

# 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:

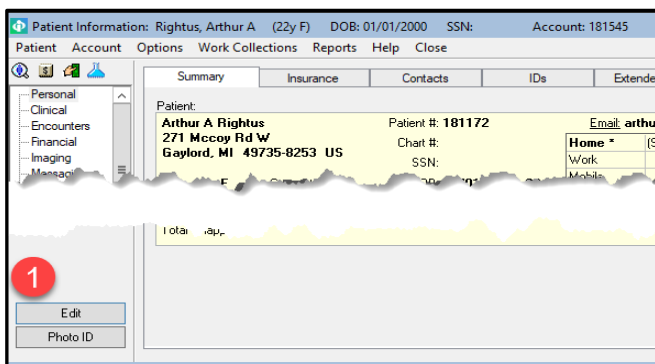
- Cancel appointments and reschedule on the original chart
- Transfer images to the original chart
- Delete open tasks and if appropriate, document on the original chart

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

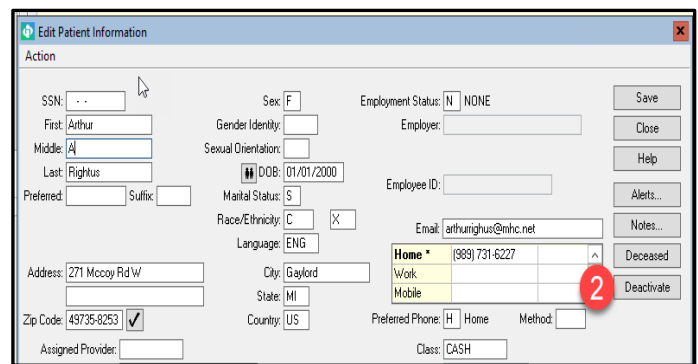
## Deleting a Duplicate Chart

In the Personal Summary module of the patient chart:

### 1. Choose Edit



### 2. Select Deactivate



3. If the Deactivate Patient window opens, deletion is not possible, and an IT ticket must be placed requesting a merge of the two charts. Click **Cancel**.

4. If the Delete Patient window opens, the chart is eligible for deletion. Select **Yes**. The chart will be deleted from Intergy.

