Practice EHR | User Guide

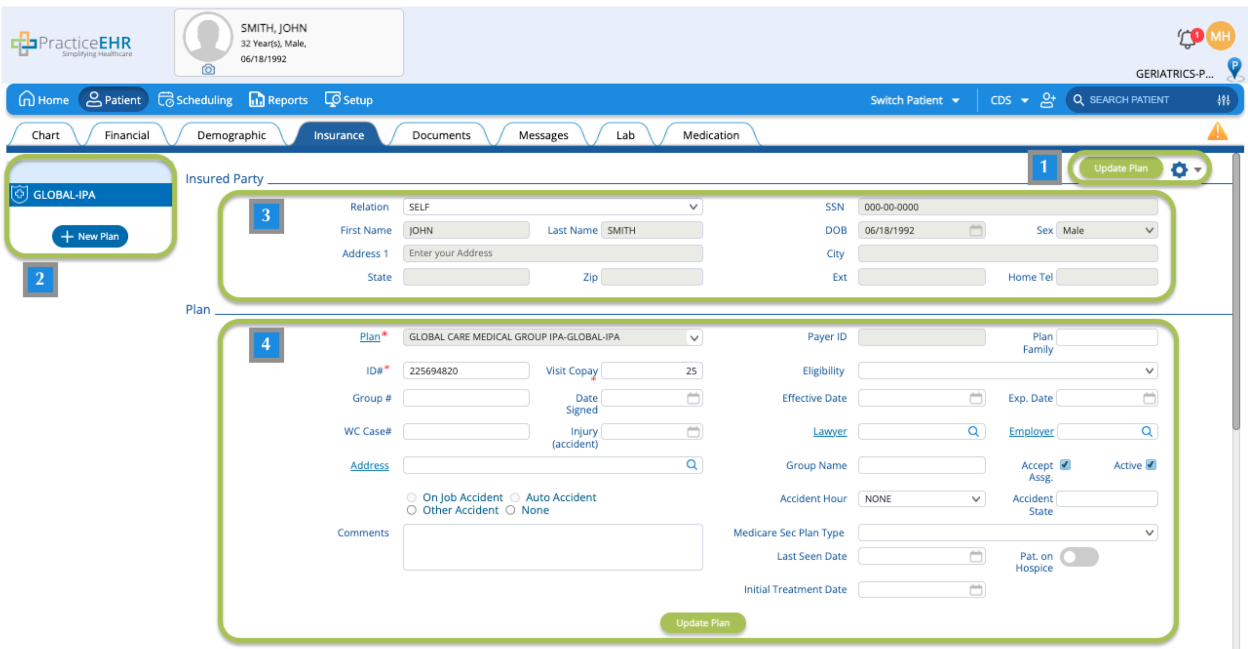
Patient Module | Part 4

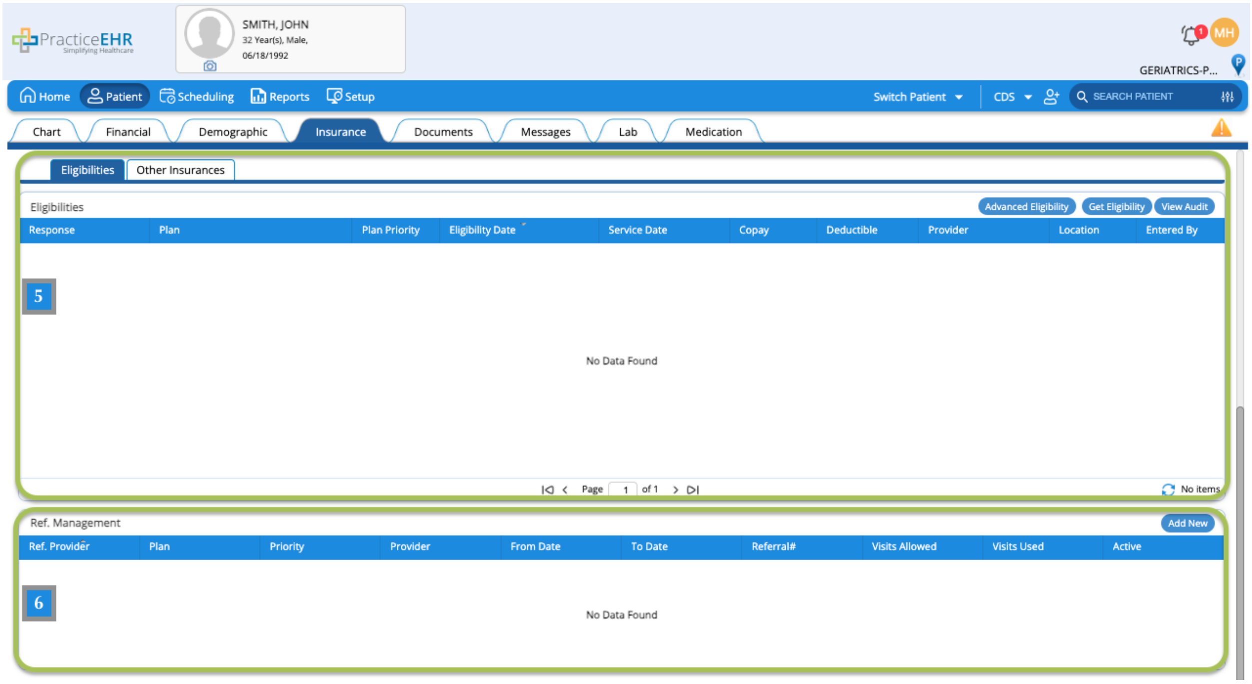
Patient Module

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. Insurance

This tab within the Patient module contains patient information related to a patient's insurance plans. The Insurance tab is divided into many sections, i.e., Insured Party, Plan, Referral Management, Case Management, and Eligibilities.



