Merging a Patient

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To perform a Merge Patient, the user must have been granted the 'Can merge patient' permission.' This is completed by your CareRight System Administrator.

If you have access to Merge a patient, the Merge Patient button will display on a Patient record. When Merging a Patient record you must first search/select the slave record (the one you want to 'remove'/ merge into a Master). Before you merge a Patient it may be helpful to note the MRN/File Number/CRN for each of the records you will be merging.

The merge process performs the following checks/ validations before allowing a merge to occur:

- All correspondence must be marked as sent. If there is correspondence not marked as sent the user needs to either send it or cancel it.
- All patient accounts must have a zero dollar balance.
- All receipts must be allocated.
- All adjustments must be allocated.
- All admissions must be fully (confirmed) discharged.
- If the result of merging admission results in overlapping admissions then the merge process must be rejected. It is not possible to merge patients in this scenario.
- The Merge Patient must not be a Master Patient to a different Merge Patient.

How to Merge a Patient

1. Select the Patient record you do not want to keep.
2. Click **Manage** from the top banner and click **Merge Patient**.
   a. The Merge Patient screen will display - Message states "The current select patient will merge into the patient you are selecting."
3. Select the patient you want to merge from the drop-down list.
4. Click **Merge**.
   a. CareRight will provide a summary of the records to be displayed for you to check.
5. Once the merge has been verified, type **MERGE** into the field.
   a. If a patient have IHI recorded on both records. The merge screen will preview any HI Alerts that the merge will automatically mark resolved

7. Click **Continue**.

    a. A green message advising that the merge was successful will display along with a note "This patient has been merged, click here to visit master patient record.'

> **Note**: If there are any issues then a message listing the failures will display. For example: There may be outstanding invoices for one patient record.
>
> If you want to merge to a new patient, you are required to check if this patient has been merged before or not. If the patient is been merged, you cannot merge them again. It is required to revert the merge. (For revert patients, please refer here)

Viewing a Merged Patient Record

If a user selects a Merged Patient form the patient search results or via any URL accessing that patient record.

Then display a custom screen with a clear message that the patient has been merged and a link to the Master Patient record. Under message show, a read-only listing of the patient demographic details and addresses.

 Following CareRight fields will be linked on merging patients

correspondences, admissions, documents, letters, medications, appointments, alerts, allergies, alert notices, measurements, metric targets, problems, problem suggestions, diagnoses, working diagnoses, diets, procedures, immunisations, insurance records, care plans, pre_ admissions, Medical certificates, clinical notes, attachments, relationships, pictures, images, workflow model state logs, prescriptions, patient tracking, patient accounts, referrals, cases, event, tasks, requests

invoice, statement, estimate, estimate item, line item, line allocation, medicare rli record, patient measurement, problem suggestion, transaction, variance