

How do I delete/make a patient inactive or deceased?

07/08/2024 7:51 pm EDT

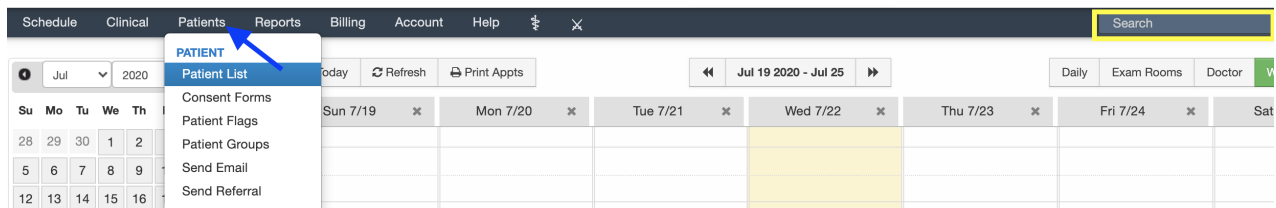
You can make patients **Inactive** so that they no longer appear in your active patient list, but they will continue to be searchable in the event you need to access their chart. DrChrono does not offer a way to delete a patient permanently.

Patients who have active/pending claims should not be marked inactive or deceased until all of their claims have been processed.

If the patient you are trying to delete is part of the sample data feature, you can remove them by turning off the sample data under **Account > Provider Settings > Sample Data**.

To list a patient as inactive/deceased

1. Go to **Patients > Patient List** or enter a patient's name or chart ID in the **Search** field in the top right. (If you use **Search**, it will take you to the patient's chart and you can go to step 3).



2. In the **Patient List**, click on the chart ID of the patient you would like to make inactive.

DOFR000001	Doctor	Doctor	Doe	Frank	(301) 555-5555	Thu, 08/09/2018
DOFR000002	Doctor	Doctor	Dough	Frank	(443) 555-5555	
DOJA000001	Doctor	Doctor	Doe	Jane	(240) 555-5555	Fri, 01/10/2020
DOJA000002	Doctor	Doctor	Dough	Jane	301-555-5555	Fri, 07/27/2018 Fri, 08/31/2018

3. Once in the patient's chart, select the **Important** tab, go to **Status**, and select **Inactive** or **Inactive - Deceased**.

Demographics
Appointments
Clinical Dashboard
Documents
Tasks 0
Problem List 0
Medication List 0
Send eRx
Allergy List 0
Drug Interactions 0

CDS: Patient must have documented

Primary Provider: Doctor Doctor

Important Demographics Insurances Eligibility Authorization

⚠ BILLING WARNING: Missing Patient Address

Important Information

Primary Provider: Doctor Doctor

Status:
 ✓ Active
Inactive
 Inactive - Deceased

4. Once you have made your selection. scroll down, and click **Save Demographics**.

Status	Inactive	
Title	<input type="text"/>	e.g. Mr, Mrs, Ms
First Name	<input type="text" value="Frank"/>	
Nick Name	<input type="text"/>	
Middle Name	<input type="text"/>	
Last Name	<input type="text" value="Doe"/>	
Previous/Birth Name	<input type="text"/>	
Suffix	<input type="text"/>	e.g. I, II, III, IV, Jr, Sr
Patient Chart Photo	<input type="button" value="Choose File"/> No file chosen	Will be attached to patient's chart on iPad EMR.
Home Phone	<input type="text"/>	
Cell Phone	<input type="text" value="(301) 555-5555"/>	Required for SMS/Text. Click here to verify cell phone for US patient
Disable SMS/Txt	<input type="checkbox"/> Disable all SMS/Txt messages for this user.	
Office Phone	<input type="text"/>	Office Ext.: <input type="text"/>
Email	<input type="text"/>	<input type="checkbox"/> Allow Duplicate Email
Alternate Email	<input type="text"/>	
Preferred Communication	-----	
Reminder Language	English	For email reminders only
Decline Clinical Summary	<input type="checkbox"/> Patient declines to receive Clinical Summary	
Medication History Consent	-----	Patient has given consent to obtain medication history.
Payment Profile	Cash	Affects default procedure prices
Patient's Copay \$	<input type="text"/>	
Default Appointment Profile	-----	
Follow-up Date	<input type="text"/>	Patient will get reminders around this date to make an appointment.
Follow-up Reason	<input type="text"/>	e.g. 2 week follow-up
Last Appointment	<input type="text" value="08/09/2018"/>	

5. When a patient is marked inactive or deceased, they will no longer be searchable in most areas in DrChrono like the live claims feed, or patient payments. However, if you need to view your inactive patients, go to **Patients >**

Patient List and select More Filters

The screenshot shows a top navigation bar with tabs for 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. The 'Patients' tab is active, and a dropdown menu is open showing 'PATIENT' (highlighted), 'Patient List', 'Consent Forms', and 'Patient Flags'. To the right, there are buttons for 'Bulk Import', 'QRDA 1 Import', 'Export (CSV)', and 'Export (C-DA XML)'. A 'Patient search...' input field is on the left. An arrow points from the 'More Filters' text to a button on the right.

Select either or both **Inactive patients include** or **Inactive patients only**.

The screenshot shows a 'Manage your existing patients' section with a search bar and a 'Search' button. Below the search bar is a 'Hide Filters' button. A list of checkboxes is provided for filtering patients:

- Possible duplicate patients
- Patients with follow-up appointment dates set
- Patients with incomplete billing information
- Patients who unsubscribed email
- Inactive patients include
- Inactive patients only