Archive or merge patients

Last Modified on 05/12/2024 10:46 am AEDT

Update the status of deceased patients and those who have not visited the practice in some time. This provides more appropriate search results and accurate information.

Patients whose records have been marked as Archived or Deceased will not be selected to appear on the Patient Selector screen unless you tick the Search Archived and Deceased box. This option can be permanently switched on through **Practice Setup > Practice > Practice Details** and selecting the **Find arch'd/deceased** checkbox.

Archived patients

Patients can be archived if they have not visited the practice within a specified period of time.

As it is not possible to delete patients with financial data, this function can also be used to set the patients' Status (in Patient Details) from Current to Archived automatically. Patients who are archived will not appear in Patient Search results (unless the Search Archived/Deceased field is ticked).

To archive a patient:

1. Go to Zedmed's **Utilities** tab.
2. Select **Archive** then **Archive Patients**.

   The **Archive Patients** screen will open.
3. Select the parameters for archiving.

   Before you proceed with the Archive, it is recommended that you Print a list of Patients that would be archived if you proceeded. This can be used to pull files and as a hard copy reference later. Alternatively, you can print a list of Archived patients through the Reports/Patients Report using the Status criteria of "Archived".
4. Select **Archive**.
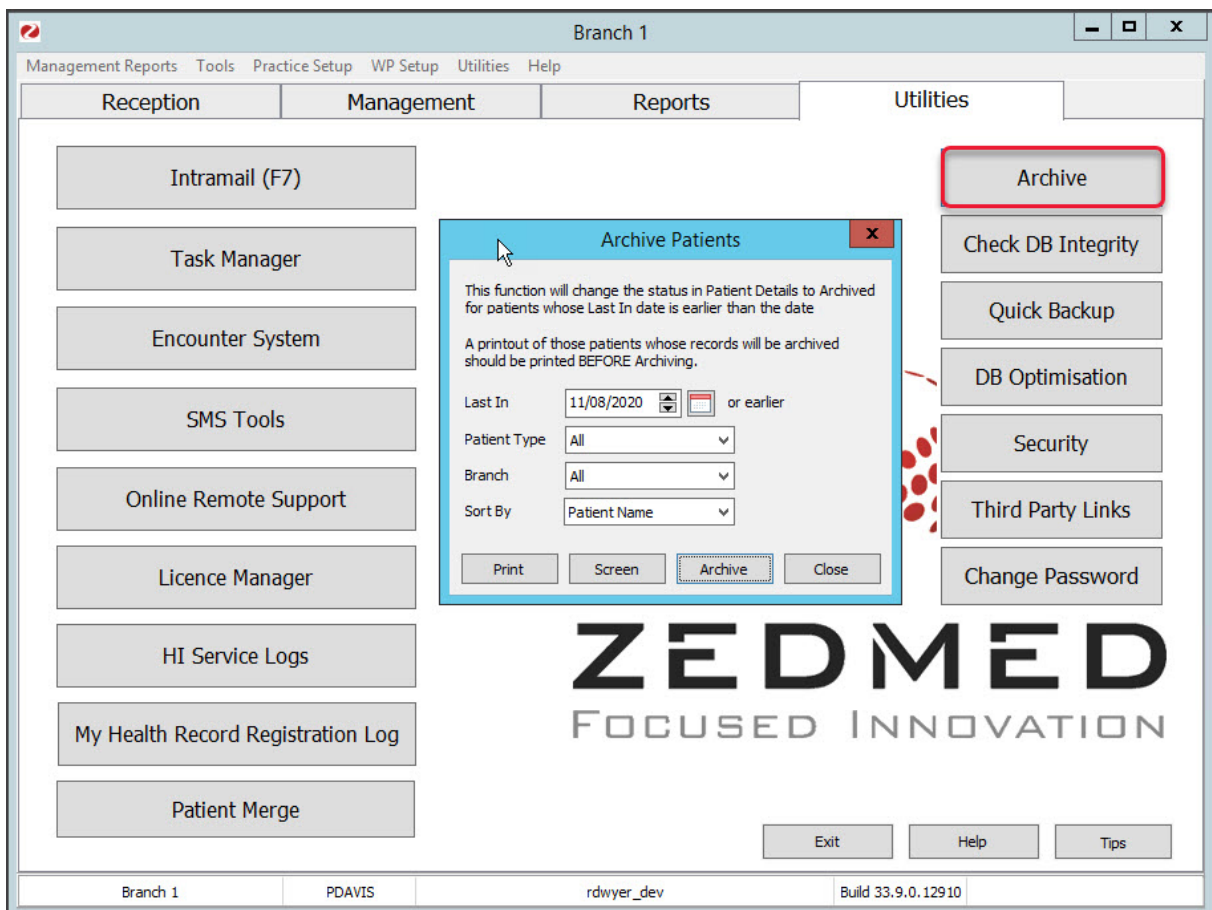
Deceased patients

