

Working with Inactive Patients

Patients are considered inactive for several reasons; they start going to another optometric practice, they move out of the area, or are deceased. To maintain the integrity of your patient database and narrow the results (and time) when browsing for patients, you should make these patients inactive.

Inactive patient records are not deleted and all inactive patients can be restored and made active again.

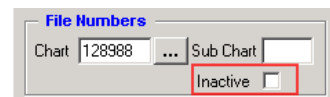
Important Notes

When instructing clients to make patients inactive, there are two steps the user must do, prior to setting that particular patient to inactive:

1. Remove the Next Recall – for example, if this is not removed, a patient that was deceased could receive a recall card even though this patient was clearly marked as inactive in ODPro.
2. Patient Account – balance out any outstanding A/R balances (whether Patient or Insurance), or these amounts will show on the A/R Reports.
3. Preappointments – if an office preappoints, please remove the patient off of the schedule.


To Make a Patient Inactive

1. Browse for patient and make active
2. Place a check in the Inactive checkbox (top middle column)
3. Click Save



To Make a Patient Active

To make an Inactive patient active again, you must use the Recalls Report option to retrieve the chart number for the inactive patient. When you have the chart number, you can then use it to browse for the patient's record and clear the Inactive checkbox.

1. Click on the Reports tab
2. Click Recalls 
3. Click on Listing of Inactive Patients
4. Keep date range and click OK
5. Note inactive patient's chart number (this is the number to the right of the patients name)
6. Open the Patient Address View window and clear the active patient's record, if required.
7. Enter the Inactive Patients chart number and click the browse button
8. Double click the patient record in the Workspace Manager
9. Remove the check in the Inactive checkbox
10. Click Save