# Steps to **CHANGE** a Patient ID

A patient ID change is used to change a patient’s ID if it was entered incorrectly.

1. Select Patient Number Mtce from the CMS Portal page.
2. Select the appropriate **County** from the drop-down.
3. **Action** should be set to Change.
4. **Patient # to update** - the patient’s current ID. This number **MUST** exist.
5. **Update Patient # to** - the patient’s correct ID. This number **MUST NOT** exist.
6. Click **Complete**.
7. If errors are not encountered, **Patient # to update** will no longer exist, and the **Update Patient # to** will exist.



# Steps to **MERGE** Patient IDs

A patient ID merge is used when a patient has more than 1 patient ID and they need to be combined into 1 record, 1 patient ID.

1. Select Patient Number Mtce from the CMS Portal page.
2. Select the appropriate **County** from the drop down.
3. **Action** should be set to Merge.
4. **Patient # to update** - the patient’s current IDs. This number **MUST** exist. This ID will be merged into the patient ID entered in the **Update Patient # to** field. After the merge has been completed, this number will no longer exist.
5. **Update Patient # to** - the patient ID you want all records merged into. This number **MUST** exist. After the merge has been completed, this will be the patient’s only ID.
6. For this merge to be successful,
	1. The date of birth, gender and race must match on both patient records.
	2. Neither patient record can have active WIC benefits.
7. Click **Complete**.
8. If errors are not encountered, **Patient # to update** will no longer exist, and the **Update Patient # to** will now be a combination of the information from both IDs.
9. If an error is encountered, further research should be completed to verify that the two IDs entered are correct.
10. **IMPORTANT – Once a merge is done, it can’t be undone.**

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