

Last Modified on 04/28/2023 3:31 pm EDT

Practicum

Version 21.1

About

Archiving Medical Records is used to help Practices comply with HIPAA regulations by making records unalterable.

Warning: Archiving records is irreversible. Encounter and Well Visit Notes that are not finalized will be finalized using this process. Any corrections or additions must be done by creating an Addenda. In addition, any Encounter or Well Visit Note that is marked as incomplete or requires a cosignature will not be finalized when the archive action is performed.

Below, you'll find guidance on working with the two primary tabs in the Archive Medical Records window:

Archive Medical Records: Daily

Path: Admin tab > Archive Records button > Daily tab

From the Daily tab, set the parameters for archiving based on all Providers or a specific Provider and a date. It is recommended that archiving from this tab is completed *by Provider*.

- 1. Navigate to the **Daily** tab of the Archive Medical Records window by following the path above. By default, the window opens to this tab.
- 2. Set the criteria for the records you want to archive.

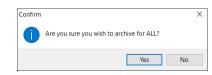
Step 1. Choose "Archive for All providers' or select a Provider: The default selection for archiving Provider records is All. To select an individual Provider (which is recommended), deselect the All checkbox and select the Provider from the drop-down.

Step 2. For dates on or before: The default is one day prior to the current date. To change the date, click the drop-down arrow and choose from the calendar, or enter a date.

3. Click the Begin Archive button.

OP Archive Medical Records	\times			
Daily Database Cleanup Why Archive Records				
1. Choose: 'Archive for All providers' or select a Provider:				
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2. For dates on or before: 8/1/2021 V				
3. Click to Archive (Finalize) Medical Records >> Begin Archive				
Messages				
Surveys (Not reviewed and older than 30 days)				
Patient Encounters				
General Letter				
Preventive Exam				

4. If All was selected for Providers, the below confirmation is displayed. ClickYes to proceed.







5. Once the archive is complete, click **OK** in the confirmation window.

Archive Medical Records: Database Cleanup

Path: Admin tab > Archive Records button > Database Cleanup tab

The Database Cleanup tab is broken into sub-tabs which allow a Practice to set the archiving criteria for each type of record that can be archived. Use the links in the table below to access pages specific to the settings in each tab.

Database Cleanup Tabunup Tab	Tab Thumbnail Click to view full-size image	Information
Database Cleanup: Messages	Authon Mathem Manner Degi Debaters Offener Manner Manner	Updates Patient and/or Non-Patient Messages from a status of Action Required to Action Complete and from a status of Not Read to Read.
Database Cleanup: Encounter Notes	Authone Mandard Research Page Debases Channel Way Annue Research Messager Denouter Horiz Spaced Ress: Reference Linters Daparatic 5 - 3 All records on or before the addre spectrum. Debage responders and well soft exceeds With Research Debage responders and well soft exceeds With Research	Updates Encounters or Well Visits from being flagged as incomplete to being archived.
Database Cleanup: Scanned Items	Automa Manifer Manager Note: N	Updates the status of Scanned Items from Not Reviewed to Reviewed.
Database Cleanup: Referral Letters	Anthen Marked Marcell Kennen Marken Starten) Kennen Marken Starten Marken Charles Garrend Marken Markende Marken Startende Marken Markende Garrende Marken	Updates the status of Referral Letters from Pending to Complete.
Database Cleanup: Diagnostic Tests	Anthen Hadron Hausenity K Basis Description Units Description Units Description Description All records on or other the data grandmatch Compared to the data grandmatch Compared to data of regaritions on the Theorem to be consider the data of regarities Description Theorem to be consider the data of regarities Description Theorem to be required on the data of the data of the data	Updates the status of Diagnostic Test requisitions from Reviewed to Complete.
Database Cleanup: Register (Patient Status)	Active Induced Pacacel Markets Cancer May Anthen Result Second Entern Retrict Letters Markets Letters machines and particle caller than age. machines and particle caller than age. machines are caller and the transmission machines are caller and the transmission machines are caller and the transmission Second Enternation Second Enternation	Updates patients' status to Inactive.
Database Cleanup: Tasks	Archite Verface Researce X Digs (Instance Curve) that and/one Researce Semantic Researce (Instance Researce) Archite Verface Researce (Instance Researce) di Tabita dans ere or behaves the date specificat Changes tables and its addits of the "Article on the behave the Changes tables and the order on or behaves the tages	Updates All Not Started tasks with a Due date on or prior to a given date to a Canceled status.





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3. Click the Begin Archive button.

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Daily	Database Cleanup	Why Archive Records		
1. Choose: 'Archive for All providers' or select a Provider:				
	All	Anna Bates 🗸 🗸		
2.	For dates on or bef	ore: 8/1/2021 ~		
3. Click to Archive (Finalize) Medical Records >> Begin Archive				
Messages				
Surveys (Not reviewed and older than 30 days)				
Patient Encounters				
General Letter				
Preventive Exam				

4. If All was selected for Providers, the below confirmation is displayed. ClickYes to proceed.

Confirm		×
İ	Are you sure you wish to archive for ALL?	
	Yes No	

5. Once the archive is complete, click **OK** in the confirmation window.





Archive Medical Records: Database Cleanup

Path: Admin tab > Archive Records button > Database Cleanup tab

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Database Cleanup Tabanup Tab	Tab Thumbnail Click to view full-size image	Information
Database Cleanup: Messages	Actives Medical Reserve X You and the Reserve Wing Andrease Creation Wing Andrease Reserve Support Reserve Reserve Support Reserve Suport Reserve Support Reserve	Updates Patient and/or Non-Patient Messages from a status of Action Required to Action Complete and from a status of Not Read to Read.
Database Cleanup: Encounter Notes	Activate Medical Research Day Debaters Cathong: Ming Andreas Research Ming and Research	Updates Encounters or Well Visits from being flagged as incomplete to being archived.
Database Cleanup: Scanned Items	Antiva Medical Research May Antime Research May Antime Research Manual Research Research Manual Research Res	Updates the status of Scanned Items from Not Reviewed to Reviewed.
Database Cleanup: Referral Letters	Activate Medical Research Day Detailers Channel Why Andrean Research Manager Researcher Meril Sanoordient Meril Sanoordient Meril Advected in one Under Andrean Research	Updates the status of Referral Letters from Pending to Complete.
Database Cleanup: Diagnostic Tests	Active Medical Research Ky Department Value, Sacronal Research Description Value, Sacronal Research Description Value, Sacronal Research Active Value, Sacronal Research Active Value, Sacronal Research Value,	Updates the status of Diagnostic Test requisitions from Reviewed to Complete.
Database Cleanup: Register (Patient Status)	Achina Madouri Records X Day Distance Canedo Woly Achine Record Sonner term: Terming Unity Achine Record Sonner term: Terming Unity Achine Record Sonner term: Terming Unity Achine Record Wonders Sonner term: Terming Unity Achine Record Sonner tereming Unity Achine Record Sonner te	Updates patients' status to Inactive.

