## **Deactivate Patient Charts**

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## Deactivate a patient chart View inactive patient charts

You cannot delete patient charts or merge duplicate patient charts, but you can deactivate patient charts by changing the active patient chart status to inactive so they no longer appear in the patient list, and then manually transfer appointments, documents, clinical notes, and other information to the active chart.

There is an additional inactive status for deceased patients.



## Deactivate a patient chart

- 1. In a patient chart, select **Demographics > Important** tab.
- 2. From the Status dropdown, select Inactive or Inactive Deceased.

Demographics						
Important	Demographics	Insurances A	Authorizations			
Important Info	ormation					
	Primary Provider	Anna Provider	~			
	Status	✓ Active	9			
	Title	Inactive Inactive - Deceased	e.g. Mr, Mrs, Ms			
	First Name	Peter				

3. Select Save Demographics.

## **View inactive patients**

When a patient chart is inactive, it is no longer searchable in most areas, such as the **Live Claims Feed** or **Patient Payments**. You can filter the patient list so you can view inactive patients.

- 1. Select Patients > Patient List.
- 2. Select More Filters.

Manage your existing patients		QRDA I Import	Export (CSV)	Export (C-CDA XML)
Patient search				More Filters

The filter list opens.

3. Select the Inactive patients include and/or Inactive patients only checkboxes.

