

Memo

To: Physicians and FO staff

From: Management

Date: 11/24/2021

Re: “Inactive” or “Deceased” Patients

Designating a patient as “Deceased” or “Inactive” in ECW:

1. Removes them from all chart searches unless search parameters are deliberately modified to include “Deceased” or “Inactive” categories.
2. Disables interaction with their chart (the front desk will temporarily open the chart if they need to document something)
3. For deceased patients the physician will need to mark the patient as deceased by going into the patient’s information page. Under “additional info” click on “Deceased” and enter the date the patient passed. Notate the cause of death. Also, the physician will need to select “Exclude from collection” on top of the page. The office manager will ensure this happens.
4. Add a Global alert on all the sibling’s charts that have a deceased sibling.
5. Unlink the patient from the other siblings under the "Responsible Party" for the patient can no longer be found on the guarantor balance.

The front desk will only inactivate a patient 60 days after they **have** been formally dismissed from the practice.

To dismiss a patient:

1. The **PCP** verbally notifies the patient of the dismissal.
2. The **PCP then** sends a telephone encounter with **documentation** of the dismissal conversation to the office manager.
3. The office manager will then send the dismissal letter to the patient.
4. The office manager will then create a global alert in patient’s chart with two dates:
 - a. The date letter was mailed certified and
 - b. The date the office manager or front office supervisor will inactivate the patient (60 days from when the letter was sent).

Reactivation of a patient in ECW requires a telephone encounter from the original PCP who dismissed the patient. The front will need to uncheck "Inactive" in "patient info → additional info" in order to send a telephone encounter.

Patients without a visit in three years

If a patient has not had a visit with a Blue Fish doctor in more than three years, they are considered a new patient for scheduling, coding, and billing purposes. They will be added to the schedule as "new sick" or "new well". They do not need to reapply as a new patient.