Audit4 – Consolidating Duplicate Patients

Audit4's Appointments and Billing detects and warns users attempting to create duplicate patients, making them a rare occurrence. When duplicates do occur, they will need to be manually resolved as Audit4 does not support single-click patient merges. Audit4's patient search menus typically lead to discovery of duplicate records before the large amounts of data has been entered in both patient records which means resolution is usually trivial.

It is possible to easily move some types of data from one patient to another and this document will guide you through this process. If you are ever unsure of how to proceed, contact S4S Support and we will be happy to assist.

If you are still using another Practice Management System that is linked to Audit4, the final page has further instructions.

Data that can be easily moved between patient records by admin staff:

- Appointments
- Consult Notes
- Results, eCorrespondence, Media
- Letters

Data that can be re-entered in primary patient records by clinicians:

- Medication History (if a full history is required)
- Conditions/ Allergies
- Medications

Data that CANNOT be moved between patient records:

- Billing items

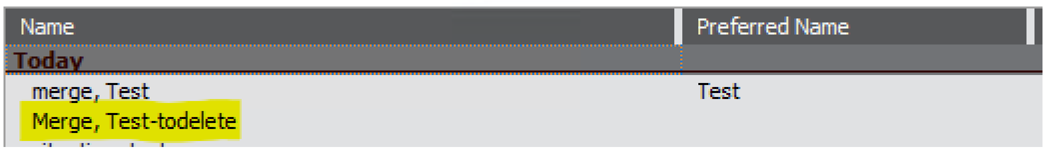
Procedure:

Choose the patient which will be retained (the Primary Patient) and the patient that will be deleted (the Secondary Patient)

Because Billing data cannot be moved or re-entered, the duplicate patient with Billing data should be chosen as the primary patient. If both patients have billing data, contact S4S to discuss options.

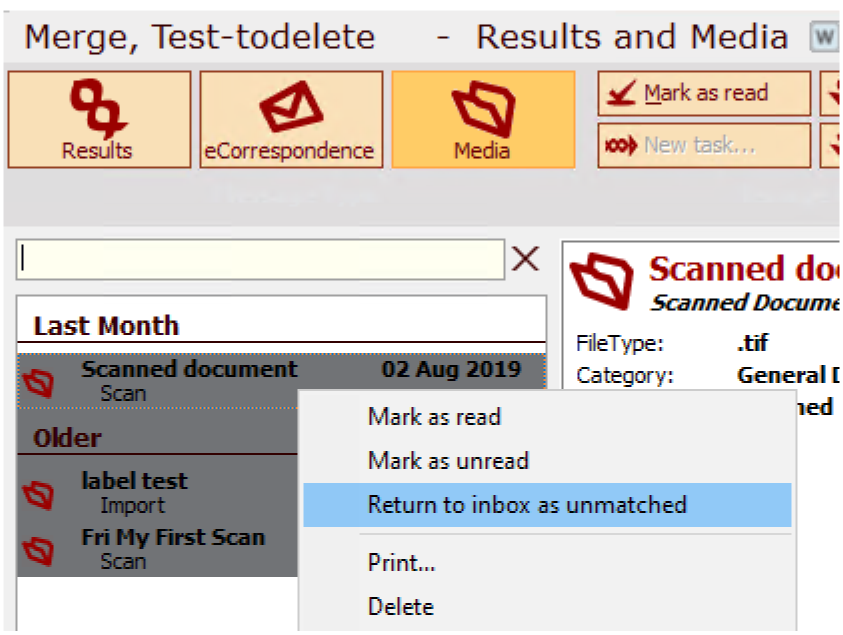
If neither patient has any Billing Data, choose the patient with the most extensive clinical data (conditions/medications/worksheets) as the Primary Patient.

Add a suffix to the given name of the secondary patient such as “-duplicate” or “-todelete”.   Note: Suffixes are used so that they do not interfere with searching for the patient.



Move Results, eCorrespondence, Letters and other Media to the Primary Patient

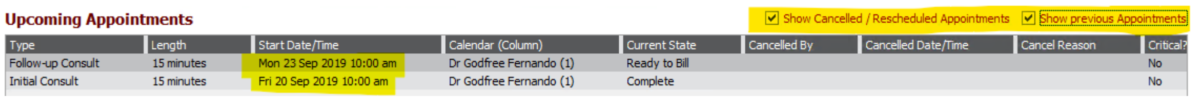
Return all results, media, eCorrespondence and letters belonging to the secondary patient to the inbox as unmatched. You can select multiple items with Shift + Click or Ctrl + Click, which you will be familiar with from Microsoft Windows and Office products.



These can then be matched to the Primary Patient in the Audit4 Inbox using the normal patient matching procedure.