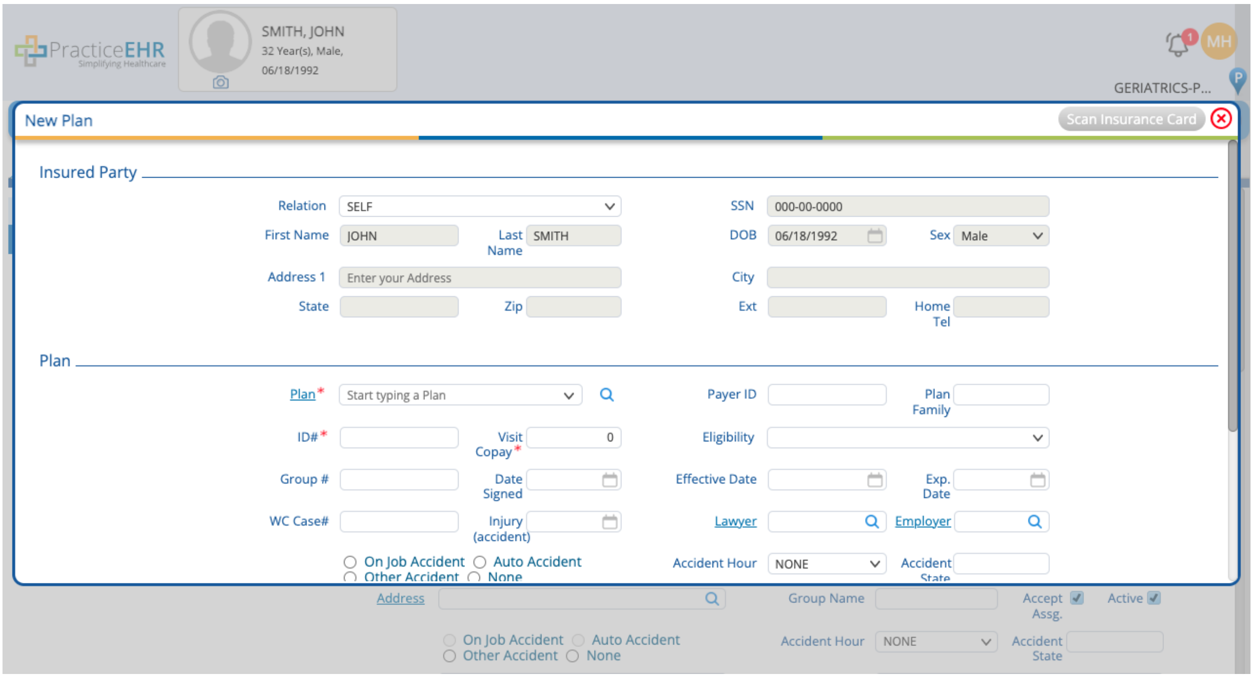


1. Top Menu Bar (Insurance Tab)

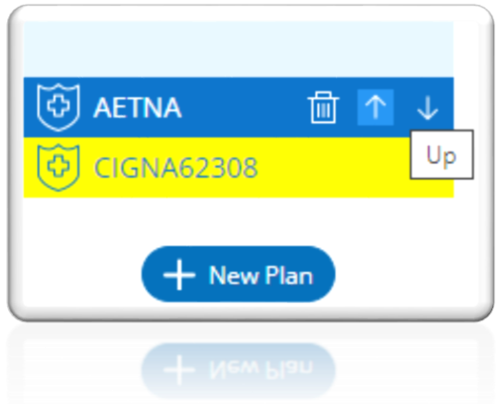
- **Update plan:** Any changes made in the subsequent sections can be saved by clicking this option.

2. Adding Insurance Plan

The user can associate an insurance plan with the patient by clicking "**+ New Plan.**"



- Some fields will appear shaded, which implies that changes can not be made to these fields. However, the information can be updated through the Demographic tab.
- The plan can be selected from a repository through a drop-down menu. However, the plan must be entered into the master directory through the Setup module.
- ID# is a patient's specific identification number provided by the plan.
- Visit copay amount for the plan can be set by entering the amount in the Copay box. If the plan does not have any specified Copay or the information is unavailable, the user should enter "0" instead.
- Once the available information is entered, the user should click "**Create Plan**" to save the plan.
