

Deactivate Patient Charts

Last modified on 05/06/2026 5:35 pm EDT

Deactivate a patient chart | View inactive patient charts

You can't delete or merge duplicate patient charts. Instead, mark the duplicate chart as inactive so it no longer shows up in the patient list. After that, manually move any appointments, documents, clinical notes, and other relevant information to the active chart.

An additional inactive status is available for deceased patients.



- Patient charts with active or pending claims can't be changed to inactive or deceased until all claims have been processed.
- Before downloading documents from the inactive chart, update the patient's name to ensure a smooth upload to the active chart.
- If the patient chart you are marking as inactive contains sample patient data, be sure to remove it. [Submit a support case](#) to have the sample data turned off.

Deactivate a patient chart

1. On the patient chart sidebar, select **Demographics**.
2. In the **Patient Profile** section, select **Edit**.

Demographics

✓ Sufficient patient demographics to bill insurance.

Demographics Insurances Authorizations Patient Flags Payments

Patient Profile

Patient Info

Celeste Patient
Active

Suffix
None

Title
None

Ethnicity
None

Ethnicity Subcategories

Gender Identity
Female

Sexual Orientation
Choose not to disclose

Pronouns
None

Patient SSN

[Edit](#)

3. From the **Status** dropdown, select **Inactive** or **Inactive - Deceased**.

Edit Patient Info ✕

<p>Primary Provider *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Hannah Provider ✕ ▾ </div>	<p>Status *</p> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Inactive ▾ </div> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Active</p> <p>Inactive - Deceased</p> <p style="background-color: #0056b3; color: white; padding: 2px;">Inactive ✓</p> </div> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 10/31/2000 📅 </div> </div>
<p>First Name *</p> <div style="border: 1px solid #ccc; padding: 2px;">Celeste</div>	
<p>Age Format</p> <p><input checked="" type="radio"/> Date of Birth <input type="radio"/> Approx. Age</p>	
<p>Middle Name</p> <div style="border: 1px solid #ccc; padding: 2px; height: 20px;"></div>	<p>Suffix</p> <div style="border: 1px solid #ccc; padding: 2px; height: 20px;"></div>
<p>Title</p> <div style="border: 1px solid #ccc; padding: 2px; height: 20px;"></div>	<p>Preferred Name</p> <div style="border: 1px solid #ccc; padding: 2px; height: 20px;"></div>
<p>Sex</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Female ✕ ▾ </div>	<p>Gender Identity</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Female ✕ ▾ </div>
<p>Ethnicity</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Search... ▾ </div>	<p>Ethnicity Subcategories</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Search... ▾ </div>
<p>Race</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Declined to specify ✕ ✕ ▾ </div>	<p>Race Subcategory ✎</p> <p>None</p>

Cancel
Save Patient Info

4. Select **Save Patient Info**.

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 to view inactive patients.

1. Select **Patients > Patient List**.
2. Select **More Filters** to open the filter list.

Manage your existing patients
[Bulk Import](#) [QRDA I Import](#) [Export \(CSV\)](#) [Export \(C-CDA XML\)](#)

Search

➔ [More Filters](#)

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

Search

- 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
- Patients who have OnPatient access

