

## Merging Records

**Step 1.** Log into Forum, go to Patient Directory screen. Click on the yellow Reset arrow in top-right corner of screen. All patients in database will now appear.



**Step 2.** Enter patient’s name, last name with a comma or space and first initial or full/partial first name. Do not use ID/MRN numbers!

Patient Name	Patient ID	Issuer of Pa...	Date of Birth	Visit Date	Visit Date	Type	Device
Test, Angle	CZMI2104260627	11652347...	Jan 27, 1955				
TEST, TEST	54545454545		Oct 2, 1990				
TEST, TEST	1254782694	EPIC	Oct 2, 1990				
Test, Test	0605025-45	Epic	Oct 2, 1990				
test, test t	CZMI354643491	11652347...	Oct 2, 1990				

Note that the duplicate entries, total of 5 patient’s names in this example, all contain the same DOB and partial name combination. These must be combined / merged together before proceeding to capture images/perform testing etc...!

**Step 3.** Locate the patient name/record that contains the correct ID/MRN, Issuer of ID etc... To display “Issuer of ID” column move mouse pointer to the ‘Patient ID’ column header, “right-click” mouse and enable the “Issuer of ID” option. In this example the correct demographics to use as the master record is coming from the EMR system known as EPIC. It could also read “CompuLink, MedFlow, Officemate, EMR” or be specific to a particular customer’s name or value such as “OSU MRN, Cook County CCHS” etc...

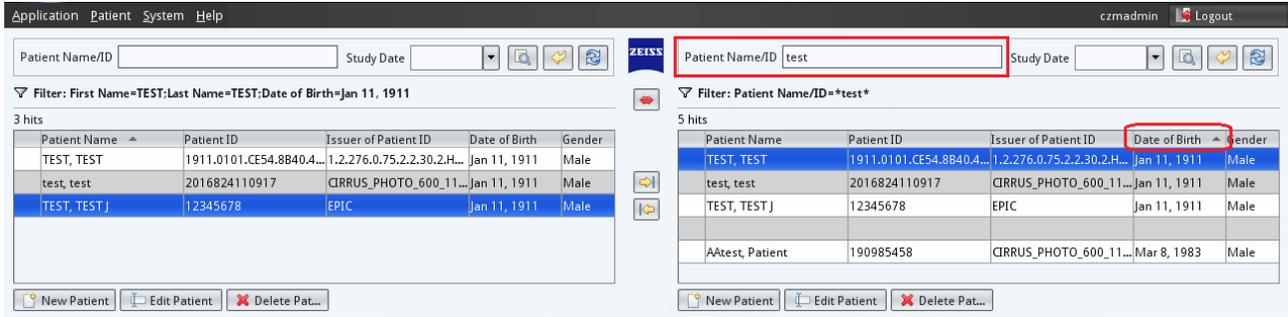
TEST, TESTJ	12345678	EPIC	Jan 11, 1911	Male
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Right-click on the correct patient name and choose from the menu box “Show Patient in Patient Administrator”.

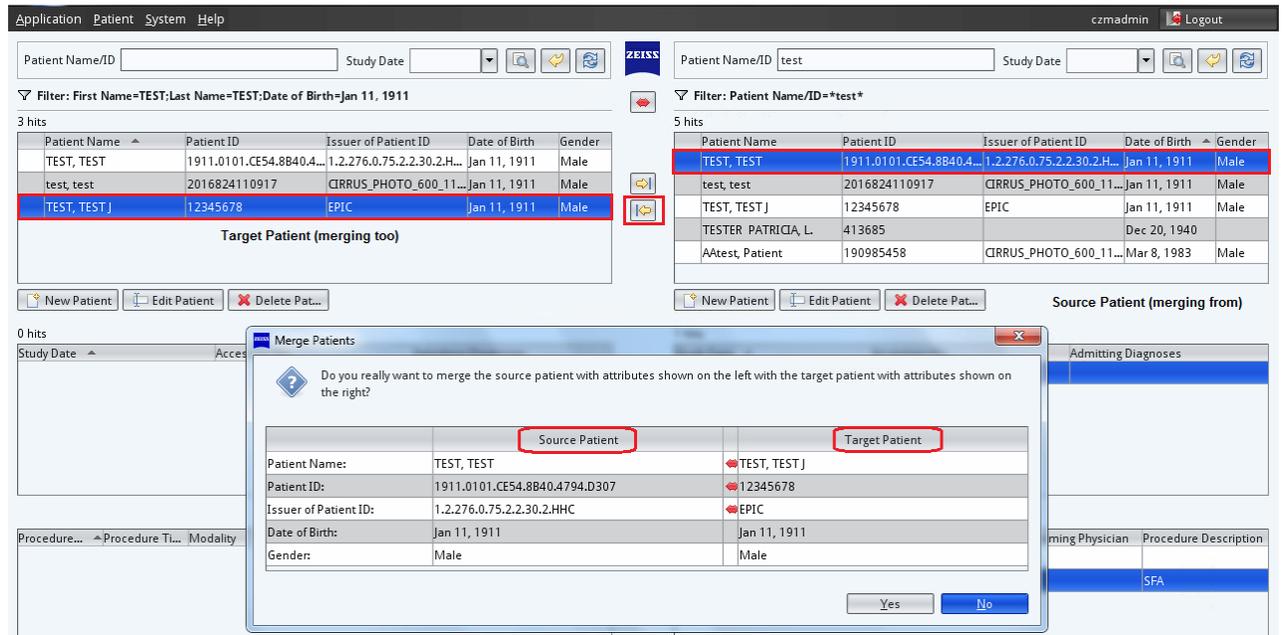
Patient Name	Patient ID	Issuer of Patient ID	Date of Birth	Visit Date
AAtest, Patient	190985458	CIRRUS_PHOTO_600_1146108	Mar 8, 1983	Jan 6, 2016
TEST, TESTJ	12345678	EPIC	Jan 11, 1911	Jan 10, 1995