A patient's status will need to be updated if the patient has passed away. This will ensure the patient is removed from any generated reminders reliant on a patient's status.
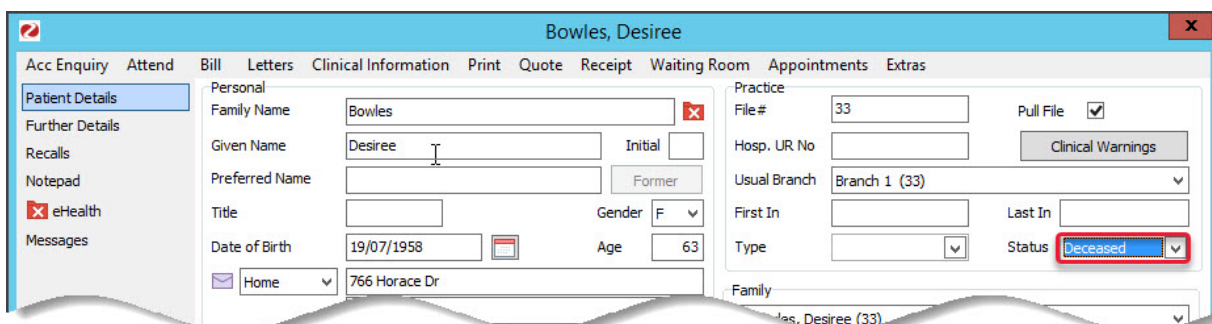
To update the patient:

1. Go to Zedmed's **Reception** tab.
2. Select **Patients** then locate the patient and open their record.

   To learn more, see the find a patient's record article.
3. Update the patient's **Status** to **Deceased**.

> **Important:** Please also cancel any future appointments for the patient, as they are not automatically removed.
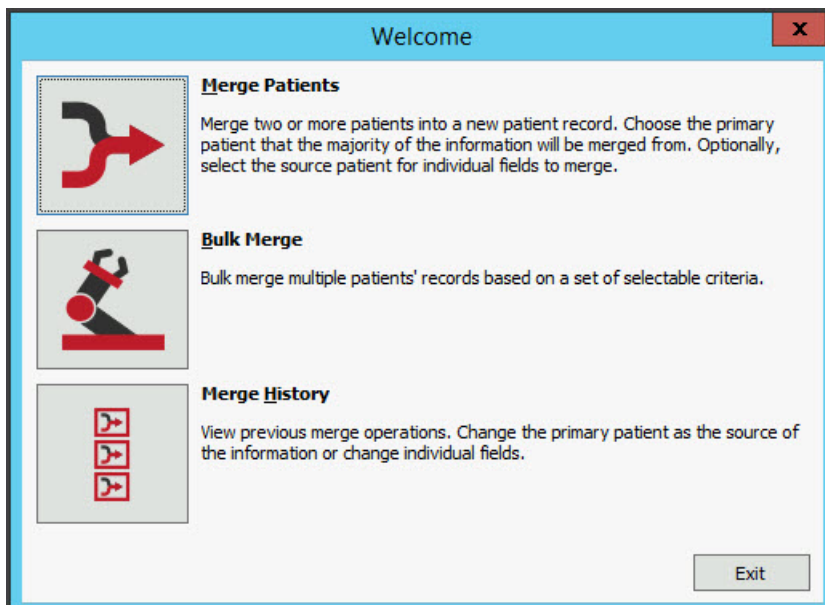
Merge patient records

The Patient Merge feature allows you to consolidate and merge duplicate patient records.

To merge a duplicated record:

