How to merge duplicate patients in Dentrix

This guide explains how to merge duplicate patients in Dentrix by combining a secondary (duplicate) patient account into the primary account you want to keep. You work in the Family File, use the **Merge Patients** dialog, and then verify the result in the patient's ledger. Following these steps preserves critical data and keeps family relationships accurate.

Prerequisites

Before you start, make sure you meet these requirements:

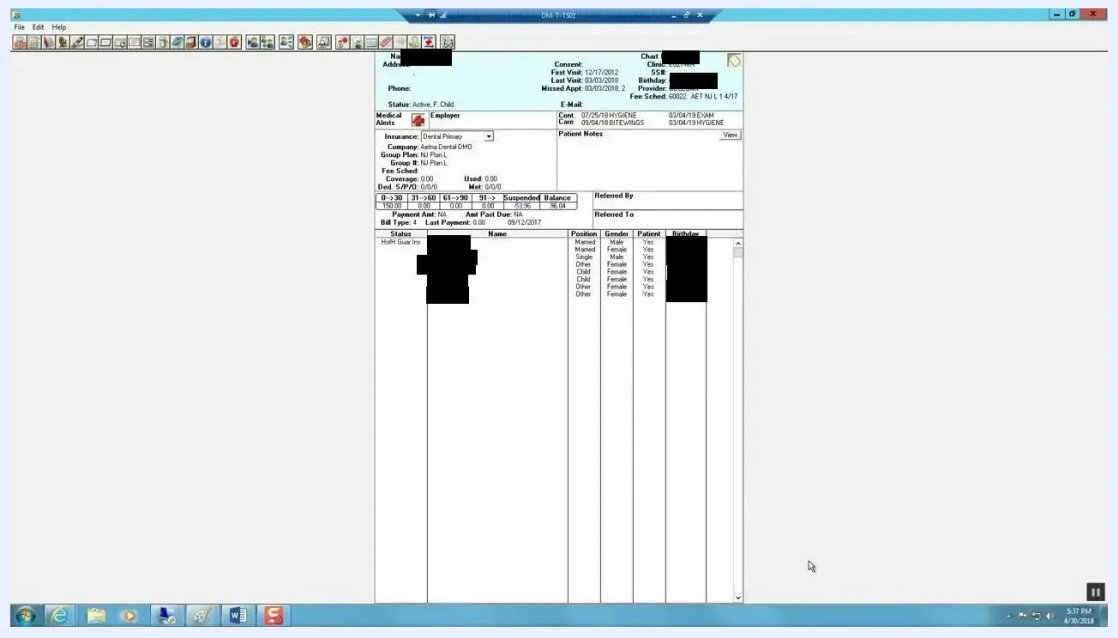
- **Patient status:** Both the primary and secondary accounts must be "Active" or "Nonpatient". Merge a "Nonpatient" account into an "Active" account only, never the reverse.
- **X-rays:** If the account you plan to eliminate has x-rays, prepare to submit a support ticket to re-link them after the merge.
- **Password:** You need your password to override and proceed with the merge.

Steps

1. Open the Family File and select the primary account

1. Go to the Family File screen in your patient management software.
2. Locate the patient account you want to keep (the primary account).

3. Select that account in the Family File.



Family File screen showing patient and family member details, including names, statuses, insurance, and billing information

2. Start the merge

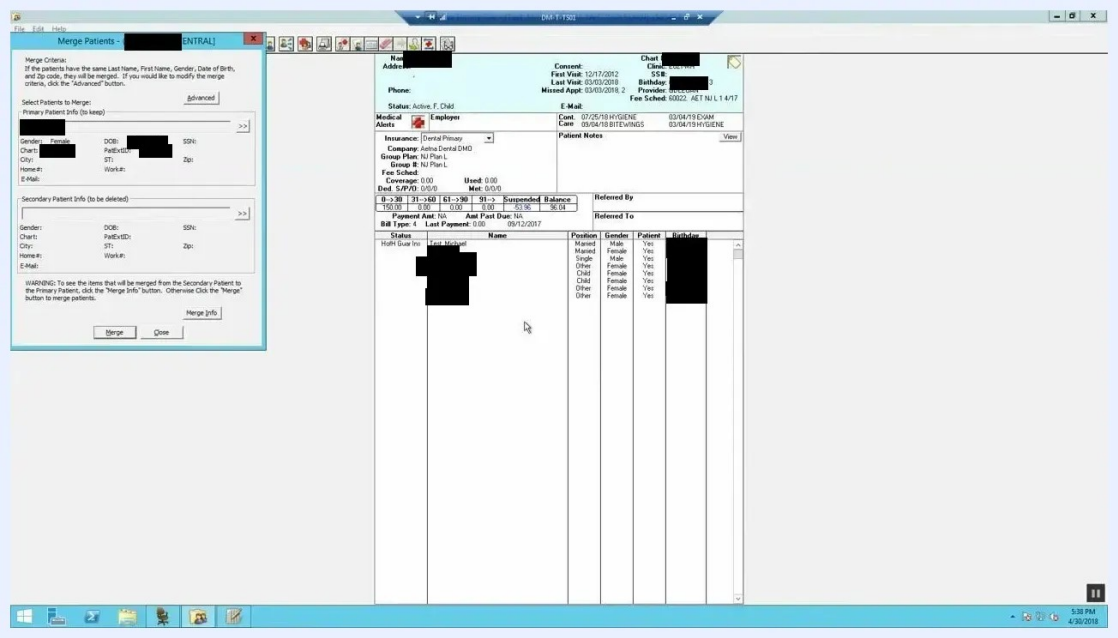
From the menu, select **Edit > Merge Patients**.

