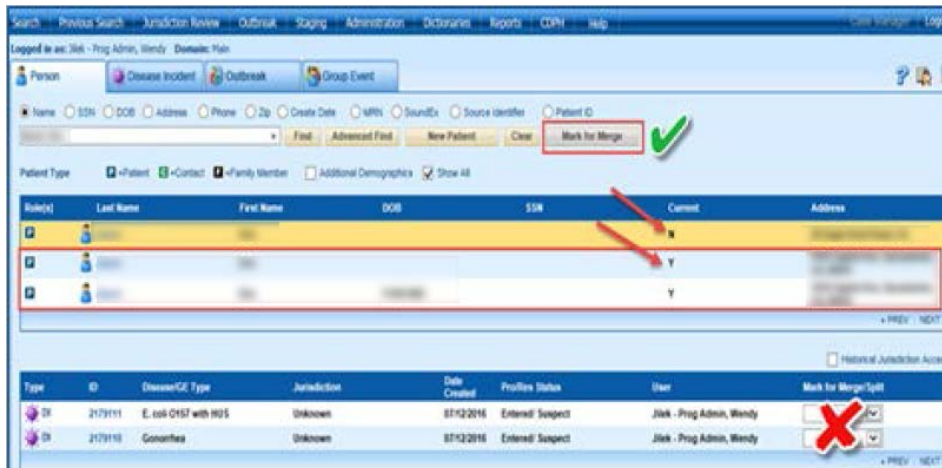# Patient Merge Quick Reference Guide

The Patient Merge Request Form is located on the [CalREDIE Help page](https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/CalREDIE-HELP.aspx): 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.

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 CalREDIEHelp@cdph.ca.gov 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.

Instructions: Fill out the requested information in the form below. *(For Quick Reference Guide, click tab below)*
• *Keep Pt. Demo. from this Pt. ID*: 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.
• Include other relevant non-demographic information in the Notes Section. Do not include PHI such as name, address, and SSN.
• 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.

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	

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.

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.

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