Managing Patient Information

This section contains information about the following tasks:

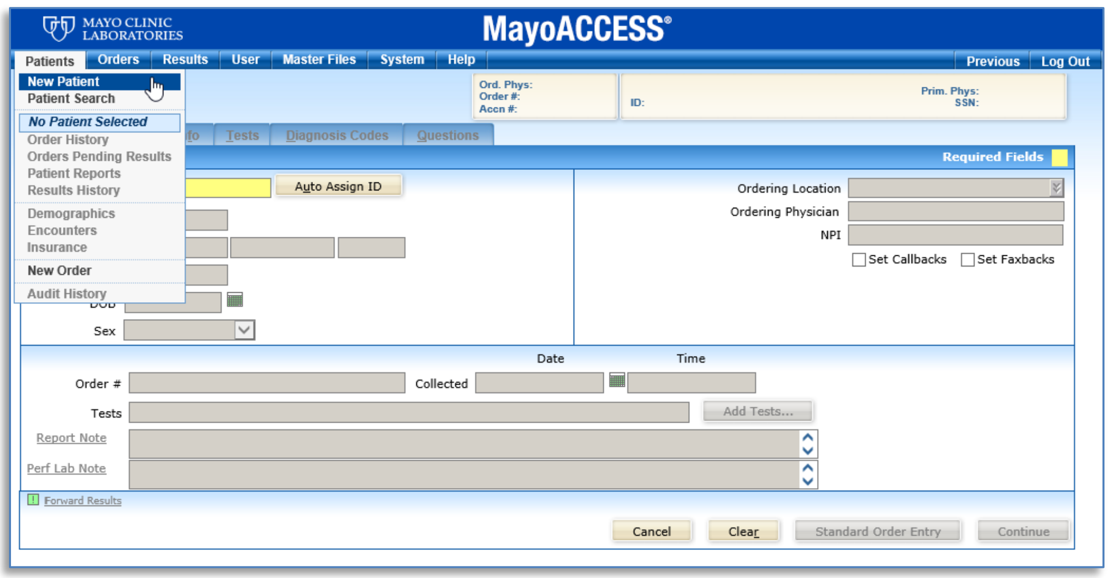
- Creating a patient record
- Searching for a patient record
- Changing patient information

Creating a Patient Record

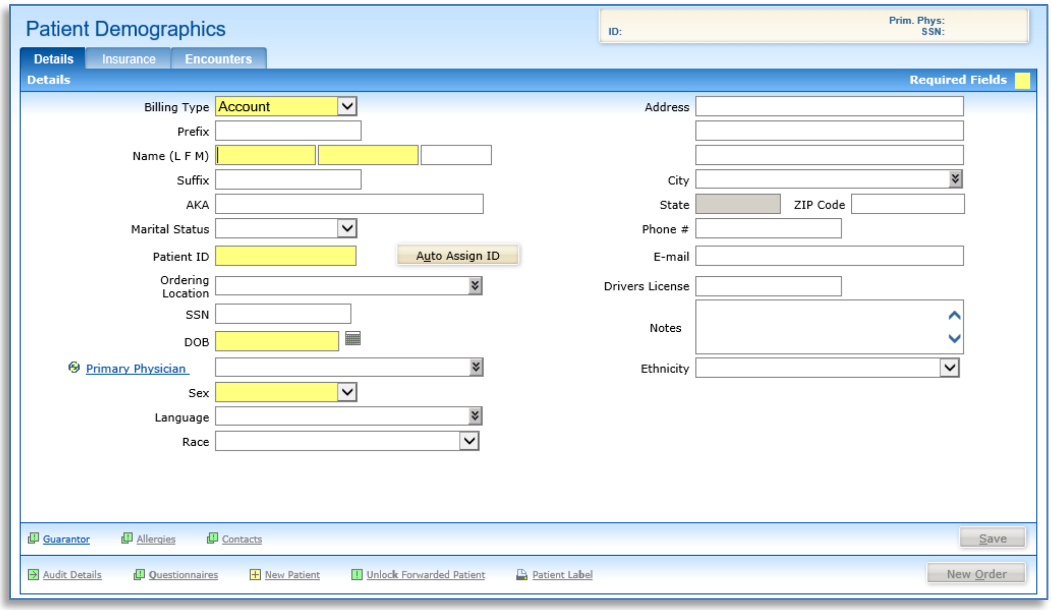
To create a patient record, follow these steps:

1. On the **Patients** menu, click **New Patient**.

   Tip: Alternatively, you can click the **New Patient** link on the Patient Search page.

