

Impacts of Marking a Patient Inactive

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Impact of Setting a Patient as Inactive

Patients can be marked inactive in **Patient Setup > Demographics** by unchecking the **Active** checkbox. Inactive patients are hidden from most day-to-day workflows, but **their chart and history are kept**. A patient can be made active again at any time by checking the box again.

Note

This article covers the main known impacts of making a patient inactive. It is **not a complete list**. Other screens, reports or integrations may also treat inactive patients differently. If you see something unexpected, contact Support.

Tips

- Before inactivating a patient, check for upcoming appointments or open balances. The patient can't be found from scheduling or the EHR search once they're inactive.
- If a workflow doesn't behave as expected for a patient, check whether the patient is inactive before reporting an issue.
- Temporarily re-activate a patient to perform necessary actions that are not available once the patient is set to inactive.

At a Glance

Area	Impact
Chart, documents, claims, billing history	☑ Kept
Patient search (most screens)	☑ Hidden
Patient Setup search	☑ Still found
Patient Portal	☑ Not eligible for new access
Reminders and outreach	☑ Stopped
Automated eligibility (270) checks	☑ Skipped
Connect reports and decision support filters	☑ Left out
MIPS reporting	☑ Not affected

What Stays the Same

- All chart data, documents, claims and billing history are kept.
- The patient can still be found in **Patient Setup** search, so they can be reviewed or reactivated.
- The patient can still be selected in the **Claim Submission Report** patient filter.
- **Recall Search** still lists the patient and shows them as inactive.

What Changes

Patient Search

The patient will **not** appear in patient search on these screens:

- EHR (Beta) patient search
- Scheduling: Appointment, Add Appointment (including mobile), Check In/Out
- Recall Setup
- Document Reconciliation
- eDocument Save
- EHI Export
- PaySimple Credit Card
- Claim Modify
- Decision Support Intervention Feedback Report

In the **EMR Portal** and **Schedule** patient search, inactive patients are hidden by default. Users who have the user setting to include inactive patients turned on will still see them.

Patient Portal

- The patient is not eligible for new portal access and is left out of mass portal key generation.
- Authorized representatives are not listed when sending new portal mail.

Reminders and Outreach

- No appointment call reminders
- No intake reminders
- The patient is not included in the Updox patient sync

Eligibility

- Automated eligibility (270) checks for appointments are skipped.

Reporting

- The patient is left out of these Connect reports: Lost to Follow-up, Hospital Discharges, CKD ED Status and Multiple Diagnosis.
- The patient is left out of decision support patient filters.
- The active patient count in Patient Setup goes down.

Integrations

- External API patient verification fails for inactive patients.
- Their appointments are not returned to web-service appointment feeds.

MIPS Reporting

Not affected. MIPS includes patients based on qualifying claims (encounters) with a date of service in the reporting period. Making a patient inactive does **not** remove them from MIPS:

- Patients seen in the reporting year still count in MIPS quality and Promoting Interoperability measures,

even if they're made inactive later.

- Making a patient inactive cannot be used to exclude them from MIPS reporting.

Auditing

Each change to the Active setting is recorded in **Patient Demographics History**, with the old and new value.
