

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Merging Duplicate Patient Charts

Last Modified on 12/31/2019 9:45 am EST

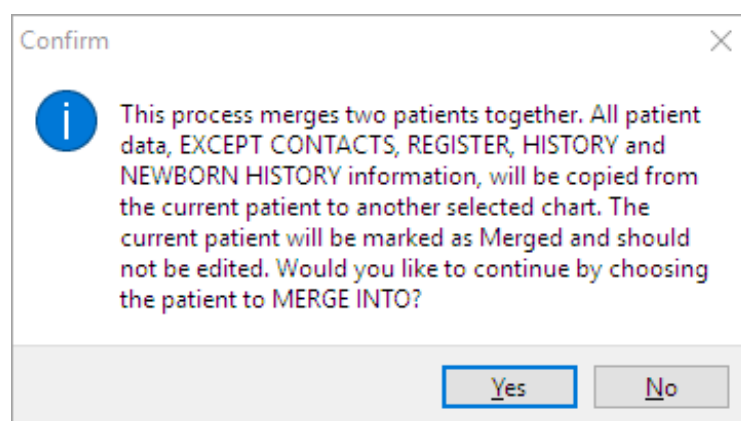
Version 14.19

User Permission: You need to be assigned the following permission to perform this workflow: AA_SystemAdmin_mi.

In the event that a patient is registered twice in OP and has two charts, you can merge the charts after deciding which chart contains the most valuable information. Follow these steps to complete the merge:

Review the two charts to decide which patient # will be active and which patient # will be merged. Ensure that both patient #s are set to Active status.

1. Within the Patient Chart, click **Basic Information** for the Chart that will be marked as Merged.
2. Click the **Merge** button in the top right of the window (next to the Print button). A Confirmation pop-up box is displayed. Review the information.



Note: In addition to contact, register, and history information, the claims from the merged patient will *not* be copied to the new patient chart.

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be copied to the new patient chart.

3. Click the **Yes** button.
4. Search for and select the **Patient** whose chart the records should be merged into.
5. Click the **Select** button and confirm the review the merge confirmation.
6. Once the Merge is complete:
 - The status of the merged Patient Chart will be changed to **Merged**.
 - **XXX** is displayed in front of the patient's name.

The merged patient will no longer be displayed when searching for Active patients in the Patient Directory.



Note: If a merge was done in error, use the Unmerge button.

Version 14.10

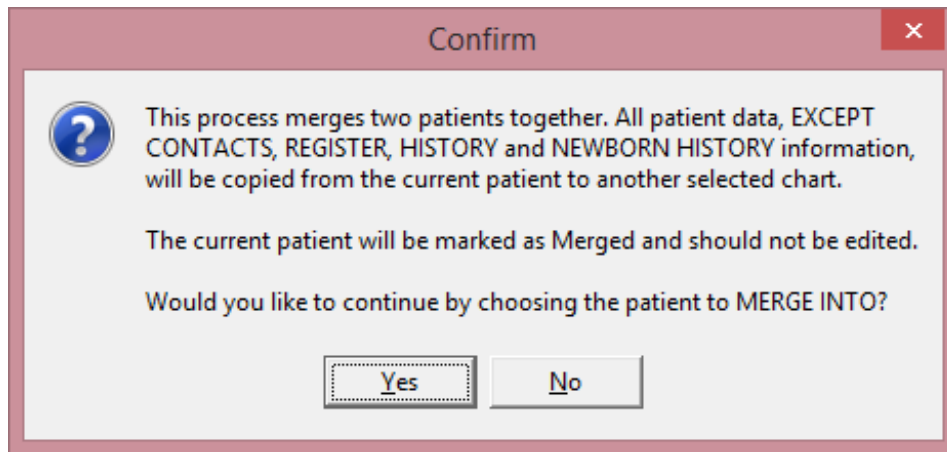
**Permission needed to
perform this workflow**

AA_SystemAdmin_mi

In the event that a patient is registered twice in OP and has two charts, you can merge the charts after deciding which chart contains the most valuable information. Follow these steps to complete the merge:

Review the two charts to decide which patient # will be active and which patient # will be merged. Ensure that both patient #s are set to Active status.

1. Access the **Patient Register** that will be marked as Merged.
2. Click the **Merge** button. A Confirmation pop-up box is displayed. Review the information.



3. Click the **Yes** button to confirm you are ready to merge.
4. Once the Merge is complete:
 - The status of the merged account in the Patient Register changes to Merged.
 - XXX is displayed in front of the patient's name

The merged patient is not displayed when searching for active patients in the Patient Directory.

 If a merge was done in error, use the Unmerge button.