

Patient Module



Searching For a Patient

Search Patient

Search By

Name Chart# SSN# DOB Phone Ticket

Cancel/Exit

Refresh

Add a New Patient

SSN	Patient	DOB	Chart No	Patient	Insurance	Credit	PatientID
555-66-6666	AFLACK, BEN	02/02/1972	102	20.00	472.00	0	3
444-55-6666	APPLE, SAM S	05/01/1960	100	40.00	175.00	0	1

Selected Patient

•You can search by Name, Chart #, SSN#, DOB, Phone, Ticket. Once you choose how you are searching by **Single Left Clicking** on that option.

•**Type** in the search information. You can select the patient by **Single Left Clicking** on the patient and then **Single Left Clicking** on Select Patient.

Adding New Patients

Search

Search

Last Name: JACKSON

First Name: BILL

Middle Name: JOE

Address: 111 8TH AVE

City: NASHVILLE

State: TN

Zip Code: 37128

Phone: (615) 255-5555

Work Phone: (615) 852-1111 x125

SSN: 123-45-6678

DOB: 08/04/1964 Sex: M

Chart No: (Leave Blank If Not Known!)

Provider: MARCUS WHELBY, MD[2]

Accept Cancel

Patient	Insurance	Credit	PatientID
20.00	472.00	0	3
40.00	175.00	0	1

Cancel/Exit

Add a New Patient

- **Single Left Click** on Add a New Patient. A pop up box will appear. **Complete** that box and then **Single Left Click** on Accept.

Adding Notes

•**Single Left Click** on Memo.
A pop up box will appear and **Type** in note.
*This note will note appear on any thing the patient will see.

OR

•**Single Left Click** on Notes and **Type** note.
*This note will appear on patient print outs.

JACKSON, BILL

Chart No 108
Last Name JACKSON
First Name BILL
MI Name JOE
Generation(JR/SR)
Address 111 8TH AVE
City NASHVILLE
State TN
Zip 37128-
Phone (615) 255-5555
Work Phone (615) 852-1111 x125
Emergency Contact
Sex Male
DOB(44) 8/4/1964
SSN 123-45-6678
Marital Status
Employed Status
Employer
Provider MARCUS WHELBY, MD
Cell
EMail
Start Date
Print Label
No Statement
CMS Signature SIGNATURE ON FILE
Signature_Date 7/30/2008
Guarantor (None).
Notes
Ref. Provider (None)
Weight 0
Source or Contact

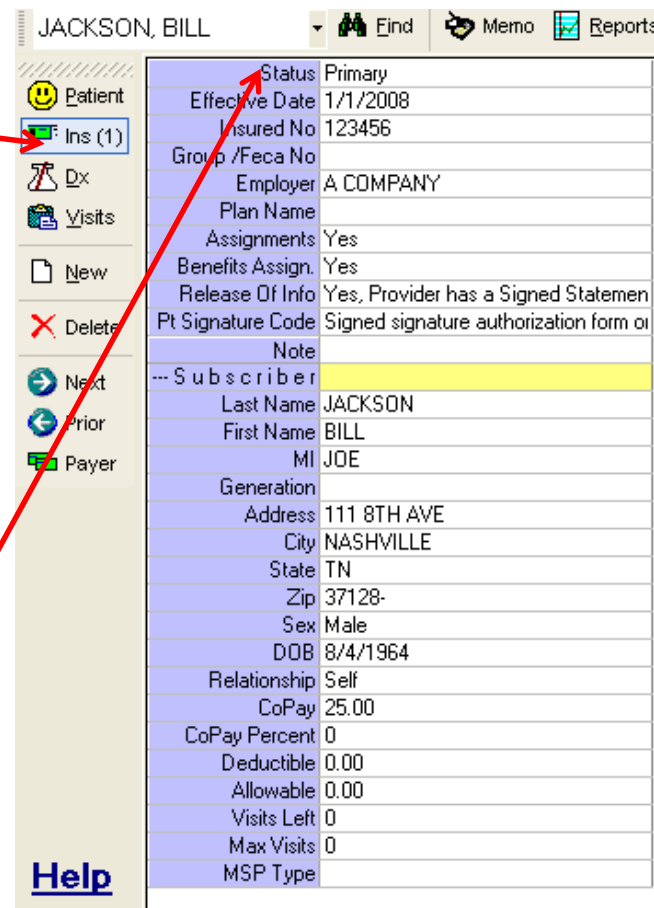
Help

Adding Insurance

- **Single Left Click** on Ins tab. **Single Left Click** on New. **Type** in or **Choose** information to complete this field.
*Make sure you

- To add a secondary insurance, **Repeat Above** except make sure you change the **status** to secondary.

