

# Archive or merge patients

Last Modified on 07/10/2024 12:54 pm 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:

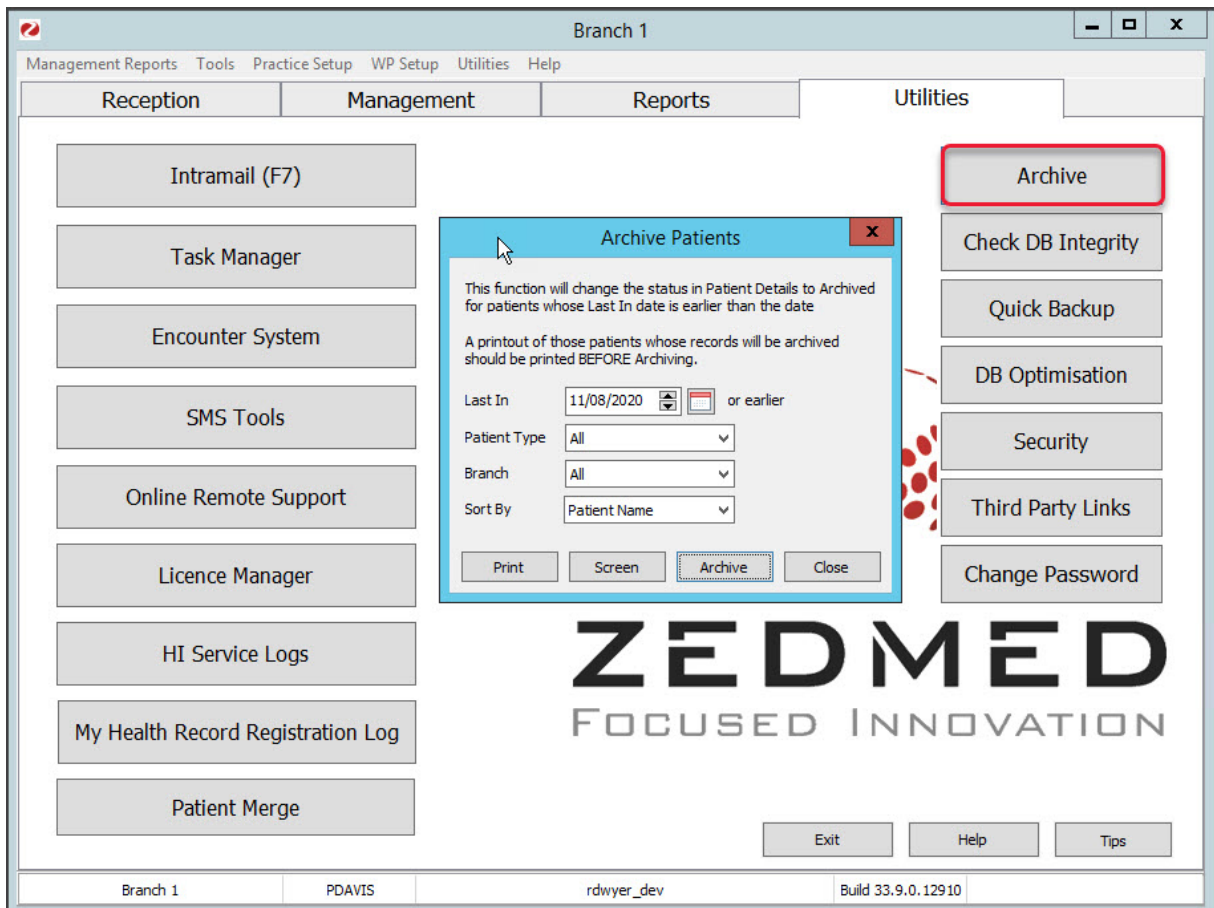
1. Go to Zedmed's **Utilities** tab.
2. Select **Archive** then **Archive Patients**.

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**.

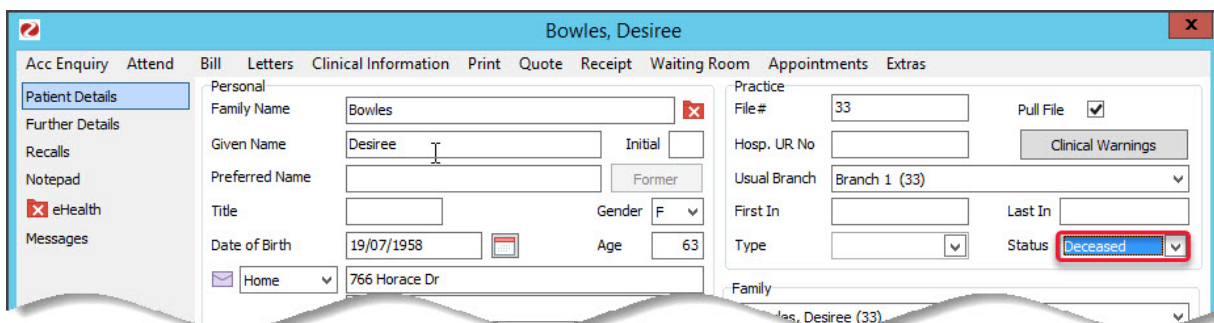


## Deceased patients

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**.