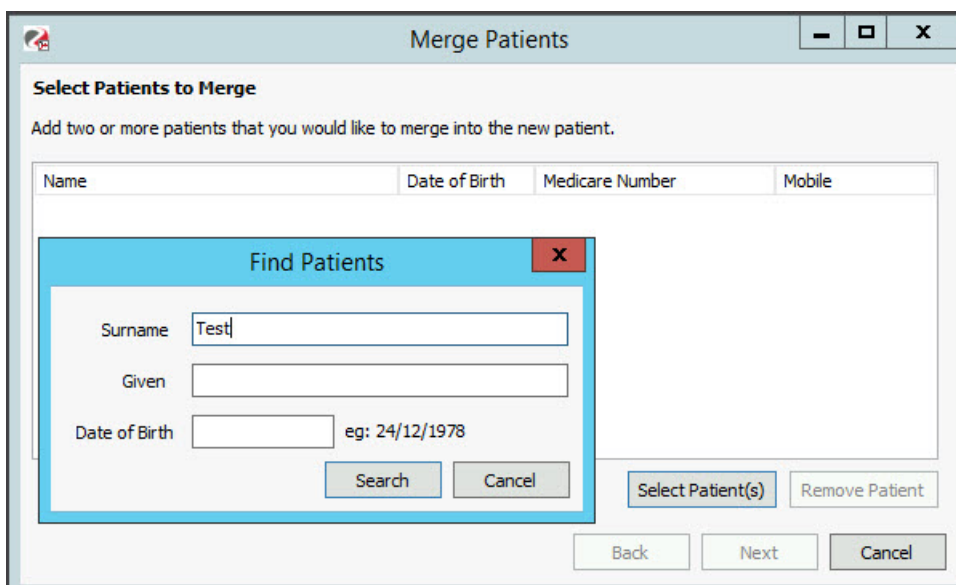1. Go to Zedmed's **Utilities** tab.
2. Select **Patient Merge**.

   The Merge **Welcome** screen will open.
3. Select **Merge Patients.**

   The **Merge Patients** screen will open.
4. Select **Select Patient(s).**
5. Enter the duplicated patient's information and select **Search.**

   The records of matching patients will appear.

6. Tick the boxes next to the duplicated records you want to merge.
7. Select **Add Patients** to add the selected patients to the **Choose Preferred Patient** screen.
8. Select the Patient that you want to be the primary record.

   If you want to specify the fields you would like to keep, select **Advanced.**

9. If you chose **Advanced**, a granular view of the patient will display.

   Use the radio buttons to select the fields you wish to use in the final patient record. In the below example, Patient 1 has been selected as the preferred/primary record; however, Patient 2's Home and postal address details have been selected for the final record. You will often find that one record is more complete than the other, and a more complete record can indicate what should be the primary source of information.

   After the desired fields have been chosen, select **Close.** This will take you back to the **Merge Patients** window.

Patient Merge

Field	Patient 1	Patient 2	Final Patient Record
Former Family name	(empty)	(empty)	(empty)
Former Preferred name	(empty)	(empty)	(empty)
Date of birth	1/01/1990	1/01/1991	1/01/1990
Gender	Male	Male	Male
Marital status	(empty)	(empty)	(empty)
First in	(empty)	(empty)	(empty)
Last in	(empty)	(empty)	(empty)
Attendances	0	0	
Future Appointments	0	0	
Home Address	Level 1	100 Test St	100 Test St
	100 Test Rd	(empty)	(empty)
Suburb	SOUTH MELBOURNE	NORTH MELBOURNE	NORTH MELBOURNI
Postcode	3205	3051	3051
Mailing Address	(empty)	PO Box 123	PO Box 123
	(empty)	(empty)	(empty)
Suburb	(empty)	NORTH MELBOURNE	NORTH MELBOURNI
Postcode	(empty)	3051	3051
Previous Address	(empty)	(empty)	(empty)
	(empty)	(empty)	(empty)
Suburb	(empty)	(empty)	(empty)
Postcode	(empty)	(empty)	(empty)
Home phone	(empty)	(empty)	(empty)
Work phone	(empty)	(empty)	(empty)
Mobile phone	0400000001	0401111111	0400000001
Email address	(empty)	(empty)	(empty)
Preferred contact method	1	1	1
Medicare Number	35290094211	35290094211	35290094211
Expiry	1/01/2021	1/01/2021	1/01/2021
IRN	(empty)	(empty)	(empty)
Veteran Affairs Number	(empty)	(empty)	(empty)
Card expiry date	(empty)	(empty)	(empty)

Close

10. Once you have selected the primary patient record and made any Advanced selections, select **Next**.

   The confirmation screen will appear.

11. Review the settings and select **Next**.

   The merge will start and display a notification once it has been successfully completed.

Bulk merge patient records

If you identify a large number of duplicate records, the Bulk Merge tool allows you to review and process multiple duplicate records at the same time.

To merge a duplicated record:

1. Go to Zedmed's **Utilities** tab.

2. Select **Patient Merge**.

    The Merge **Welcome** screen will open.
3. Select **Bulk Merge.**
4. Review the **Match Patients By** options to modify the results

    You must use at least two criteria.
5. Select the first letter/s of the family name you have identified duplicates of.
6. Select **Search**.

    The patient records matching the selected criteria will display.
7. Expanded the family name to check there are only duplicated records showing.
8. Select the records to merge.
9. Select **Merge Selected**.

    Caution: this will start the merge, so make sure you have only selected duplicate records and that you have used the Match Patient By options to exclude any records that are not duplicates.