



MMEEx User Manual

Merge Patient Records

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Merge Patient Records

There may be times when it is identified that there are two patient records for one patient. This might be due to:

- user error - a user creates a second record for a patient
- user error - a duplicate record is created due to incorrect spelling / recording of the patient name
- user error - a new record may have been created for a patient who has a record marked as inactive.
- merging of organisations - one patient may previously have been seen at the separate organisations

If there are two patient records for a particular patient in MMEEx, the merge function can be used to integrate two records.

Records to be merged, **must** have the same owner.

Preventing Duplicate Records

Prevention is better than cure! MMEEx checks you patient list as you create a new patient record and advises if a similar sounding patient already exists.

You already seem to have a similar patient
 Bugs Bunny, DOB: 02/08/2010 [Open Details](#) [Open Summary](#)
 I confirm that I wish to save a new patient anyway

Save
Save & Open
Close

Personal			
Title	<input type="text"/>	First Name	<input type="text" value="Bugs"/>
Surname *	<input type="text" value="Bunny"/>	Preferred Name	<input type="text"/>
Middle Name	<input type="text"/>	Gender *	<input type="text" value="Unknown"/>
DOB *	<input type="text"/>		

From the warning you can review the original file to see if it belongs to the patient standing in front of you.

You can then discard the new file or proceed with creating the “duplicate” by acknowledging the warning.

Organisation Settings for Merge

The Organisation can set some guidance for Merging and Unmerging patient records. Options include: Clinical Review Required:

- to set whether or not system needs to create a task for clinical review after merge.
 - Options: No Prompt (ie no Review required), Prompt, Auto-Prompt.

Clinical Review Task:

- set a Task type to be created which requests clinical review.
 - Options: currently *Clinical Data Review* is the Task option available.

Restrict unmerge after:

- Set a time limit on when the records may be unmerged
 - Options 1-7 days

In order to be able to merge a patient record, users need to have been assigned Patient Merge permission. In user permissions, Org Admin should select **Write** for the Patient Merge permission

See: [Org Admin - Patient Record Management](#)

How to Merge

At times it may be noticed that there are two patient records with very similar characteristics. if it is determined that the records do indeed belong to the same person and the decision is made to merge the records, the following process is followed.

Title	Last Name	First Name	Gender	DOB	Medicare	URN	Address	Record Owner
Mr	Bunny	Bugs	Male	02/08/2010		URN	3 Carrot Lane, Bunnyville, NSW	ISA Health Care Solutions (ISAHCS)
Prof	Bunny	Bugs	Male	10/07/2010			44 Burrow Street	ISA Health Care Solutions (ISAHCS)

Open patient search screen and search for the first patient record - this is usually the one with the most correct information in it and is referred to as the *Primary Patient*

