

Delete Patient Records

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Depending on your role, you may be authorized to delete records. A single record located through the Dashboard can be deleted. One or more records located through the Filters or Locate tab can be deleted. In general, this process should be reserved for records that were added by mistake or during training.

To delete a record from the Dashboard

1. On the *Dashboard*, locate the record in a gadget.
2. On that row, click the edit icon. The *Detailed Patient Information* window opens.
3. On the upper right, click **More**, click **Actions**, and click **Delete**. The *Delete* window opens.
4. For **Comment**, enter the reason you are deleting the record.
5. Click **Delete**.

To delete one or more records from the Filters or Locate tab

1. On the *Filters* or *Locate* tab, click **Add Search Term** and in the menu, click a term associated with the records you want to find. The term appears below.
2. Click the term and in the field, enter or select a value. If necessary, click **OK**. The value appears with the term.
3. If necessary, repeat this step to add more values for this term.
Note: Adding more values produces more results because records can contain any one of the selected values.
4. If necessary, add more search terms.
Note: Adding more search terms produces fewer results because records must contain a value for every selected term.
5. On the *Filters* tab, add another *Search Set* if necessary by clicking the plus icon and repeating the steps to add terms and values.
6. If necessary, remove values, terms, and sets as follows:
 - To remove a value from a term, click the term and in the field, clear the check box for that value.
 - To remove a term, click the remove icon for that term.
 - To remove a set, click the remove icon on that Search Set tab.
7. Choose to the type of records you want to search:
 - a. On the right of the **Search** button, click the arrow.
 - b. In the list, select the check boxes for *Active*, *Archived*, and/or *Deleted* records.
8. Click **Search**. The results appear.
9. Locate the records you want to delete and, on those rows, select the check box.
10. Above the results, click **Actions** and, in the menu, click **Delete**. The *Delete* window opens.
11. For **Comment**, enter the reason you are deleting the records.
12. Click **Delete**.