- To deactivate, **Change** the **status** to Expired-Primary or Expired-Secondary.



JACKSON, BILL	
Status	Primary
Effective Date	1/1/2008
Insured No	123456
Group /Feca No	
Employer	A COMPANY
Plan Name	
Assignments	Yes
Benefits Assign.	Yes
Release Of Info	Yes, Provider has a Signed Statement
Pt Signature Code	Signed signature authorization form of
Note	
--- Subscriber	
Last Name	JACKSON
First Name	BILL
MI	JOE
Generation	
Address	111 8TH AVE
City	NASHVILLE
State	TN
Zip	37128-
Sex	Male
DOB	8/4/1964
Relationship	Self
CoPay	25.00
CoPay Percent	0
Deductible	0.00
Allowable	0.00
Visits Left	0
Max Visits	0
MSP Type	

Adding Diagnosis Codes

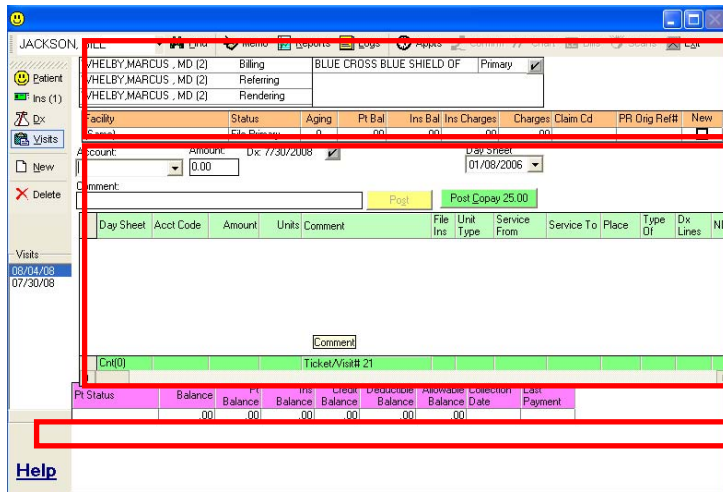
•**Single Left Click** on Dx.
Single Left Click on New. A pop up will appear, **Enter** the date. **Complete** the fields.

Note: For hospital claims, be sure to input a date for Date Start Hosp (18). For Workers Comp/accident claims, be sure to complete Condition to state and Accident state.

Field	Value
Date Current(14)	7/30/2008
Date First Illness(15)	7/30/2008
Dx Code 1	V70.0
Dx Code 2	
Dx Code 3	
Dx Code 4	
Dx Code 5	
Dx Code 6	
Dx Code 7	
Dx Code 8	
Last Seen Date	
Date Start NoWork	
Date End NoWork	
Date Start Hosp(18)	
Date End Hosp(18)	
Original Ref No(22)	
Prior Auth No(23)	
Referral No	
Reserved(19)	
Condition To(10)	(None)
Condition to State	
Accident Date	
Nature Of Condition	(None)
Subluxation Level	
XRay Date	
Manifest Date	
Complicated	
LocalUse Box10d	

Creating a Visit

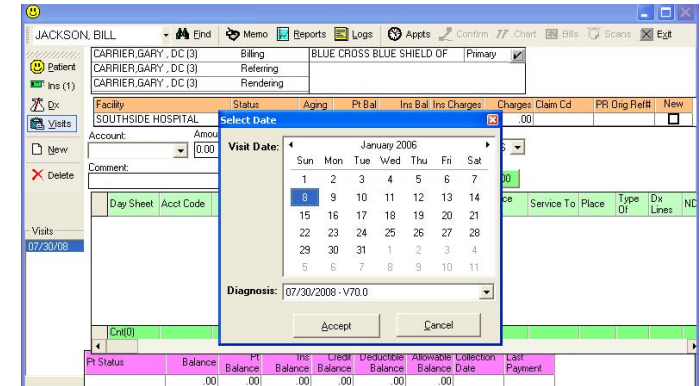
•Single Left Click on Visits to get to the Visit screen.



