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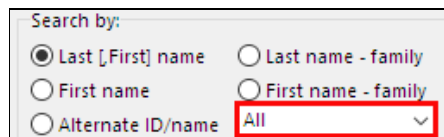
## Enter Patient Demographics

Your practice may collect or require additional information at the time of registration. Required fields are listed below.

1. Access the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button.**
2. Click the **Patient Finder** button to search for the patient.


**Note:** It is a Best Practice to conduct a full patient search prior to creating a new patient. This helps to prevent the creation of duplicate patient records.

3. Ensure you are searching for **ALL** patients.



4. If the patient is not located, click **New Patient** to display the **Patient Chart: new patient** window.
5. Complete the Demographics section using one of the following methods.

### Copy From Sibling:

- a. Enter the patient's first and last name, date of birth, and sex.
- b. Click the **Copy From** button to open the Patient Directory.
- c. Search for the sibling to copy from, choose the sibling, and click **Select**.
- d. Complete any other information according to your practice policy.
- e. Confirm the PCP and change if necessary by clicking on the **Address Book** button .
- f. Complete the **Patient Preferred Contact Methods** by choosing an option from the drop-downs.
- g. Click **Save**.

### Not Copying From Sibling:

- a. Complete the following required fields: **Last, First, Sex, Birth date, PCP, Primary phone, and Primary Address.**

- b. Complete the **Patient Preferred Contact Methods** by choosing an option from the drop-downs.
- c. Click **Save**.

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## Enter Patient Contact Information

Individuals responsible in any way for the patient should be added to the Patient Chart as a contact. Only those individuals entered as contacts may be added as Guarantors or Insurance Subscribers in a patient's record.

1. Within the Patient Chart, navigate to **Family Contacts**.
2. Click **Add**.
3. The Contact Finder window will display one of the following scenarios:
  - The window displays contacts with the patient's last name.
    - a. Highlight the contact you want to add and click the **Select** button.  
**Note:** If the contact has a different last name, search for it in the Contact Finder window. If no match exists, click the **New** button.
    - b. Review and complete the contact information.
    - c. Select the Preferred Contact Methods by choosing an option from the drop-downs.
  - If no last name match exists, the user will be prompted with "No Contacts for this patient. Create new contact record?"
    - a. Click **Yes** to create a new contact record.
    - b. Enter the contact's information.  
**Note:** You can double-click in the **Last Name** and **Address** fields to auto populate information if the contact's last name, address, and primary phone is the same as the patient's. Complete the Patient
    - c. Select the Preferred Contact Methods by choosing an option from the drop-downs.
    - d. Click **Save**.
4. In the top section of the **Family Contacts** window, indicate the contact's relationship to the patient:
  - **Role/Reason:** Contact's relationship to the patient.
  - **Authority:** Authority the contact holds regarding patient's care.
  - **Res?:** (Resides with) Contact resides with the patient. This links patients to a Social Family. [See Linking Families](#) below. A confirmation window displays asking if you would like to sync the contact's address to the patient. Click **Yes** or **No** after reviewing the information.
  - **Start/End date:** Type into the field or choose a date from the drop-down.
  - **Portal:** Not applicable to OP Intelichart Patient Portal.


- Click the **Save** button at the bottom.

**Note:** If Mother or Father was chosen as a Role/Reason, upon saving you will be prompted to indicate if the contact is the genetic mother or father: **Yes**, **No**, or **X** (if unsure or did not ask). This links patients to a Genetic Family. [See Linking Families](#) below.


- Repeat this process for each contact that should be added to the patient's record.

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## Enter Insurance Information

- Within the Patient Chart, navigate to **Insurance**.
- Click the **Add** button .
- Add insurance details by using one of the following methods:

### Copy From Sibling:

- Click the **Copy From** button.
- Click the **Family** button and select the sibling to copy from.
- Click the **Copy Record** button.
- Select the policy to copy.
- Click the **Copy Record** button.
- Confirm the information copied is correct and make changes if necessary.
- Click the **Save** button .

