

Managing Patient Information

This section contains information about the following tasks:

- Creating a patient record
- Searching for a patient record
- Changing patient information

Creating a Patient Record

To create a patient record, follow these steps:

1. On the **Patients** menu, click **New Patient**.

Tip: Alternatively, you can click the **New Patient** link on the Patient Search page.

The screenshot shows the MayoACCESS web application interface. The top navigation bar includes 'Patients', 'Orders', 'Results', 'User', 'Master Files', 'System', and 'Help'. The 'Patients' menu is open, showing options like 'New Patient', 'Patient Search', 'No Patient Selected', 'Order History', 'Orders Pending Results', 'Patient Reports', 'Results History', 'Demographics', 'Encounters', 'Insurance', 'New Order', and 'Audit History'. The 'New Patient' option is highlighted. The main content area is divided into sections for 'Required Fields' (Ordering Location, Ordering Physician, NPI, Set Callbacks, Set Faxbacks), 'Order #', 'Collected' (Date and Time), 'Tests', 'Report Note', 'Perf Lab Note', and 'Forward Results'. There are buttons for 'Cancel', 'Clear', 'Standard Order Entry', and 'Continue' at the bottom.

2. On the Patient Demographics page, click the **Details** tab.
3. On the Details page, specify the information for this patient, including the patient's address, city, state, and zip code. The highlighted fields indicate information that is required.

For more information about the fields on this page, go to [Patient Details](#) on page 28.

4. To specify third-party billing for this patient, select **Insurance** for the **Billing Type**.
5. To view third-party billing for this patient, click the **Insurance** tab.

| Active Insurance Providers | | | | | | | | Missing Information MI |
|---|----------|---------|---------|--------------|--------------------|----------|--|------------------------|
| Insurance Provider | Policy # | Group # | Expires | Billing Type | Pre-Approved/Local | Priority | | |
| | | | | | | | | |
| <a>New Provider <a>Edit Provider <a>Remove Provider | | | | | | | | |

| Associated Insurance Providers | | | | | |
|--|----------|---------|---------|--------------|--------------------|
| Insurance Provider | Policy # | Group # | Expires | Billing Type | Pre-Approved/Local |
| | | | | | |
| <a>Delete Provider <a>Edit Provider <a>Activate Provider | | | | | |

6. On the Insurance page, you can view the primary insurance information for this patient.
7. If the patient has a secondary insurer, click **Show Secondary Insurer** to view the insurance information.
8. Click **Save**.

From this page, you can click **New Order** to order a test for this patient.

The Patient Demographics page also contains the following links:

| Link | Description |
|----------------|---|
| Guarantor | Guarantor information for the patient |
| Allergies | Allergy information for the patient |
| Contacts | Emergency contact information for the patient |
| Questionnaires | Questionnaires for the patient |
| New Patient | Link to add a patient |
| Patient Label | Label that shows patient information |

Tip: For more information about each of these links, click the arrow next to the link name, and then click the **Information** link.

Patient Details

To display the detailed demographic information for the patient, click the **Details** tab on the Patient Demographics page.

The screenshot shows the 'Patient Demographics' form with the 'Details' tab selected. The form is divided into two main columns. The left column contains fields for Billing Type (set to 'Account'), Prefix, Name (L F M), Suffix, AKA, Marital Status, Patient ID (with an 'Auto Assign ID' button), Ordering Location, SSN, DOB, Primary Physician, Sex, Language, and Race. The right column contains fields for Address, City, State, ZIP Code, Phone #, E-mail, Drivers License, Notes, and Ethnicity. At the bottom, there are navigation buttons for 'Save' and 'New Order', and a footer with links for 'Guarantor', 'Allergies', 'Contacts', 'Audit Details', 'Questionnaires', 'New Patient', 'Unlock Forwarded Patient', and 'Patient Label'.