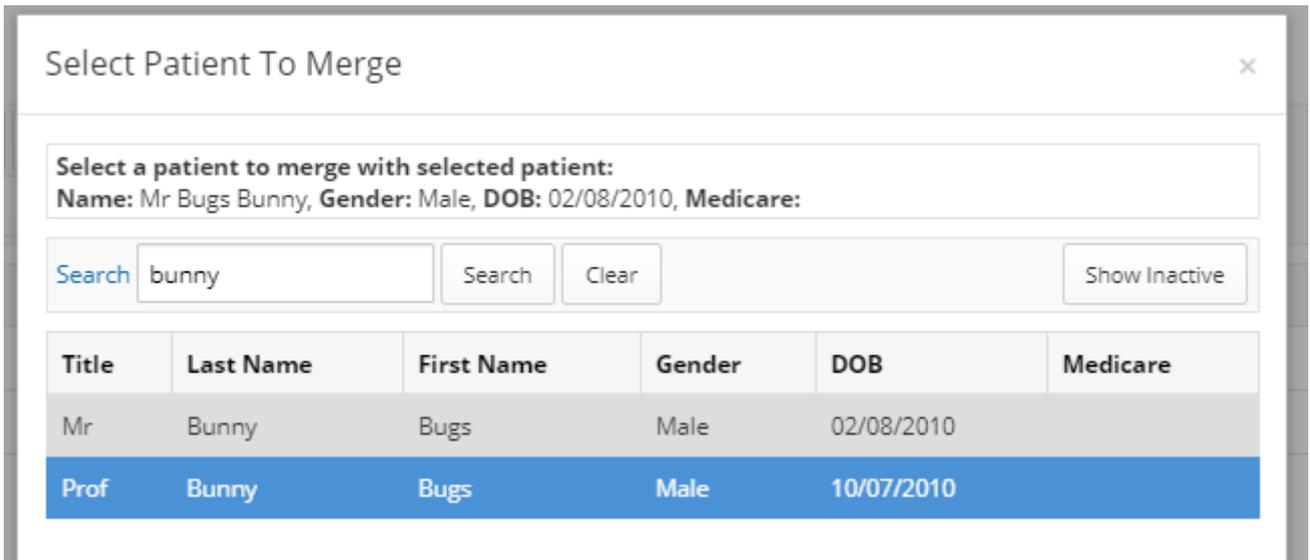
Right click on the patient record and select **Merge**.

Title	Last Name	First Name	Gender	DOB
Mr	Bunny	Bugs		
Prof	Bunny	Bugs		

- View Details
- Add Tag
- Billing
- Add Bill
- Verify
- Patient Import Update
- Merge...
- Put Patient In Venue

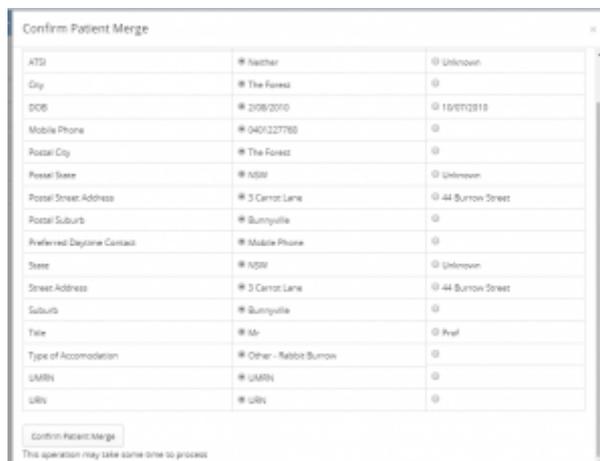
A new window opens that asks you to select the patient record that will be merged into the previously selected record. Search for the other patient and click on the record. This will be your *Secondary*

Patient. **Note:** basic demographic details of the Primary Patient are listed at the top of the window, and the Primary patient is highlighted in grey.



Important to Note: When merging patients MMEx will use the Patient Date of Registration of the Primary Patient even if the Secondary Patient information has a date preceding the primary record.

A new screen appears listing all the discrepancies between the two patients, select the correct data from each side. This will be the demographic data displayed in the newly merged record.

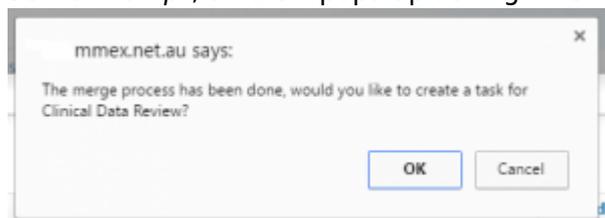


Click **Confirm Patient Merge**.

Depending on organisation settings, you may see one of the following:

Set to No Prompt, no extra screen will appear;

Set to Prompt, an alert pops up asking whether users want to create a Clinical Review task



if select OK, **Add New Task** window will open

If set to Auto-prompt **Add New Task** window will open for users to create a task for clinical review.

On the Task screen assigning the task to a specific user to review and select a reason.



A record **CANNOT** be unmerged if the number of days specified for your organisation have passed. If an incorrect merge is identified, it is recommended to rectify it immediately.

