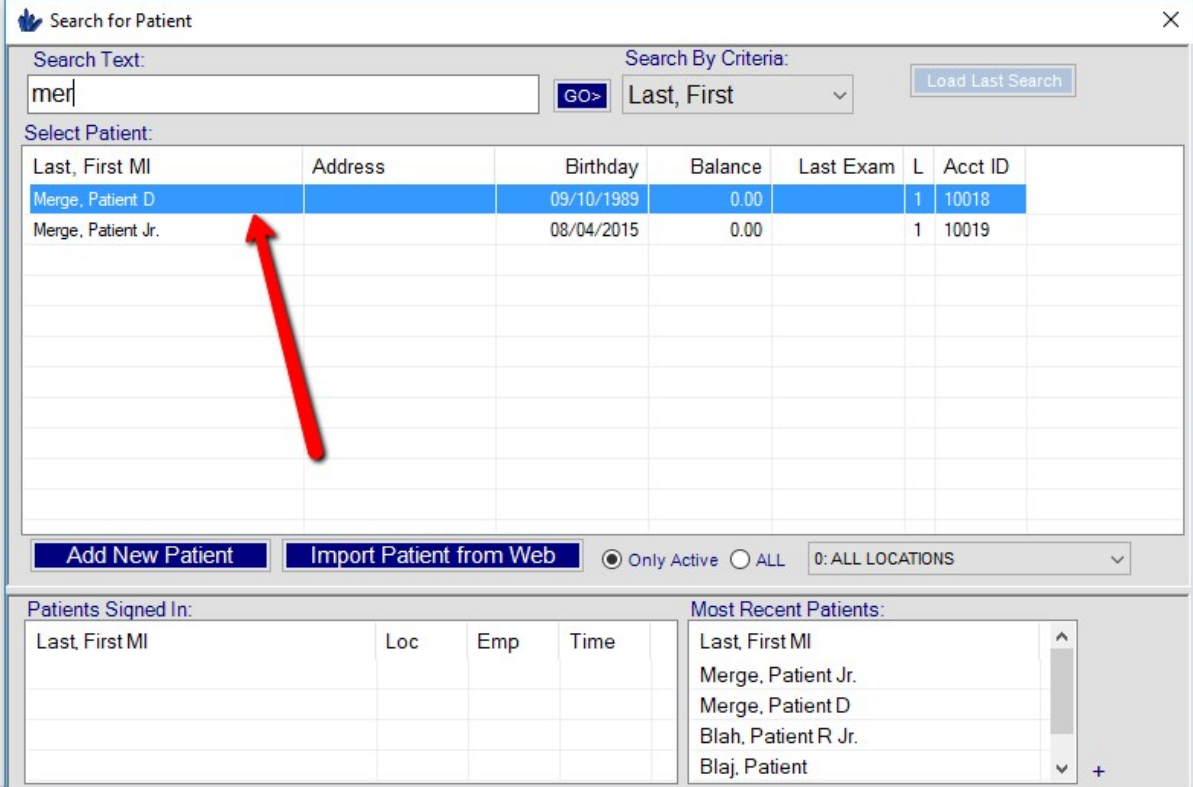


Unmerging Patients

If 2 patients are merged that should not have been merged, they must be manually separated again. In this case I have 2 patients, father and son with the same name, whom I merged. The father had files, an invoice and an exam record. The son did not.



The screenshot shows a 'Search for Patient' window. The search text is 'merl' and the search criteria is 'Last, First'. The search results table is as follows:

Last, First MI	Address	Birthday	Balance	Last Exam	L	Acct ID
Merge, Patient D		09/10/1989	0.00		1	10018
Merge, Patient Jr.		08/04/2015	0.00		1	10019