3. Authenticate the merge

Enter your password when prompted to override and proceed with the merge.

4. Open the advanced merge options

In the **Merge Patients** dialog, click the **Advanced** button to adjust the merge criteria if necessary.



Merge Patients dialog showing primary and secondary patient information, with the Advanced button highlighted

5. Remove validation points (if needed)

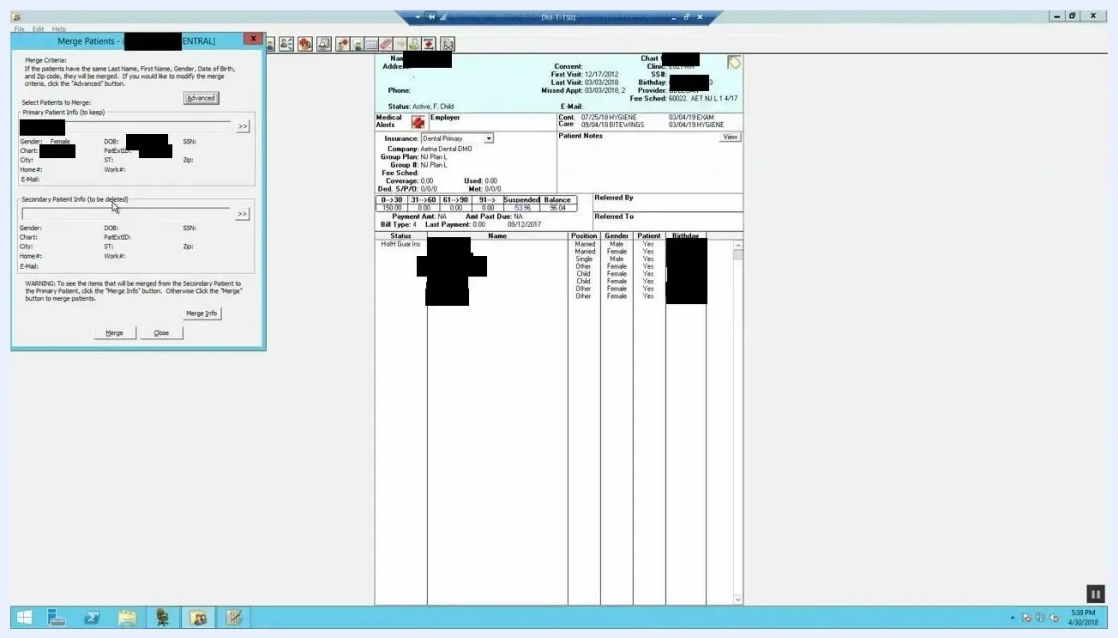
Use the advanced options to remove certain validation points. This allows the system to merge patients even when all fields do not match exactly.

6. Select the patient to eliminate

1. In the **Merge Patients** dialog, click the search icon next to the "Secondary Patient Info (to be deleted)" field.
2. Use the search function to locate the patient account you want to eliminate.
3. Select the correct patient and click **OK** to confirm your selection.

7. Understand how non-guarantor merges work

If the secondary patient is a non-guarantor, all of that patient's information merges directly into the primary patient's account. You don't need a separate family transfer for non-guarantor merges.



