Archive or merge patients

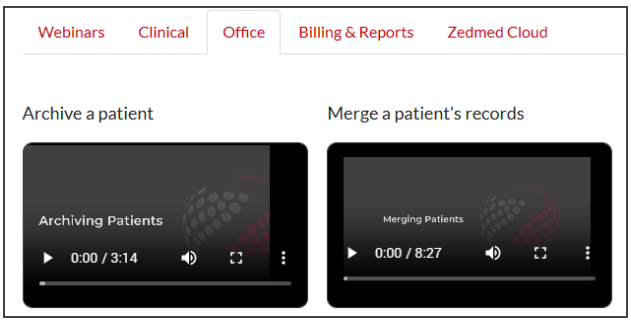
Version: 1.01 | Last Modified on 27/10/2025 10:08 am AEDT

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 display 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.

Video guides

Please see our video guides for a detailed walkthrough and explanation.



Archive patients

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

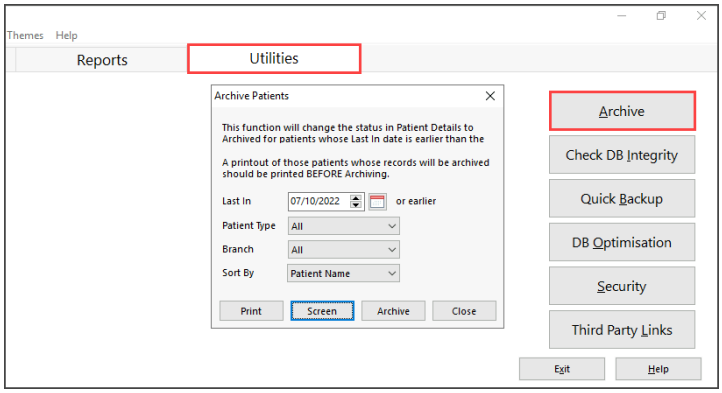
As it is not possible to delete patients with financial data, this function can also be used to set the patients' Status (in Patient Details) from Current to Archived automatically.

To archive a patient:

1. In Office, 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, you may Print a list of Patients. Alternatively, you can view a list of Archived patients through the Reports/Patients Report using the Status criteria of "Archived".
4. Select **Archive**.



Deceased patients

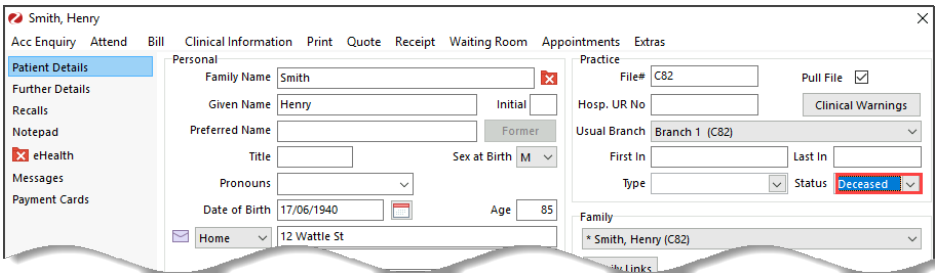
A patient's status will need to be updated if the patient has passed away. This will ensure the patient is removed from any generated reminders reliant on a patient's status.

To update the patient:

1. In Office, search the **Patient** and open their record.

   To learn more, see the find a patient's record article.
2. Update the patient's **Status** to **Deceased**. If Recalls exist, you will be prompted to deactivated them.

   Important: Cancel any future appointments for the patient, as they are not automatically removed.



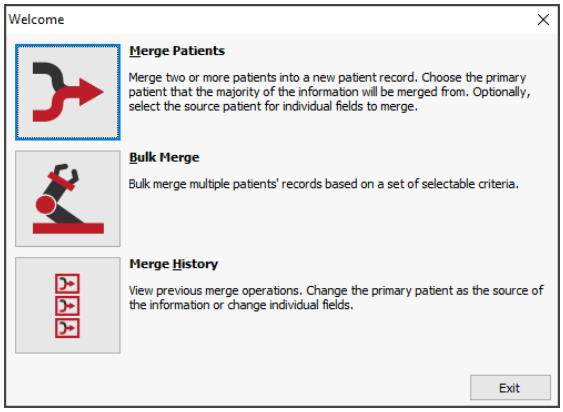
Merge patient records

The Merge Patients Wizard allows you to consolidate and merge duplicate patient records.

To merge a duplicated record:

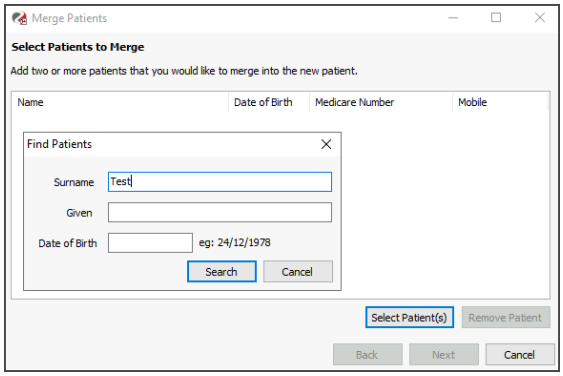
1. In Office, go to Zedmed's **Utilities** tab.
2. Select **Merge Patients**.