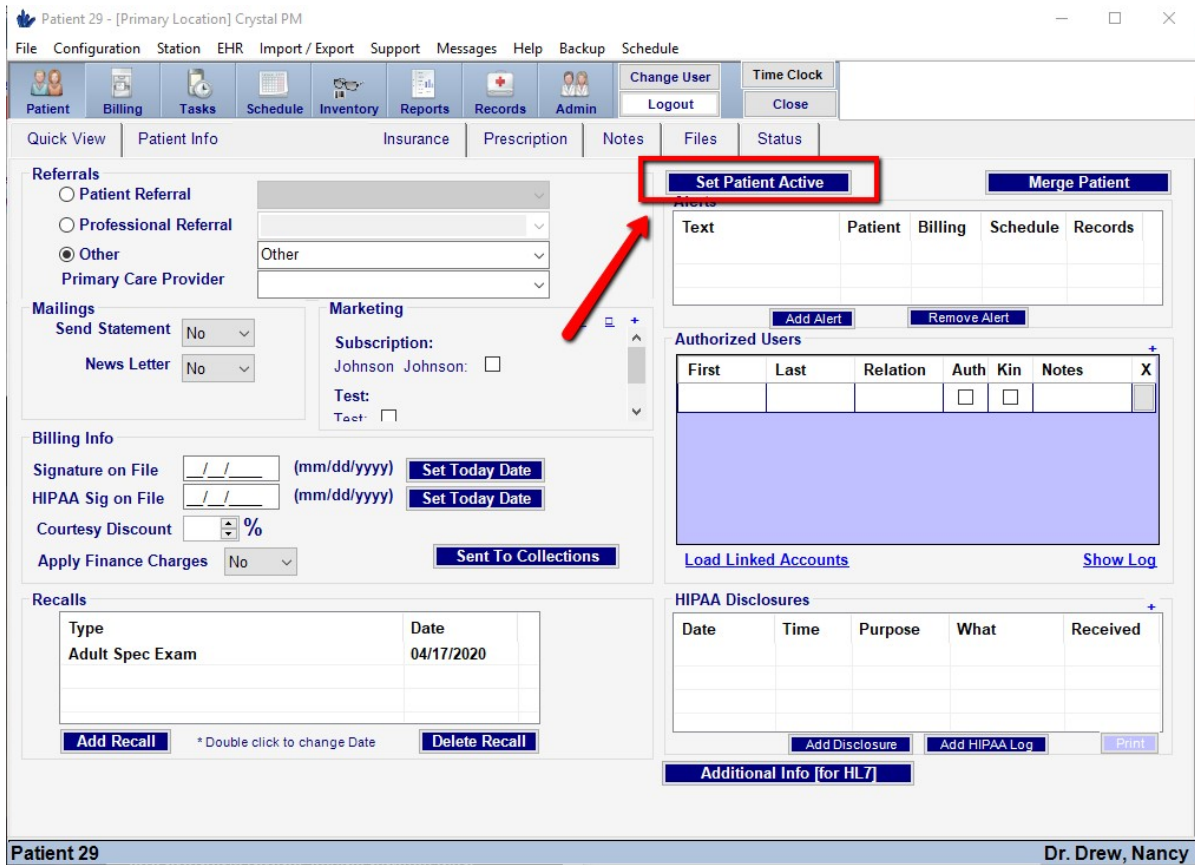
Below the table are buttons for 'Add New Patient' and 'Import Patient from Web', along with radio buttons for 'Only Active' (selected) and 'ALL'. A dropdown menu shows '0: ALL LOCATIONS'. At the bottom, there are sections for 'Patients Signed In:' and 'Most Recent Patients:'.

Dr. Drew, Nancy

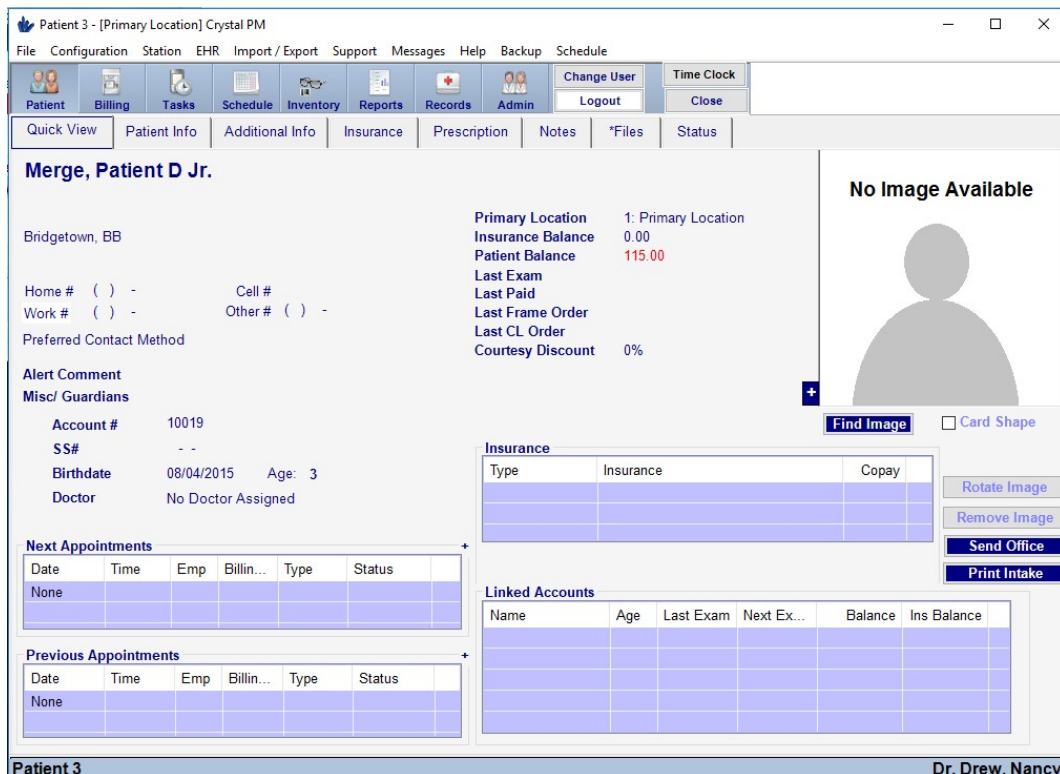
Once merged, the patient you began the Merge from will be Inactive. You will need to search for them (make sure "All" is selected in the patient search in order to include Inactive patients).

