

APPENDIX B - Merge a Patient

Last updated: April 20, 2022


Duplicate medical records are created as a result of patient identification errors. A duplicate medical record occurs when a single patient is associated with more than one medical record. Often times, duplicate medical records are partial duplicates that only capture a portion of a patient's medical history.

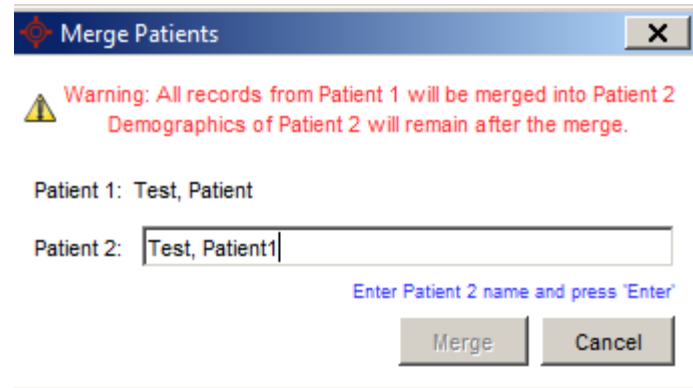
Duplicate charts may have been created as a result of three different scenarios, within these scenarios there are differing merging responsibilities:

1. Duplicates created within own site - Site responsibility
2. Duplicates identified due to inactive file or a historical paper chart conversion – Site responsibility
3. Duplicates created or identified with multi service/program involvement with an active status in the status history – If unsure which chart should merge into the other active chart(s) contact Service Desk for EMR Support Services (ESS)

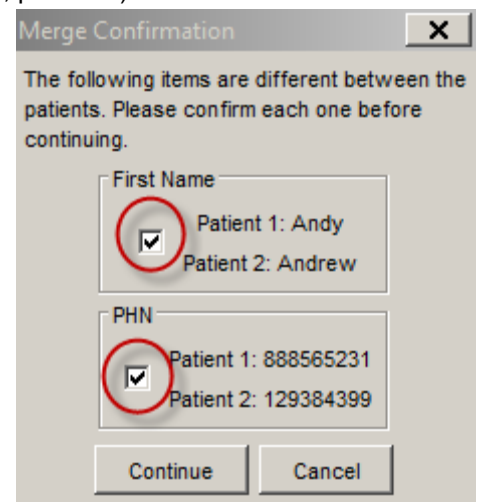
Use this feature when there are two records for the same patient and you want to merge them into one record.

- ❖ Merges are identified when at least 4 identifiers match between the patient charts. Examples include: last name, first name, PHIN and date of birth.
- ❖ When using this feature you must validate which patient's chart is the source of truth via patient, eChart or other sources.

1. From the patient section. Search for the patient that you wish to merge using the **Search Tool**. This patient will be **Patient 1** during the merge function and represents the record that will be **deleted** from Accuro. All records from this patient will be added to the chart of the second **Patient 2**.
2. Click the **Merge** button  located at the bottom of the Patient Demographics screen.
3. Type the last name of the patient you wish to have the patient 1 merged with (the patient you want to keep, patient 2).
4. Press **ENTER** on your keyboard to start the search.
5. Select the desired patient whose record you want to keep.
6. Click the **Merge** button.
7. In the Merge Confirmation window, be sure to confirm each item identified by clicking in the **checkbox**.
8. Click on **Continue**.
9. From the **Merge Patient** window, click on **Yes** to continue the merge.



The 'Merge Patients' dialog box features a blue title bar with a close button (X). A red warning icon and text state: 'Warning: All records from Patient 1 will be merged into Patient 2. Demographics of Patient 2 will remain after the merge.' Below this, 'Patient 1: Test, Patient' is displayed. A text input field for 'Patient 2:' contains 'Test, Patient1'. A blue instruction reads 'Enter Patient 2 name and press 'Enter''. At the bottom are 'Merge' and 'Cancel' buttons.

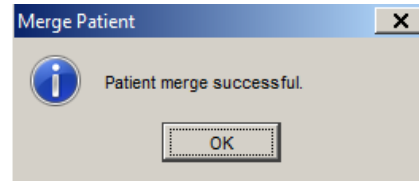
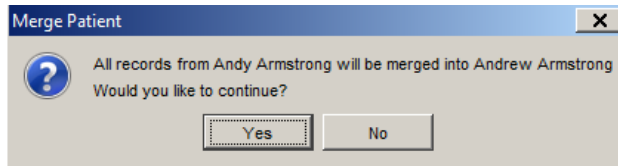


The 'Merge Confirmation' dialog box has a grey title bar with a close button (X). The text reads: 'The following items are different between the patients. Please confirm each one before continuing.' It contains two sections: 'First Name' with 'Patient 1: Andy' and 'Patient 2: Andrew', and 'PHN' with 'Patient 1: 888565231' and 'Patient 2: 129384399'. Each section has a checkbox with a red circle around it. At the bottom are 'Continue' and 'Cancel' buttons.

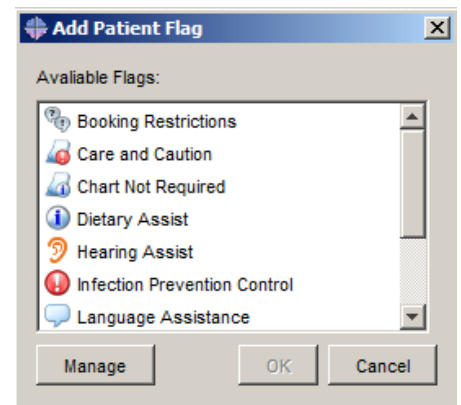
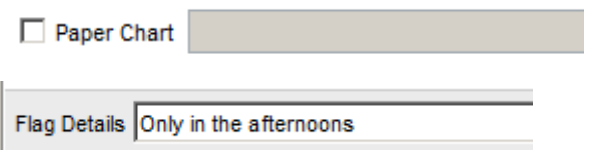
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10. Click on **OK** to acknowledge the successful merge.



Caution: When records are merged, those unique demographic fields in the "Patient" section such as; Flag Details, Paper Chart or Global/Your Message fields, and Flag icons. These fields will only be retained in the surviving record (i.e. Patient2) and so unique information in the first record (Patient1) **needs to be noted and re-entered** after the merge.



Caution: When merging a patient with a multiple site record please contact servicedesk@sharedhealthmb.ca for further assistance as not all patient information is shared across the Community EMR.

Caution: A patient Merge is final and cannot be reversed unless the System Administrator is contacted. Please contact servicedesk@sharedhealthmb.ca.

Expected Results:

When merging, all clinical documentation from **both** patient records is merged into one file. Patient demographic information will be overridden with the surviving chart's information. It is recommended that users take note of the items below and if they are still valid for the surviving chart and not already entered, one must add them to the Patient Demographics as per standard practice.

- ❖ Patient flags details
- ❖ Global / your message fields
- ❖ Flag icons
- ❖ Historic chart #
- ❖ Status history indicator(s)