The following table provides instructions for completing the information on this page:

| Field | Instructions |
|----------------|---|
| Billing Type | Select Account to bill the test to the client. Select Medicare to bill the test to Medicare or Medicaid. Select Insurance to bill the test to patient insurance. |
| Prefix | Enter a title for the patient, such as Mr., Mrs., or Miss. |
| Name (L F M) | Enter the last name, first name and, if applicable, the middle initial or middle name for the patient. |
| Suffix | Enter a title for the patient, such as Sr. or Jr. |
| AKA | Enter any other name that the patient uses, such as a nickname or a maiden name. |
| Marital Status | Select the patient's marital status from the drop-down list. |
| Patient ID | Enter an identification number for the patient. Tip: Click Auto Assign ID to generate a new patient identification (ID) number. |

| Field | Instructions |
|-------------------|---|
| Ordering Location | If specified, all orders for the patient will default to the selected location. |
| SSN | Enter the patient's social security number. |
| DOB | Specify the patient's date of birth. |
| Primary Physician | Select or enter the name of the patient's primary physician. Tip: To enter the information for a physician, click the Primary Physician link. For instructions, see Creating a Physician Record on page 103. |
| Sex | Select the patient's sex from the drop-down list. |
| Language | Patient's primary language (not used). |
| Race | Patient's race (not used). |
| Address | Enter the patient's home address. |
| City | Specify the patient's city of residence. Tip: Enter the patient's zip code to automatically complete the City and State fields. |
| State | Enter the patient's state of residence. |
| ZIP Code | Enter the patient's zip code. |
| Phone Number | Enter the patient's telephone number. |
| E-mail | Enter the patient's e-mail address. |
| Drivers License | Enter the patient's driver's license number. |
| Notes | Enter any other relevant information about the patient. |
| Ethnicity | Patient's nationality (not used). |

Patient Insurance

To display the insurance information for the patient, click the **Insurance** tab on the Patient Demographics page. This page contains the patient's primary and secondary insurance information.

The screenshot shows the 'Patient Demographics' page with the 'Insurance' tab selected. At the top right, patient information is displayed: ID: [redacted], Male, 9M, Prim. Phys: [redacted], SSN: [redacted]. Below this are three tabs: 'Details', 'Insurance', and 'Encounters'. The 'Insurance' tab is active, showing two sections: 'Active Insurance Providers' and 'Associated Insurance Providers'. Both sections contain empty tables with columns for Insurance Provider, Policy #, Group #, Expires, Billing Type, Pre-Approved/Local, and Priority. Below the 'Active Insurance Providers' table are buttons for 'New Provider', 'Edit Provider', and 'Remove Provider'. Below the 'Associated Insurance Providers' table are buttons for 'Delete Provider', 'Edit Provider', and 'Activate Provider'. At the bottom of the page are buttons for 'Questionnaires', 'New Patient', 'Unlock Forwarded Patient', 'Patient Label', and 'New Order'.

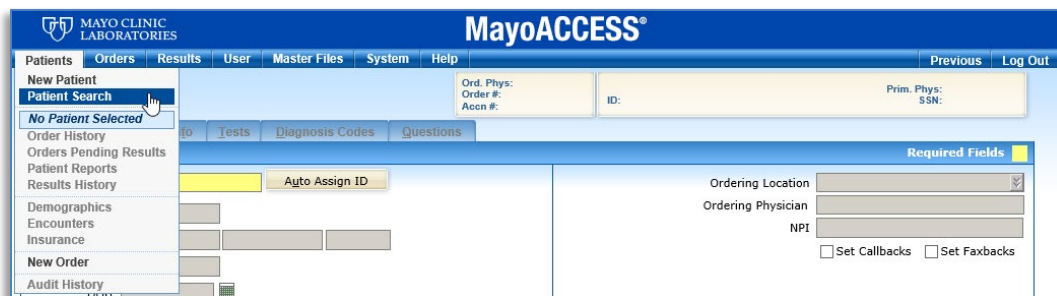
The screenshot shows the 'New Insurance Provider for' form. At the top, there are radio buttons for 'Pre-Approved' (selected) and 'Local'. A 'Required Fields' indicator is in the top right. The form is divided into two main sections: 'Insurer' and 'Subscriber'. The 'Insurer' section includes a dropdown menu for 'Insurer', a 'filter by:' section with checkboxes for 'Medicare' and 'Medicaid', and fields for 'Network', 'Responsible Party (L F MI)', 'Issue Date', 'Expires', and 'Policy #'. The 'Subscriber' section includes fields for 'Subscriber (L F MI)', 'Address', 'City, State ZIP Code', and 'Employer'. On the right side, there are fields for 'Status', 'Lab', 'Group ID #', 'Priority' (set to 'Primary'), 'Relationship', 'Sex', 'SSN', 'DOB', and 'Phone'. At the bottom, there are buttons for 'Copy Subscriber Information From Patient', 'Copy Subscriber Information from Guarantor', 'Save', and 'Cancel'.

