

Requesting a Patient Merge in eRAD

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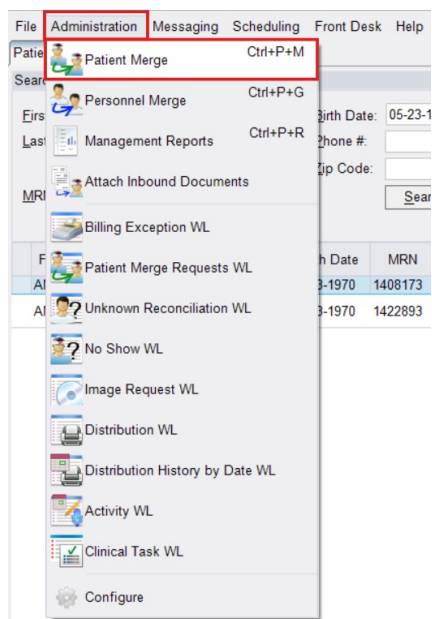
1. Open the Patient Folder

A screenshot of the "Patient Search" window in eRAD. The window has a "Search Criteria" section with fields for First Name (AMY), Last Name (ZTEST), Birth Date (05-23-1970), Phone #, Zip Code, and MRN. There are "Search" and "Reset" buttons, and a "New Patient / New Appointment" dropdown. Below the search criteria is a table with columns: First Name, Last Name, Middle Name, Birth Date, MRN, Issuer, Gender, Address, City, State, Zip Code, Matching Alternate MRN, Matching Alternate MRN Issuer, Matching Alternate First Name, and Matching Alternate Last Name. The table contains two rows: one for AMY ZTEST (1408173) and one for AMY Z (1422893). The second row is highlighted with a red border, and the "Matching Alternate First Name" column for that row contains the text "AMYZ".

First Name	Last Name	Middle Name	Birth Date	MRN	Issuer	Gender	Address	City	State	Zip Code	Matching Alternate MRN	Matching Alternate MRN Issuer	Matching Alternate First Name	Matching Alternate Last Name
AMY	ZTEST		05-23-1970	1408173	system	F	1234 FAKE LANE DRIVE	DALLAS	TX	75248				
AMY Z	ZTEST		05-23-1970	1422893	system	F	5060 ADDISON CIRCLE DR, APT 5836	ADDISON	TX	75001			AMYZ	

- Use the **search function** in eRAD to locate and open the **Patient Folder**
- At this point, it does not matter which of the duplicate records you select.

2. Navigate to the Merge Tool



- From the eRAD menu, click **Administration**
- Select **Patient Merge**

3. Enter Patient Records

- The **Patient Merge** tab will open, displaying the details tied to the open **Patient Folder**

The screenshot shows the 'Patient Merge' window with two main sections: 'Source Patient Details' on the left and 'Destination Patient Details' on the right. The 'Source Patient Details' section includes fields for MRN (1408173), Name (ZTEST, AMY), Birth Date (05-23-1970), and Address (1234 FAKE LANE DRIVE, DALLAS, TX, 75248). It also lists Phone Numbers and Email Addresses. The 'Destination Patient Details' section is currently empty. Below these sections is a 'Patient History' table with columns for Nuggets, Status, Procedures, and Scheduled Date. The table shows two entries: 'Cancelled Bone Density [49]' and 'Cancelled 3D Mammogram Diagnostic Unilateral Digital W/CAD...'. The 'Patient Merge' tab is highlighted in the top navigation bar.

- **Source Patient Details (Left):** The duplicate MRN to be discarded.
- **Destination Patient Details (Right):** The correct MRN to be kept (primary/active record).
- Ensure you've verified both MRN's before proceeding.

4. Search and Confirm

- In **Destination Patient Details**, click [Search]

The screenshot shows the 'Destination Patient Details' window. The 'Search' button is highlighted with a red box. The window contains fields for MRN, Name, Birth Date, and Address. Below these fields are sections for 'Patient Portal Username', 'Phone Numbers', 'Email Addresses', and 'Patient History'.

- Patient name will auto-populate, enter patients date of birth to narrow the results
- Double-click on the additional MRN to add it under **Destination Patient Details**

The screenshot shows the 'Patient Search' window. The 'Search Criteria' section includes fields for First Name (AMY), Last Name (ZTEST), Birth Date (05-23-1970), Phone #, and Zip Code. There is a checkbox for 'Search Other Variations' and buttons for 'Search' and 'Reset'. Below the search criteria is a table with columns: Last Name, First Name, Middle Name, Birth Date, MRN, Issuer, Gender, Address, City, and State. The table contains two rows: one for 'ZTEST AMY' with MRN 1408173 and address '1234 FAKE LANE DRIVE, DALLAS, TX', and another for 'ZTEST AMY Z' with MRN 1422893 and address '5060 ADDISON CIRCLE DR, APT 5836, ADDISON, TX'. The second row is highlighted with a red box.

- Verify each record's demographics to confirm accuracy

5. Choose Data to Retain

The screenshot shows the 'Patient Merge' window with two tabs: 'Source Patient Details' and 'Destination Patient Details'. The 'Source Patient Details' tab is active, showing patient information for MRN 1408173, Name ZTEST, AMY, Birth Date 05-23-1970, and Address 1234 FAKE LANE DRIVE, DALLAS, TX 75248. The 'Destination Patient Details' tab shows patient information for MRN 1422893, Name ZTEST, AMY Z, Birth Date 05-23-1970, and Address 5060 ADDISON CIRCLE DR, APT 5836, ADDISON, TX 75001. A red arrow points to the swap button between the two sections.

- If the **MRNs selected** are on the wrong sides of the screen (**Source Patient Details** vs. **Destination Patient Details**), click the **arrows** between the sections to **swap them**.
- For each field (e.g., name, DOB, address), click the **radial buttons** next to the value you want to keep.
- Review carefully-this determines which data survives the merge.

6. Submit the Merge Request

- Click **[Suggest]**

The screenshot shows the 'Suggest Patient Merge' dialog box with three buttons: 'Suggest', 'Merge', and 'Close'. The 'Suggest' button is highlighted with a red box.

- In the **Comment** box, enter:

The screenshot shows the 'Suggest Patient Merge' dialog box with the following text: 'You are suggesting a merge of clinical data from MRN: 1408173 to MRN: 1422893. If approved, this will delete 'ZTEST, AMY' (MRN 1408173)'. The 'Comment' box contains the text 'BETHESDA'. The 'OK' and 'Cancel' buttons are at the bottom.

- **Location first** (using standard naming conventions: PARK, STERL, etc.)
- Any additional context or MRNs
- Click **[OK]**

The screenshot shows the 'Suggest Patient Merge' dialog box with the 'OK' button highlighted with a red box.

- This action submits the merge request only. The team responsible for validating and executing the Merge will work the request once received.