Practice EHR | User Guide

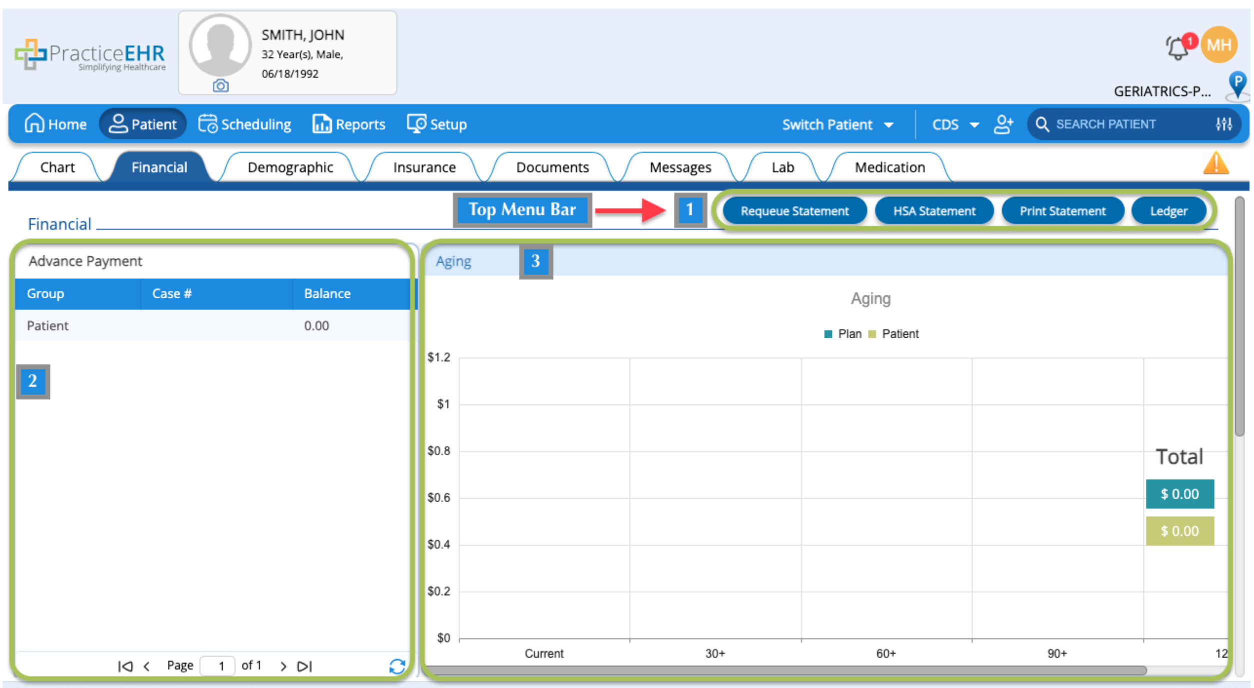
Patient Module | Part 3

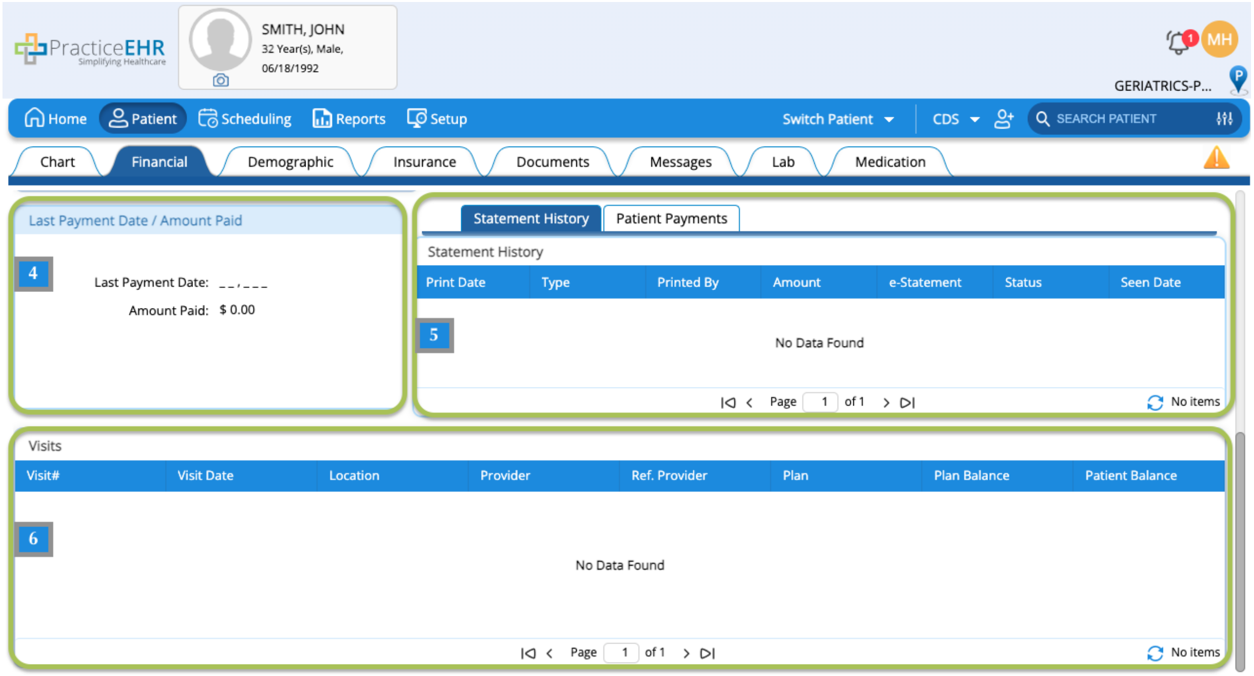
Patient Module

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. Financial

The financial tab of the patient module provides an overview of a patient's financial records, like the amount pending on behalf of the plan or patient, last payment date, patient payment history, and financial visits.





1. Top Menu Bar (Financial Tab)

The top menu bar allows the user to take different actions:

- **Requeue Statement**: Using this option, the user can re-queue a patient statement.
- **HSA Statement:** The user can generate a year-end statement of the amount paid by the patient to the practice that can later be submitted to their HSA.
- **Print Statement:** This option allows the user to print a patient statement.
- **Ledger**: This option will display the patient ledger and give an in-depth view of the patient's financial records.

2. Advance Payment

This section will show the advance payments made by the patients toward the practice.

3. *Aging*

The aging section of the financial tab illustrates the amount pending on behalf of the patient and their insurance plan toward the practice.

4. *Last Payment Date*

This section will display the date of the last payment along with the amount paid.

5. *Statement History and Patient Payments*

The user can see and print patient statements through the "Statement History" section, which is a repository of the patient statement history. On the other hand, the "Patient Payments" section provides the patient payment history in detail.