- Create Automatic Order
- Create Automatic Order for ... >
- Remote Data >
- Import
- Show Patient in Patient Administration
- Show Patient in Worklist
- Create Patient ID
- Glaucoma Workplace
- Create HFA-Cirrus Combined Report

**Step 4.** You are now in the Patient Administration screen. Patient your keeping/merging records to is shown on left-hand side already highlighted. Type the same patient name on the right hand side in the Patient Name field. Now place your mouse pointer in the DOB column header and left-click it. It will group together the DOB's making it easier to find the patients to merge.

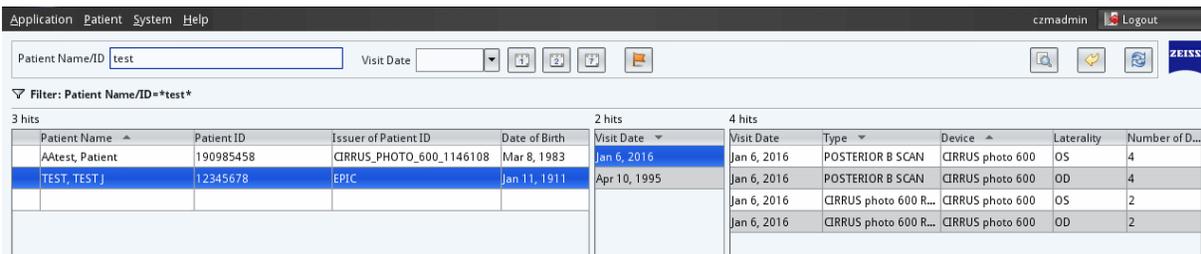


**Step 5.** On the right side, select the patient name needing to be merged. Next, select the yellow arrow that points to the left. A message box appears asking for confirmation to merge/combined the records together! The Source Patient is the one being merged from; the Target patient is the one being merged too!



Check / confirm you wish to make the changes / merge the two records together. Select 'Yes' if you want to make the changes, 'No if you don't or are unsure. Repeat step 5 as needed for any additional duplicate copies of patient names.

**Step 6.** When done, select on the top Menu bar choosing 'Patient, then choose Patient Directory'. You are returned back to where you initially started with all the duplicate patient entries now combined to the one correct record including all historical data/tests.



## Moving Tests from one patient to another

**Step 1.** On Patient directory, select the name the test(s) that currently have the incorrect data saved under.....then ‘right-click’ on the patient name & choose “Show Patient in Patient Administration”. That patient is shown on left side. Now type/enter the patient’s name that the test(s) need to be moved too on the right side in the ‘Patient Name/ID’ field.

**Step 2.** On the right side under the correct patient record, select the “Study Date” column header 1 or 2 times which creates in the “Date/Time” field an opening to move over a test(s).

The screenshot displays two side-by-side windows from a patient administration system. The left window shows a patient record for 'TEST, TEST' with a filter for 'First Name=TEST; Last Name=TEST; Date of Birth=Jan 11, 1911'. Below the patient list are three tables: 'Study Date' (2 hits), 'Procedure...' (12 hits), and 'Date/Time' (1 hit). A 'RAW' data icon is highlighted with a red box. The right window shows a patient record for 'AAtest, Patient' with a filter for 'Patient Name=AAtest, Patient; Patient ID=190985458; Issuer of Patient ID=CIRRUS\_PHOTO\_600\_1...; Date of Birth=Mar 8, 1983; Gender=Male'. Below the patient list are three tables: 'Study Date' (1 hit), 'Procedure...' (0 hits), and 'Date/Time' (0 hits). A yellow arrow icon is highlighted with a red box.