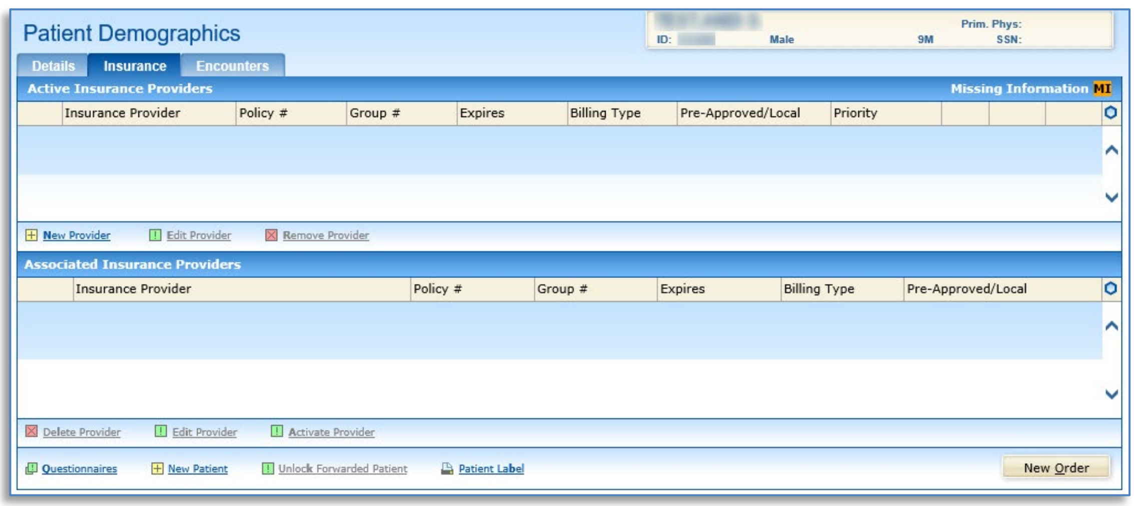


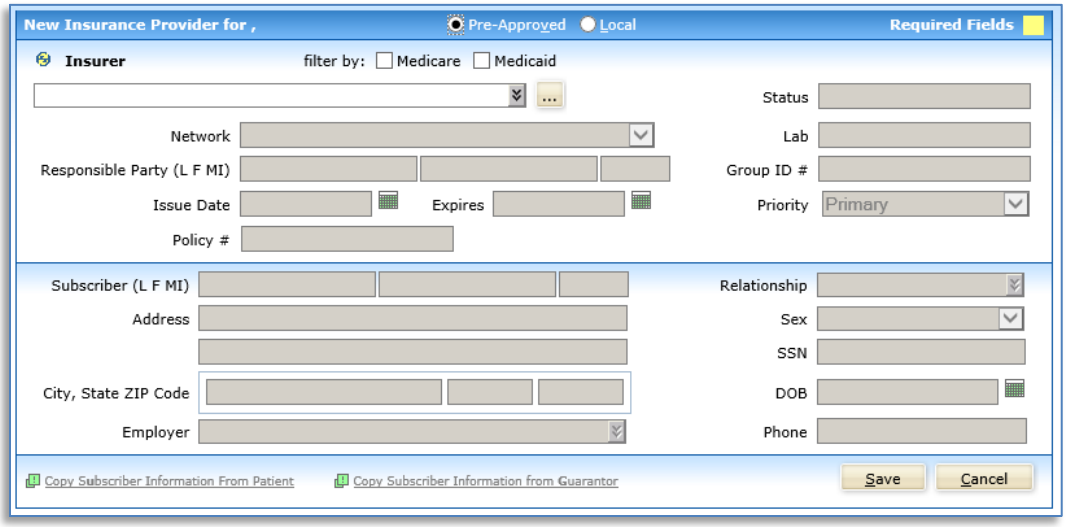
2. On the Patient Demographics page, click the **Details** tab.
3. On the Details page, specify the information for this patient, including the patient's address, city, state, and zip code. The highlighted fields indicate information that is required.



For more information about the fields on this page, go to Patient Details on page 28.

4. To specify third-party billing for this patient, select **Insurance** for the **Billing Type**.
5. To view third-party billing for this patient, click the **Insurance** tab.





6. On the Insurance page, you can view the primary insurance information for this patient.
7. If the patient has a secondary insurer, click **Show Secondary Insurer** to view the insurance information.
8. Click **Save**.

   From this page, you can click **New Order** to order a test for this patient.

