Creating a Patient Record

To create a patient record in OD Professional, all you need to enter is the Patient's First and Last name.

The required information for your practice may be different which you should review with your Office Manager before using OD Professional. Your practice may require additional information when creating a new patient record, which may include, but not limited to: the patient's address, birth date, phone number and insurance information.

Before creating a new patient record, always verify that the patient is not already listed in your database. Browsing for a patient's record, using the first few letters of the patient's first and last name will determine if the patient already has a record.

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1. Open Patient Address View

    a. Remember to clear any active record. If you try to browse for a patient using the patient's first or last name, when another patient is active, you will get the following message: "Patient's last name has been modified. Are you sure you want to change patient's last name?" Click No, unless you actually want to change the patient's last name (e.g. legal change, marriage, adoption, etc.)

2. Enter Patient's Last and First Name

    a. If you only enter the patient's first or last name, you receive the following error message: "First or Last name can not be blank. This will result in the loss of lookup for this patient file. Click OK and enter the patient's First and Last name.

    b. OD Professional generates system initials, using the first two letters of the patient's last name and the first letter of the patient's first name.

3. Click Save

When you click Save, OD Professional creates a patient record in the Task Manager and generates the Patient's ID and Chart Number.

The Patient's ID and Chart numbers are sequential based on a starting number initially entered into OD Professional during setup.