

Patient Categories and Patient Classifications

Utilizing Patient Categories and Patient Classifications facilitates more refined reporting. This may be especially helpful for group assessment situations such as AHP.

A patient's Classification is accessed through **Patient Activity**, **Patient Info tab**, **Classification**.

The screenshot shows the 'Patient Info' tab in a software interface. The 'Patient Data' section includes fields for First Name (David), Last Name (E), Nickname (Dave), Address (123 North Street), Birth Date (11/03/1963), Sex (Male), and others. The 'Classification' dropdown menu is open, showing options: Discharged, Exclude from Reportin, Inactive Patient, Regular (highlighted), Transferred Out, Transferred, and *Add New Code*. The 'Treatment Info' section includes Regular Prv (HF), Chart # (31918986), and Last Treatment (08/28/2017). Buttons for 'Save' and 'Cancel' are visible at the bottom.

Current patients are classified as Regular. You may create your own classification by choosing *Add New Code* at the bottom of the drop down list.

Enter the name of the new classification in the Description field of the **Add New Code** window.

The 'Add New Code' window is shown with the 'Description' field containing the text 'Deceased'. Buttons for 'OK' and 'Cancel' are visible at the bottom.

New classifications may also be created and managed by choosing **Tables, Patient Tables, Patient Classification**. From the **Patient Classification** window, create a code for the new classification, enter a description and check appropriate boxes.

Patient Classification

Code:

Description:

Appointment Warning

Active Patient

Inactive Patient

Please note: Using a created versus a system generated classifications (e.g. Discharged and Transferred) may affect reporting.

Patient Category is found directly below Patient Classification. A category may be created for any subset of patients you wish to identify.

Patient Info | Responsible Party | Insurance Plans | Account Ledger | Documents

Add New Code

Description:

s: 123 North Street

d:

y: Webster

e: NY Zip: 14580

e: 585 359-0736

e: 585 424-6000 x251

e: 733-9087

it: dblackwell@aol.com

e: Text

Expressed Sex: Same

Relation: Resp Party

Marital Status: Single

Employ Status: Employed

Ethnicity: White

Language: English

Classification: Regular

Category: Add New Code*

Notice Of Dismissal

New categories may also be created and managed by choosing **Tables, Patient Tables, Patient Category**. From the **Patient Category** window, create a code for the new category and enter a description

Patient Category

Code:

Description:

Save Delete Cancel

Access Classification and Category data for reporting by going to Reports, Clinical Reports, Patient Query.

Patient Query

General **Patient** Claim Clinical Visit Preventive FlowSheets

Last Name: from thru

Last Treatment: from thru

Date of Birth: from thru

Sex: Unspecified Male Female

Ref Phys: PCP:

Include inactive patients
 Include deceased patients
 De-Identify patients on export
 Include only patients enrolled in the portal

Regular Provider:

Billing Status:

Classification:

Category:

Ethnicity:

Ins Category:

Communication:

Referral Source:

OK Save Query Delete Query Cancel