



# Marking Patient for Merge Tip Sheet

Revision Date 12/17/2020

## Overview

Users who discover potential duplicate records can use the "Mark Patients for Merge" activity to conveniently and efficiently notify data integrity staff. Unlike an InBasket message, this activity allows the records in question to appear directly on the Identity Events Report for data integrity specialists to review.

## Try It Out!

1. Click **Mark Patients For Merge** on the Hyperspace toolbar.
  - a. If you do not have this button on your toolbar, you can use the Chart Search activity located on the right side of the screen, just below the Hyperspace Toolbar and enter " Mark Patients For Merge"
  - b. Select Activity
2. The **First Patient** window opens.
3. Enter the name of your patient.
4. A **Second Patient** window opens.
5. Enter the name of the second patient.
6. The **Mark Patients for Merge** window appears.
  - a. From this window, you can offer suggestions on what the merge result should be by selecting individual items.
7. It is HIGHLY suggested that you enter in a reason in the **Reason** field.
  - a. (see image on next page)
8. Select the **Mark for Merge** button.

# Marking Patient for Merge



Mark Patients for Merge

**⚠** You have both records locked. Other users cannot make changes until you are finished.

**?** To make recommendations for the demographic values to preserve in the merge, select the appropriate cells in the First Patient or Second Patient column.

	First Patient	Second Patient	Merge Result
Name	ADVENTUREALLURE, KIMBE	ADVENTUREALLURE, KIMBE	
MRN	999227741	999227381	999227741
Sex	Female	Female	
Birth Date	1/6/2014	1/6/2014	
SSN	xxx-xx-9041	xxx-xx-7274	
Address	711 Dune Dr	711 Dune Dr	
City	MADISON	MADISON	
State	Wisconsin	Wisconsin	
ZIP	53703	53703	
Phone	608-555-8213	608-555-8213	608-555-8213
Registration Status	New	New	New
Patient Status	Alive	Alive	

Reason:

Comment:

Mark for Merge Cancel

## Did You Know?

After both patients are marked for merge, there is an **automatic** patient advisory placed within each of the patient's chart. This advisory has a link to the potential duplicate patient's chart so providers and users can easily view both charts.

Patient Chart Advisories

### Patient Chart Advisories

Name: Adventureallure, Kimberly-DIS  
MRN: 999227741

**i** Take notice of the following advisories for this patient before you continue.

#### ➤ Patient Marked for Merge

The patient you selected has been marked for a potential merge and may include associated patients beyond the initial potential merge. The merge has not yet occurred, so data for this patient may be incomplete. This situation is currently being remedied. In the meantime you may continue your work with this record.

Associated Patient - MRN  
[Adventureallure, Kimberlyn-DIS - 999227381](#)