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

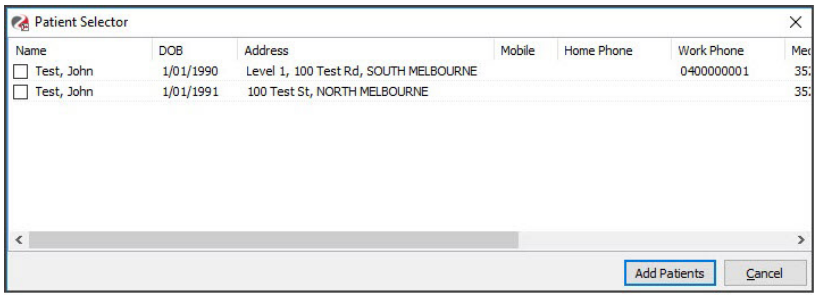


The **Merge Patients** screen will open.

4. Select **Select Patient(s).**
5. Enter the duplicated patient's information and select **Search.**

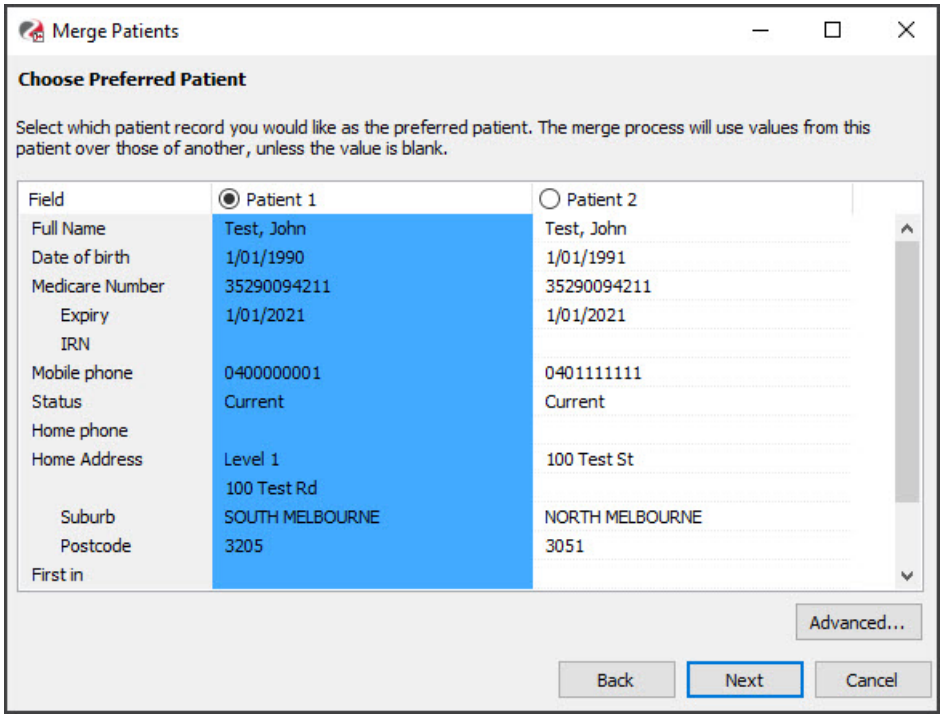


The records of matching patients will appear.



6. Tick the boxes next to the duplicated records to be merged.
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.

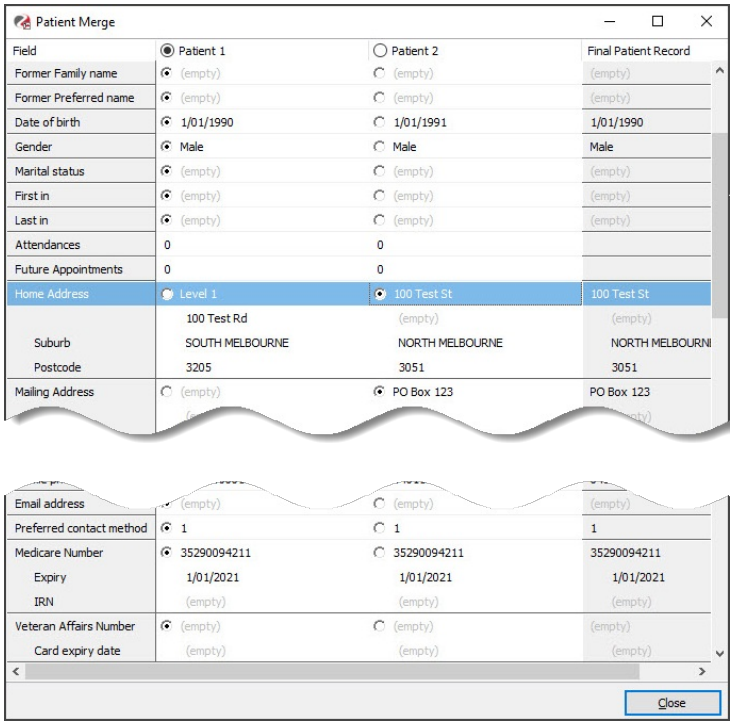
   If you want to specify the fields you would like to keep, select **Advanced.**



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

   Use the radio buttons to select the fields you wish to keep 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 Mailing Address details have been selected for the final record. You will often find that one record is more complete than the other.
10. Select **Close**.

