

Patient Browsing

Whenever someone calls to schedule an appointment, you need to determine whether that person is in your patient database or not.

To browse for a patient's record, you should use only the first few letters of the patient's last and/or first name. By simply browsing using the first few letters of the patient's last and/or first name, you will avoid duplicating a patient's record if the patient was entered into your database incorrectly. Let's look at a few examples of how you could duplicate a patient's record:

Example: Browsing for patient record with a misspelled last name


Suppose that John Rickey is a patient that is already entered in your database. If John calls and you browse for his last name, but misspell as Ricky, you would get no results and assume that John doesn't have a patient record. You would then create a new and subsequent duplicate record for John.

Example: Browsing for a patient record that was initially entered incorrectly

Suppose that John Rickey is a patient that is already entered in your database. If John calls and you browse for his last name, but John's existing record is spelled incorrectly as Ricky, you would get no results and assume that John doesn't have a patient record. You would then create a new and subsequent duplicate record for John.

OD Professional also allows you to browse for patient records using the patient's ID, chart number or birth date. This is especially helpful when you receive patient payments in the mail. Requiring the patient to enter their chart number on their remittance, allow you to browse for the patient by their unique chart number. Therefore, you do not have to scroll through hundreds of Smiths or Johnsons.

Browsing for Patients

1. Open the Patient Address View
2. Click Clear active patient record, if necessary
3. Enter the first few letters of the patient's last and/or first name
4. Single click on the browse  button
 - (Any results will be displayed in the Patient Browse List. If no patient records are displayed and the browse data was entered correctly, then a new patient record should be entered and saved.)
5. Double click on the patient record in the Patient Browse List.

OD Professional understands the necessity of maintaining the integrity of any patient database. This is the reason why we recommend browsing for all patients using the first few letters of the patient's last or first name. It saves you time, reduces the number of mistakes you make and maintains the integrity of your database.