

Deleting a Duplicate Chart for Clerical Staff

Intergy Practice Management, Ambulatory EDUCATION

Determination of Eligibility for Deletion

A duplicate chart may be deleted if there is no clinical documentation. If any of the following documentation has occurred, the duplicate chart must be merged with the original chart and cannot be deleted.

- Correspondences
- Encounters
- Prescriptions
- Orders
- Completed Tasks

Prior to deleting a duplicate chart:

- Cancel appointments and reschedule on the original chart
- Transfer images to the original chart
- Delete open tasks and if appropriate, document on the original chart

If an appointment has occurred, an encounter has been created and the chart is not eligible for deletion.

Deleting a Duplicate Chart

In the Personal Summary module of the patient chart:

1. Choose Edit

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2. Select Deactivate

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Action			
SSN: · · ·	Sex F	Employment Status: N NONE	Save
First Arthur	Gender Identity:	Employer:	Close
Middle: A	Sexual Orientation:		Help
Last Rightus	🗰 DOB: 01/01/2000	Evelowe ID	Пар
Preferred: Suffix	Marital Status: S	Employee to.	Alerts
	Race/Ethnicity: C X	Email: arthurrighus@mhc.net	Notes
	Language: ENG	Home * (989) 731-6227	Deceased
Address: 271 Mccoy Rd W	City: Gaylord	Work	Docodaca
	State: MI	Mobile 2	Deactivate
Zip Code: 49735-8253 🗸	Country: US	Preferred Phone: H Home Method:	
Assigned Provider:		Class: CASH	

- 3. If the Deactivate Patient window opens, deletion is not possible, and an IT ticket must be place requesting a merge of the two charts. Click **Cancel**.
- If the Delete Patient window opens, the chart is eligible for deletion. Select Yes. The chart will be deleted from Intergy.

