ISWIKI

Merging Duplicate RiO Records

Sometimes an RiO record is created for a patient who already has a record on RiO. Errors in the process of migration from ePEX to RiO have created a number of duplicate records. It is necessary for the two records to be merged so that all clinical information is on the same record.

! It is very easy to merge records in RiO but reversing a merge is slow and labour-intensive. (It has to be done manually.) Before merging a record it is **important** to make sure that the two records really are for the same person.

Identifying Duplicates

Most duplicates are either discovered in the course of doing other things, such as identifying the NHS numbers of RiO records without an NHS number, or are reported by clinical staff. However there is a report listing putative duplicates accessible at DuplicateRecordsinRiO [http://bi-rsd-01/Reports/Pages/Report.aspx?ItemPath=%2fReports%2fDQ+Reports%2fDuplicate+Records+in+RiO]

This report provides a list of putative duplicates listing; date added; RiO ids; Forename; Surname; NHS number (if present); DOB and Gender. For recent records it also provides information about record creation. Putative duplicates on the report can be updated as Merged Pending False or Placeholder (For use with very old records). Icon colour of putative duplicate will change when report is updated. Merged, False or placeholder responses will stay visible for 24 hours after the selection and then will not show again. New or pending duplicates will be shown all the time.

Procedure for Merging Duplicates

Select source and target records

One of the two records for the patient (the source record) must be merged into the other (the target record). The GP and address information on the source record will be lost so if this is required it must be added to the target record before proceeding with the merge.

Merge source into target

Click on the *Client Merge* option on the *PAS Admin* menu. First select the source record then select the target record. Now select the *Merge Clients* option. RiO will usually produce a list of possible problems with the merge. Some of these problems will prevent a merge. For example both patients have a (different) NHS number, the patients are of different genders, both patients have open referrals from the same team, both patients are currently in patients, both patients have an open care plan. These problems must be resolved before the merge can proceed. Other issues such as differences in DOB Address or GP will cause a warning that the records are possibly not for the same person. If either record has an address history or a GP history there will be a warning of the risk of losing this history during the merge. This is your last chance to avoid a mistaken merge. **If** you are convinced that the source and target record both refer to the same person, and that merging the records will not lose important information, then click to proceed with the merge. The merge will now be performed automatically by RiO.

Check merge

RiO provides a merge log for each successful merge, allowing one to check the actions that have been performed and the rows affected. There is also a list of all merges on the *Client Merge History* option on the *PAS Admin* menu.