We provide easy navigation to patient lookup, or to the Patient Dashboard. Click **'Patient'** from the menu or Icon

Go-cuts (keyboard shortcuts)

Type 'P' followed by the patient number or name

- **Pat 1234**
- **Pat Smith, A**
- **P1234**

Type the letters 'CN' followed by the chart number

- **CN 123456**

Patient Dashboard
Displays Basic Demographics, Guarantor, Balance, Insurance Information

⊞ ⊠ Balance   Add Charge   Add U804 Charge   Cases   Receipts   Post Payment   Post Adjustment   Post Refund   Patient Ledger

Insurance	Patient	Collection	In Escrow	Include Zero-Balance Encounters [15]: ☐
195.81	15.00	0.00	0.00	

Responsible Party		0-30	31-60	61-90	91-120	121+	Total
[1082/2] AARP		0.00	0.00	0.00	0.00	35.81	35.81
[MEDICARE/1] MEDICARE		0.00	0.00	0.00	0.00	160.00	160.00
[PATENT/99]		0.00	0.00	0.00	0.00	15.00	15.00

-Select Action-   ⌄   Apply

⊞	Encounter	☐	DOS	Lines	Total Charge	ALWD	CO	OA	Ins Paid	Pat Paid	InsBal	PatBal	ColBal	Statements	Add'l Info
⊞	10413	☐	08/11/2011	2	125.00	116.18	8.82	0.00	101.18	0.00	0.00	15.00	0.00	0	View
⊞	10219	☐	07/25/2011	2	160.00	0.00	0.00	0.00	0.00	0.00	160.00	0.00	0.00	0	View
⊞	5165	☐	03/25/2010	1	110.00	96.88	13.12	0.00	60.53	0.54	35.81	0.00	0.00	0	View

⊞ ⊠ Active Policies   Insurance Management [Ctrl-F7]

Insurance	Status	Role	Policy	Group	Relationship	Policy Holder	Effective	Expiration	Last Verified
MEDICARE [MEDICARE]	DEFAULT	PRIMARY	279102125A		SELF	SMITH, ANNABELLE			
AARP [1082]	DEFAULT	SECONDARY	0205414451		SELF	SMITH, ANNABELLE			Check Eligibility

⊞ ⊠ Notes   Add

Date	Note	Entered By
05/18/2011	enc 5165; secondary does not cover medicare part b deduct	
05/18/2011	enc 5165; ins pymts final; bal should have been applied to pa.	

⊞ ⊠ Patient Appointments   Schedule   Recalls

Date	Time	When	Resource	Facility	Type	Reason	Status
08/21/2013	09:00 AM	Today	LINDA IRRA MD	DR S...	OFFICE VISIT - ESTABLISHED PATIENT		S

⊞ ⊠ Patient Documents   Add

Date Scanned	Type	Note
08/21/2013	DRIVER'S LICENSE	DRIVERS LICENSE

Dashboard Controls   Save Current View

1. Patient Demographics, click the plus sign to expand
2. Guarantor demographics, click the NAME to view Statement information
3. Balance information, click Responsible Party to view only the encounters with balances out to that party
   a. Click the aging bucket to view encounter of that age only.
4. Encounter (charge) details
5. Active Policy information
6. Check Eligibility- Real-Time check eligibility *if enabled
7. Appointment- listed, if any
8. Patient Documents – Scanned
9. Dashboard Controls- Click 'Save Current View' to save expanded or contracted view of the Dashboard