Using Patient Search

When opening a patient’s chart, it is best practice to select a patient from either a Patient List or from the Ambulatory Organizer. When selecting a patient from either of these locations, you will open to the correct Visit, Encounter, or FIN number for documentation. However, when you must search for a patient, follow these steps below to ensure you open the chart to a correct encounter (visit #, or FIN #) for documentation.

Click the small drop-down arrow to change this to FIN; then type the FIN# into this field.

OR click the magnifying glass to open the Patient Search window.

Searching by FIN NBR (encounter or visit #), limits the results to a specific visit for a specific patient.

Since there is only 1 encounter (visit/FIN) listed for this patient, click OK to open to this visit.
Searching by name

1) Typing the **Last Name** and **First Name** (or partial first name) will strengthen the search results.

   Then click the **Search** button, or press the **Enter key** on the keyboard.

2) Select the patient’s **name** in the top window. All of visits for that highlighted patient will display in the lower window.

3) Then select the correct **FIN/Encounter** in the bottom window.

4) Once you have selected both the patient and the visit, click **OK**.

Typing only the **last name** (or partial last name) of the patient may return a **No persons found** result. Or you might get this **Search Quality** message.

If you clicked Yes to the **Search Quality** message above, you may get this type of search results – multiple patients with the same last name.
Changing to a different FIN/Visit/Encounter inside the patient's chart

1) Click the location link on the blue banner bar to view all of this patient's visits

2) Double-click on the new FIN/Visit/Encounter you want to open; Or highlight it and click OK

3) Then click Yes

4) You may need to declare a relationship to the new FIN/Visit/Encounter and click OK
The new FIN # selected should now be displayed along with the new location.

Changing to a different FIN/Visit/Encounter can also be done from the **Patient Information / Visit List** tab by following the same process.