

Using ProviderLink to Merge and Unlink Patient Records

Merging Patient Records

Merging patient records is an important ProviderLink function. When two records for the same patient are accidentally created, you can merge the records, in which tasks, history, authorizations, and documents from the two records will be combined. This function cannot be undone and must be handled carefully. Follow the steps below to ensure proper workflow.

■ Search for Duplicate Patient Record

When you find there are two or more patients with the same name, first do a search before creating a new patient record to be sure the patient does not already exist in ProviderLink.

1. Login to ProviderLink.
2. Choose the appropriate Work List View, and click *Submit* to go to the Main Window screen.
3. From the Main Window screen, click *Lookup* on the menu bar, and then select *Patient* from the drop-down list. The Patient Lookup screen displays.
4. To search for a patient record:
 - a. In the First and Last Name fields, type the first couple letters of the *patient's first and last name*.
 - b. Click *Search* on the menu bar.
Helpful Hint: Avoid typing the patient's full name, as the patient could exist in ProviderLink already with a similar spelling.
5. The Search Results screen displays. If two or more patient records display in the listing, follow the instructions below.
 - a. Check both patients' records to positively identify that the patients are indeed the same person.
 - b. Check birth date, SSN, demographics, etc.
 - c. Click *Search Results* in the crumb trail at the top of the screen to navigate back to the listing of patients.
 - d. Select a different patient from the list and repeat step 3.

■ Determine Which Patient Record to Keep

After reviewing all patient information, select which patient's demographic information to save. (e.g., One patient may and another may not have any demographics entered. In that case, the choice is clear as to which record to keep.). All tasks, history, authorizations, and documents from the two records will be combined.

■ Merge Patient Records

In order to merge the patients' data, you must make their unique IDs the same. The unique ID is located on the View Patient information screen. This number can vary between facilities but is most often the Medical Record Number.

1. On the Search Results screen, select one of the similar *patients* from the search results.
2. Enter a *unique ID* number for the patient.
3. Click *Save* on the menu bar.
4. Repeat steps 1 to 3 for the next similar patient record. Remember to enter the same unique ID number for this patient record if you want to merge it with the first record.
5. The Merge Patient Information screen displays. Both patient demographics are displayed. Review both records, then click *Keep This Patient's Data* for the demographics to keep for the merged patient record.
6. Another prompt will appear in a separate window and ask you once again if you are sure you want to proceed.
 - a. If you are sure you want to merge these patients, click *Yes* and the process will be complete.
 - b. If you do not want to merge, the data click *No*.
 - c. Next, click *Main Window* in the crumb trail at the top of the screen to return to the Main Window screen. The records will not be merged and you may resume working as usual in ProviderLink.

Please exercise caution with merging patient data. **This action cannot be reversed.**

tip sheet

Unlinking Patient Records

You must be a Facility Administrator to complete this function. As stated above, once patient records have been merged, it cannot be reversed. The patient records in the history will always remain merged, however you can unlink the messaging link. When a message is sent to a facility where the patient has been merged with another, messages will appear in the history for both patients. Unlinking the message link will allow a new patient record to be created with the new message attached to the history when another facility sends a message. You may then move any documents to the corresponding new patient record. Follow the instructions below to unlink patient messaging.

■ Search for Merged Patient Record

1. Log in to ProviderLink.
2. From the Main Window screen, click *Lookup* on the menu bar, and then select *Patient* from the drop-down list.
3. To search for a patient record:
 - a. In the First and Last Name fields, type the first couple letters of the *patient's first and last name*.
 - b. Click *Search* on the menu bar.
Helpful Hint: Avoid typing the patient's full name, as the patient could exist in ProviderLink already with a similar spelling.
4. The Search Results screen displays. Choose the patient with the merged records.

■ Determine Which Patient Record has been merged

You will need to decide which patient name should remain on the record in question. ProviderLink recommends keeping the patient name on the record that has the most history listed. If the current name on the record is not the patient with the most history, you can change the name and demographic information with the steps below. If the patient demographics are correct, skip to the next step.

1. From the View Patient Information screen, you can type in *new name, DOB, SSN, etc.*
2. After entering the information, click *Save*.
3. Also from the View Patient Information screen, click *Demographics* on the menu bar and make necessary changes.

■ Unlink Patient

1. From the View Patient Information screen, click *Admin Tools > Clear Remote Patient Map*.
2. The screen refreshes and displays the following message "The remote patient map was cleared successfully."

■ Contact Facility(s) That Have Sent Messages

You will need to contact the facility(s) that have sent a message(s) about the other patient that now does not have a record in your system. Ask the facility to resend a message that was previously sent. The facility can simply use the resend button in the message screen. When this message is sent, a new patient record will be created for the patient. Once this is complete you will need to move any documents from the original patient record that belongs to the patient record newly created. Follow the instructions below to move patient documents:

1. Locate original patient record.
2. Click *Documents* in the menu bar to view the patient's list.
3. Click the *Move* icon next to the document you want to move.
4. Search for and choose the newly created patient record and click *Move*.

If you have further questions regarding the merge function, call one of our Support Specialists at the Covisint ProviderLink Support Center toll-free at 866-373-0878.