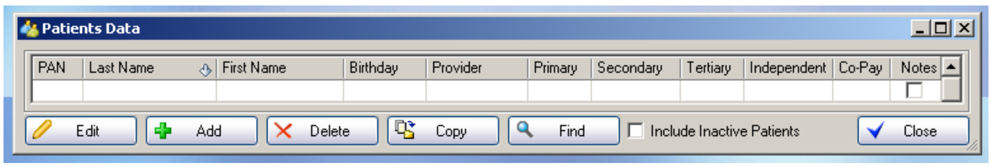
6C. WORKING WITH PATIENT RECORDS (IN GENERAL)

This area will discuss how to **FIND**, **INACTIVATE/ACTIVATE**, **COPY**, and **DELETE** a previously created Patient Record.

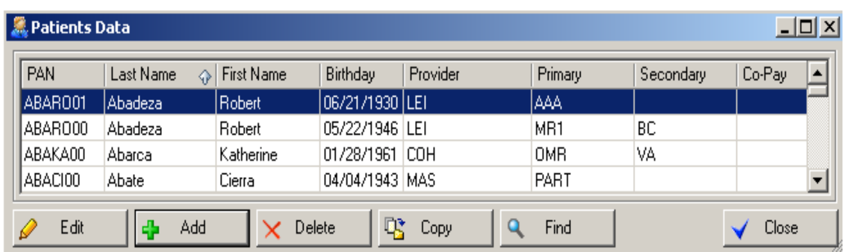
To access the **Patients Data screen**, click on the "**Patients**" Icon on the Left Navigational Menu, or, from the Top Navigational Menu, select "**Patients Data**".



A. Finding a Patient Record

There are 4 ways you can find a Patient's Record within the MPM Office program:

1. Sorting Patient Data (Least to Greatest or Greatest to Least)



To sort the "**Patients Data**" screen alphabetically or numerically (depending on the information found in the fields provided) from least to greatest or greatest to least (a small arrow appearing on the right side of the column name will indicate which direction the column is being sorted), left click on the column name field.

2. Columnar Search

Left click once on the column name field and type the fist three letters or numbers of the information you are trying to find. You will see the rows move and the one with the information you are entering will become highlighted.

3. Using a Patient's Social Security Number (SSN)

Click the "**Find**" button at the bottom of the "**Patients Data**" screen to open the "**Find Text**" box. Enter Patient's Social Security Number in the field labeled "**SSN**", and then click the "**Find**" button to the right of this field.

4. Using a Patient's Insurance ID ("Ins. ID")

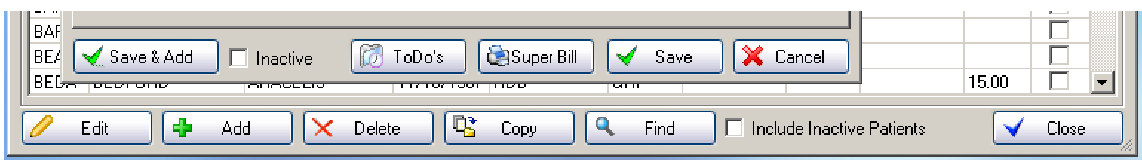
Click the "**Find**" button at the bottom of the "**Patients Data**" screen to open the "**Find Text**" box. Enter the Patient's Social Security Number Insurance ID number in the field labeled "**Ins. ID**", and then click the "**Find**" button to the right of this field.

B. Inactivating/Activating a Patient Record

Your office will have some Patients whom either come to see you only once and never again, or whom have not seen you for a long time because they have moved, they passed on, or they have been released from your Provider's care.

The MPM Office program allows you to whittle down the number of Patients that appear in your **Patient Data** screen by allowing you to hide them by making them "**Inactive**".

To **Inactivate** a Patient Record, double-click on the Patient's Record to open it, and from the bottom left of the Patient Record, click in the check box labeled "**Inactive**" and then click the **SAVE** button when done. The Patient Record is then removed from the Patients Data screen.



To make an **Inactive** Patient Record **Active** again, simply click on the box labeled **Include Inactive Patients** found towards the bottom right of the **Patients Data** screen. A column will appear on the far left labeled **INACTIVE** with a check mark in the boxes below next to those accounts that were made inactive. Find the Patient Record you want to reactivate and double-click on it to open it. From the bottom left of the Patient Record, click in the check box labeled "**Inactive**" to remove the check mark that is currently in there, and then click the **SAVE** button when done. The Patient Record will then reappear in the Patients Data screen.

C. Copying a Patient Record

Certain circumstances may necessitate having to create a second record for the same Patient.

Take the following steps to create a copy of the Patient Record:

1. Click on the “**Patients**” icon located in the Left Navigational Menu to open the “**Patients Data**” screen.

2. Left click on the appropriate Patient Record to select (highlight) it.

3. Click the “**Copy**” key at the bottom of the “**Patients Data**” screen to create a new, separate account for your patient. This new account will contain all of the same information found under the Demographic and Insurance tabs as in the original account.

D. Editing a Patient Record.

To access this section, click on the “**Patients**” Icon on the Left Navigational Menu, or, from the Top Navigational Menu, select “**Patients Data**”.

Note: The record of the Patient whose data you want to edit must not opened on any other computer that may be sharing the same data file for this program.

1. Left click on the name of the Patient Record you want to edit.
2. Click the “**Edit**” button at the bottom of the screen to open the “**Edit Patient Data**” screen containing the Patient you selected.
3. Find the area you need to edit and make the appropriate changes.
4. Click on the “**Save**” button at the bottom of the page to close the “**Edit Patient Data**” screen and return to the “**Patients Data**” window.

E. Deleting a Patient Record

To delete a Patient Record, click on the “**Patients**” Icon on the Left Navigational Menu, or, from the Top Navigational Menu, select “**Patients Data**”, to open the “**Patients Data**” screen and select the Patient Record you want to delete by left-clicking on the **Patient Account Number** (**PAN**).

Note: The record of the Patient you want to delete must not be opened on any other computer that may be sharing the same data file for this program.

Make sure the following three areas in the Patient record are completely empty before attempting to delete the Patient record:

1) In the **Credit** box, make sure that there are no credits in the account. Click on the "**CREDIT**" button at the top of the "**Edit Patient Data**" screen and left click on the credit to be deleted. Click on the "**Delete**" button to delete it.
2) Next, check to make sure that there are no **Prior Authorizations** in the Patient's Record under the **Defaults Tab**. Use the drop-down menu arrow to open the "**Prior Authorization**" field, and select **EDIT**. Left click on the one you want to delete, and then click the "**Delete**" button.
3) Finally, make sure there are no **Claims (open or closed)** in the Patient's Record. Delete open claims by clicking the "**Claims**" button at the top of the "**Edit Patient Data**" screen and deleting them from there. Closed claims are found under the "**Closed Claims Tab**" towards the center of the "**Edit Patient Data**" screen. Please refer to section titled "**CLAIMS**" for more information on how to delete previously entered claims.

When done with each section, close the Patient Record completely returning back to the "**Edit Patient Data**" screen. Left click on the Patient Record you want to delete, and then click on the "**Delete**" button at the bottom of the screen. Answer "**Yes**" when asked if you are sure you want to delete the record.