**Step 3.** On the left side under the patient record containing the incorrect tests....use either the “Study Date, Procedure... and or Date/Time” fields to locate the specific test(s) needing to be moved. Select the applicable test and click the “Yellow arrow” pointing to the right to move the test over to the correct patient. Repeat the process for each additional test/record/document.

Note: For OCT’s and Visual Fields....you must first delete all PDF documents / reports! These cannot be moved as moving them will not update the patient/name on the actual reports! Delete the report(s).....HFA-OCT Combined reports as well as all other PDF reports!

**Do not delete the RAW data icons!**

Move the RAW data objects to the correct patient then use either Glaucoma Workplace, Retina Workplace, the Cirrus Review software or the instrument itself to re-create the actual report(s). With both Cirrus Review and the instrument, you must analyze the patient data to create any reports!

## Deleting

**Step 1.** On Patient directory, select the name the test(s) that currently have the incorrect data.....then right-click on the patient name & choose “Show Patient in Patient Administration”. That patient is shown on left side.

**Step 2.** Use either the “Study Date, Procedure... and or Date/Time” to locate the specific test(s) needing to be deleted. Select the applicable test and click the “Delete Document”.

2 hits

Study Date	Accession No.	Admitting Diagnoses
Apr 10, 1995		
Jan 6, 2016		

12 hits

Procedure...	Procedure Ti...	Modality	Device	Performing Physician	Procedure Description
Jan 6, 2016	4:05 PM	OPT	CIRRUS phot...		Glaucoma OU Analy...
Jan 6, 2016	4:05 PM	OPT	CIRRUS phot...		Optic Disc Cube 200...
Jan 6, 2016	4:05 PM	OPT	CIRRUS phot...		
Jan 6, 2016	4:07 PM	OPT	CIRRUS phot...		Macular Cube 200x...
Jan 6, 2016	4:07 PM	OPT	CIRRUS phot...		
Jan 6, 2016	4:07 PM	OPT	CIRRUS phot...		Macular Thickness

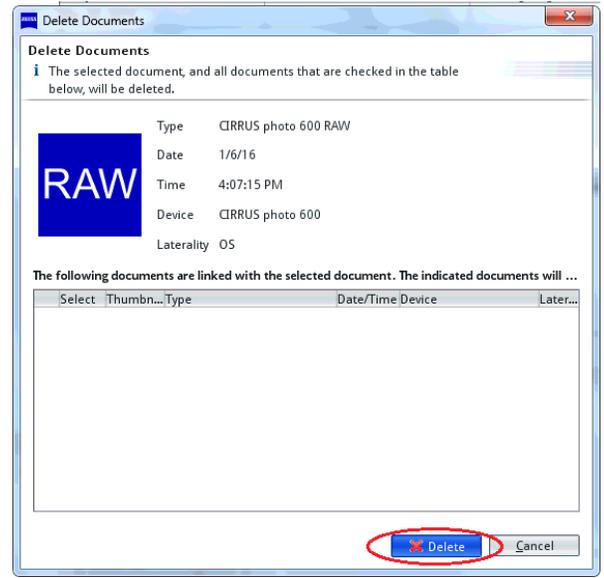
1 hits

Date/Time	SOP Class UID
1/6/16 4:07 PM	1.2.840.10008.5.1.4.1.1.66



1/6/16 OS  
CIRRUS photo 6...

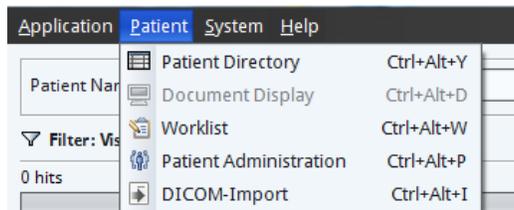
⌘ Delete Do... Save as



You will be prompted with 2 Window dialog boxes confirming the deleting the document / image. Click “Delete to the first one then Yes” to the second complete the deleting process. Repeat as needed for any additional documents/images/ojects.

## Optional method

Users can also go directly to “Patient Administration” by selecting from the top menu bar ‘Patient’ then ‘Patient Administration’.



Patient Name/ID Study Date

16 hits

Patient Name	Patient ID	Issuer of Patient ID	Date of Birth	Gender
Demo, BRVO / Nevus	1717678805	Clarus 500	Mar 21, 1953	Male
Demo, Diabetic Retinopathy	1716809003	Generic Device 133221	Apr 16, 1946	Male
Demo, Dry AMD / GA	1716221888	Generic Device 133221	Dec 31, 1947	Female
Demo, FAF GA	1716459630	Generic Device 133221	Apr 4, 1984	Female
Demo, FAF RD repair with gas	1716467643	Generic Device 133221	May 5, 1975	Male
Demo, Hemorrhagic PED	1716222125	Generic Device 133221	Jul 15, 1939	Male

New Patient Edit Patient Delete Pat...