

Linking Families in OP

Last Modified on 04/11/2023 8:50 pm EDT

Version 14.19

Overview

There are three types of family classifications in OP: Social Family, Financial Family, and Genetic Family. These families are used to link patients together for the purpose of easily sharing clinical information and navigating to linked Accounts and Charts as well as other benefits described below.



Note: In order for Patients to be displayed as linked, each patient involved must have an Active status selected in their Patient Chart button > Basic Information.

Social Family

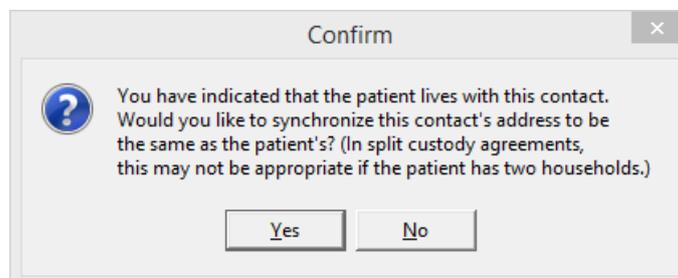
Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Family Contacts

Social Families in OP link patients together for the purpose of easily documenting the patients' Social History. A social family is linked by selecting the Resides With (Res?) checkbox in a patient's chart under Family Contacts. All patients connected to the same contact by selecting the Resides With checkbox make up that social family. Once contacts have been marked as Resides With, each patient that shares the link is displayed in the Social History tab within the Patient Chart. This provides the Clinical Staff or Provider the ability to collect Social History information on one of the linked patients and apply it to the other patients without having to repeatedly complete each History question. If there is a Contact or patient in OP that is not displayed this way, navigate to the **Patient Chart button > Family Contacts** and ensure the Contact is indicated as residing with that Patient.



#	Name	Role/Reason	Authority	Res?	Start Date	End Date	Portal
1	SUSAN TESTPATIENT	Mother	Joint	<input checked="" type="checkbox"/>			Minor
2	JOHN TESTPATIENT	Father	Joint	<input checked="" type="checkbox"/>			Minor
3	DONALD TEST			<input type="checkbox"/>			None
4	address change	Prior Address		<input type="checkbox"/>		4/4/2019 10:37:35 AM	None

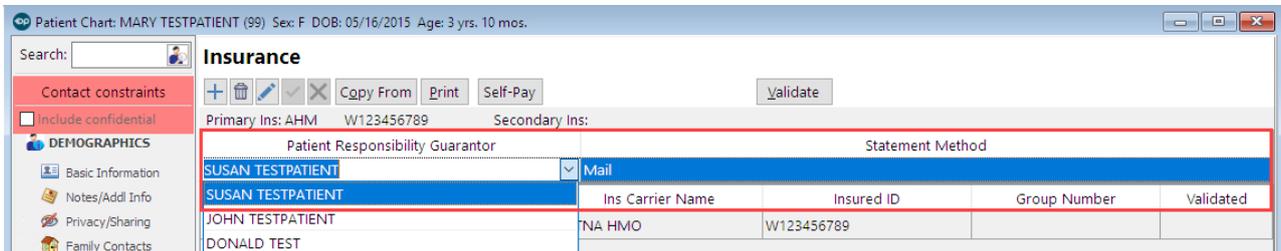
When you select the Res? checkbox, a Confirmation pop-up box is displayed that asks you to confirm if you would like to sync the Address for the Contact to be the same as the patient's.



Financial Family

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Insurance

Financial Families in OP link patients together for the purpose of transferring credits between patients and for family billing purposes such as receiving family statements. A financial family is linked through the Patient Responsibility Guarantor field in a patient's Insurance record. The Guarantor indicates who is financially responsible for settling all balances owed by the family. All patients that share the same Patient Responsibility Guarantor will be linked as a Financial Family. There may be situations (such as custody or foster care) where siblings may have different Patient Responsibility Guarantors and should not be linked here.



Patient Responsibility Guarantor	Statement Method
SUSAN TESTPATIENT	Mail
JOHN TESTPATIENT	NA HMO
DONALD TEST	

Note: To select the Guarantor from the drop-down menu, (as displayed in the image above) the Guarantor must first be added to the patient's Patient Chart button > Family Contacts.

Genetic Family

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Family Contacts

Genetic Families in OP link patients together for the purpose of easily documenting the patient's Family History. In the Patient Chart button > Family Contacts, once a user selects Mother or Father in the Role/Reason field for a contact, the following Warning pop-up box is displayed:

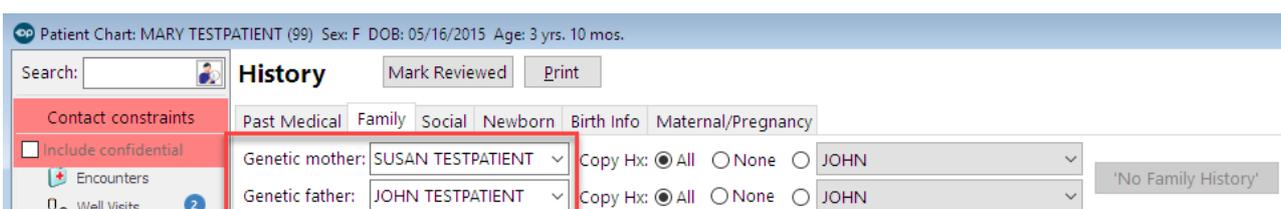


Users should:

- Click the **Yes** button if the Contact is the Genetic Parent.
- Click the **No** button if the Contact is not the Genetic Parent.
- Click the **X** button to close the Warning pop-up box if genetic relation is unknown.

Note: You can only indicate genetic Mother/Father from this tab one time. If the selection needs to be changed, it must be done from the patient's chart in the Family History tab.

The confirmed Genetic Parents are displayed in the Patient Chart button > History > Family tab along with a Drop-down Menu of linked patients to whom the Family History can be copied.



Where links are seen in OP

Since the Phone Number no longer links Patients together, all Patients must be updated to indicate their Social, Financial, and Genetic families. As long as that information is up to date, the patient's family is accurately displayed in the following areas:

- Patient Finder Window > Family button
 - Family displayed on the Patient Chart button > Clinical Overview.
 - Copy from sibling on Social history.
 - Copy from sibling on Family History.
 - Change family addresses from Patient Chart button > Basic Information.
 - Family tasks mode on Patient Chart button > Account Summary.
 - Family mode on Lookup Consent Forms.
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