

Practice EHR | User Guide

Patient Module | Part 1

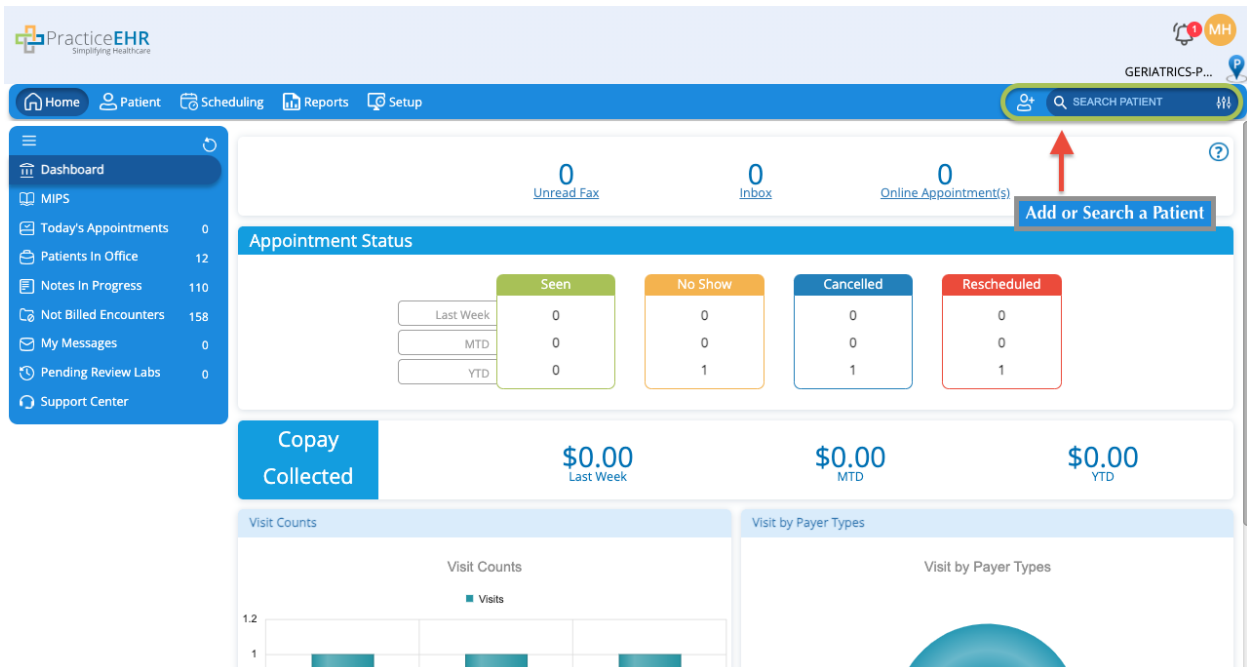


Patient Module

The “Patient” module offers extensive information related to a patient’s clinical and financial information. A user can add, view, and edit general and visit-specific patient information through the Patient module.

1. Add or Search a Patient

A user can add a new patient by clicking on the “**New Patient**” icon at the top right corner of the screen.



The screenshot shows the PracticeEHR Patient Module dashboard. The top navigation bar includes Home, Patient, Scheduling, Reports, and Setup. A search bar with a magnifying glass icon and the text "SEARCH PATIENT" is highlighted with a red box and an arrow pointing to it. Below the navigation bar, there are three status indicators: Unread Fax (0), Inbox (0), and Online Appointment(s) (0). The main content area is titled "Appointment Status" and contains a table with columns for "Seen", "No Show", "Cancelled", and "Rescheduled". The table has rows for "Last Week", "MTD", and "YTD". Below the table, there are three boxes for "Copay Collected" showing \$0.00 for Last Week, MTD, and YTD. At the bottom, there are two charts: "Visit Counts" and "Visit by Payer Types".

	Seen	No Show	Cancelled	Rescheduled
Last Week	0	0	0	0
MTD	0	0	0	0
YTD	0	1	1	1

Once clicked, a dialogue box will appear, asking for crucial information about the new patient. A red mark will appear before the mandatory fields, which can not be left blank.

A user can also add a patient’s drivers license by clicking on the “**Scan Drivers License**” or “**Import Drivers License**” at the top right corner of the dialogue box.

After filling in the available information, click “**Create Patient**” to register a patient into the practice’s record.



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New Patient Scan Drivers License Import Drivers License

Account # <input type="text"/>	SSN <input type="text"/>	Med Rec # <input type="text"/>
First Name * <input type="text"/> MI <input type="text"/>	Last Name * <input type="text"/> Old Name <input type="text"/>	Preferred Name <input type="text"/> Suffix <input type="text"/>
DOB * <input type="text"/> Sex * <input type="text"/>	Age <input type="text"/>	Marital Status <input type="text"/>
Address 1 <input type="text"/>	Address 2 <input type="text"/> City <input type="text"/>	State <input type="text"/> Zip <input type="text"/>
Home Tel <input type="text"/>	Work Tel <input type="text"/> Ext <input type="text"/>	Cell# <input type="text"/> Chart # <input type="text"/>
Fax <input type="text"/>	Email <input type="text"/>	Primary Contact <input type="text"/>
Patient Referral Source <input type="text"/>	Statement <input type="checkbox"/> Active <input type="checkbox"/>	Adv. Directive <input type="checkbox"/> Pregnant <input type="checkbox"/>
Practice * <input type="text"/>	Location * <input type="text"/>	Provider * <input type="text"/>
Race <input type="text"/>	Ethnicity <input type="text"/>	Class <input type="text"/>
Preferred Language <input type="text"/>	Preferred Communication <input type="text"/>	Ref. By <input type="text"/>
Pharmacy <input type="text"/>	Resp. Party <input type="text"/>	Sexual Orientation <input type="text"/>
Birth Order <input type="text"/> Multiple Birth <input type="checkbox"/>	Gender Identity <input type="text"/>	
Comments <input type="text"/>	PCP <input type="text"/>	

Create Patient Close

If you want to find a patient already added to the system, click the **“Search Patient”** box, which will open a patient search box. You can use this box to search for patients by their first, middle, last name, or account number.

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Patient Search Advanced Search Import Patient

First Name <input type="text"/>	Last Name <input type="text"/>
Account # <input type="text"/>	Middle Initial <input type="text"/>
Practice <input type="text"/>	Location <input type="text"/>
Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> All	DOB <input type="text"/>

Search Close

	Seen	No Show	Cancelled	Rescheduled
Last Week	0	0	0	0
MTD	0	0	0	0
YTD	0	1	1	1

Copay Collected

\$0.00	\$0.00	\$0.00
Last Week	MTD	YTD

Visit Counts Visit by Payer Types

Visit Counts Visit by Payer Types

■ Visits



After entering a search query, a list of patients will appear. You can select the required patient by clicking their name. Once clicked, the “**Chart**” tab of the patient module will appear on your screen.