Clinical review of Merged File

After creating clinical review task, although the task itself is visible to all, only the assigned user will be able to complete the task.

<input type="checkbox"/>	Task	Reason	Status	Date	Patient	Assigned To Group	Test Name	Assigned To	Assigned By	Importance	Contacted
<input type="checkbox"/>	Clinical Data Review	Merge Patient	Pending	16/05/2016	Aardvark, John	Other		Ms Sarah Baker	Ms Sarah Baker	Routine	0 attempts

<input type="checkbox"/>	Task	Reason
<input type="checkbox"/>	Clinical Data Review	Merg
<input type="checkbox"/>	REFERRAL TO	REFE

The Task Recipient clicks on the task link.

A Clinical Data Review screen appears. This enables the Clinician to determine which parts of the Clinical Record to keep as current, or to archive. Parts of the Clinical Record that are similar will be shown on the first column (Items) and the discrepancies on the second one (Differences), and has a purpose of reducing duplication in the new single Clinical Record.

Clinical Data Review

Current Medications

Items	Differences
Accomin Adult Mixture 10 Morning	Added by: Mr Reza Tabrizi on 5/04/2016 - Route: Oral - Indication: - Strength: <input type="radio"/> Keep <input type="radio"/> Archive
	Added by: Mr Reza Tabrizi on 16/05/2016 - Route: Oral - Indication: - Strength: <input type="radio"/> Keep <input type="radio"/> Archive
	Added by: Mr Reza Tabrizi on 23/05/2016 - Route: Oral - Indication: CKD with eGFR <15 (stage 5) - Strength: <input type="radio"/> Keep <input type="radio"/> Archive
Codeine phosphate 1 Morning	Added by: Mr Reza Tabrizi on 5/04/2016 - Route: Oral - Indication: - Strength: 5mg / mL (APF Formula) <input type="radio"/> Keep <input type="radio"/> Archive
	Added by: Mr Reza Tabrizi on 5/04/2016 - Route: Oral - Indication: - Strength: 5mg / mL (APF Formula) <input type="radio"/> Keep <input type="radio"/> Archive

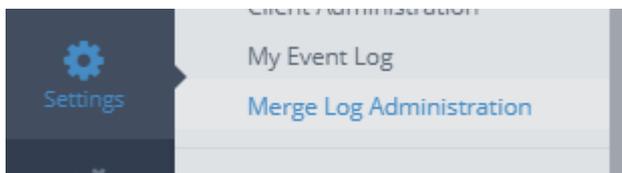
After selecting what needs to be kept or archived, click **Finalise All Actions** to complete the Merge process. The task will be *Marked Complete and Archived* and the Clinical Record will display the selected information as the current information.

Unmerge Patient Records

The Unmerge functionality enables users to undo the merging of two patient records within a maximum of 7 days - this timeframe is set at an Organisation level. To access this section Users must have [Merge Log Administration](#) permission.

Unmerge steps

Select **Merge Log Administration** from the **Settings** menu - in the *Tools* section..



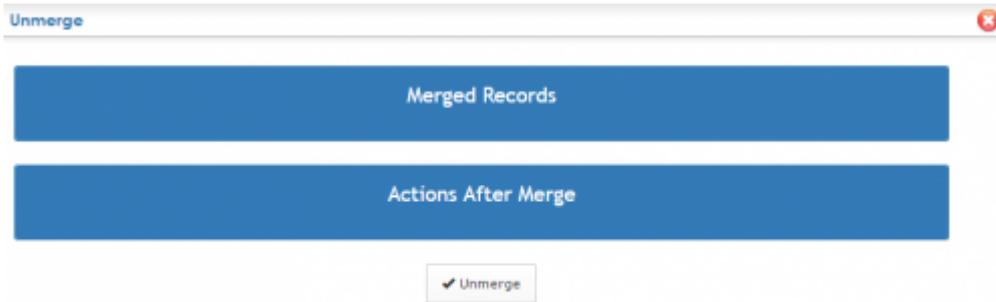
Click on the **Unmerge** button for the file you wish to unmerge.