### Not Copying From Sibling:

- Enter the following information:
  - Insurance Subscriber:** Use the drop-down (field highlighted in red) to select the insurance subscriber.

|   |   |   |
|---|---|---|
| <div style="background-color: red; color: white; padding: 2px;">▼</div> |   |   |
| First name:   | <input type="text"/>                                    | <input type="text"/>  |
| Sex/birth date:   | <input type="radio"/> Male <input type="radio"/> Female | <div style="border: 1px solid black; padding: 2px;">▼</div> |

**Note:** If the subscriber is not the patient (self), the person must first be entered as a Family Contact to appear in the drop-down.

- Sex/birth date:** Gender and date of birth of the subscriber. Depending on the subscriber, this could either be the child or parent.

- **Patient Rel to guarantor:** Relationship of the patient to the subscriber (e.g., child, self, mother, father, spouse, etc.)
- **Insurance Carrier:** Use the **Ellipsis** button to select the insurance from the **Insurance Carrier Lookup** window.
- **Subscriber ID:** Enter the Subscriber ID number.

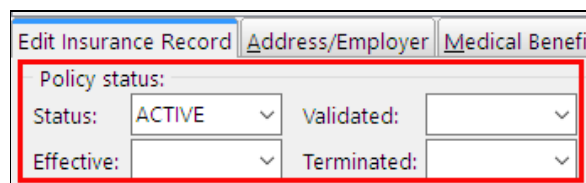
**Note:** The fields listed above are required to save the insurance record.

- If you have an integrated clearinghouse, click the **Validate** button at the top of the window to validate the insurance.

**Note:** Insurance validation only functions if you have contracted for Real-Time Eligibility with your clearinghouse.

- The fields below may populate from validation. If you do not have an integrated clearinghouse, manually enter the information.

- **Plan Name:** This field may only populate when validating insurance.  
**Note:** This is not a free text field and cannot be modified.
- **Group Number:** Confirm or enter the group number.
- **Group Name:** Confirm or enter the group name.
- **VFC Eligibility:** Confirm or select VFC eligibility.
- **Patient responsibility Type:** Confirm or select the patient responsibility for the policy.
- **Copays:** Confirm or enter copay obligations in the appropriate copay fields.
- Select a status and enter any notable dates regarding the policy in the **Policy status** section.



| Edit Insurance Record   Address/Employer   Medical Benefit |        |             |  |
|--|--------|-------------|--|
| Policy status:   |        |             |  |
| Status:  | ACTIVE | Validated:  |  |
| Effective:   |        | Terminated: |  |

- In the **Patient Responsibility Guarantor** field located at the top of the window, select the person who should receive statements for the patient. This links patients to a Financial Family. [See Linking Families](#) below.

**Note:** This may differ from the insurance subscriber at the bottom of the window.

- Select the **Statement Method**.

- **Mail:** A statement will be sent via USPS mail when a statement file is generated.
- **Credit card on file:** Balances on the patient's account will be paid using the credit card that has been saved on file.
- **Hold (don't send):** Statements will not be sent until another method has been selected.

- Click in the **Ranking** field to select **P**- Primary, **S**- Secondary, **T**-Tertiary, or **C**- to Clear the ranking. This saves the entry.

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## Enter Notes and Additional Info

The Notes/Addl Info. is where you can add or edit notes or comments pertinent to the patient.

- Within the Patient Chart, navigate to **Notes/Addl Info**.
- (Optional) Enter the following information into the Miscellaneous Notes window. The record autosaves as you enter information.
  - Default Well Visit Type:** Select the default Well Visit type for this patient.
  - Default Sick Visit Type:** Select the default Sick Visit type for this patient.
  - Employment / Student Status:** Defaults to part-time student/not employed, change if necessary.
  - Marital Status:** Defaults to single, change if necessary.
  - Miscellaneous Notes:** Provide any specific note for the patient (for example, patient is always late).  
**Note:** Add @@ prior to the text of the note to make the note a popup note when appointments are scheduled.
  - Billing Notes:** Provide any specific type of billing note for the patient.  
**Note:** Add @@ prior to the text of the note to make the note a pop up note.
  - Referred to practice by:** If the office keeps track of who refers a patient to their practice, enter that reference here.

