

Entering a New Patient

From Patient Activity screen: Make sure the patient has not been previously registered by typing a **question mark** in **Account Box** or clicking on **Magnifying Glass**. Hit enter.

Practice Made Perfect - Hst

File Reports Billing Patients Appointments Inventory Communications Tables Tools

PatientActivity

Account: [?] [?] [Magnifying Glass] [Cross] [Arrow]

Patient:

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger

Patient Info

Age: Sex:

First Name: [] Date of Birth: []

Last Name: [] Last Visit: []

Address: [] Next Visit: []

cont'd: [] Provider: []

City: [] Chart #: []

State: [] Zip Code: [] Category: []

Home Phone: [] - []

Work Phone: [] - []

Responsible Party

First Name: []

Last Name: []

Home Phone: []

Work Phone: []

Relation: []

Billing Status: []

Pat Balance: []

Ins Balance: []

Plan Insured Party ID

Patient Notes

Charge Payments Walk-Out Apptmnt Exit

Patient Search box will open. Search by **first few of letters of patient's last name** or **Date of Birth**. Click OK.

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File Reports Billing Patients Appointments Inventory Communications Table

Patient Search

Last Name: TES First Name:

Search Identity History Info

or

Date of Birth: 12/27/82 Date of Last Treatment: / /

Phone: Home Work

Insurance Plan: Insurance Carrier:

Regular Provider: All Providers

Billing Status: All Statuses

OK Cancel

If patient not found , click on Add New Patient icon:

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File Reports Billing Patients Appointments Inventory Communications 1

PatientActivity

Account: ? 🔍 + 📄

Cover Page Patient Info Responsible Party Insurance P

Patient Info Age:

New Patient Info Screen will appear along with a **system generated account number**. Fill in fields highlighted in **red** for all patients. Save.

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File Reports Billing Patients Appointments Inventory Communications Tables Tools

PatientActivity

Account **10009** Patient:

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger

Patient Data

First Name: [red] M.I.: [red] Birth Date: [red]
Last Name: [red] SSN: - -
Nickname: [red] Sex: Female
Address: [red] Expressed Sex: Same
cont'd: [red] Relation: Resp Party
City: [red] Marital Status: Unknown
State: [red] Zip: [red] Employ Status: Unknown
Home Phone: [red] - [red] Ethnicity: White
Work Phone: [red] - [red] Language: English
Cell Phone: [red] Classification: Regular
E-Mail: [red] Category: Regular
Preference: Mail

Treatment Info

Regular Prv: 1
Referring Phys: [red]
Authorization #: [red]
Next Visit: [red]
Last Treatment: [red]
Diagnosis 1: [red]
Diagnosis 2: [red]
Diagnosis 3: [red]
Rx Coverage: [red] days

Notice Of Privacy

Status: Incomplete
Date: [red]

Save Cancel

For Patients with Insurance that will be billed fill in the fields highlighted in yellow. Save

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File Reports Billing Patients Appointments Inventory Communications Tables Tools

PatientActivity

Account: 10009 Patient:

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger

Patient Data

First Name: [] M.I.: [] Birth Date: []
Last Name: [] SSN: []
Nickname: [] Sex: Female
Address: [] Expressed Sex: Same
cont'd: [] Relation: []
City: [] Marital Status: Unknown
State: [] Zip: [] Employ Status: Unknown
Home Phone: [] Ethnicity: White
Work Phone: [] Language: English
Cell Phone: [] Classification: Regular
E-Mail: [] Category: Regular
Preference: Mail

Treatment Info

Regular Prv: 1
Referring Phys: []
Authorization #: []
Next Visit: / /
Last Treatment: / /
Diagnosis 1: []
Diagnosis 2: []
Diagnosis 3: []
Rx Coverage: [] days

Notice Of Privacy
Status: Incomplete
Date: / /

Save Cancel

Responsible Party: If patient is not responsible party, this can be changed in "Relation" drop down box on previous screen or click on Responsible Party Tab and check "Patient is not Responsible Party." Fill in pertinent responsible party info on this screen and Save.

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File Reports Billing Patients Appointments Inventory Communications Tables Tools

PatientActivity

Account: 10003 Patient: Arika Test

Cover Page Patient Info **Responsible Party** Insurance Plans Account Ledger

Responsible Party Data

Title: [] Birth Date: / /

First Name: [] M.I.: [] SSN: - -

Last Name: Test Sex: []

Address: [] Relation: Self

cont'd: [] Marital Status: Unknown

City: [] Employ Status: Unknown

State: [] Zip: []

Home Phone: [] -

Work Phone: [] -

Billing Info

Billing Status: Regular

Fee Schedule: Regular

Patient is not Responsible Party

Apply Service Charge

Hold Statement


Hold Aging Message/Letter

Portal Statement Only

No Co-Payments

Account is Inactive

Flagged to Receive Statement



Insurance Plans: Hit "Insurance Plans" tab. Choose "Add Plan" to enter insurance info.