Merge Patients dialog showing primary and secondary patient details, with the secondary patient listed as a non-guarantor

8. Review the merge information

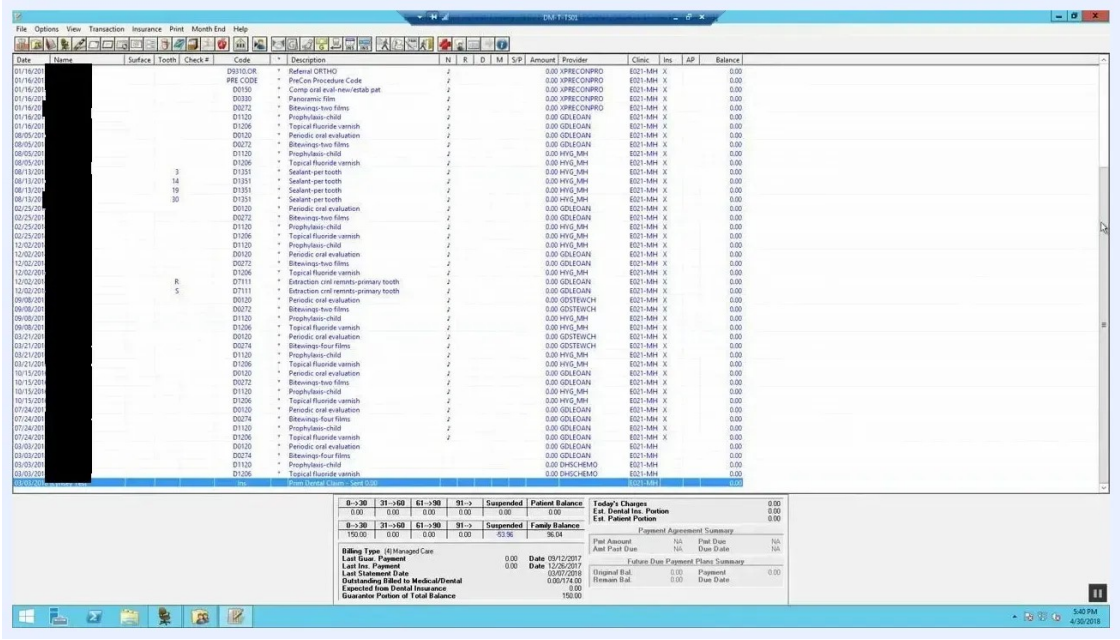
If the secondary patient is a guarantor, all of their information and family members move to the primary patient's family. Click **Merge Info** to review which data will be transferred.

9. Complete the merge

Click the **Merge** button to finalize the process, and confirm any prompts to proceed.

10. Confirm the merge succeeded

After the merge completes, a confirmation dialog states "Patients have been merged successfully!" Click **OK** to close it.



Confirmation dialog stating "Patients have been merged successfully!" in the Dentrix Enterprise Family File

11. Close the dialog and refresh the Family File

1. Close the **Merge Patients** dialog.
2. Go to the **File** menu and select **Refresh** to update the Family File view with the merged data.

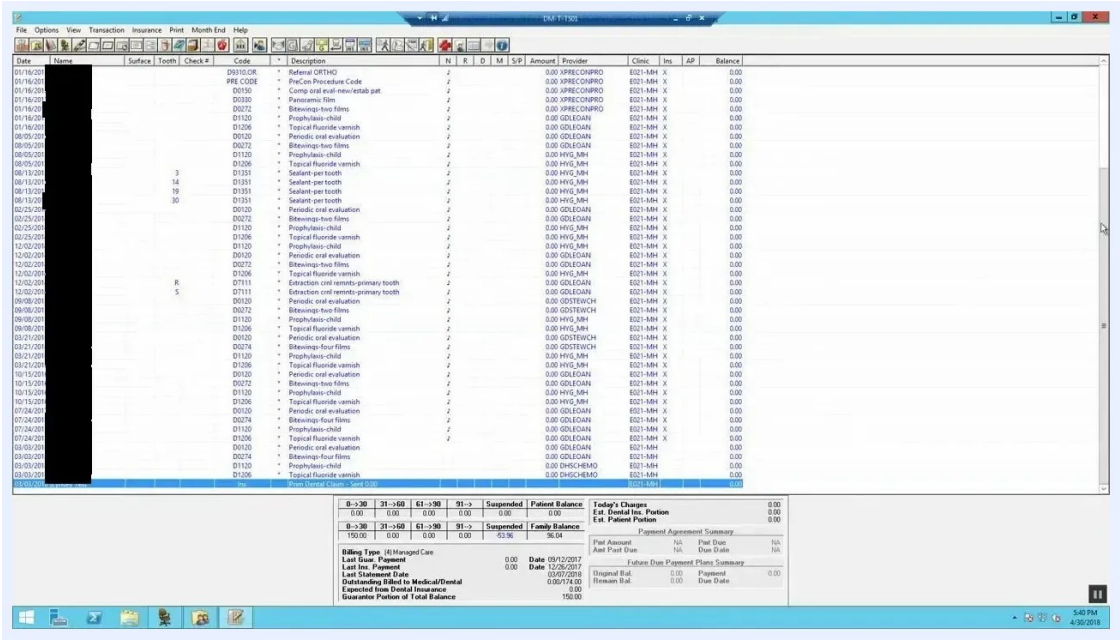
12. Merge the spouse and dependents (if applicable)

