are you still sure that you want to proceed?*' If you are sure, select **Merge**.

7. The records now merge and a progress bar displays:

   Note - During this process, if one of the records to be merged is in use, the following message displays, '*The merge could not proceed because the patient (patients name displayed) is locked by (details of user, workstation and time displayed)*'. Select **OK** to close and try again when the records are available.

8. Once the patient merge is complete the following message displays:
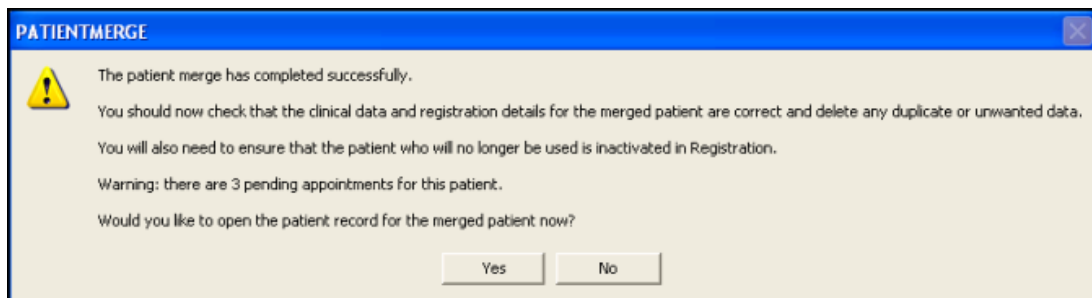
Select **Yes** to open the active record in **Consultation Manager**.

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

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

10. 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.

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, for example, GP2GP/Summary Care Record/Emergency Care Summary.

To check the patient record:

1. After the merge is complete and you have opted to view the merged patient record, the following message displays, '*This patient record has been merged, but the clinical data has not been checked. You should check the clinical data before using this record.*'. Select **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 are duplicated.

2. The **Patient record has been merged** screen displays each time the patient is selected until the record is checked:
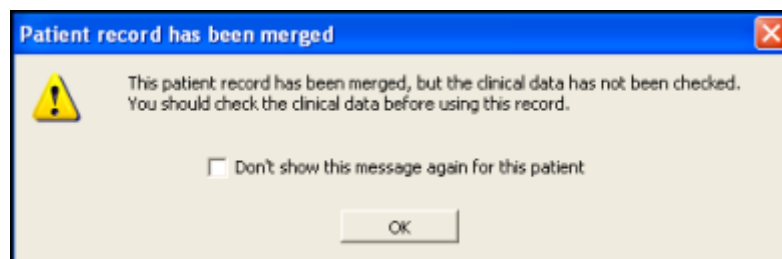
3. Select **OK** to open the patient record and complete a review of the data.
4. When checking is complete, reselect the patient.
5. The **Patient record has been merged screen** displays, tick **Don't show this message again for this patient** and then select **OK** to finish. This confirms the record is checked.

Moving a Patient's documents in Docman

The **Merge Patient** functionality moves clinical data from one patient's record to another and this includes attachments. However, it does not move the actual documents from **Docman**.

To move documents from one patient to another in **Docman**:

1. Log into **Docman**.
2. To check if the duplicate patient has documents that require moving, select the patient in Consultation Manager.
3. Select **Documents** from the floating toolbar .
4. The patient's documents display, select **Selected Documents** - **Select Mode**:
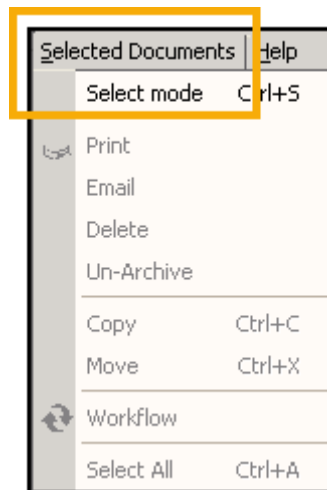
5. All the documents you can select now display, you can select them individually or select **Selected Documents** - **Select All**.
6. Select **Selected Documents** again and then **Move.**
7. The following warning displays, select **Yes** to continue:
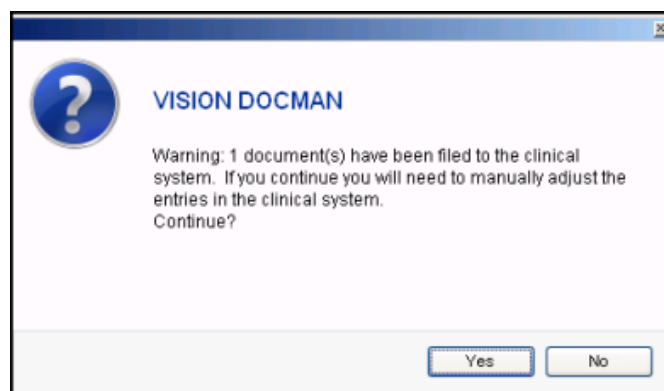
8. The **Docman** selection screen displays, highlight **Patients** and select **Select**.
9. Enter your patient details in the usual way.
10. A confirmation message displays when the documents have been moved.