Deleting a Duplicate Guarantor

What is a guarantor?

A guarantor is a person who may have a financial responsibility on a patient’s record. If a patient has dental or medical insurance, a subscriber/policy holder will be required on the Guarantor tab of the Patient Card even if the subscriber/policy holder will not be responsible for patient’s balance.

When searching for a Guarantor, if a duplicate record exists, the duplicate must be converted to a patient and then deleted from the main axiUm Rolodex.

Duplicates usually occur when a search WAS NOT conducted in the Guarantor Rolodex and the Guarantor was added in the Guarantor tab of the Patient Card instead of attaching an existing record from the Guarantor Rolodex.

In this example, a duplicate guarantor record is visible as there are two “John Doe” Guarantors with the same name and phone number.

Guarantor Rolodex

The record with a check in the box is a patient who is also a guarantor. The record with the unchecked box is a non-patient and will not have a chart # (Guarantor only).
How to Delete a Duplicate Guarantor Record

1. From the Guarantor Rolodex double-click the record which is considered the “duplicate” to temporarily attach it to the patient record.

2. In the Patient Card, uncheck all Guarantor flags for this Guarantor record. If this guarantor was primary you will need to make another Guarantor primary prior to un-checking the Primary Guarantor flag.

3. Change the phone number 999-999-9999; this will make the record easy to find for deletion.

4. Click the Add New Record icon to add the Guarantor
5. Then use the Convert to Patient icon to make the Guarantor a Patient (This is all temporary but very important!!!!)

![Image of Convert to Patient icon]

6. Notice that the other John Doe now appears in the list below.

![Image of Patient list with two entries]

7. Click the Delete Record icon to delete the duplicate Guarantor (the one with the phone number of 999-999-9999).
8. Go to the main axiUm Rolodex, find and select the patient/guarantor to be deleted using the phone number 999-999-9999.

9. Click the Delete Patient icon.

If you receive this message when trying to delete a patient from the Rolodex, complete the following steps:

To determine which other patients have the same Guarantor as the patient to be deleted, conduct a search by Guarantor name.

**Search Criteria:**

*If you do not have a searchable column for "Guar. Name"; click on the Options/Setting icon in the main axiUm Rolodex and select it from the drop-down list for the Optional Display Column 1-3.*

By searching by the Guarantor it is clear which patient has the guarantor which is marked for deletion.
Select the patient and open the Patient Card to assign the correct Guarantor and remove the erroneous Guarantor.

1. Highlight the erroneous guarantor (the one with the 999-999-9999 phone number).
2. Click the Delete Record icon.
3. Answer Yes to confirm the deletion.

4. After a guarantor has been deleted, checking the “Show Deleted” option will show any deleted guarantor records in grey text.
5. When the patient record which was the erroneous Guarantor is no longer attached to any patients, the patient can finally be deleted.