



ADDING A NEW PATIENT

To add a New Patient, click on the Patient icon  on the top-left of the main ClinicPro window, or go to Activities and the Manage Patients

Then, select the New Button  and this will bring up a new blank Patient Detail screen.

Once you begin to create a new patient, you will not be able to save the information until you have added these fields:

- Patient Number – this is automatically generated by the ClinicPro software unless you specifically turn this function off and add them manually. This feature is found in System Parameters
- First and Last name
- Birth date
- Gender
- Primary Doctor

PATIENT DETAIL

The Patient detail screen houses all of the patient specific information. Any field in red is used for billing information.

Field	Value
Patient No.	00000011
Name (Last)	BUFFALO
Name (First)	WINNIE
Name (MI)	
Address	2800 AURORA DR LAHSING, MI 49912
Phone	(517) 351-1021
Fax	() -
Cell	(517) 856-1247
Birth	01/01/1962
Gender	F
SSN	111-11-1111
Primary Dr	SARNO, LISA M
Salutation	NONE

NAME

Enter the patient's name, middle initial, and suffix / salutation.

ADDRESS

The address you enter here will be the address submitted to insurance companies, patient mailings, etc. Click on the Address Box you see there and enter the information in the fields. You are free to type in the box free-form but using the Address Box will help avoid misalignment with electronic billing files. Please do not use any type of punctuation or characters that are not alpha or numeric in these fields as they may also cause your electronic billing to reject.

PHONE

Enter in the patient phone numbers. There are designated fields for Home, Fax, and Cell yet many people are now typically using cell phones as their main number. If this is the case, please put the patients' MAIN contact number in the Home field and apply a check mark in the adjacent box. This will allow you to have access to the patient's number as you run reports and use the Appointment Scheduler.

EMAIL

The email field will obviously hold punctuation and various characters without causing problems with your billing. Again, there is an adjacent box here for you to apply a check mark if you wish to have your patients email address for use in some of the ClinicPro reports and Email Merge feature.

BIRTHDATE & GENDER

Make sure you have an accurate birth date as this is transmitted in billing files.

SSN

This is not a requirement as most insurance companies have moved away from using this information to insure security. If you do decide to house this information, it will transmit to the insurance company. Please do not input "000-00-0000," or something else that functions as a placeholder. Either use the field with accurate information or leave it blank.

PRIMARY DOCTOR

Input the doctor who will be automatically assigned as rendering the provided services

Residence	PRIVATE HOME	<input type="checkbox"/> Assignment Signature	Default Diagnosis	
Related To	AUTO	<input checked="" type="checkbox"/> Release Signature	739.1	739.2
Referring Dr		<input checked="" type="checkbox"/> Send Statements	756.10	995.3
Med Rec No.		<input type="checkbox"/> Bill Patient Only	.	.
APG No.		Marital Status	.	.
Financial Class		Student Status	NON STUDENT	
Mail Code		Initial Balance	Source	
Attorney		Insurance		
		Patient	Responsible Party	BUFFALO, WINNIE
		As of	Legal Representative	
Employer	Job Title	Status	COB	Work Phone
1				(248) 597-0258
2				() -
Last Update		09/05/2008 01:21:31 PM	By ADMINISTRATOR	
				Notes

RESIDENCE

This field is typically PRIVATE HOME unless the doctor does work at a nursing home, hospital, or other care facility

RELATED TO

Specify what the injury or claim is related to with this field. Typically the field is set to NONE, unless there is an auto accident, or work injury.

REFERRING DOCTOR

This field automatically assigns a Referring Doctor to the patient's transactions and can be changed on a charge-by charge basis on the Patient Transaction screen as well.

ASSISGNMENT SIGNATURE

Checking this box submits a code to the insurance company that tells them the patient has authorized the office to collect the benefits from the insurance company.

RELEASE SIGNATURE

Checking this box signifies that the office has a release of information waiver signed, and on file. Without this, the doctor is not authorized to bill for the patient, per HIPAA guidelines.

SEND STATEMENTS

Checking this box will enable patient billing to be processed for the patient. In the event that a patient account has been sent to collections, be sure to uncheck this box.

BILL PATIENT ONLY

Checking this box will cause any charge entered to default to patient responsibility, no matter what insurance is enabled for the patient. You check this box after a patient has exhausted their maximum visits allowed by insurance.

MARITAL & STUDENT STATUS

These fields can be used for sorting the patient's database into more specific demographics in the reports.

DEFAULT DIAGNOSIS

Input the patient's current diagnosis. These codes will be input on every new transaction automatically. It is recommended to input at least one, so that the user is not prompted every time a charge is added on the transaction screen.

FINANCIAL CLASS & MAIL CODE

You can classify your patient with these fields when running query reports. The Financial Class can be customized for various reasons.

ATTORNEY

If there is an attorney involved in your patient's injury or accident case, please add them to the appropriate patient in this field

INITIAL BALANCE

When adding in patient information from other software programs, and converting their balance in to the ClinicPro software, this field will add their balance brought forward on to their account.

SOURCE

If you would like to keep records of how your patients were referred to you, use this field. If the patient was referred to you by another patient, select which patient referred them. This is also great for running a query report and for referrals.

RESPONSIBLE PARTY

This field will display the person responsible for the patient's balance. For example, minor patients would have their parent, or guardian entered in this field. This prevents a bill being generated for the minor; instead it would generate the parent or guardian's name. This is not the same as the "Insured Person," it pertains to only patient balances.

LEGAL REPRESENTATIVE

If there is a legal representative present, add their name here

EMPLOYER INFORMATION

Input information about the patient's place of employment for Worker's Compensation claims.