Patient Merge Quick Reference Guide

The Patient Merge Request Form is located on the CalREDIE Help page: https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/CalREDIE-HELP.aspx under User Guides & Reference Materials.

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

The Local Health Department determines which two patient records belong to the same patient. On the CalREDIE Person Search screen, you will notice a checkbox titled Show All under the button New Patient. The Show All checkbox dictates which version of the records will display in a search. If checked, Current (Y) and Noncurrent (N) versions will show in the search results. If unchecked, only Current versions will show. Please note that only Current versions can be merged, because Noncurrent versions are not duplicates.

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

Press the Mark for Merge button to the right of the person search bar. The patient record will then be highlighted red. Do not select Mark for Merge from the drop down menu on the bottom right, as it is used for incident merges, not patient merges.

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 Patient Demographics from this Patient ID column. The Patient ID can
be found by clicking on the blue person icon next to the last name. Do not write “most current” or leave blank.

Step 5: Send the completed form to 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.

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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.

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Contact CalREDIE Help Desk with any questions at (866) 866-1428 or CalREDIEHelp@cdph.ca.gov