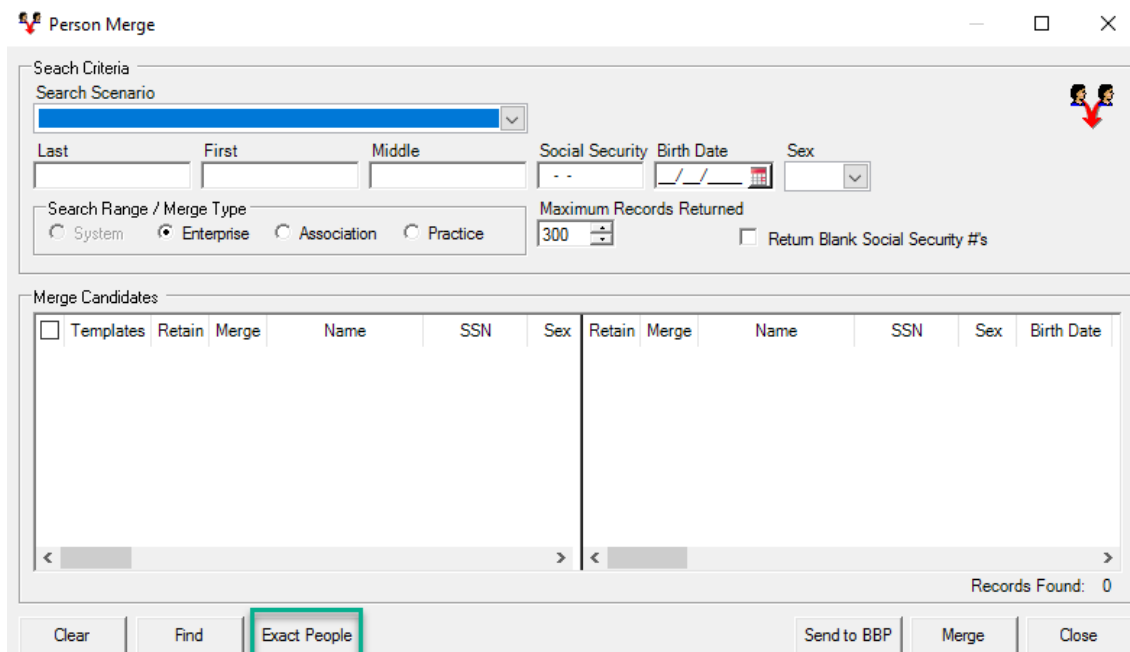


Merging Duplicate Person/Patient Records:

1. Log into NextGen PM, and from the main tool bar select **File > Processes > Person Merge**. You will receive a notice *"The Person Merge function is a database-intensive search that requires a large amount of system resources and can impact all other users on the system. It's recommended that you run this function after business hours and that you are the only person logged onto the system."*
2. Click Yes to continue with the search



The Person Merge Search screen enables you to:

- Drill down to the Patient Maintenance screen
 - Drill down into the patient's chart
 - Search for matching blank SSN records
 - View the practice name where the people/patient record exists
 - Merge duplicate people/patients into one record
3. Click the Exact People button at the bottom left of the window.
 4. The People Look Up window will open for Merge 1. In the Search Criteria section, enter the appropriate patient information for person record 1 and click the **Find** button.
 5. The results will display in the Matching Records section of the screen. Select Person 1 and click **Open**.
 6. The People Lookup – Merge person 2 window will display. In the Search Criteria section, enter the appropriate patient information for person record 2 and click the **Find** button.
 7. The results will display in the Matching Records section of the screen. Select Person 2 and click **Open**.
 8. Review the records and determine which, if any, should be merged, keeping in mind patients with patient portal access, dental radiology records, etc. Click the space under Retain for the record you'd like to keep. This will populate a check under Merge for the record that will be merged.

Person Merge

Search Criteria
 Search Scenario: Same Last Name/SSN - Different First Name

Last: Zztest First: Rid Middle: Social Security: Birth Date: Sex:
 Search Range / Merge Type:
☒ System ☐ Enterprise ☐ Association ☐ Practice
 Maximum Records Returned: 300 ☐ Return Blank Social Security #'s

Merge Candidates

<input checked="" type="checkbox"/> Templates	Retain	Merge	Name	SSN	Sex	Retain	Merge	Name	SSN	Sex	Birth Date
<input checked="" type="checkbox"/> <done>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zztest, Rid	000-11-2222	Male	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ZZTest, Riddick	000-11-2222	Male	01/01/1999

Records Found: 1

Clear Find Exact People Send to BBP Merge Close

- To view additional information for the merge candidates, highlight the patient record and right-click. The shortcut menu displays.
- If there are templates to assign, select the Assign Templates

Assign Templates...

View Person...

View History

Select All

Deselect All

- From the Templates window, select the templates that have the most recent template activity (Created/Last Modified column) by clicking in the space next to the template name in the **Select** Column.

Template Merge

Person 1
 Name: Zztest, Rid
 SSN: 000-11-2222
 Sex: Male
 Birth Date: 01/01/1999

Person 2
 Name: ZZTest, Riddick
 SSN: 000-11-2222
 Sex: Male
 Birth Date: 01/01/1999

Templates

Select	Table Name	Created/Last Modified	Select	Table Name	Created/Last Modified
<input type="checkbox"/>	Template_name_here	modified 5-9-2022	<input type="checkbox"/>	Template_name_here	N/A
<input type="checkbox"/>	Template_name_here	N/A	<input type="checkbox"/>	Template_name_here	modified 5-9-2022
<input type="checkbox"/>	Template_name_here	modified 5-9-2022	<input type="checkbox"/>	Template_name_here	N/A

Records Found: 0

OK Cancel

- d) Once all templates are selected click **OK**
9. Continue to make your selections for each row (pair) of potential duplicate patient records until you have selected all the records that you want to merge.
10. Click the **Merge** button. The warning message that displays, when you are accessing the Person Merge Search screen, displays again to remind you that this process is database intensive and should only be run after business hours.
11. Click Yes, another warning will display with the number of patient records being merged.
12. Click Yes and the merge process will take place. Depending on the number of merges and a number of templates associated with each, this may take a few to several minutes.
13. Once complete a message will display to inform the user that the merge has been successfully completed.
 - a) When duplicate patients are merged, all the patient information, chart information, and history are pulled from the merged record and entered into the retained record. The retained record will not include demographic information from the merged patient record.

Assign Person Merge to BBP job:

1. Log into NextGen PM, and from the main toolbar select **File > Processes > Person Merge**.
2. Select a merge process from the **Person Merge** dialog box by selecting the row in the **Merge Candidates** list.
3. Click **Send to BBP**.
4. Then **Select BBP Package** and **Job for Merge Set** dialog box displays.
5. Select the appropriate **Package** and **Job** combinations (a package containing more than one job displayed in the **Package** list for each of its Person Merge jobs).
6. Click **OK**.

Cancel Person Merge sent to the BBP

1. Log into the BBP and access the designated Person Merge package
2. Select the Jobs tab
3. Double-click on the job
4. Click once on the **Value**
5. Click the ellipsis button
6. The list of patients to merge appears
7. Uncheck the patient you don't want merged

Significant Events

A Significant Event is created at the practice level when a patient record is merged. The event can be viewed on the retained patient's chart's Clinical History/Notes tab. If a merged patient did not have a chart or any encounters, a Significant Event will not be created.