Patient Record Removal

Overview

Patient records can be removed by deleting or archiving them.

Manual Record Removal

Note the following about manual record removal:

- You can delete or archive patient records one at a time.
- Deletion is generally reserved for patient records that were created in error.
- You can archive a patient record only if that patient is not currently involved in an incident.

Removed records are retained, but the patients no longer appear in incidents and dashboards. In addition, removed patient records appear in reports only when you specify they should be included. Furthermore, only authorized users can search for these records and, when appropriate, re-instate them.

Automatic Record Archival

In addition to being able to archive a record manually, your EMTrack system automatically archives patient records under the following conditions:

- Actual Incident: The system archives associated patient records 15 days after the end of the incident.
- Exercise, Drill, or Test Incident: The system archives associated patient records immediately after the incident's end.
- No Incident: If the patient is not associated with any incidents, EMTrack archives the record after 90 days of inactivity.
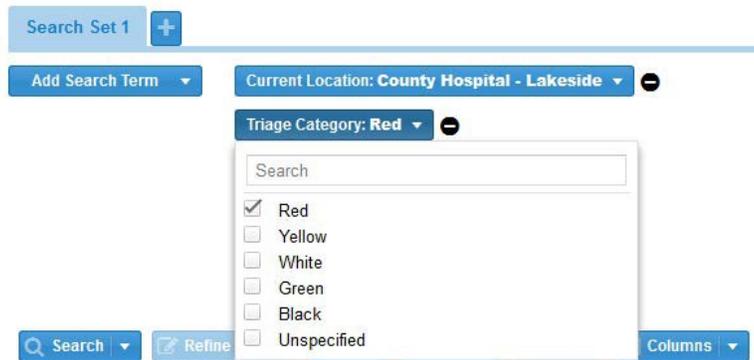
Search Terms

When conducting a search, you can specify a single search term, a set of terms, or multiple sets of criteria. In a set of terms, the more criteria you specify, the narrower your search results.

Use multiple sets to build an "OR" operation. The resulting list includes the records that meet the criteria specified in one of the sets you defined. For example, you would build two search sets to create a filter showing all patients at or en route to your location.
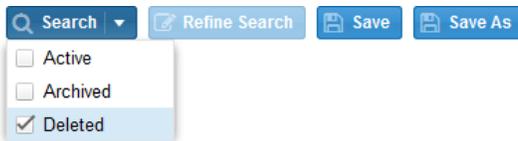
To Search for a Record

1. From any page, click the **Filters** or **Locate** tab.

2. If other results are on the page, in the upper left, click **New**.

3. Add search criteria as follows:

   a. Click **Add Search Term**.

   b. Select the term from the list. It appears in the page.

   c. Click the term and either select the appropriate values from the list or enter data.

   d. Repeat steps a – c for each term you want to add.

4. If appropriate, add another set of criteria as follows:

   a. To the right of the current **Search Set** tab, click the plus icon.

   b. In the new tab, click **Add Search Term**.

   c. Select the term from the list. It appears in the page.

   d. Click the term and either select the appropriate values from the list or enter data.

   e. Repeat steps b – d for each term you want to add to this set.

5. As applicable, repeat step 4 to add another search set.

6. If you are searching for a deleted or archived record:

   a. On the **Search** button, click the arrow.

   b. From the menu, select the **Archived** or **Deleted** check box, and clear **Active**.


7. Click **Search**.

To Delete or Archive a Record

1. From the **Filters** or **Locate** tab, search for the record as described in To Search for a Record.

2. In your search results, click the view icon 🔍 for the appropriate record. The *Detailed Patient Information* window opens.

3. Click **More**, point to **Actions**, and choose the appropriate option: **Archive** or **Delete**.

4. If appropriate, for **Comment**, enter notes or comments.

5. Click **Archive** or **Delete**.
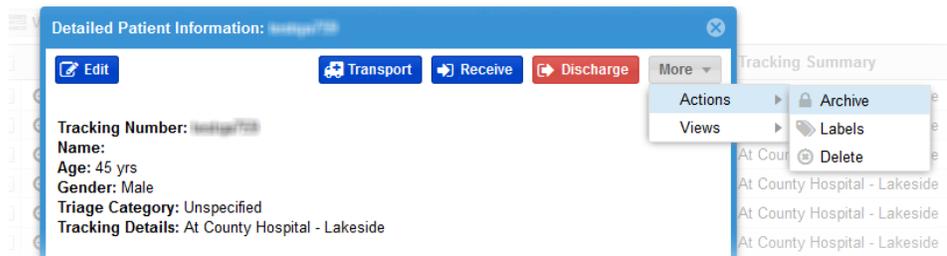
To Re-instate a Removed Record

1. From the **Filters** or **Locate** tab, search for the record as described in To Search for a Record.

2. In your search results, click the view icon 🔍 for the appropriate record. The *Detailed Patient Information* window opens.

3. Click **More**, point to **Actions**, and choose the appropriate option: **Undelete** or Unarchive.
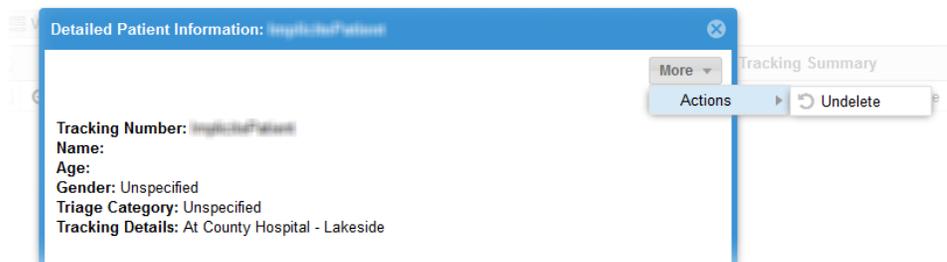
4. If appropriate, for **Comment**, enter notes or comments.

5. Click **Unarchive** or

6. Undelete.

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