Merge Log Administration

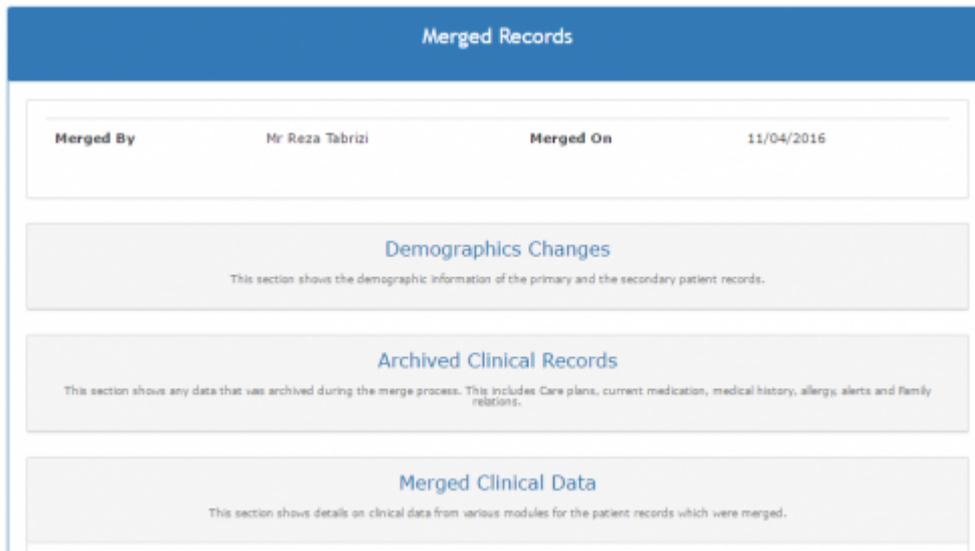
Search From To Search Clear

User	Primary Patient	Secondary Patient	Date	Unmerged by User	Date Unmerged		
Ms Sarah Baker	Bugs Bunny	Bugs Bunny	10/07/2018			<input type="button" value="View"/>	<input type="button" value="Unmerge"/>
Mr John Wikstrom	Frank Jones	Frankie Jones	16/04/2018			<input type="button" value="View"/>	

A popup screen appears which has two sections. Click on the blue heading block to expand or close the section.



Merged Records: Displays the history of the merge - all the actions happened at the time of merge including Archived Clinical record.



Actions After Merge: Displays the actions that took place within the Clinical Record AFTER the two Patient Records were merged. For example, any medication or care plans that were added to the Patient Record from the time they were merged, until now.

- Demographics section list all the changes made to the patient record since the merge.
- Events Added After Merge lists all the events (like adding a new medication) occurred after merge and lets users decide which patient should keep the records.
- Read-Only Events Added After Merge lists all the events occurred after merge but will remain for the primary patient.

Unmerge

Events Added After Merge

This section details the events added to the merged patient file.

Module	Details	Keep For
Care Plans	LIFETIME SURVEILLANCE: ABORIGINAL, FEMALE Current	<input checked="" type="radio"/> Primary <input type="radio"/> Secondary
Medication	Accomin Adult Mixture 10 Morning Oral Mr Reza Tabrizi May 23 2016 1:47PM	<input checked="" type="radio"/> Primary <input type="radio"/> Secondary

Read-Only Events Added After Merge

This section details the events which remain for the primary patient.

Module	Details
Observation	Weight kg 80 May 23 2016 1:48PM
Observation	Height cm 180 May 23 2016 1:48PM
Observation	BMI 24.7 May 23 2016 1:48PM

[Print Read-only Events](#)

In this section, the user makes a decision about which patient will *keep* the added data.

Note:

- If neither Primary or Secondary is selected, then the original value will be set for the patients.
- It is possible to keep the new value for the both patients.

Click **Unmerge** to complete the process