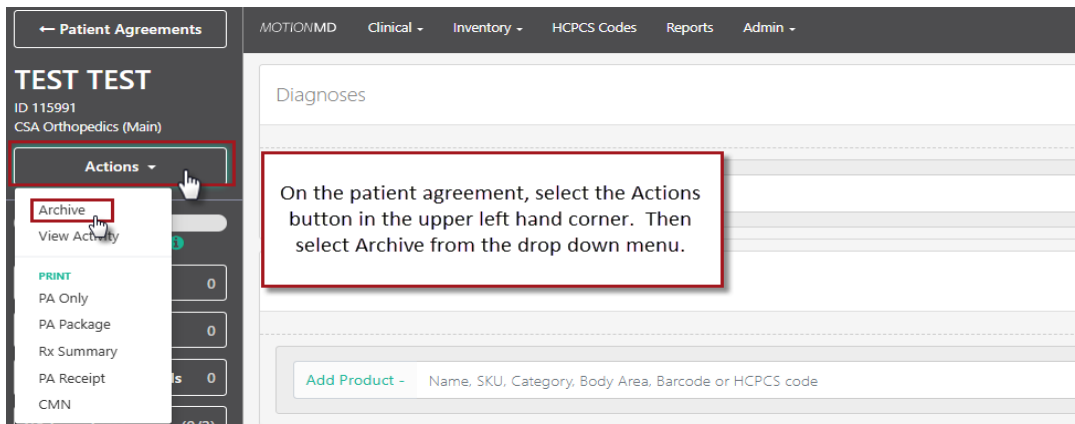


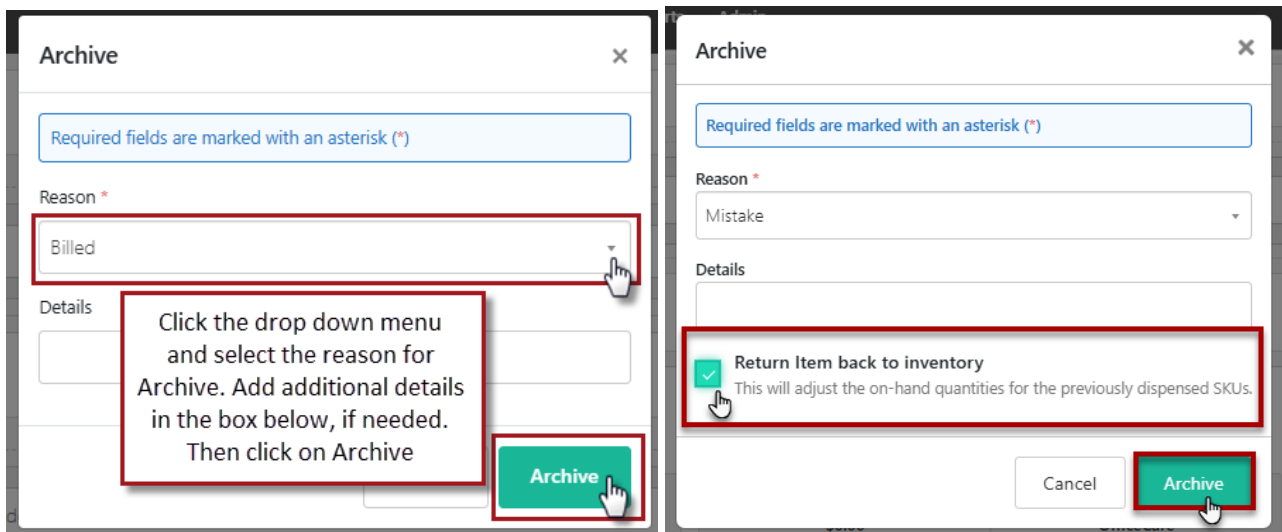
ARCHIVE A PATIENT AGREEMENT

At times a patient agreement may be created and in progress when it's decided the claim is not able to be completed for various reasons. The claim may be archived to remove it from the active claim workflow.

Follow the steps below to archive a patient agreement:



Select the Archive Reason and add additional details in the box below, if needed. If the item on the PA was fulfilled and the product was not provided, select the Return Item back to Inventory. This will automatically adjust and add the product back into the On-hand count. Select Archive to complete the archive process.



ARCHIVE A PATIENT AGREEMENT

If a payment was processed on the claim being archive, an alert will appear asking users to Submit a Help Ticket for the patient refund. Under the “Describe the issue or change needed” field, include a note to process a refund. Once the Submit Request is sent, the Customer Success team will receive a help ticket and complete the refund.

Archive

PA has a processed payment. Please submit a Help Ticket requesting a refund and state a reason so patient can be refunded timely.

Submit a Help Ticket

Required fields are marked with an asterisk (*)

Reason *

Order cancelled

Details

Return Item back to inventory
This will adjust the on-hand quantities for the previously dispensed SKUs.

Cancel Archive

How can we help?

Your Name *

Kristen DiRocco

MotionMD Email Address *

kristen.dirocco@enovis.com

What can we help you with? *

Patient Agreement Change

PA ID *

116965

Describe the issue or changes needed *

Please process a refund, patient did not take product

Priority

Normal

Our Agents aren't available to chat at this time. If it's within normal business hours check back, if not, please submit a Ticket. [Live Chat](#)

Attachments (optional)

Click "Choose File" or drag and drop a file into this container to upload (PNG, JPEG, PDF, CSV, XLSX).

Choose File

Cancel Submit Request

After the Archive button is selected, a message will appear at the top of the PA stating the PA was archived. A PA can be unarchived by selecting the Unarchive button on the top right corner of the agreement.

Test P. Patient
ID 116965
CSA Orthopedics (Main)

Archive (Order cancelled -)
This Patient Agreement was archived on 02/23/2026 by Kristen DiRocco.

Unarchive