



Optos *Advance*TM Merge Patients



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Purpose

This document will provide 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 will want to merge these two records into one.

You must have the correct privileges in *OptosAdvance* to edit patient studies.

Merge Two Patients

- 1 | Login to *OptosAdvance*.
- 2 | From the Patient Study Directory select the checkbox beside the study that contains the patient information you want to copy into another study.

<input checked="" type="checkbox"/>	Scleral-Buckle, Daytona-1	1037-D1
<input type="checkbox"/>	RPE-Degeneration, Daytona-1	1035-D1

- 3 | Select the checkbox beside the study you want to copy the patient information into.

<input checked="" type="checkbox"/>	Scleral-Buckle, Daytona-1	1037-D1
<input checked="" type="checkbox"/>	RPE-Degeneration, Daytona-1	1035-D1

- 4 | Right-click one of the studies, then select **Merge Patients**.



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<input checked="" type="checkbox"/>	Scleral-Buckle, Daytona-1	Load Studies	▶	1
<input checked="" type="checkbox"/>	RPE-Degeneration, Daytona-1	Send to Device	▶	1
<input type="checkbox"/>	Retinal-Hole-Operculated, Daytona-1	Send Link		1
<input type="checkbox"/>	Chorioretinitis, Daytona-1	Copy Link		1
<input type="checkbox"/>	Shadow-of-Mittendorfs-Dot, Daytona-1	Lock/Unlock		1
<input type="checkbox"/>	Retinitis-Pigmentosa--, Daytona-1	Merge Studies		1
<input type="checkbox"/>	Retinitis-Pigmentosa--, Daytona-1	Merge Patients		1
<input type="checkbox"/>	Retinal-Degeneration--, Daytona-1	Delete		1
<input type="checkbox"/>	Hemorrhages--, Daytona-1	Delete Pre-processed Results		1
<input type="checkbox"/>	Cystoid-Macular-Edema, Daytona-1	Download Study		1
<input type="checkbox"/>	Choroidal-Nevus-, Daytona-1	Apply Policy	▶	1
<input type="checkbox"/>	Choroidal-Nevus-, Daytona-1	File to Folder	▶	1

The patient information will appear in a new window:

Merge Patients		
Attribute	Value	Value
Last Name	Scleral-Buckle	RPE-Degeneration
First Name	Daytona-1	Daytona-1
Middle Name		
Patient Id	1037-D1	1035-D1
Issuer Of Patient Id		
Gender	F ▼	F ▼
DOB	19700101	19700101
<input checked="" type="checkbox"/> Apply changes to all studies for the same patient		
Merge to left Merge to right Cancel		

- 5 | To update patient information in all studies with the same Patient ID, 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 be updated 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 be updated to match the study on the right.
- 7 | Select **Continue** to retain changes. If you selected to apply changes to all studies, all studies for the Patient ID are updated accordingly.



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