

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

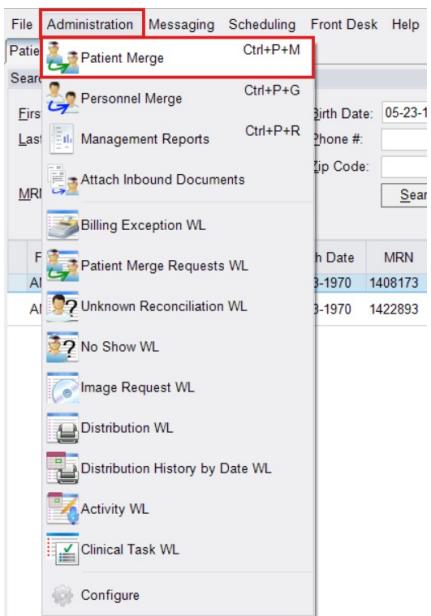
- Use the search function in eRAD to locate and open the patient folder.
- At this point, it does not matter which duplicate record you open first.

A screenshot of the eRAD Patient Search interface. The search criteria are set to First Name: AMY and Last Name: ZTEST. The results table shows two rows of data, both of which are highlighted with a red border. The columns in the table are: 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 first row corresponds to the search criteria, and the second row is a duplicate entry with a slightly different address and zip code.

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:

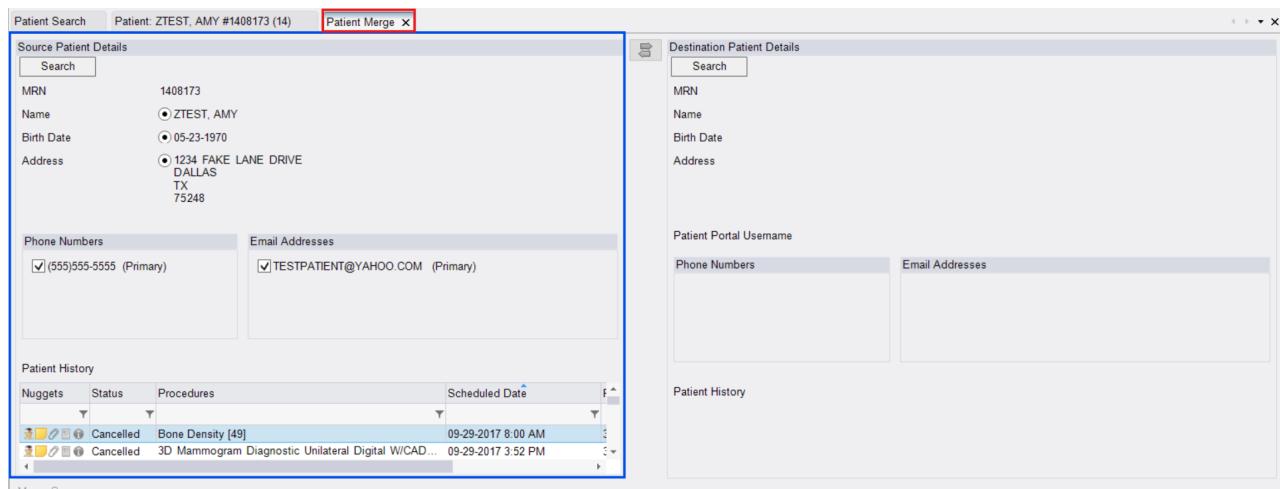
 **Source Patient Details (Left):**

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	7
ZTEST	AMY Z		05-23-1970	1422893	system	F	5060 ADDISON CIRCLE DR, APT 5836	ADDISON	TX	7

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

Source Patient Details		Destination Patient Details	
Search		Search	
MRN	1408173	MRN	1422893
Name	<input type="radio"/> ZTEST, AMY	Name	<input checked="" type="radio"/> ZTEST, AMY Z
Birth Date	<input type="radio"/> 05-23-1970	Birth Date	<input checked="" type="radio"/> 05-23-1970
Address	<input type="radio"/> 1234 FAKE LANE DRIVE DALLAS TX 75248	Address	<input checked="" type="radio"/> 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)

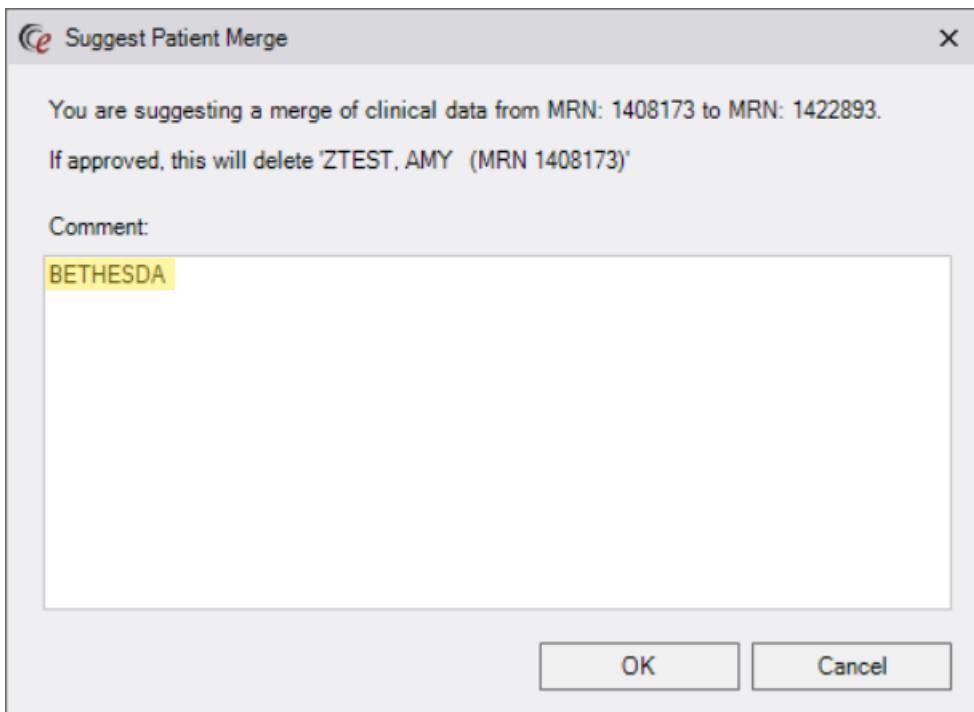
✓ Optional: Any helpful identity confirmation details such as:

- 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



C) Click OK

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



EDITED: 01/30/2026