

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.



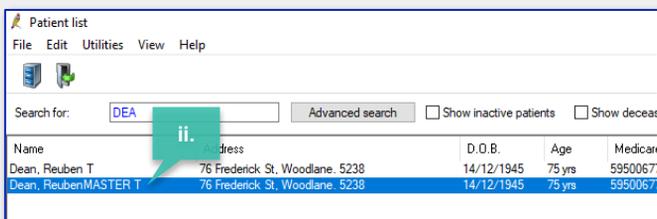
Remember to change it back again!

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)

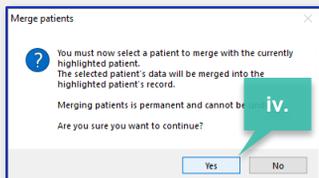
Merge Records

Step 1: Select the Master

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

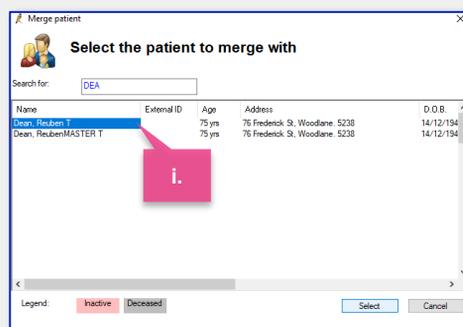


- iii. Select **Edit > Merge**.
- iv. Click **Yes** to the popup warning (or **No** to cancel).



Step 2: Select the Duplicate

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



Step 3: Merge the Patients

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

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