If the merged family file contains a spouse and dependents, repeat the merge process for each of those accounts. This consolidates all related records under the primary account.

13. Verify the merge in the ledger

1. Open the patient's ledger.
2. Confirm that transactions from the eliminated account now appear under the primary account.

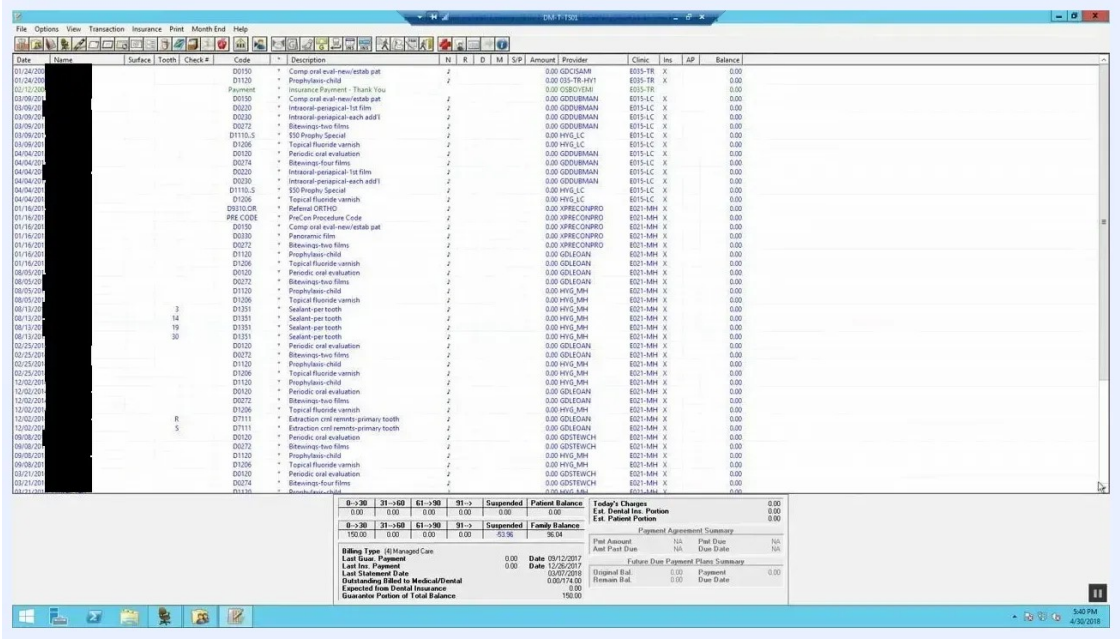
3. Review the ledger for all historical transactions, and make sure data from both accounts is present and accurate.



Ledger screen displaying a comprehensive list of transactions, confirming the merged account data is now visible

14. Complete a final check

Scroll through the ledger to make sure all expected transactions, including those from the secondary account, are present.



Ledger screen with transaction details, showing merged data from both accounts

Summary

When you merge duplicate patients, keep these points in mind:

- **Family members:** All family members of the secondary (deleted) patient move to the primary patient's family.
- **X-rays:** If the eliminated account had x-rays, submit a support ticket to have them re-linked to the primary account.
- **Verification:** Always verify the ledger and Family File after merging to confirm the consolidation succeeded.

Following these steps ensures that all patient data, including transactions, family relationships, and historical records, is accurately merged and visible in the system.

What's next

After you merge duplicate patients, complete these follow-up tasks:

- **Repeat for all family members:** If there are additional duplicate family members, such as a spouse or dependents, repeat the merge process for each.
- **Check for x-ray data:** Submit a support ticket to re-link any x-rays from the eliminated account to the primary account.
- **Review family relationships:** Confirm that all family members are now correctly associated with the primary account.