

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.



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.

A screenshot of the 'Patient Demographics' form in the MayoACCESS system, specifically the 'Details' tab. The form is divided into two 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), 'SSN', 'DOB', 'Primary Physician', 'Gender', 'Language', and 'Race'. The right column contains fields for 'Address', 'City', 'State', 'ZIP Code', 'Phone #', 'E-mail', 'Drivers License', 'Notes', and 'Ethnicity'. A 'Required Fields' indicator is visible in the top right corner of the form area. At the bottom, there are buttons for 'New Order' and 'Save'.

For more information about the fields on this page, go to [Patient Details](#) on page 29.

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

6. On the Insurance page, specify the primary insurance information for this patient.
If your site has defined local insurance, follow these steps:
 - a. Click **Local**.
 - b. Select the appropriate insurance from the **Insurer** drop-down list.
 - c. Specify the relevant insurance information, such as Policy #, Group ID #, and Subscriber information if the patient is not the subscriber.
7. If the patient has a secondary insurer, click **Show Secondary Insurer** and specify 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
MRNList	Medical record numbers for the patient
Allergies	Allergy information for the patient

Link	Description
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 sections: 'Details' on the left and 'Required Fields' on the right. The 'Details' section includes fields for Billing Type (set to 'Account'), Prefix, Name (L F M), Suffix, AKA, Marital Status, Patient ID (with an 'Auto Assign ID' button), SSN, DOB, Primary Physician, Gender, Language, and Race. The 'Required Fields' section includes Address, City, State, ZIP Code, Phone #, E-mail, Drivers License, Notes, and Ethnicity. At the bottom of the form, there are navigation buttons: 'Guarantor', 'MRN List', 'Questionnaires', 'New Patient', 'Unlock Forwarded Patient', 'Patient Label', 'New Order', and 'Save'.

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.

Field	Instructions
Name (L F M)	Enter the last name, first name and, if applicable, the middle initial or middle name for the patient.
Patient ID	Enter an identification number for the patient. Tip: Click Auto Assign ID to generate a new patient identification (ID) number.
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.
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 105.
Gender	Select the patient's gender from the drop-down list.
Language	Patient's primary language (not used).
Ethnicity	Patient's nationality (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.

Field	Instructions
Drivers License	Enter the patient's driver's license number.
Notes	Enter any other relevant information about the patient.

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.

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.

- 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.
- 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.

The screenshot shows the 'Patient Search' interface. At the top, there is a header for 'TEST,PATIENT' with details: ID: C7234588-0..., Female, 04/22/1977, 37Y, Prim. Phys: SSN: [redacted]. Below this is a 'Lookup By' section with a search box containing 'TES', a 'Search' button, a 'Clear' button, a checkbox for 'Recently Selected Patients', and an 'Advanced' button. The search results are displayed in a table with columns: Name, ID, SSN, DOB, Gender, and City. The first row is highlighted in yellow and shows 'TEST,PATIENT' with ID 'C7234588-000011', DOB '04/22/1977', and Gender 'Female'. Other rows include 'TEST,PATIENT' (ID: C7234588-000017, Gender: Female) and 'TESTING,BULKLOAD' (ID: JR10000009, Gender: Male). At the bottom of the table, there are links for 'New Patient', 'Demographics', and 'Insurance', along with a checkbox for 'Show Deleted Patients' and a 'New Order' button.

Name	ID	SSN	DOB	Gender	City
TEST,PATIENT	C7234588-000011		04/22/1977	Female	
TEST,PATIENT	C7234588-000017			Female	
TESTING,BULKLOAD	JR10000009			Male	
TESTING,BULKLOAD	JR10000010			Male	

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:

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

For information about searching, see [Searching for a Patient Record](#) on page 31.

- Select the patient for whose record that you want to change
- 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 with the 'Details' tab selected. At the top right, the patient's name 'TEST, PATIENT' is displayed along with 'Prim. Phys: 12M' and 'SSN:'. Below the tabs, the form is organized into two columns. The left column contains fields for Billing Type (set to 'Account'), Prefix, Name (L F M) (set to 'TEST PATIENT I'), Suffix, AKA, Marital Status, Patient ID (set to 'C7234588-000017' with an 'Auto Assign ID' button), SSN, DOB, Primary Physician, Gender (set to 'Female'), Language, and Race. The right column contains fields for Address, City, State, ZIP Code, Phone #, E-mail, Drivers License, Notes, and Ethnicity. A 'Required Fields' indicator is present in the top right of the form area. At the bottom of the form, there are several navigation links: 'Guarantor', 'MRN List', 'Questionnaires', 'New Patient', and 'Unlock Forwarded Patient'. On the far right, there are 'New Order' and 'Save' buttons.

- 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**.