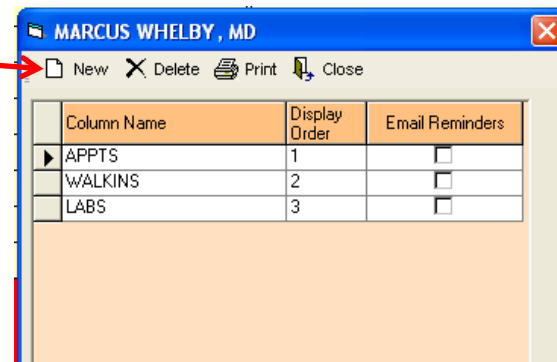
•Visit Summary

•Visit Detail

•Patient Summary



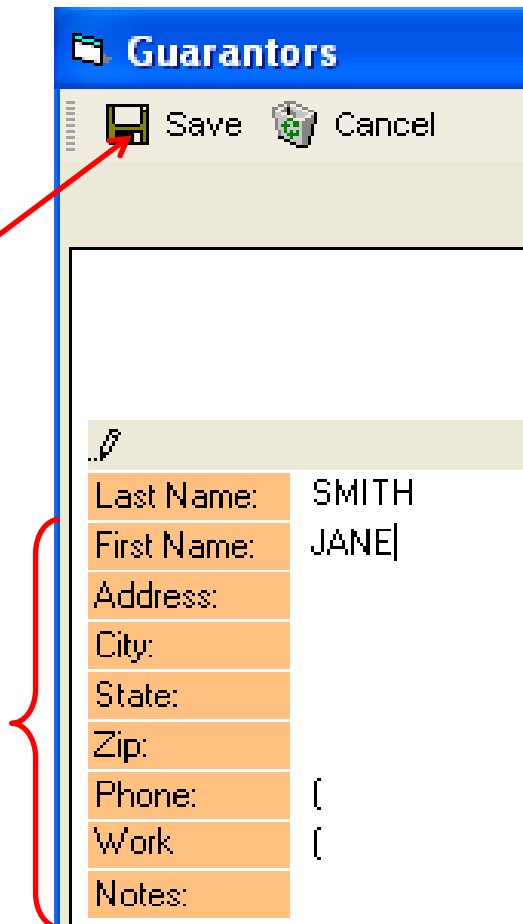
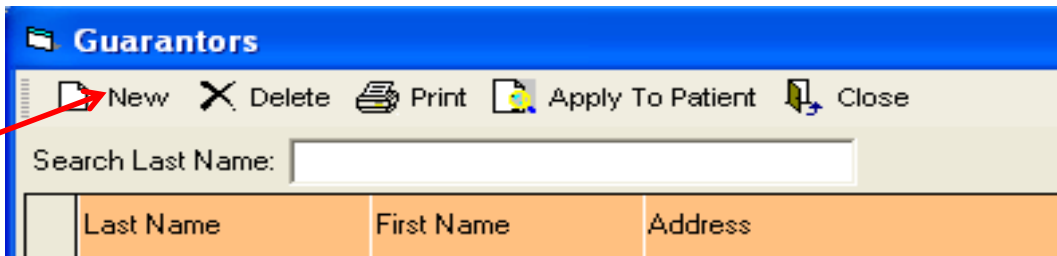
•Single Left Click on New. Enter Column Name and display order. If you send email reminders Mark the column that would have email reminders. Single Left Click on Close.



Adding Guarantors

Note: Definition of Guarantor is the person responsible for the bill: Not related to insurance policy holder.

•From the patient demographics, **Single Left Click** on Grntr. **Single Left Click** on New. A new pop up window will appear, **Type** in all information and **Single Left Click** on Save.



Adding a Referring Provider

- From the patient demographics, **Single Left Click** on Ref Dr.
- Single Left Click** on New.
- Complete** fields.

Referring Providers	
New Assign To Pt. Prior Next Labels Labels! >>	
Search Last Name: <input type="text"/>	
Signature	(New)
Last Name	
First Name	
MI	
Address	
Attn Line (Labels)	
City	
State	
Zip	
Phone	(
Fax#	(
Doctor UPIN	
Other ID:	Tax ID
Other ID#	
National Provider	

Note: Required fields for completion are: Signature & NPI. All other fields are optional.

