



iQIES S&C Delete an Intake

Job Aid

Notes

- The intake must have a status of **Triage/Prioritization**
- Only the CMS General User and the Intake Admin user roles can delete an intake

Process

- 1.1 Go to the **Basic Information** page of the intake.
- 1.2 Verify **Intake Status** is **Triage/Prioritization**.
- 1.3 Select **Delete** from the **Intake** action drop-down menu. The **Confirm Intake Deletion** pop-up window opens.

Note: The **Delete** selection only appears when all conditions under **Notes** are met.

- 1.4 Select the **Deletion Reason** from the drop-down menu under **Deletion Reason**.

There are three choices:

- **Data Entry Error**
- **Duplicate**
- **Other**

- 1.5 Click **Save**.

Note: **Save** is disabled until a reason is selected.

- 1.6 Verify the green notification banner confirms the intake was deleted.