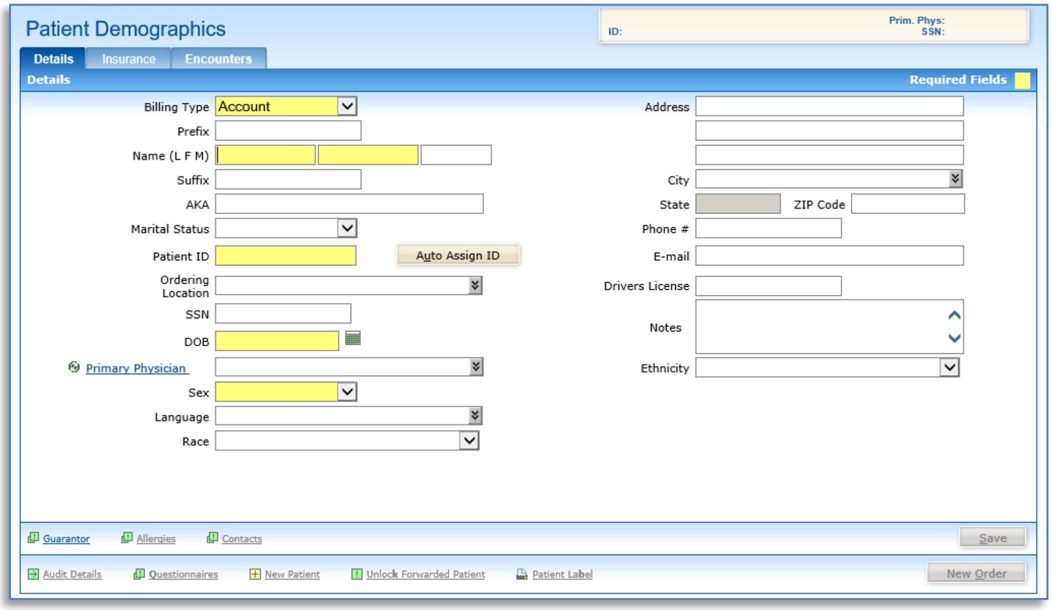
The Patient Demographics page also contains the following links:

Link	Description
Guarantor	Guarantor information for the patient
Allergies	Allergy information for the patient
Contacts	Emergency contact information for the patient
Questionnaires	Questionnaires for the patient
New Patient	Link to add a patient
Patient Label	Label that shows patient information

Tip: For more information about each of these links, click the arrow next to the link name, and then click the **Information** link.

Patient Details

To display the detailed demographic information for the patient, click the **Details** tab on the Patient Demographics page.



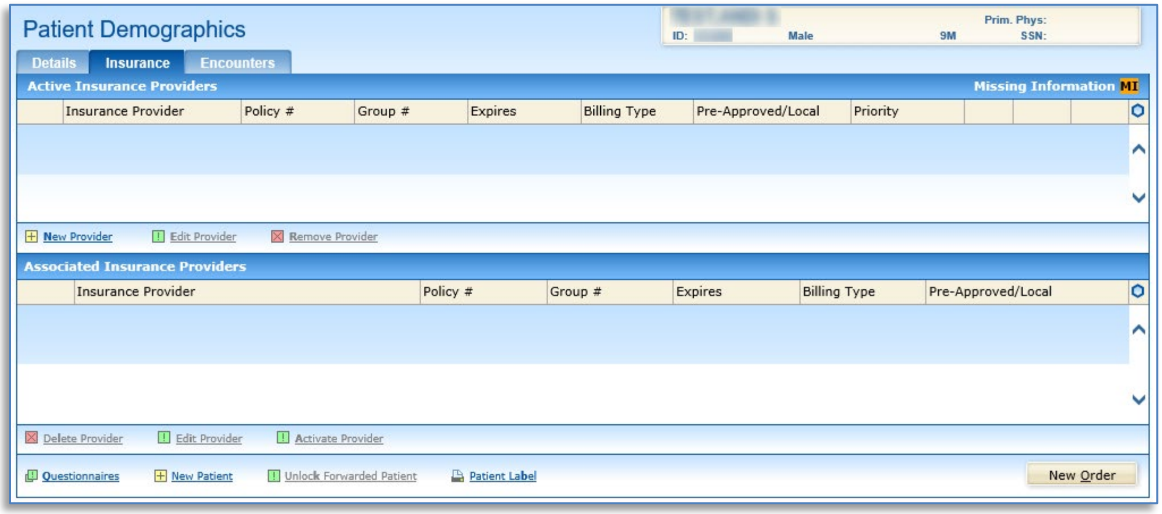
The following table provides instructions for completing the information on this page:

