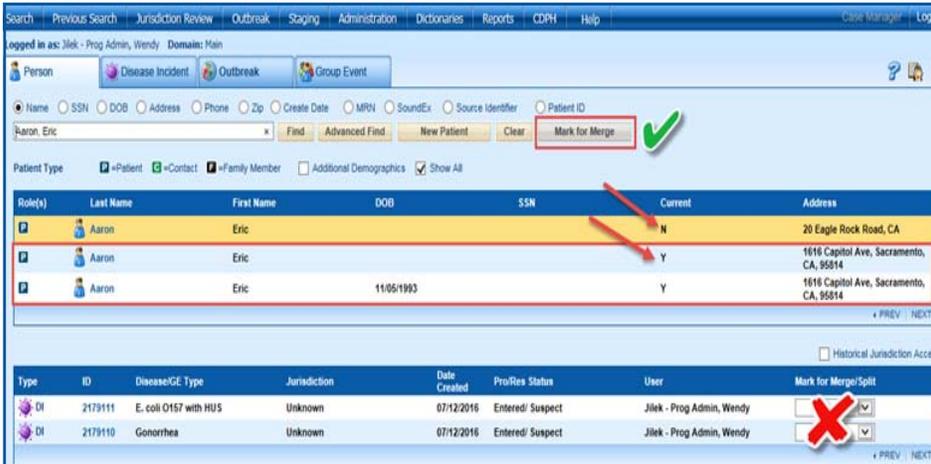


## STEP 1: Identify patient records to be merged on the Person Search page.



### Locate Duplicate Patient Record

The Local Health Department determines which two patient records belong to the same patient.

**Show All** checkbox dictates which version of the records display.

- ◆ Checked=Current (Y) & noncurrent versions (N)
- ◆ Unchecked=Current versions (Y)

**Y=Current Version** (Can be merged)

**N=Noncurrent Version** (Cannot be merged because it is not a duplicate)

**Press "Mark for Merge" button on top right corner.**

Do not select "Mark for Merge" from the drop down menu on the bottom right. It is used for incident merges, not patient merges.

## STEP 2: Select first patient record and mark it for merge.

## STEP 3: Select the second patient record and mark it for merge. Both of the patient records will be highlighted orange.

## STEP 4: Fill out the Patient Merge Request Form. Specify which patient record contains the correct patient demographics in the "Keep Pt. Demo. from this Pt. ID" column. Patient ID can be found by clicking on the icon next to the last name. **DO NOT** write "Most Current" or leave blank.

Patient Merge Request Form				
Request a Patient Record merge from CalREDIE Help by marking the Patient Records for merge, completing the below form, and sending this excel file by email to <a href="mailto:CalREDIEHelp@cdph.ca.gov">CalREDIEHelp@cdph.ca.gov</a> with "Merge Request" in the Subject line. Once the Patient Record merge is complete, CalREDIE Help will send a merge completion email. At that point any outstanding incident merges can be completed by the Local Health Department.				
<b>Instructions:</b> Fill out the requested information in the form below. <i>(For Quick Reference Guide, click tab below)</i>				
<ul style="list-style-type: none"> <li>• <b>Keep Pt. Demo. from this Pt. ID:</b> Keep Patient Demographics associated with this patient ID. Provide the patient ID associated with the Patient Demographics that will be kept in the merge. Enter all the correct demographics onto one patient record and provide that patient ID.</li> <li>• Include other relevant non-demographic information in the Notes Section. <b>Do not include PHI such as name, address, and SSN.</b></li> <li>• Request multiple merges by filling out multiple rows. If a patient record needs to be merged more than once (i.e. there are more than 2 Patient Records for the same Patient), list additional patient ID(s) in the Notes column.</li> </ul>				
Last Initial	First Initial	Keep Pt. Demo. from this Pt. ID	DOB (MM/DD/YYYY)	Notes (No Demographic Information)
R	R	123450	1/1/1111	
E	L	678900	2/2/2222	

Patient Merge Request Form is located on CalREDIE Help web page (<http://www.cdph.ca.gov/data/informatics/tech/Pages/CalREDIEHelp.aspx>) under **CalREDIE Documentation**.

## STEP 5: Send completed form to [CalREDIEHelp@cdph.ca.gov](mailto:CalREDIEHelp@cdph.ca.gov). CalREDIE Help will merge patient records and send confirmation to requestor.

## STEP 6: Complete any necessary incident merges once the patient merge has been completed.

### IMPORTANT POINTS TO KEEP IN MIND BEFORE SENDING REQUESTS TO CalREDIE HELP

- Local Health Departments are responsible for verifying and inputting accurate demographic information into one patient record. **DO NOT** assume that the most current incident has all of the demographic information needed for patient merging.
- **DO NOT** mark **MORE** than two patient records for merge for the same person. To request a merge for three or more records belonging to the same patient, follow all of the steps above and list additional patient ID(s) in the **Notes** column.
- There will be a delay in processing requests if the patient ID provided in the "Keep Pt. Demo. from this Pt. ID" column is missing critical demographic information (SSN, address, phone numbers, etc.).