

# Archiving Medical Records

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

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**

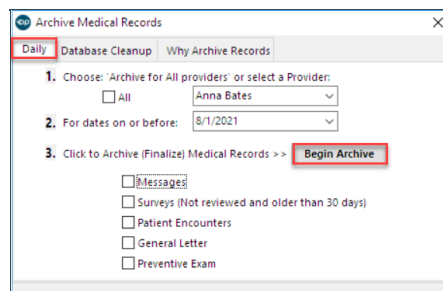
From the Daily tab, set the parameters for archiving based on all Providers or a specific Provider and a date. It is recommended that archiving from this tab is completed *by Provider*.

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.



Archive Medical Records

Daily Database Cleanup Why Archive Records

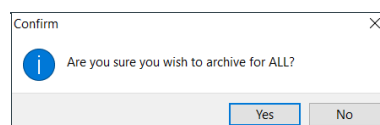
1. Choose: 'Archive for All providers' or select a Provider:  
 All  Anna Bates

2. For dates on or before: 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. Click **Yes** to proceed.



Confirm

Are you sure you wish to archive for ALL?

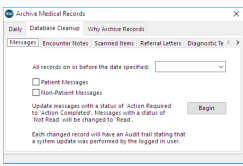
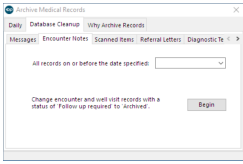
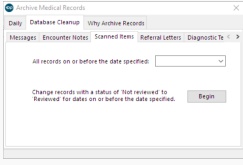
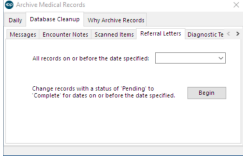
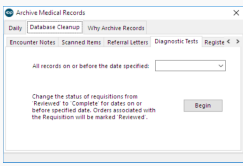
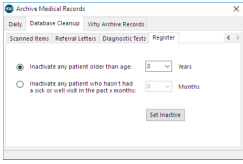
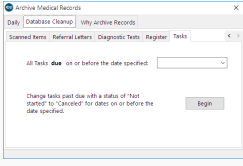
Yes No

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**

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 Tab	Tab Thumbnail <i>Click to view full-size image</i>	Information
<a href="#">Database Cleanup: Messages</a>		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.
<a href="#">Database Cleanup: Encounter Notes</a>		Updates Encounters or Well Visits from being flagged as incomplete to being archived.
<a href="#">Database Cleanup: Scanned Items</a>		Updates the status of Scanned Items from Not Reviewed to Reviewed.
<a href="#">Database Cleanup: Referral Letters</a>		Updates the status of Referral Letters from Pending to Complete.
<a href="#">Database Cleanup: Diagnostic Tests</a>		Updates the status of Diagnostic Test requisitions from Reviewed to Complete.
<a href="#">Database Cleanup: Register (Patient Status)</a>		Updates patients' status to Inactive.
<a href="#">Database Cleanup: Tasks</a>		Updates All Not Started tasks with a Due date on or prior to a given date to a Canceled status.

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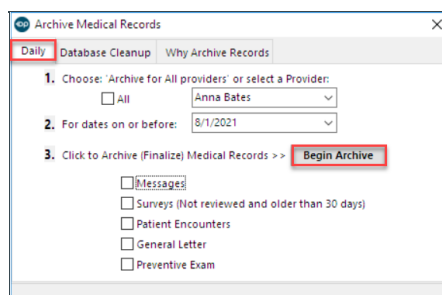
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3. Click the **Begin Archive** button.



Archive Medical Records

Daily Database Cleanup Why Archive Records

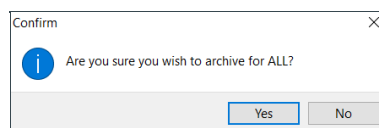
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 All  Anna Bates

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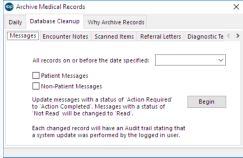
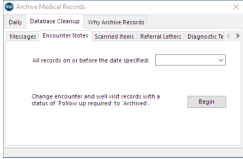
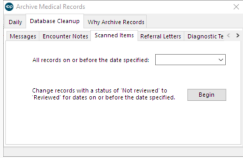
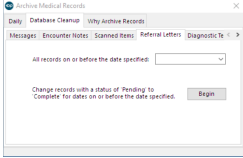

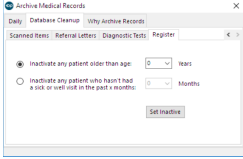
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