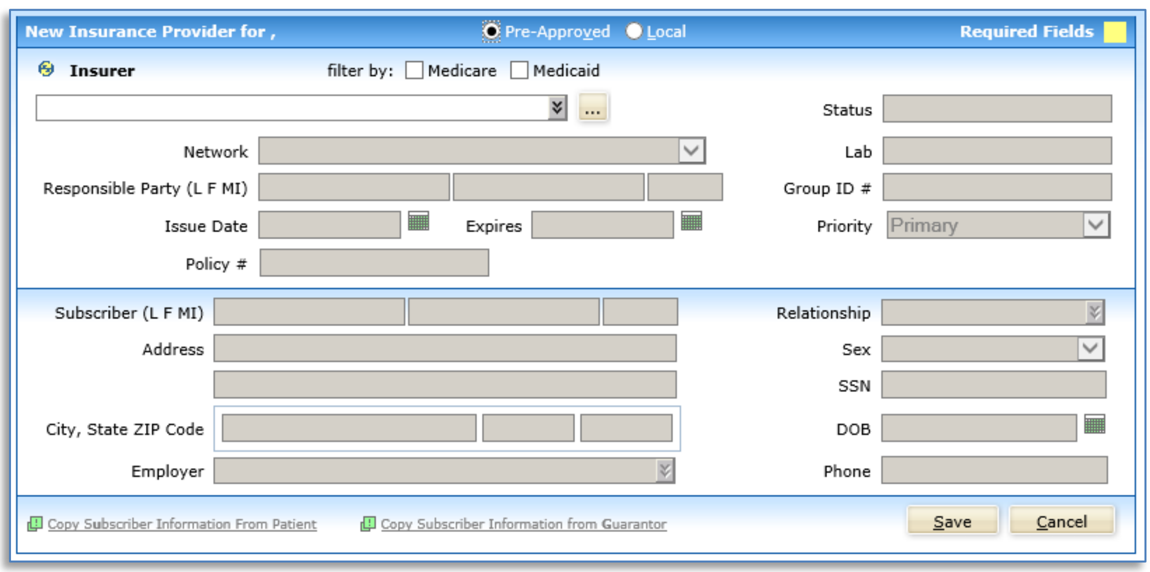
Field	Instructions
Billing Type	Select **Account** to bill the test to the client. Select **Medicare** to bill the test to Medicare or Medicaid. Select **Insurance** to bill the test to patient insurance.
Prefix	Enter a title for the patient, such as Mr., Mrs., or Miss.
Name (L F M)	Enter the last name, first name and, if applicable, the middle initial or middle name for the patient.
Suffix	Enter a title for the patient, such as Sr. or Jr.
AKA	Enter any other name that the patient uses, such as a nickname or a maiden name.
Marital Status	Select the patient's marital status from the drop-down list.
Patient ID	Enter an identification number for the patient. **Tip:** Click **Auto Assign ID** to generate a new patient identification (ID) number.

Field	Instructions
Ordering Location	If specified, all orders for the patient will default to the selected location.
SSN	Enter the patient's social security number.
DOB	Specify the patient's date of birth.
Primary Physician	Select or enter the name of the patient's primary physician. **Tip:** To enter the information for a physician, click the **Primary Physician** link. For instructions, see Creating a Physician Record on page 103.
Sex	Select the patient's sex from the drop-down list.
Language	Patient's primary language (not used).
Race	Patient's race (not used).
Address	Enter the patient's home address.
City	Specify the patient's city of residence. **Tip:** Enter the patient's zip code to automatically complete the **City** and **State** fields.
State	Enter the patient's state of residence.
ZIP Code	Enter the patient's zip code.
Phone Number	Enter the patient's telephone number.
E-mail	Enter the patient's e-mail address.
Drivers License	Enter the patient's driver's license number.
Notes	Enter any other relevant information about the patient.
Ethnicity	Patient's nationality (not used).

Patient Insurance

To display the insurance information for the patient, click the **Insurance** tab on the Patient Demographics page. This page contains the patient's primary and secondary insurance information.





