

Archive or merge patients

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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.

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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.

2		Boy	wles, Desiree			X
Acc Enquiry Attend	Bill Letters Cli	nical Information Print Quote	Receipt Waiting R	oom Appoint	tments Extras	
Patient Details	Personal Family Name	Bowles	X	Practice File#	33	Pull File 🗸
Further Details Recalls	Given Name	Desiree T	Initial	Hosp. UR No		Clinical Warnings
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× eHealth	Title		Gender F 🗸	First In		Last In
Messages	Date of Birth	19/07/1958	Age 63	Туре	V	Status Deceased V
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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.

	Welcome
≯	<u>Merge Patients</u> 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.
2	Bulk Merge Bulk merge multiple patients' records based on a set of selectable criteria.
소 소 소	Merge <u>History</u> View previous merge operations. Change the primary patient as the source of the information or change individual fields.
	Exit

The Merge Patients screen will open.

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

Find Patients	Hobie
Surname Test	
Given	

The records of matching patients will appear.

Relecto	r					×
Name	DOB	Address	Mobile	Home Phone	Work Phone	Med
🗌 Test, John	1/01/1990	Level 1, 100 Test Rd, SOUTH MELBOURNE			040000001	35:
Test, John	1/01/1991	100 Test St, NORTH MELBOURNE				35
<						>
				Add	Patients Can	cel

- 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.

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hoose Preferred P	atient			
elect which patient re	cord you would like as the preferre	d patient. The merge process will use v	alues from this	;
atient over those of a	nother, unless the value is blank.			
Field	Patient 1	O 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	040000001	0401111111		
Status	Current	Current		
Home phone				
Home Address	Level 1	100 Test St		
	100 Test Rd			
Suburb	SOUTH MELBOURNE	NORTH MELBOURNE		
Postcode	3205	3051		
First in				_
			Advanc	ed
			_	
		Back Next	t Ca	ncel

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.

		0	
Field	Patient 1	O Patient 2	Final Patient Record
Former Family name	C (empty)	C (empty)	(empty)
Former Preferred name	C (empty)	C (empty)	(empty)
Date of birth	1/01/1990	C 1/01/1991	1/01/1990
Gender	• Male	C Male	Male
Marital status	C (empty)	C (empty)	(empty)
First in	(empty)	C (empty)	(empty)
Last in	(empty)	C (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 MELBOURN
Postcode	3205	3051	3051
Mailing Address	C (empty)	PO Box 123	PO Box 123
	(empty)	(empty)	(empty)
Suburb	(empty)	NORTH MELBOURNE	NORTH MELBOURN
Postcode	(empty)	3051	3051
Previous Address	• (empty)	C (empty)	(empty)
	(empty)	(empty)	(empty)
Suburb	(empty)	(empty)	(empty)
Postcode	(empty)	(empty)	(empty)
Home phone	€ (empty)	C (empty)	(empty)
Work phone	(empty)	C (empty)	(empty)
Mobile phone	• 040000001	C 0401111111	040000001
Email address	(empty)	C (empty)	(empty)
Preferred contact method	© 1	C 1	1
Medicare Number	35290094211 35290094211	C 35290094211	35290094211
Expiry	1/01/2021	1/01/2021	1/01/2021
IRN	(empty)	(empty)	(empty)
Veteran Affairs Number	(empty)	C (empty)	(empty)
Card expiry date	(empty)	(empty)	(empty)
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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.

8		Bulk Merge	•				- 0 X
Match Patients By:	Name	Address	DOB	Title	Medicare No	Suburb	Post Code
	BLAIR	11 Joachim Cct	Node				
Family Name	🗉 🗌 Bailey	14 Kent Ave	Node				
First 5 letters of Given Name	🗄 🔄 Bates	13 Jeremy Ave	Node				
Date of Birth	🗄 🗹 Blair	11 Joachim Cct	Node				
Medicare Number							
Address Line 1							
Suburb							
Post Code							
And Family Names Starting with:							
ABCDEEG							
HIJKLMN							
OPQRSTU							
V W X Y Z							
All Family Names							
	<	Ш					>
Search	Merge Selected	Print Selected					Close