

Merging Patient Records



Merging patient records is permanent and cannot easily be reversed.

Bp advises only senior team members are given the appropriate permissions to merge patients.



Prepare Records

Determine which record is the **MASTER** and which is the **DUPLICATE**.



If not using Bp Management, merge the MASTER and DUPLICATE records in the PMS first.

It can be helpful to temporarily rename the master record first (e.g., SmithMASTER) to assist when selecting the correct record.



Remember to change it back again!

Item	Master Record	Duplicate Record
Patient Demographic	Retained	Overwritten
Family History	Retained	Overwritten
Social History	Retained	Overwritten
Allergies	Retained	Appended except where the master record has Nil Known recorded allergies. In these cases, the allergies for the duplicate record are overwritten with Nil Known
All other clinical data	Retained	Amended (added to the record)

Merge Records

Step 1: Select the Master

- From the home screen, select **View > Patients**.
- Search for and select the **MASTER** patient.



Step 2: Select the Duplicate

- Search for and select the **DUPLICATE** patient.



Patient list

File Edit Utilities View Help

Search for: Advanced search ☐ Show inactive patients ☐ Show deceased

Name	Address	D.O.B.	Age	Medicare
Dean, Reuben T	76 Frederick St, Woodlane, 5238	14/12/1945	75 yrs	59500677
Dean, ReubenMASTER T	76 Frederick St, Woodlane, 5238	14/12/1945	75 yrs	59500677

- Select **Edit > Merge**.
- Click **Yes** to the popup warning (or **No** to cancel).

Merge patients

You must now select a patient to merge with the currently highlighted patient. The selected patient's data will be merged into the highlighted patient's record. Merging patients is permanent and cannot be reversed. Are you sure you want to continue?

Merge patient

Select the patient to merge with

Search for:

Name	External ID	Age	Address	D.O.B.
Dean, Reuben T		75 yrs	76 Frederick St, Woodlane, 5238	14/12/1945
Dean, ReubenMASTER T		75 yrs	76 Frederick St, Woodlane, 5238	14/12/1945

Legend: ☐ Inactive ☐ Deceased

Step 3: Merge the Patients

NB: A warning displays if the patient records do not match exactly, e.g., if you renamed the MASTER.

- Click **Yes** to merge or **No** to cancel.

Merge patient

The patient to merge does not have the same first name and date of birth as the one that was selected in the list. Are you sure you want to merge these 2 patients?

- Select the Master
- Select the Duplicate
- Merge Records

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