- The sequencing of the associated plans will be displayed in the upper left corner of the screen.



- Each payer can be moved into the primary or secondary position by using arrows that will appear when the cursor hovers over this section.

3. Insured Party

The Insured Party section will populate automatically based on the information provided in the demographic tab if the "**Relation**" is identified as "**SELF**." Otherwise, the data can be entered manually for any relation other than SELF.

4. Plan

This section will display information related to a specific plan selected. The data can be modified and updated by clicking "**Update Plan**."

5. Eligibilities

The Eligibilities section serves as the last checkpoint to ensure that correct information is entered in the Plan section. Practice EHR automatically runs an eligibility check on each scheduled appointment 24 hours prior to the appointment.

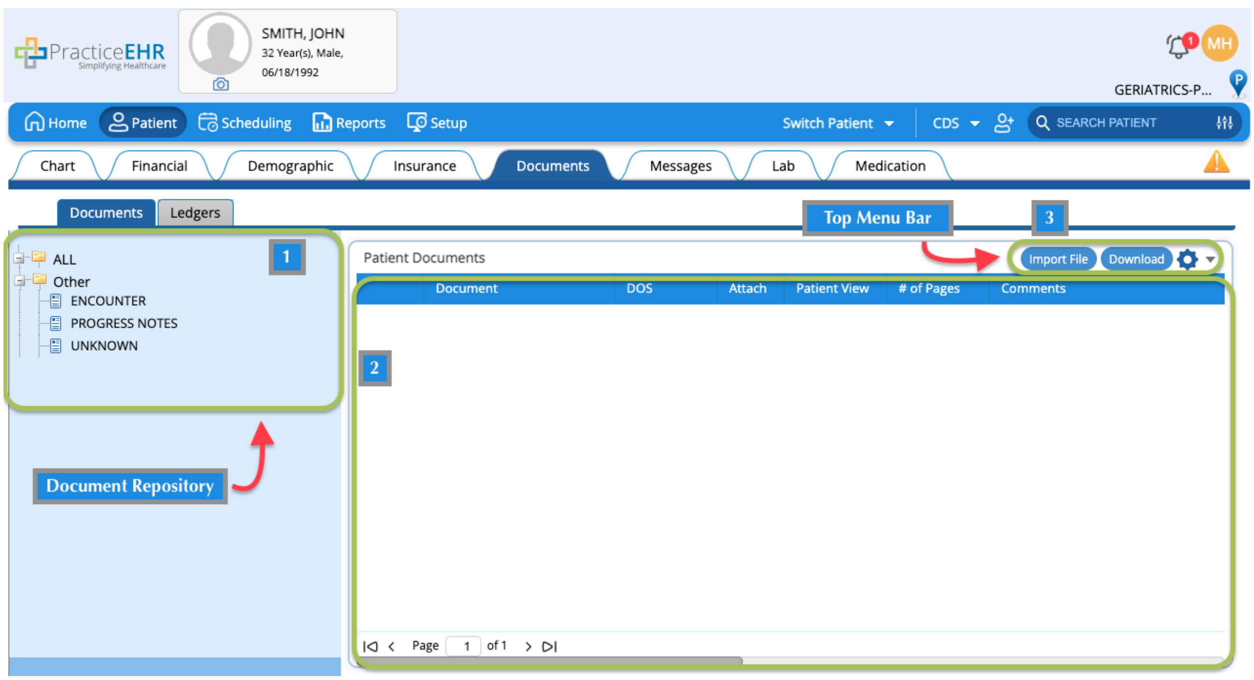
The results of the eligibility checks will be displayed in the Eligibilities section and the Calendar section of the Scheduling module.