    This will take you back to the **Merge Patients** window.



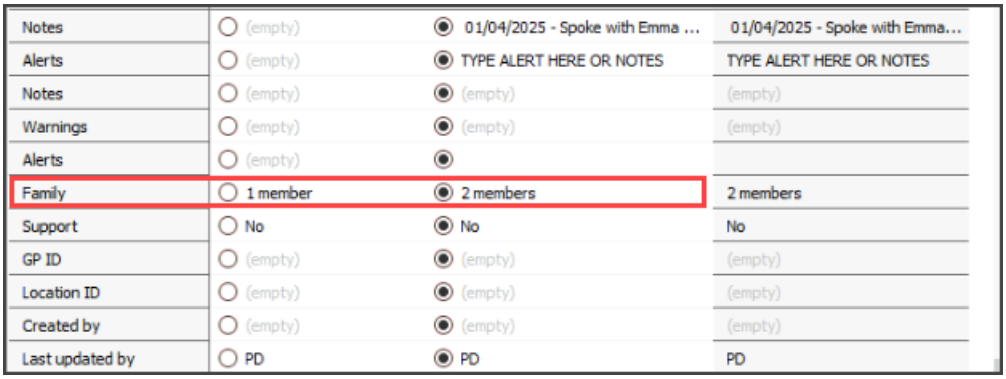
11. Select **Next**.

    The confirmation screen will appear.
12. Review the settings and select **Next**.

The merge will start and display a notification once it has been successfully completed. A new Primary record is created and the original two records are **archived**.

Merging conflicting NOK Acc payers

A criteria for merging is **Family** which may include the NOK Account Payers. If a duplicate record exists and both records have different NOK Account Payers, when merging only one set can be selected for the final record.



Where an invoice exists for the family member (NOK Account payer) that **was not selected** in the merge, it will be merged to the final record but the payer will change from the family member to the patient. Users may want to make sure that the NOK Account Payers are represented on a single record prior to merge. All third parties will be merged without impact, regardless of which record they belonged to.

Bulk merge patient records

If you identify duplicate records for multiple patients, the Bulk Merge tool allows you to process multiple duplicate records at the same time. This feature **will not** allow you to choose the fields you wish to keep in the final patient record. The **newest** record will automatically be made the **Primary record**.

To merge a duplicate record:

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

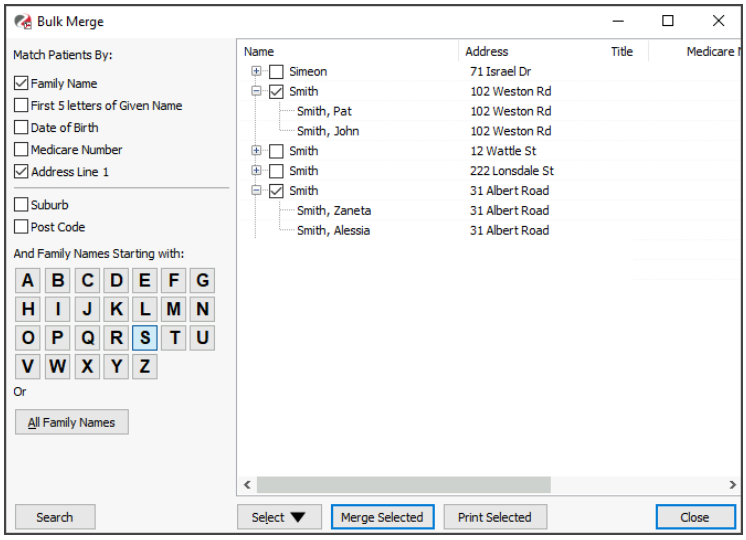
   The Merge **Welcome** screen will open.
3. Select **Bulk Merge.**
4. Review the **Match Patients By** options to modify the results.

   You must use **at least two criteria**.
5. Select **And Family Names Starting with** and choose the letters ***or*** select **ALL Family Names.**
6. Select **Search.**

   The patient records matching the selected criteria will display.
7. Expand 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.
10. Should you wish to further define the Primary record, or conduct the merge using the Merge Patients Wizard, **right click** on the patient name and select **Merge in Merge Wizard**.

In the example below, the records of Pat and John Smith will be merged followed by the merging of Zaneta and Alessia Smith.



Un-Merge

Merged records can be viewed in the **Merge History** screen. To undo a merge:

1. Select one of the merged patient records
2. Select **Un-Merge**.