Patient Appointments

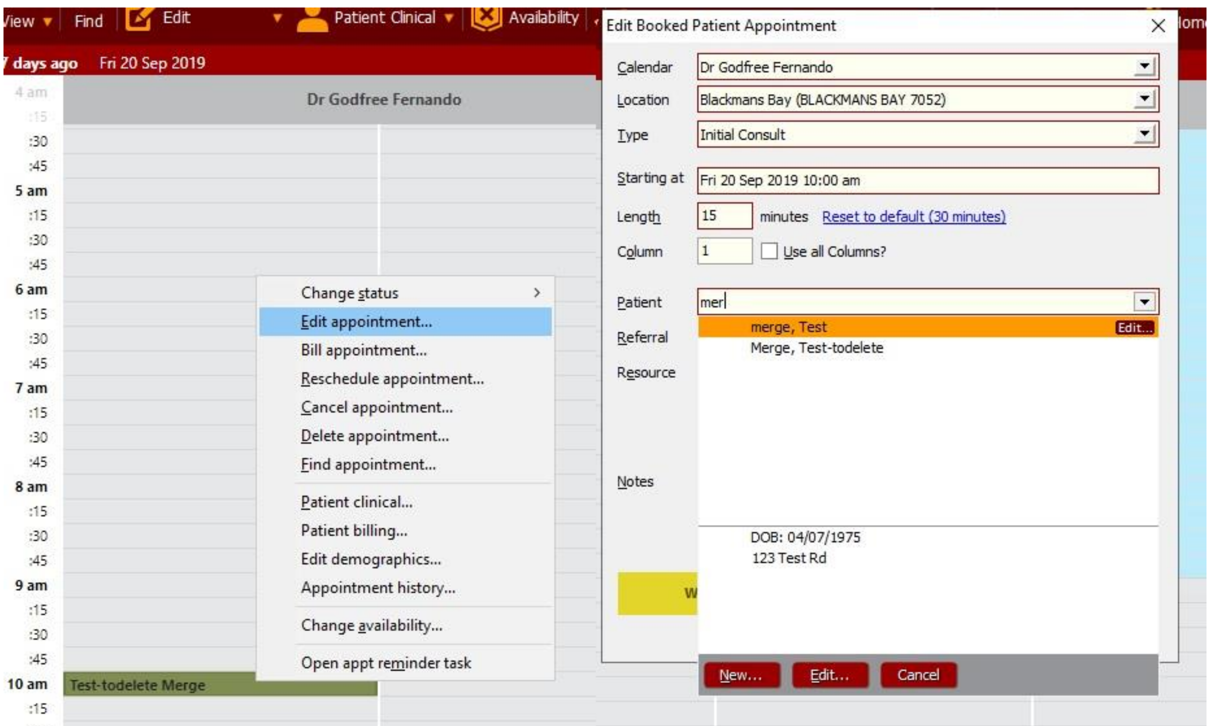
To see a full list of previous and upcoming appointments for the Secondary Patient navigate to the Patient Appointments tab in the Secondary Patient's clinical file and tick "Show previous Appointments".



Upcoming Appointments ☑ Show Cancelled / Rescheduled Appointments ☑ Show previous Appointments

Type	Length	Start Date/Time	Calendar (Column)	Current State	Cancelled By	Cancelled Date/Time	Cancel Reason	Critical?
Follow-up Consult	15 minutes	Mon 23 Sep 2019 10:00 am	Dr Godfree Fernando (1)	Ready to Bill				No
Initial Consult	15 minutes	Fri 20 Sep 2019 10:00 am	Dr Godfree Fernando (1)	Complete				No

The patient associated with each appointment cannot be changed from the clinical screen so you need to open Audit4 Appointments and then find and edit each of the Secondary Patient's appointments to assign them to the Primary Patient.



Consult Notes

Copy and paste the consult notes individually over to the Primary Patient, backdating each entry as you create the consult notes in the Primary Patient to keep the record order correct.

Clinical Data

The clinician will need to recreate any Clinical Data (diagnoses, medications, procedures, and clinical worksheet data) in the Primary Patient that may be present in the Secondary Patient.

Not using Audit4 Appointments and Billing?

If your practice is one of the few still using another Practice Management System (PMS) for appointments and billing and if that PMS is linked to Audit4 using the Patient.IN linking method**, then:

1. Identify the patient you want to keep in your PMS (the PMS Primary Patient record).
2. Rename the duplicate you intend to delete in your PMS (the PMS Secondary Patient record) such that it is easy to identify in Audit4 (e.g., add -delete to the end of the surname or end of the street address).
3. Switch to Audit4 and assess which record you want to keep in Audit4.
4. Check which Audit4 record was changed when you renamed the Secondary Patient record in the PMS in step 2.
    a. If the PMS Secondary Patient record links to the Audit4 patient record that is the most practical to delete (contains no/little clinical data such as medications, conditions etc.) then you are in luck. You may just have to transfer some easy to move items such as Inbox results etc. See instructions on page 2.
    b. If the PMS Secondary Patient record links to the Audit4 patient record that contains the majority of the clinical data, then contact S4S Support. We can switch over the underlying patient linking identifiers so that the PMS Secondary Patient is linked to the Audit4 patient record that is the most practical to delete. You can then keep the Audit4 patient record with good clinical data and only need to transfer the easily moveable data items from the patient that you want to delete.
5. You can delete the Audit4 Secondary Patient record once all data items have been moved to the Audit4 Primary Patient record.

*** Linked PMS Systems using Patient.IN include: Medilink, BlueChip, CCOS, Zedmed, Shexie, Mediflex*