The screenshot shows the 'Practice Made Perfect - Hst' software interface. At the top, there is a menu bar with 'File', 'Reports', 'Billing', 'Patients', 'Appointments', 'Inventory', 'Communications', 'Tables', and 'Tools'. Below the menu bar, the 'PatientActivity' tab is active. The 'Account' field contains '10002' and the 'Patient' field contains 'Mary Test'. A white arrow points to the 'Insurance Plans' tab in the navigation bar. The 'Insurance Plans' tab is selected, and the 'Add Plan' button is circled in red. The form contains the following fields:

Insurance: Insured: Order: ID: Assigned

Insured Party Data

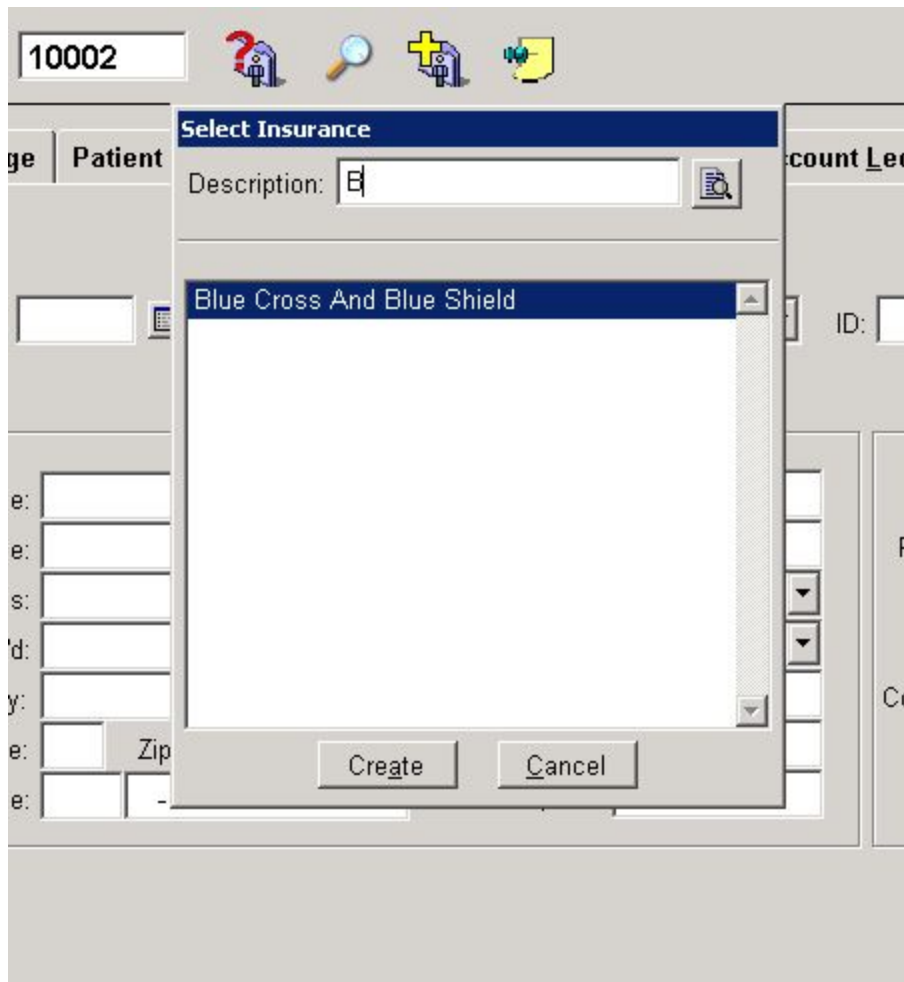
First Name: M.I.: Birth Date:
Last Name: SSN:
Address: Sex:
cont'd: Relation:
City: Insured's ID:
State: Zip: Effective:
Phone: - Expired:

Plan Info

Group #:
Plan Name:
Formulary:
Employer:
Co-Payment:

Buttons:

A Select Insurance Box will appear.



Type in first letter of name of patient's insurance. Only the insurance plans your practice currently accepts will be available to choose. Double Click on the correct insurance and some insurance information will prefill.

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File Reports Billing Patients Appointments Inventory Communications Tables Tools

PatientActivity

Account: 10003 Patient: Arika Test

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger

Blue Cross And Blue Shield Blue Cross And Blue Shield

Insurance: BCBS Insured: Arika Order: Primary ID: UGG922000021 Assigned

Rectangular Grip Add Plan

Insured Party Data		Plan Info	
First Name: Arika	M.I.: <input type="text"/>	Birth Date: //	Group #: <input type="text"/>
Last Name: Test		SSN: - -	Plan Name: <input type="text"/>
Address: <input type="text"/>		Sex: Female	Formulary: Plan Default
cont'd: <input type="text"/>		Relation: Self	Employer: <input type="text"/>
City: <input type="text"/>		Insured's ID: <input type="text"/>	Co-Payment: 0.00
State: <input type="text"/> Zip: <input type="text"/>		Effective: //	
Phone: <input type="text"/> - <input type="text"/>		Expired: //	

Save Cancel Delete Plan

Make sure you enter the insurance ID # from the insurance card.

If known, add insurance **Effective** date in that field. If not known, use today's date.

If a Co-Payment amount prefills, change it to 0.00.

Save

Please Note: Never choose "Delete Plan" when entering a new insurance for the same patient. Just make the old one "Inactive" in **Order** Field by using drop down then follow same steps for adding an insurance plan.

New Patient Registration is complete.