

Requesting a Patient Merge in eRAD

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Requesting a Patient Merge in eRAD

Purpose: When duplicate patient records exist in eRAD (multiple MRNs for the same patient), Contact Center team members will submit a Merge Suggestion so the appropriate team can review and complete the merge.

✦ **Important:** PARs do not complete merges - we submit the request for review.

1. Open the Patient Folder

- Use the search function in eRAD to locate and open the patient folder.
- At this point, it does not matter which duplicate record you open first.

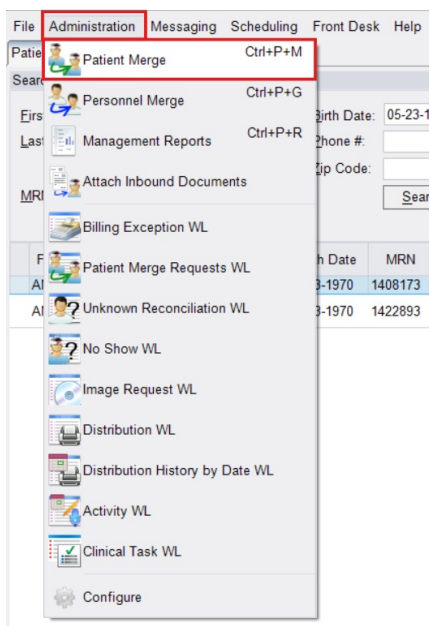
The screenshot shows the "Patient Search" window in eRAD. The search criteria are: First Name: AMY, Last Name: ZTEST, Birth Date: 05-23-1970, Phone #: (empty), MRN: (empty), and Zip Code: (empty). The "Search" button is highlighted. Below the search criteria is a table with the following columns: First 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 of data:

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			AMY Z	

2. Navigate to the Merge Tool

From the eRAD menu:

- Click Administration
- Select Patient Merge



3. Enter Patient Records

The Patient Merge window will open with two sections:

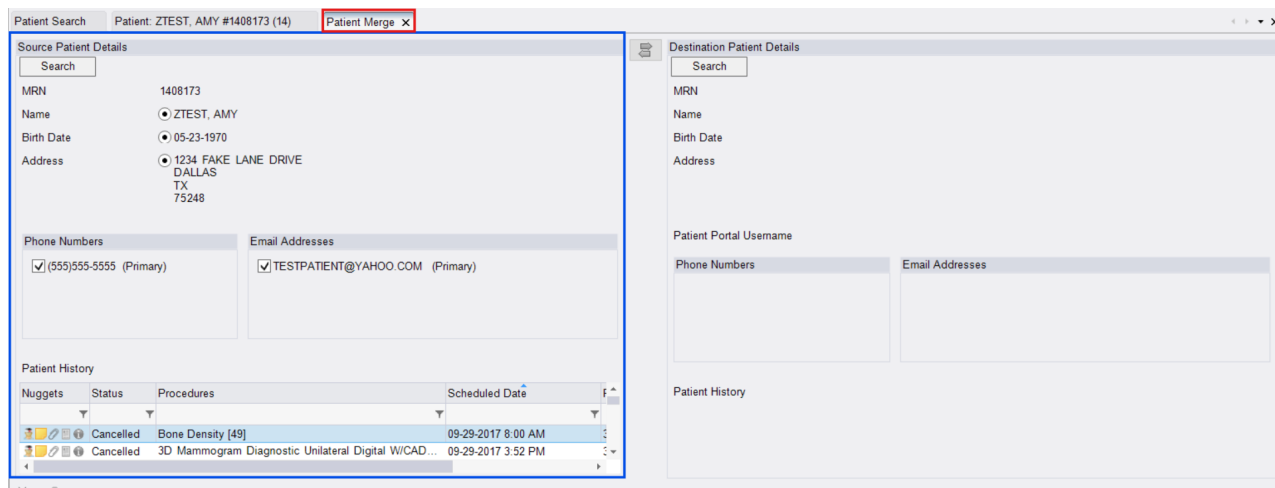
✓ Source Patient Details (Left):

The duplicate MRN that will be discarded

✓ Destination Patient Details (Right):

The MRN that will be kept (primary/active patient record)

✦ Always verify both records belong to the same patient before submitting a request.



4. Search and Confirm

In Destination Patient Details, click Search

- Patient name may auto-populate
- Enter patient's date of birth to narrow results
- Double-click the additional MRN to add it under Destination Patient Details

- ✓ Verify demographics match (ex: full name, DOB, phone, address) before proceeding.