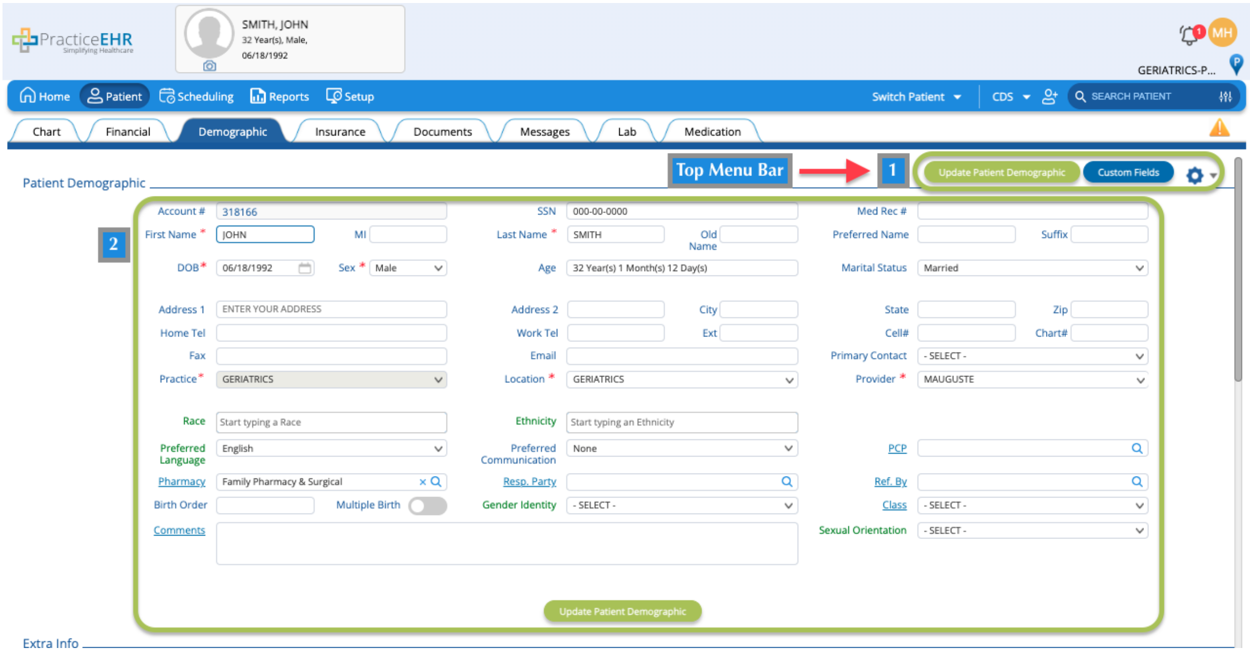
6. *Visits*

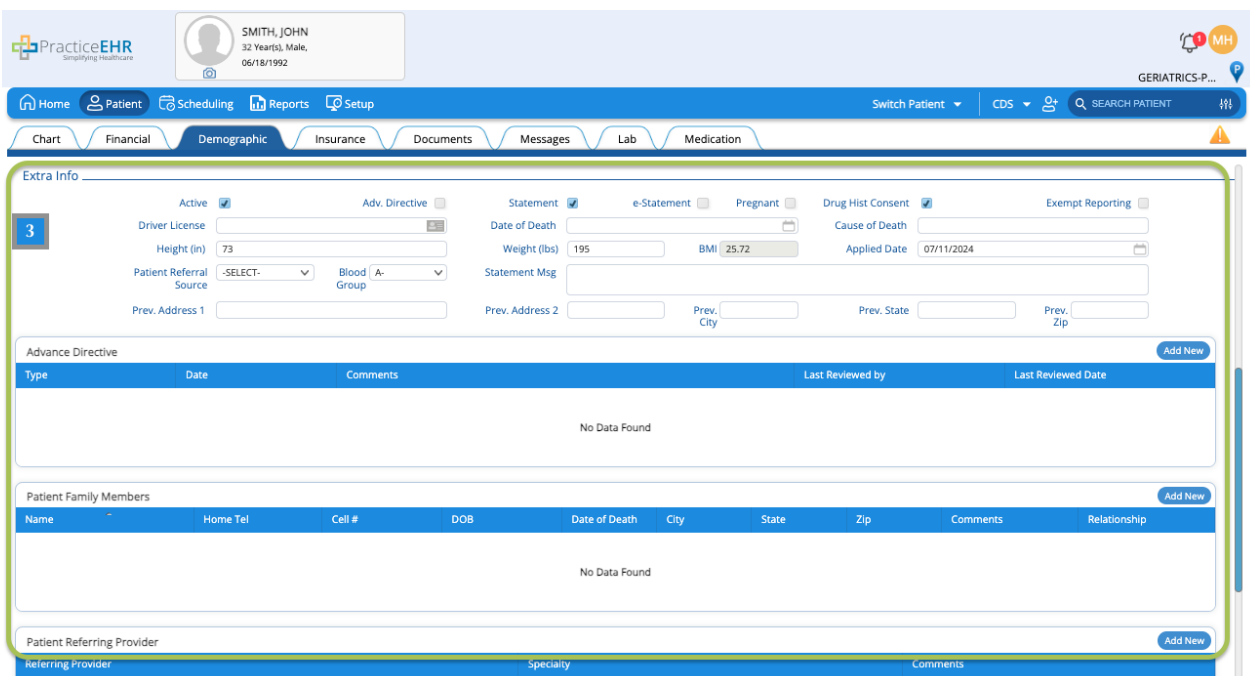
This is a crucial section of the financial tab, which enlists the financial record of individual patient visits. The user can check the details of the visit by clicking the visit number assigned to each visit.

Moreover, the practice can post payment against each visit individually by clicking on the visit line and clicking "Patient Payment" in the top right corner of the section.

2. Demographic

The demographic tab consists of a significant amount of crucial patient information and is divided into two main sections, i.e., "Patient Demographic" and "Extra Info."





1. *Top Menu Bar (Demographic Tab)*

The top menu bar can be used to take various actions:

- **Create RCM Task:** The user can create RCM tasks using this option.
- **Update Patient Demographic:** Patient demographics can be updated using this option once they are modified.
- **Custom Fields:** This option will display custom fields created through the Setup module, as discussed in the "Setup Module" guide.
- **Demographic Tools:** Clicking the blue gear icon "⚙" will open a drop-down menu, which offers different functions frequently used by the front desk staff.

2. *Patient Demographic*

The demographic section has seven mandatory fields identified by a red mark before each box. These fields represent basic and crucial patient information that can not be left blank.

There are also five fields displayed in a green font that collect data for meaningful use by the practice, like a patient's race, ethnicity, preferred language, gender identity, and sexual orientation.

The **Comments** box allows the support team to color-code the patient with a unique identifier. The color will then be displayed as a dot against the patient's name.

Once modified, it is crucial to update the patient demographic information using the "***Update Patient Demographic***" option at the end of the Patient Demographic section just below the Comments box.

3. *Extra Info*

While most of the options here are self-explanatory, there are a few worth explaining:

- The **Driver License** can be added to the patient demographic using a scanner.

- The **Drug Hist Consent** box should be checked once the patient has signed the "Practice Consent to Treatment" form. It will allow the practice to access the online drug history and save time entering a patient's current or past medication list.