Got to the Inactive patient's Patient tab > Additional Info > click "Set Patient Active".

Chart: Patient, Merge D.



Next you will go to the patient tab of the patient you merged all the information to. Follow the steps in the pictures below.



Patient 3 - [Primary Location] Crystal PM

File Configuration Station EHR Import / Export Support Messages Help Backup Schedule

Patient Billing Tasks Schedule Inventory Reports Records Admin Change User Time Clock Logout Close

Quick View Patient Info Additional Info Insurance Prescription Notes *Files Status

Date	Filename	Type	Description
04/17/2019	How to move the Crystal Database to a different...		TestDoc

If a patient is wrongfully merged, and their files are now in another patient's record, you must go to that record open the file (will open in adobe, foxit, etc) download and save this to the desktop. You will need to manually add it to the correct patient's Files tab. You can then remove it from the patient it was wrongfully merged to.

Red = stored location Display TreeView

Add File Add Printed Print Address Label Create CCD or CCR Edit File Type Edit Description Edit Filename Edit Date Remove File

Send Office Document Show Patient Log Print Billing Label Show Tasks Email Portal Access

Email Office Document Online Portal (Add/Remove Files) Print Folder Label

Online Registration Form

Patient 3 Dr. Drew, Nancy

Patient 3 - [Primary Location] Crystal PM

File Configuration Station EHR Import / Export Support Messages Help Backup

Patient Billing Tasks Schedule Inventory Reports Records Admin Change User Time Clock Logout Close

View/Print Old Invoices Create New Invoice Transaction History Recall Overall Balance Patient: \$115.00 Insurance: \$0.00

Patient: Merge, Patient D Jr. Date of Service: 04/17/2019 [115.00 / 115.00] Invoice Notes (Does Not Print on Invoice):

Provider: Dr. Drew, Nancy Invoice #: 20

Staff: Location: 1: Primary Location

Bill Code	CPT	Description	Emp	Insurance	Amount	Diag
Exam Comp	92014	Established Patient, Comprehensive Visit			115.00	

Merging a patient also merges invoices. You will need to open the patient the invoices are now located in. Find the ones that belong in the other patient record and recreate them under the correct patient. You will then need to Void them from the patient they were merged to. There is no other way to move them except manually recreating them in the correct patient, and voiding them from the incorrect patient.

Print CMS Form Make Payment / Adjustment Product Return Void Invoice Edit Invoice Add Discount View/Print Options Invoice Balance Patient: \$115.00 Insurance: \$0.00

Save to PDF Upload to Portal Clinical Summary Email Portal Access Claim History Frames

Patient 3 Dr. Drew, Nancy

Patient 3 - [Primary Location] Crystal PM

File Configuration Station EHR Import / Export Support Messages Help Backup **EHR Settings** Time Clock

Patient Billing Tasks Schedule Inventory Reports Records Admin Logout Close

Merge, Patient D Jr. Add Addendum EDIT Dr. Drew, Nancy 04/17/2019 Pics Letter R Slip Files Spec RX CL RX

Record Completed Diags Drugs Extern Obs Proc RX Off

CC today Medical Hx today Objective today Refraction today Binocular today Prescription today Exam today Interp today A & P today CL today Diag RX today Summary today GL Flow today DED today Post-Op today SPEC CLS today

Spectacle Rx 1	Spectacle Rx 2	Spectacle Rx 3	PL Sun/CL							
Sphere	Cylinder	Axis	Vert Prism	Hori Prism	Ad	Seg Ht	Dist PD	Mono PD		
+2.00 OD	+2.00	-1.00								
+2.00 OS	+2.00	-1.00								

Notes:

Contact Lens Rx 1 Contact Lens Rx 2 Contact Lens Rx 3

Disposable Soft Rigid Ortho-K

Sphere Toric Bifocal Multifocal Multi-Toric Gas Perm

Max

OD

OS

Notes:

To put the Exam Records back under the correct patient, go to the Records tab of the patient you merged them to, click **Old Records**. You will need to check the records to know which record belongs to which patient. Sometimes you can use the **Prescriptions** in the records to tell which patient the record belongs to. Once you find a record that belongs to the merged patient, pull it up, got to **EHR Settings > Record Information > Change Medical Record Patient > Select the rightful patient**. You will need to do this for each exam record that is now under the incorrect patient.

CC A&P Summary ARRA Presc
04/17/2019 04/17/2019 04/17/2019 04/17/2019 04/17/2019

Alerts Tasks

04/17/2019: CC A &

Patient 3 Dr. Drew, Nancy