Destination Patient Details

Search

MRN

Name

Birth Date

Address

Patient Portal Username

Phone Numbers

Email Addresses

Patient History

Patient Search

Search Criteria

First Name: AMY Birth Date: 05-23-1970

Last Name: ZTEST Phone #:

☐ Search Other Variations Zip Code:

MRN: Search Reset

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

5. Choose Data to Retain

- If the MRNs are on the wrong sides (Source vs Destination), use the arrows to swap.
- For each field (ex: name, DOB, address), click the radio button next to the value that should be kept.

- ✦ Review carefully - these selections determine which data remains after the merge is completed.

Patient Search Patient: ZTEST, AMY #1408173 (14) Patient Merge X

Source Patient Details

Search

MRN 1408173

Name ☐ ZTEST, AMY

Birth Date ☐ 05-23-1970

Address ☐ 1234 FAKE LANE DRIVE DALLAS TX 75248

Destination Patient Details

Search

MRN 1422893

Name ☒ ZTEST, AMY Z

Birth Date ☒ 05-23-1970

Address ☒ 5060 ADDISON CIRCLE DR, APT 5836 ADDISON TX 75001

6. Submit the Merge Suggestion

A) Click Suggest

Suggest Merge Close

B) In the Comment box, enter ONLY the following:

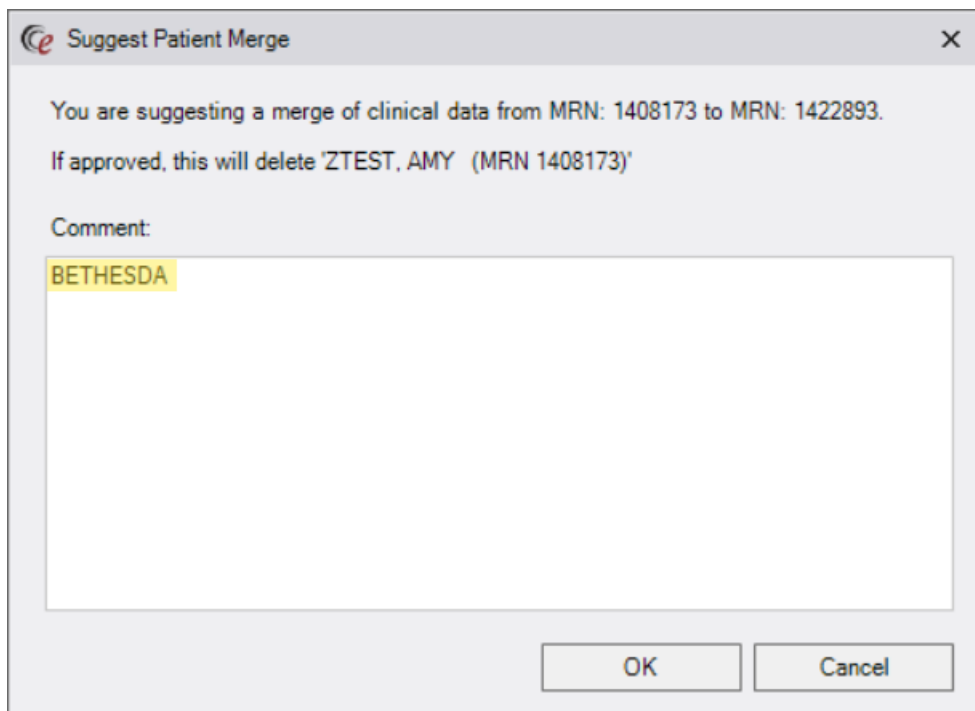
- ✓ Required: Site location (first)
- ✓ Optional: Any helpful identity confirmation details such as:

- Prior / maiden name
- Phone number
- Address
- Other demographic details that support validation

❌ Do not include unnecessary or unrelated comments. Extra comments delay review and processing.

✅ Comment Examples (Preferred Format):

- BETHESDA, PRIOR LAST NAME: SMITH
- STERL, PHONE MATCHES: 555-123-4567
- PARK, DUPLICATE MRNS, SAME DOB AND ADDRESS



Suggest Patient Merge

You are suggesting a merge of clinical data from MRN: 1408173 to MRN: 1422893.
If approved, this will delete 'ZTEST, AMY' (MRN 1408173)

Comment:

BETHESDA

OK Cancel

C) Click OK

✦ This submits the merge suggestion only. The team responsible for validating and completing merges will process it once received.



OK Cancel

EDITED: 01/30/2026