Searching for a Patient Record

To locate a patient record, follow these steps:

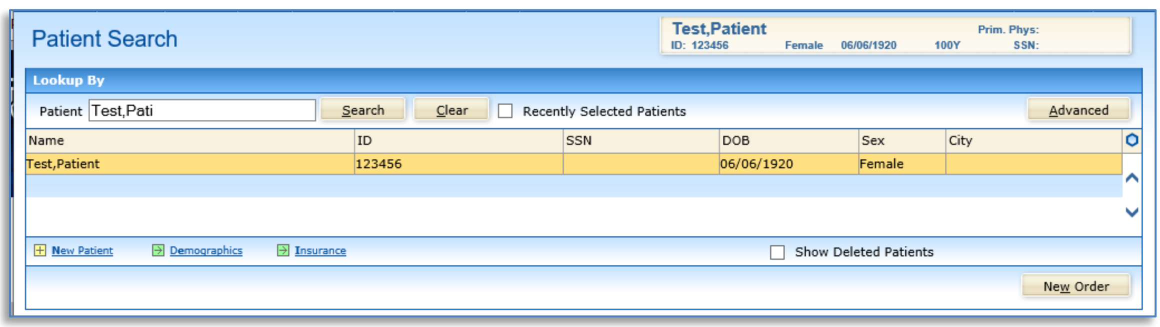
1. On the **Patients** menu, click **Patient Search**.

   Tip: Alternatively, you can click **Patient Search** in the extended frameset.

2. In the **Patient** text box on the Patient Search page, enter either the ID number or the first few characters of the patient's last name.
3. Click **Search.**

   Tips:

   - If you are unsure of the ID number or the spelling of the patient's last name, enter just the letters or numbers that you know. The search results contain all the patient records that match the numbers or letters that you specify. For example, if you enter TES in the **Patient** text box, and then click **Search,** all patients with last names or records that begin with TES are shown.
   - To display patient records that were recently opened, click the **Recently Selected Patients** check box.



To order a test for that patient, select the patient record, and then click **New Order**. To view patient demographics or insurance information, click the **Demographics** or **Insurance** link.

Changing Patient Information

To change patient information, follow these steps:

1. On the **Patients** menu, click **Patient Search**.

   For information about searching, see Searching for a Patient Record on page 30.

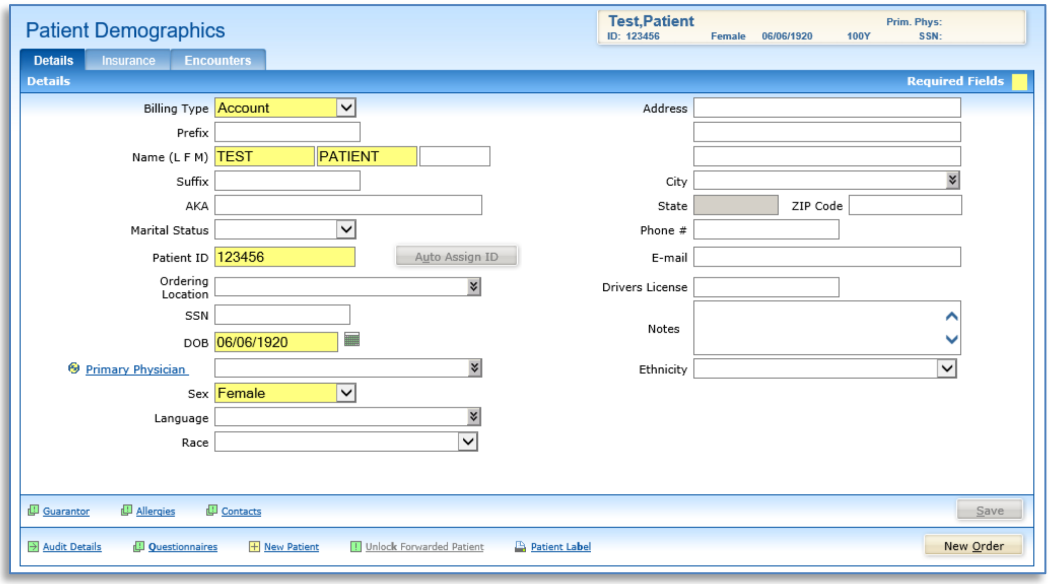
2. Select the patient for whose record that you want to change
3. To change the patient's demographics, click the **Demographics** link.

   Tip: You can access this page by clicking **Demographics** on the **Patients** menu.

4. To change the patient's insurance information, click the **Insurance** link.

   Tip: You can access this page by clicking **Insurance** on the **Patients** menu.

5. On the Patient Demographics page, change the values in any of the fields on the Details or Insurance pages. To switch between the pages, click the **Details** or **Insurance** tab.



6. To change additional information, click the appropriate link at the bottom of the page. For example, you might want to change the address on the page, and then click the **Guarantor** link to change the address for the guarantor for this patient.

   Tip: To view information about any of the links, click the arrow next to the link name.

   Note: If the patient's name is dimmed, this means that pending reports are still open for this patient and that the patient name cannot be changed until the report is final.

7. Click **Save**.