Searching for a Patient Record

To locate a patient record, follow these steps:

1. On the **Patients** menu, click **Patient Search**.

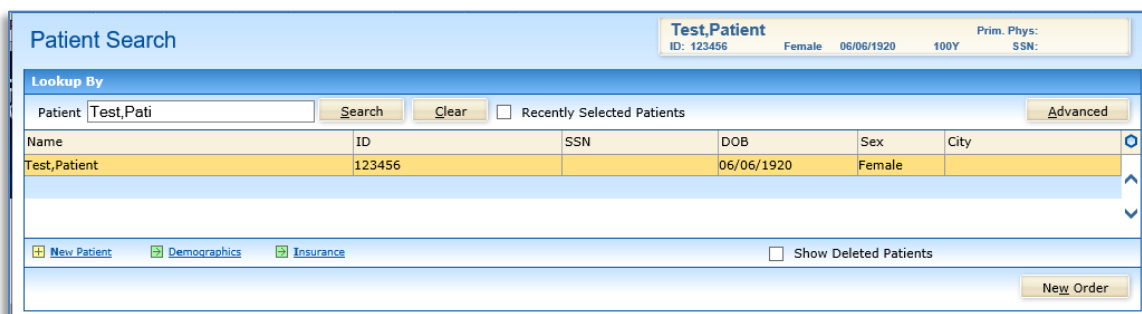
Tip: Alternatively, you can click **Patient Search** in the extended frameset.



2. In the **Patient** text box on the Patient Search page, enter either the ID number or the first few characters of the patient's last name.
3. Click **Search**.

Tips:

- If you are unsure of the ID number or the spelling of the patient's last name, enter just the letters or numbers that you know. The search results contain all the patient records that match the numbers or letters that you specify. For example, if you enter TES in the **Patient** text box, and then click **Search**, all patients with last names or records that begin with TES are shown.
- To display patient records that were recently opened, click the **Recently Selected Patients** check box.



To order a test for that patient, select the patient record, and then click **New Order**. To view patient demographics or insurance information, click the **Demographics** or **Insurance** link.

Changing Patient Information

To change patient information, follow these steps:

1. On the **Patients** menu, click **Patient Search**.
For information about searching, see [Searching for a Patient Record](#) on page 30.
2. Select the patient for whose record that you want to change
3. To change the patient's demographics, click the **Demographics** link.

Tip: You can access this page by clicking **Demographics** on the **Patients** menu.

- To change the patient's insurance information, click the **Insurance** link.

Tip: You can access this page by clicking **Insurance** on the **Patients** menu.

- On the Patient Demographics page, change the values in any of the fields on the Details or Insurance pages. To switch between the pages, click the **Details** or **Insurance** tab.

The screenshot shows the 'Patient Demographics' form for a patient named 'Test Patient'. The form is divided into two main sections: 'Details' and 'Insurance'. The 'Details' section contains the following fields:

- Billing Type: Account (dropdown)
- Prefix: (text input)
- Name (L F M): TEST PATIENT (text input)
- Suffix: (text input)
- AKA: (text input)
- Marital Status: (dropdown)
- Patient ID: 123456 (text input) with an 'Auto Assign ID' button
- Ordering Location: (dropdown)
- SSN: (text input)
- DOB: 06/06/1920 (text input)
- Primary Physician: (dropdown)
- Sex: Female (dropdown)
- Language: (dropdown)
- Race: (dropdown)

The 'Insurance' section contains the following fields:

- Address: (text input)
- City: (dropdown)
- State: (dropdown) and ZIP Code: (text input)
- Phone #: (text input)
- E-mail: (text input)
- Drivers License: (text input)
- Notes: (text area)
- Ethnicity: (dropdown)

At the bottom of the form, there are several links: Guarantor, Allergies, Contacts, Audit Details, Questionnaires, New Patient, Unlock Forwarded Patient, and Patient Label. A 'Save' button is located at the bottom right.

- To change additional information, click the appropriate link at the bottom of the page. For example, you might want to change the address on the page, and then click the **Guarantor** link to change the address for the guarantor for this patient.

Tip: To view information about any of the links, click the arrow next to the link name.

Note: If the patient's name is dimmed, this means that pending reports are still open for this patient and that the patient name cannot be changed until the report is final.

- Click **Save**.