Request to Merge Clients in PHIMS

\*\*Note: Once clients are merged they CANNOT be unmerged.

Data integrity guidelines require a MINIMUM of 5 MATCHING client identifiers between the duplicate records to ensure the clients are the same for the merge to proceed. Merge requests without 5 matching client identifiers will be returned to the requester, asking that additional demographic data be added to the client record(s), to provide evidence of client match.

Please ensure the client’s address, gender and additional demographics details **are added to both client records in PHIMS** for the 5 client identifier match to occur.

**Information required for ALL merge requests:**

|  |  |  |
| --- | --- | --- |
| **Date requested** (yyyy/mm/dd):  Click here to enter a date. | **Requested by** Name: Click here to enter text.  Phone #: Click here to enter text. Email: Click here to enter text. | |
| **Duplicate Client Description** | | |
| **Client Identifiers** | **Client 1** | **Client 2** |
| PHIMS - Client ID | Click here to enter text. | Click here to enter text. |
| Initial of First Name | Click here to enter text. | Click here to enter text. |
| Initial of Last Name | Click here to enter text. | Click here to enter text. |
| Gender | Choose an item. | Choose an item. |
| Date of Birth (yyyy/mm/dd) | Click here to enter a date. | Click here to enter a date. |
| **And at least 1 of these identifiers:** | | |
| Address | Click here to enter text. | Click here to enter text. |
| Phone Number | Click here to enter text. | Click here to enter text. |
| Alternate ID | Click here to enter text. | Click here to enter text. |
| Comments: Click here to enter text. | | |

Submit completed forms to PHIMS via Shared Health Service Desk – [servicedesk@sharedhealthmb.ca](mailto:servicedesk@sharedhealthmb.ca)

**For merged records containing documentation from both client records**, once the merge request is complete, the primary investigator/merge requestor will be notified to review the merged client record. For merged records with immunization and/or investigation information, it is the responsibility of the requester to review the client record and retain the relevant documentation.

\*For further guidance on this process, refer to the [Documentation Review following Client Merge](https://phimsmb.ca/document/69/1-0-managing-client-records/1394/1-0d-documentation-review-post-client-merge.pdf) on the PHIMS website. If you require assistance transferring documentation elements (i.e. notes, medications), please contact the PHIMS support team via [servicedesk@sharedhealthmb.ca](mailto:servicedesk@sharedhealthmb.ca)