6. Ref. Management

A specific insurance plan may require a referral associated with a specific number of visits or time frame for which the patient may be covered. The referral number and related details can be saved in the Ref. Management section.

2. Documents

The Documents tab is at the heart of the medical record and is one of the most crucial parts of Practice EHR. All documents generated in and faxed, scanned, or imported into Practice EHR can be located in this tab.



1. Document Repository

Each document is assigned a type or category to assist with the organization and retrieval of a specific document when required. All of these categories can be seen on the left side of the screen in the Documents tab.

2. *Documents*

Clicking on a specific document type or category will display associated documents in the Documents section on the screen.

From here, a user can access the required document by clicking the respective hyperlink, which will open the Document Viewer. Within the Document Viewer, the user can make modifications, add notes, and even print the document.

The user can check the box against a document under Patient View to allow the patient to access the document through their Patient Portal.

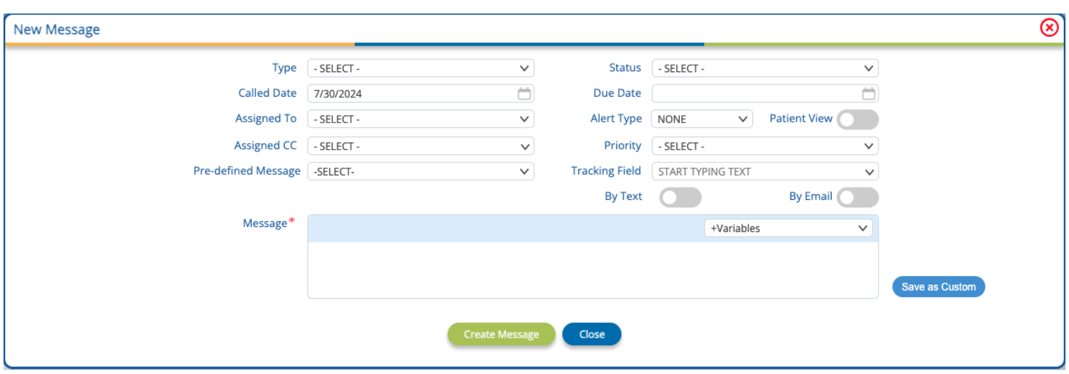
The user can also add comments against each document through this section.

3. *Top Menu Bar (Documents Tab)*

Import File: The user can import various documents, like driver's license, insurance card, etc., using this option.

Download: This option allows the user to download the required document(s), which will be displayed in the "**Inbox**" section of the "**Home**" module once ready for download.

Link to Message: The user can also link a document to a message by clicking the gear icon and selecting the "Link to Message" option. To do so, select the document and click "Link a Message," which will open the following window:



The user can then assign the message to the relevant provider or staff member for document review.

Scan: This option, accessible through the gear icon, allows the user to scan a document to be saved into Practice EHR.