

# Merging Duplicate Accounts - Administrative Task

Last Modified on 05/12/2023 11:46 am EDT



## Merging Duplicate Accounts

This details how to combine duplicate accounts in Merge RIS and MDM. This process is irreversible. Be sure to take caution before completing!

1. Identify the duplicate accounts. Confirm the Name and DOB are the same to ensure it is the same person.
  - The "Winning Account" will be the account with the most patient history. Typically, this account has a smaller jacket number.
  - The "Account to be Deleted" will be the newer account and will typically have a larger jacket number.
2. Using the Patient File tab, open the account that will be DELETED.



3. Click the Merge button at the bottom the window, this will open a new window.



## Patient File: Merge Patient Search

Patient Name

Additional Search Criteria

DOB

Accession Number

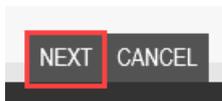
**Search Results**

Patient Name	DOB	Phone Num.	SSN	PMIS

**Visit Info**

Status	Date	Jacket No.	Exam	Description	Loc.	Radiologist	Ref. Phys.

4. Search for and select the "Winning Account", then click Next



5. Verify the "Account to be Deleted" is displayed on the left side, and the "Winning Account" is on the right side.

## Patient File: Merge Patient Records

Source Record			Destination Record (Winning Demographics)				
Name	TEST, STEPHANIE	DOB	09/25/1976	Name	TEST, STEPHANIE	DOB	09/25/1976
Address	12345 YOU WISH LN Fort Worth, TX 76179	SSN		Address	12345 YOU WISH LN Fort Worth, TX 76179	SSN	
H Phone	2020000000	PMIS		H Phone	2020000000	PMIS	
W Phone		W Phone		W Phone		W Phone	
Jacket	Last DOS	Location	Jacket	Last DOS	Location		
1098703	10/27/2022	2141K	1090373	05/24/2022	CHCH		

BACK COMPLETE CANCEL

- If the demographics are not the same, we need to update the "Winning Account" with the most recent demographic information. Double-click in the "Winning Account" jacket number and the Patient Files: Demographics window will open. Update the necessary information and then click Complete.

Patient Files: Demographics

TEST, STEPHANIE 09/25/1976 46 yo

Demographics | Patient Details | Policies | Visit Info | Exam Details | Labs | Film | Audit Trail

SSN	Jacket Number	PMIS No.
Last Name *	First Name *	Middle Name
Alias	DOB *	Suffix
Gender	Race	Marital Status
Primary Physician		
Address 1	Address 2	
Zip Code	City	State/Province
County	Country	Email
Home Phone	Work Phone	Fax Number
Mobile Phone	Alternate Phone	Notification Method
Employer		Status
Student Status	School	Employer Phone
Date of Death	Cause of Death	Consent
Emergency Contact		Notice of Privacy

EXTERNAL IDS SUMMARY OF CARE CLINICAL SUMMARY APPOINTMENT DETAILS EDUCATION PATIENT PORTAL

BACK NEXT COMPLETE CANCEL

- When ready to finalize the merge, click Complete.

## Patient File: Merge Patient Records

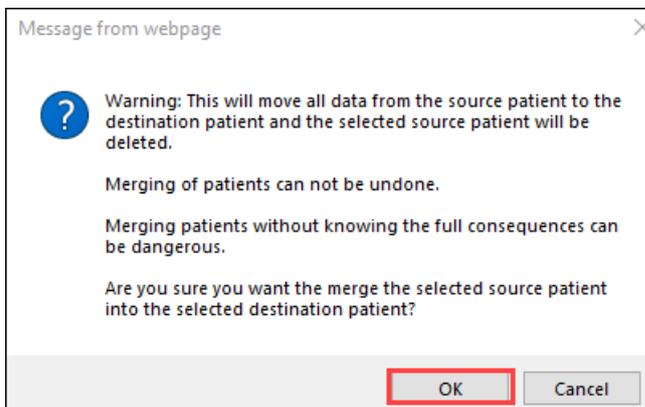
Source Record			Destination Record (Winning Demographics)				
Name	TEST, STEPHANIE	DOB	09/25/1976	Name	TEST, STEPHANIE	DOB	09/25/1976
Address	12345 YOU WISH LN	SSN		Address	12345 YOU WISH LN	SSN	
	Fort Worth, TX 76179	PMIS			Fort Worth, TX 76179	PMIS	
H Phone	2020000000	W Phone		H Phone	2020000000	W Phone	

Jacket	Last DOS	Location	Jacket	Last DOS	Location
1098703	10/27/2022	2141K	1090373	05/24/2022	CHCH

BACK COMPLETE CANCEL

8. A warning box will appear, advising that this process cannot be undone. Click OK. When this is completed, the accounts will automatically merge in MDM as well.



9. Respond to the sender, advising the duplicate accounts have been merged. Log on the Admin Tracker under Duplicates.

								Shift in Functions throughout the day should be documented below
<b>Order Category:</b>								
Athena	0							
Electronic	0							
Physicians	0							
OLR	0							
Duplicates	1							
OSO	0							
Emails	0							
<b>Total Processesd</b>	<b>1</b>							
MRN	Athena	Electronic	Physicians	OLR	Duplicates	OSO	Emails	Processing Notes
783064				X				

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EDITED: 05/12/2023

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