


Linking Family Members

Linking family members is critical for increased bookings and for accepting family payments and is as easy as 1 2 3.

Linking Spouses

1. Browse for patient and make active
2. Select the Spouse / Referral tab (bottom left of the Patient Address View window)
3. Click the Browse button 
 - a. You don't have to enter the first few letters of the Spouse's last name, unless the Spouse's last name is different. OD Professional™ assumes that the spouse has the same last name as the active patient.
 - b. If the Spouse's last name is different, enter the first few letters of the Spouse's last and first name before clicking the Browse button.
4. Select the Spouse
 - a. *If the Spouse is not listed*, add the Spouse's information and click Save.
5. Click Apply
 - a. OD Professional™ automatically saves the linked spouse to the active patient. If you open the spouse record, you will notice that the active patient is also linked to the spouse's record.
6. If you wish to use the spouse's address on the active patient's records, click Yes to the following message: "One or more fields in the current patient address are blank. Do you wish to use the address of the spouse?"
 - a. You will receive this message even if the addresses are identical because one of the fields are blank, usually Address 2.
7. The Note section under the Spouse's link provides you with a field to retain important information such as when the Spouse can be reached or where to send the invoice or statement.

Linking Parents

Important: To link parents, you must have the child as the active patient. You can only link parents to children. You cannot link children to parents or link siblings.

1. Browse for child and make active
 - a. If the child is not in your patient database, you will need to add them. Remember that you only need to add the child's last and first name to create a patient record.

2. Click on the Parents tab (bottom left of the Patient Address View window)
3. Click Browse button next to the Father's last name field
 - a. You don't have to enter the first few letters of the Father's last name, unless the Father's last name is different. OD Professional™ assumes that the father has the same last name as the child.
 - b. If the Father's last name is different, enter the first few letters of the Father's last and first name before clicking the Browse button.
4. Select the Father
 - a. If the Father is not listed, add the Father's information and click Save.
5. Click Apply
 - a. OD Professional automatically saves the linked spouse to the active patient. If you open the spouse record, you will notice that the active patient is also linked to the spouse's record.
6. Repeat steps 3 to 5 for Mother
7. If you wish to use the parent's address on the child's records, click Yes to the following message: "One or more fields in the current patient address are blank. Do you wish to use the address of the "parent"?"
 - a. You will receive this message even if the addresses are identical because one of the fields are blank, usually Address 2.
8. The Note section under the Parent's link provides you with a field to retain important information such as when the Parent can be reached or where to send the invoice or statement.

Unlinking Family Members

1. Browse for patient and make active
2. Highlight and delete the linked spouse or parent's last and first name
3. Click Save