## Merge patient records

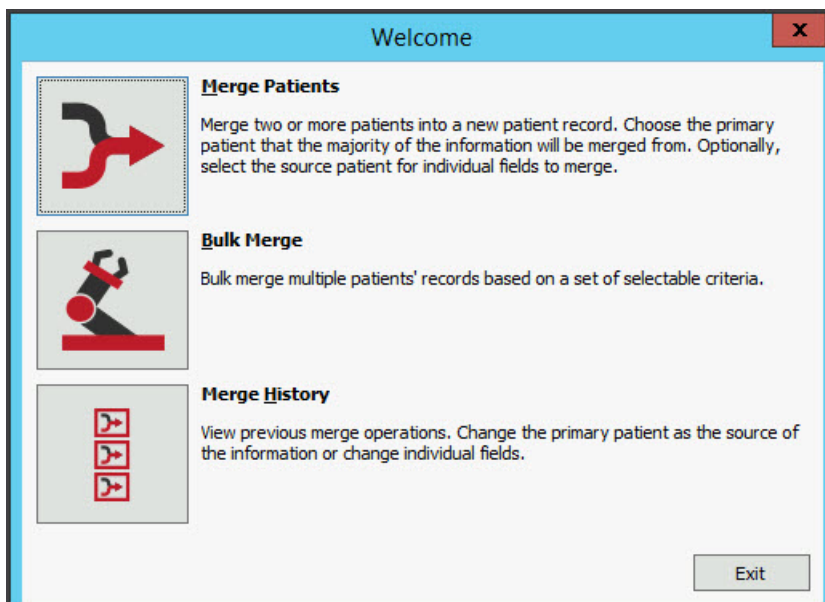
The Patient Merge feature allows you to consolidate and merge duplicate patient records.

To merge a duplicated record:

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

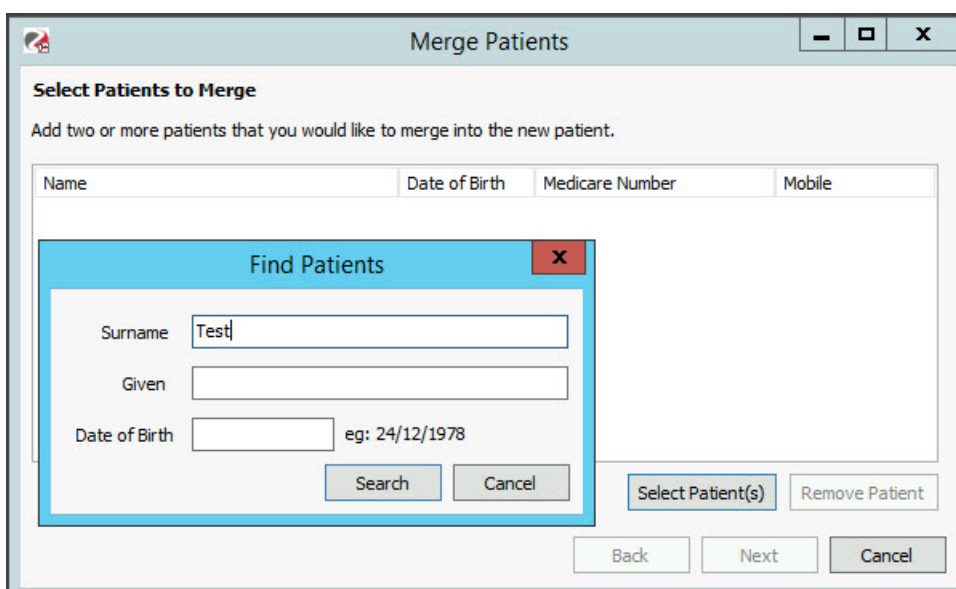
The Merge **Welcome** screen will open.

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.

Name	DOB	Address	Mobile	Home Phone	Work Phone	Med
<input type="checkbox"/> Test, John	1/01/1990	Level 1, 100 Test Rd, SOUTH MELBOURNE			0400000001	35
<input type="checkbox"/> Test, John	1/01/1991	100 Test St, NORTH MELBOURNE				35

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**.

**Choose Preferred Patient**

Select which patient record you would like as the preferred patient. The merge process will use values from this patient over those of another, unless the value is blank.

Field	<input checked="" type="radio"/> Patient 1	<input type="radio"/> Patient 2
Full Name	Test, John	Test, John
Date of birth	1/01/1990	1/01/1991
Medicare Number	35290094211	35290094211
Expiry	1/01/2021	1/01/2021
IRN		
Mobile phone	0400000001	0401111111
Status	Current	Current
Home phone		
Home Address	Level 1 100 Test Rd	100 Test St
Suburb	SOUTH MELBOURNE	NORTH MELBOURNE
Postcode	3205	3051
First in		

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.

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

Name	Address	DOB	Title	Medicare No	Suburb	Post Code
<input checked="" type="checkbox"/> BLAIR	11 Joachim Cct		Node			
<input type="checkbox"/> Bailey	14 Kent Ave		Node			
<input type="checkbox"/> Bates	13 Jeremy Ave		Node			
<input checked="" type="checkbox"/> Blair	11 Joachim Cct		Node			