Posting a Co-Pay

•Either **Single Left Click** on the green Post Copay button **OR** skip to the next step, by **Typing** in the Account box the method of payment for Co-Pay: Cash, Chk, Chrg. **Type** in the amount of the co-payment and **Single Left Click** on Post.

The screenshot shows a medical software interface for patient CARRIER, GARY, DC (3). The patient is at Southside Hospital. The interface includes a menu bar with options like Find, Memo, Reports, Logs, Appts, Confirm, Chart, Bills, Scans, and Exit. Below the menu bar, there are fields for Patient, Ins (1), Dx, and Visits. A table shows charges for the patient, with columns for Facility, Status, Aging, Pt Bal, Ins Bal, Ins Charges, Charges, Claim Cd, PR Orig Ref#, and New. The 'Post Copay 20.00' button is highlighted in green. A red arrow points from the text instructions to this button, and another red arrow points to the 'Post' button.

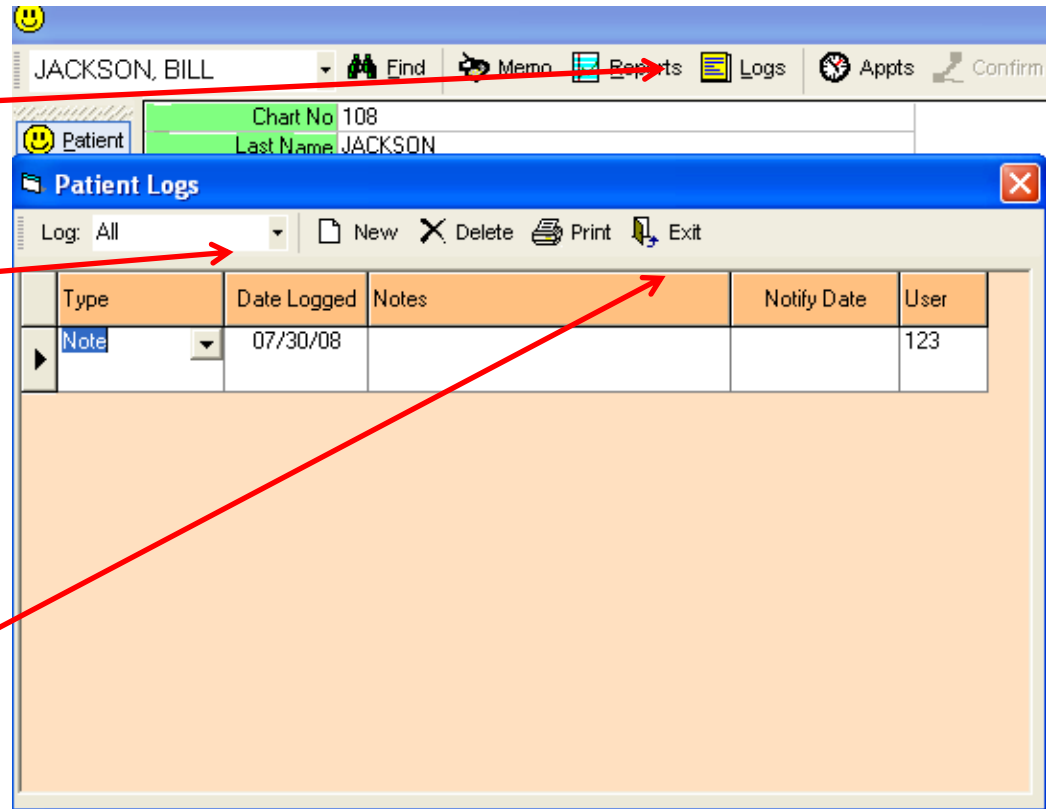
Facility	Status	Aging	Pt Bal	Ins Bal	Ins Charges	Charges	Claim Cd	PR Orig Ref#	New
SOUTHSIDE HOSPITAL	Hold	0	.00	.00	.00	.00			<input type="checkbox"/>

Day Sheet	Acct Code	Amount	Units	Comment	File Ins	Unit Type	Service From	Service To	Place	Type Of	Dx Lines	NC

Note: Co-Pay amount comes from the Insurance page.

Creating Logs

•To add a Log,
Single Left Click
on Logs. A pop up
box will appear,
Single Left Click
on New.



•**Complete** the
Type and Note.
After completion,
Single Left Click
on Exit.