

## Optos*Advance*™ Merge Patients



## **Purpose**

This document provides guidance on how to merge two patients in OptosAdvance. If you have the same patient with two different IDs, or differently spelled names for the same patient, you can merge these two records into one.

NOTE: Full operating instructions are provided in the **Help** section of Optos*Advance*. Once logged into the software, select the **Help** icon from the toolbar to search and browse guidance topics.

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## **Merge Two Patients**

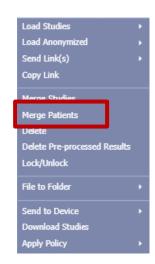
You must have the correct privileges set in OptosAdvance user account to edit patient studies.

- 1 Login to Optos Advance.
- 2 | From the **Patient Directory** select the checkbox beside the study that contains incorrect patient demographics.
- 3 | Select the checkbox beside the study that contains correct patient demographics. NOTE: You cannot merge more than two patient studies at a time. Ensure there are only two checkmarks active in the Directory.



4 | Right-click one of the studies, then select **Merge Patients.** The patient information will appear in a new window:



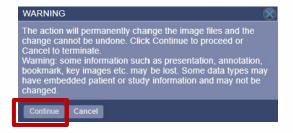




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- 5 | To update patient demographic information to all studies with the incorrect demographics, select the checkbox that precedes **Apply changes to all studies for the same patient.**
- 6 Identify which patient information is correct and select the button to merge:
  - a. **Merge to left:** Use the patient information from the study shown on the left. The study on the right will update to match the study on the left.
  - b. **Merge to right**: Use the patient information from the study shown on the right. The study on the left will update to match the study on the right.
- 7 A Warning box will appear. Select **Continue** to retain changes. If you selected Apply changes to all studies for the same patient, all studies with incorrect demographics are updated accordingly.





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