

Report Patient Duplicates Quick Reference Guide



Note: All imMTrax users can report duplicate patients in imMTrax. Only merge capable users for each facility can access the reported duplicate patients records and consolidate the records.

Merge queues are facility specific, not organization specific.

Steps to Follow:

1. If two or more possible duplicate patient records are identified in the Patient Search Results, select Report Duplicates.

Patient Search Results
Records Found = 2 Search Criteria: First Initial / Birth Date

Show entries Search:

First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
SARAH		ANDERSON	09/20/1983	1306009		
SARAH		JENKINS	09/20/1983	1306010		

Showing 1 to 2 of 2 entries

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2. Select a Reason for Deduplication.
3. Select the checkboxes next to the identified possible duplicate patient records.
4. Select Report Duplicates.

• Please select a deduplication reason.

Report Duplicate Patients

Reason for deduplication: **2**

Please select two or more records you would like to merge.

Select	First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
<input checked="" type="checkbox"/>	SARAH		ANDERSON	09/20/1983	1306009		
<input checked="" type="checkbox"/>	SARAH		JENKINS	09/20/1983	1306010		

3 **4**

5. Use the radio button. Located above the patient record name, to select the Master patient record.
 - a. The most complete record, the one with the most updated information or the record with the most complete spelling should be marked as the Master record.

6. It's best practice to enter a note in the notes field for the merge user to review before consolidating the record, especially for complex merges where it is not readily apparent that the patients are the same.

Example: Patient has legally changed their name.

7. Select Merge.

Please select the master record to be merged into:

Patient Set Merge		
Master Patient:	5	
SIIS ID	1306009	1306010
First Name	SARAH	SARAH
Middle Name		
Last Name	ANDERSON	JENKINS
Suffix		
Birth Date	09/20/1983	09/20/1983
Sex	FEMALE	FEMALE
Medicaid Number		
Birth File		
Race	White	
Language		
Mother Maiden Name		
Guardian First Name		
Guardian Middle Name		
Guardian Last Name		
Street Address	4201 ELM AVE	4201 ELM AVE
City	HELENA	HELENA
State	MONTANA	MONTANA
Zip Code	59601	59601
Phone		
Email		
Health Plan		
Health Plan ID		
HP Enroll Date		
Multi Birth Indicator	N	N
Birth Order		

Reason for deduplication:
Same Patient

SAME PATIENT

The patient recently got married and legally changed their name

Back Merge

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- a. Note: Selecting Merge will not consolidate the records. The records will be flagged for manual resolution and available for a facility level merge user to review and consolidate. You will see a message like below if your flag for manual review was successfully submitted.

• Your request for record merging has successfully been submitted for manual review.

Patient Search				Click here to use the "advanced" search	
Last Name or Initial:		ID:			
First Name or Initial:	sarah	SIIS Patient ID / Bar Code:			
Birth Date:	09/20/1983	Chart Number:			
Family and Address Information:					
Guardian First Name:		Mother's Maiden Name:			
Street:					
City:		State:	Select...		
Zip Code:		Phone Number:			
Country:	United States				

Note: When searching by First and Last Name, you may use the wildcard character % to replace multiple characters and _ to replace a single character.
☐ Check here if adding a new patient.

Clear Search

Patient Search Results						
Records Found = 2 Search Criteria: First Initial / Birth Date						
Show	100	entries	Search:			
First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
SARAH		ANDERSON	09/20/1983	1306009		
SARAH		JENKINS	09/20/1983	1306010		

Showing 1 to 2 of 2 entries