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## Set Patient Privacy

Privacy/Sharing allows you to add privacy information and restrictions to the patient's chart. The record autosaves as you complete fields. To add privacy restrictions:

- Within the Patient Chart, navigate to **Privacy/Sharing**.
- (Optional) Enter the following information into the Privacy/Sharing window. The record autosaves as you enter information.
  - Overall chart visibility:** Click the drop-down and choose from the list. This determines which staff members can access the patient's record.  
**Note:** The default is Any staff member.
  - Social Security Number:** Click into the field and type.

- **Contact Constraint:** Click on the radio button to choose an option. Elaborate on the restrictions in the **Privacy Notes** box.

**Note:** If a **Restricted** option is selected, the patient's chart will include a red **Contact Constraint** indicator in the upper left corner of the chart navigation panel.

- **Consent of Submission to Third Party:** This information is typically entered by the clinical team and displayed here.
- **Immunization Registry Reminder/Recall Preference:** This information is typically entered by the clinical team and displayed here.

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## Add Patient Consents

Consent Forms lists and adds the consent forms and directives that are linked to a patient's record. To add consents:

1. Within the Patient Chart, navigate to **Consent Forms**.
  2. Click the **Add** button located at the bottom of the grid.
  3. Click the **Document Type** drop-down and select a document type.
  4. Add a **Note**, if applicable.
  5. Enter the **Begin Date** and **End Dates**.
- Note:** The Begin Date defaults to the current date but should be edited as appropriate.
6. Select **Correspondent**.
  7. Click the **Consent Mode** drop-down and select the consent mode.
  8. Click **Attach Document**.
  9. Double-click or click on the scanned consent form and select **Use Selected Document**.
  10. Click the **Save** button.

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## Add Clinical Contacts

This is an optional component of the Patient Chart. Clinical Contacts keeps track of contacts such as specialists, providers, and pharmacies that participate in the care of a patient. After adding a Clinical Contact, the record is autosaved. To add to the patient's Clinical Contacts:

1. Within the Patient Chart, navigate to **Clinical Contacts**.
2. From the Clinical Contacts window, click **Add**.

3. Locate and highlight the contact in the **Address Book**.
4. Click **Select**.

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## Linking Families

OP recognizes three types of “families”: Social, Financial, and Genetic. Below, you will find a short description of each type of family, as well as the steps to link family members or siblings to a patient. In order for Patients to be displayed as linked, each patient involved must have an Active status selected in their Patient Chart button > Basic Information.

**Social Family:** Links patients who reside with the same contact. Social families in OP link patients together for the purpose of easily documenting the patient’s Social History. To link patients socially:

1. In the Patient Chart, navigate to: **Demographics** group > **Family Contacts**.
2. Select the contact.
3. Select **Res?** checkbox.

**Financial Family:** Links patients who share the same Patient Responsibility Guarantor. Financial families in OP link patients together for the purpose of transferring credits between patients and for family billing purposes such as family statements. To link patients financially:

1. In the Patient Chart, navigate to: **Account** group > **Insurance**.
2. Select the **Patient Responsibility Guarantor**.

**Genetic Family:** Links patients who share the same genetic parents. Genetic families in OP link patients together for the purpose of easily documenting the patient’s Family History. To link patients genetically:

1. In the Patient Chart, navigate to **Demographics** group > **Family Contacts**.
2. Select the contact’s **Role Reason** as **Mother/Father**.
3. After saving, click **Yes** to agree the contact is the genetic mother or father.

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