

Archive or merge patients

Version: 1.01 | Last Modified on 10/10/2025 11:21 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.

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:

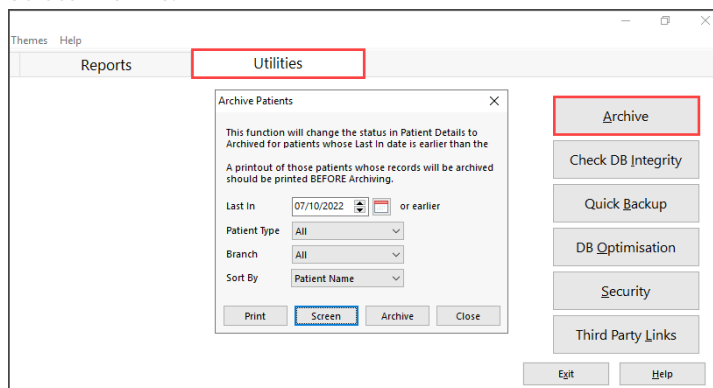
1. In Office, go to Zedmed's **Utilities** tab.
2. Select **Archive** then **Archive Patients**.

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 deactivate them.

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

The screenshot shows a patient record form for Henry Smith. The form is divided into several tabs: Personal, Clinical Information, Print, Quote, Receipt, Waiting Room, Appointments, and Extras. The Personal tab is active, showing fields for Family Name (Smith), Given Name (Henry), Initial, Preferred Name, Title, Sex at Birth (M), Date of Birth (17/06/1940), Age (85), and Home address (12 Wattle St). The Status field is set to Deceased. The Family section shows the patient's name and ID (C82).

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 screenshot shows the 'Merge Patients' Welcome screen. It has three main sections: 'Merge Patients' (with a red arrow icon), 'Bulk Merge' (with a red arrow icon), and 'Merge History' (with a red arrow icon). The 'Merge Patients' section is highlighted. The 'Merge Patients' section contains the text: 'Merge two or more patients into a new patient record. Choose the primary patient that the majority of the information will be merged from. Optionally, select the source patient for individual fields to merge.' The 'Bulk Merge' section contains the text: 'Bulk merge multiple patients' records based on a set of selectable criteria.' The 'Merge History' section contains the text: 'View previous merge operations. Change the primary patient as the source of the information or change individual fields.' There is an 'Exit' button at the bottom right.

The **Merge Patients** screen will open.

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

The screenshot shows the 'Merge Patients' Select Patients to Merge screen. It has a title bar 'Merge Patients' and a subtitle 'Select Patients to Merge'. Below the subtitle is the text: 'Add two or more patients that you would like to merge into the new patient.' There is a table with columns: Name, Date of Birth, Medicare Number, and Mobile. Below the table is a 'Find Patients' dialog box. The dialog box has fields for Surname (Test), Given, and Date of Birth (eg: 24/12/1978). There are 'Search' and 'Cancel' buttons. Below the dialog box are buttons for 'Select Patient(s)', 'Remove Patient', 'Back', 'Next', and 'Cancel'.

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 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**.

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 St
Suburb	100 Test Rd	NORTH MELBOURNE
Postcode	SOUTH MELBOURNE	3051
First in	3205	

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.

Patient Merge			
Field	<input checked="" type="radio"/> Patient 1	<input type="radio"/> Patient 2	Final Patient Record
Former Family name	<input type="radio"/> (empty)	<input type="radio"/> (empty)	(empty)
Former Preferred name	<input 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 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
	100 Test Rd	(empty)	(empty)
Suburb	SOUTH MELBOURNE	NORTH MELBOURNE	NORTH MELBOURNE
Postcode	3205	3051	3051
Mailing Address	<input type="radio"/> (empty)	<input checked="" type="radio"/> PO Box 123	PO Box 123
	(empty)	(empty)	(empty)
Email address	<input 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			

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.

Notes	<input type="radio"/> (empty)	<input checked="" type="radio"/> 01/04/2025 - Spoke with Emma ...	01/04/2025 - Spoke with Emma...
Alerts	<input type="radio"/> (empty)	<input checked="" type="radio"/> TYPE ALERT HERE OR NOTES	TYPE ALERT HERE OR NOTES
Notes	<input type="radio"/> (empty)	<input checked="" type="radio"/> (empty)	(empty)
Warnings	<input type="radio"/> (empty)	<input checked="" type="radio"/> (empty)	(empty)
Alerts	<input type="radio"/> (empty)	<input checked="" type="radio"/>	
Family	<input type="radio"/> 1 member	<input checked="" type="radio"/> 2 members	2 members
Support	<input type="radio"/> No	<input checked="" type="radio"/> No	No
GP ID	<input type="radio"/> (empty)	<input checked="" type="radio"/> (empty)	(empty)
Location ID	<input type="radio"/> (empty)	<input checked="" type="radio"/> (empty)	(empty)
Created by	<input type="radio"/> (empty)	<input checked="" type="radio"/> (empty)	(empty)
Last updated by	<input type="radio"/> PD	<input checked="" type="radio"/> PD	PD

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.

Bulk Merge

Match Patients By:

- ☒ Family Name
- ☐ First 5 letters of Given Name
- ☐ Date of Birth
- ☐ Medicare Number
- ☒ Address Line 1
- ☐ Suburb
- ☐ Post Code

And Family Names Starting with:

A B C D E F G
H I J K L M N
O P Q R **S** T U
V W X Y Z













Or

Name	Address	Title	Medicare
<input type="checkbox"/> Simeon	71 Israel Dr		
<input checked="" type="checkbox"/> Smith	102 Weston Rd		
<input checked="" type="checkbox"/> Smith, Pat	102 Weston Rd		
<input checked="" type="checkbox"/> Smith, John	102 Weston Rd		
<input type="checkbox"/> Smith	12 Wattle St		
<input type="checkbox"/> Smith	222 Lonsdale St		
<input checked="" type="checkbox"/> Smith	31 Albert Road		
<input checked="" type="checkbox"/> Smith, Zaneta	31 Albert Road		
<input checked="" type="checkbox"/> Smith, Alessia	31 Albert Road		

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**.

Merge History				
<div>  Re-Merge  Un-Merge </div>				
Patient	Date of Birth	Medicare number	Mobile Phone	Merged
 Crawford, Mandy	1/01/1990			
 Test, Friday	16/04/2024		0434618620	20/06/2024 3:...
 Test, Friday	14/05/2013		0434618620	
 Test , Test	12/05/2015			
 Test, Training	1/12/2023		0400000000	6/10/2025 3:1...
 Test, Training	1/12/2023		0400000000	
 Test , Training1	10/07/2004		0434618620	
 Zedmed, Donna	9/09/2016			24/04/2025 11...
 Zedmed, Donna	9/09/2016			
 Zedmed, Pamela	8/07/2000			