

Search for a Patient in the Practice Portal

Last Modified on 10/04/2021 2:58 pm EDT

Version 20.13

About

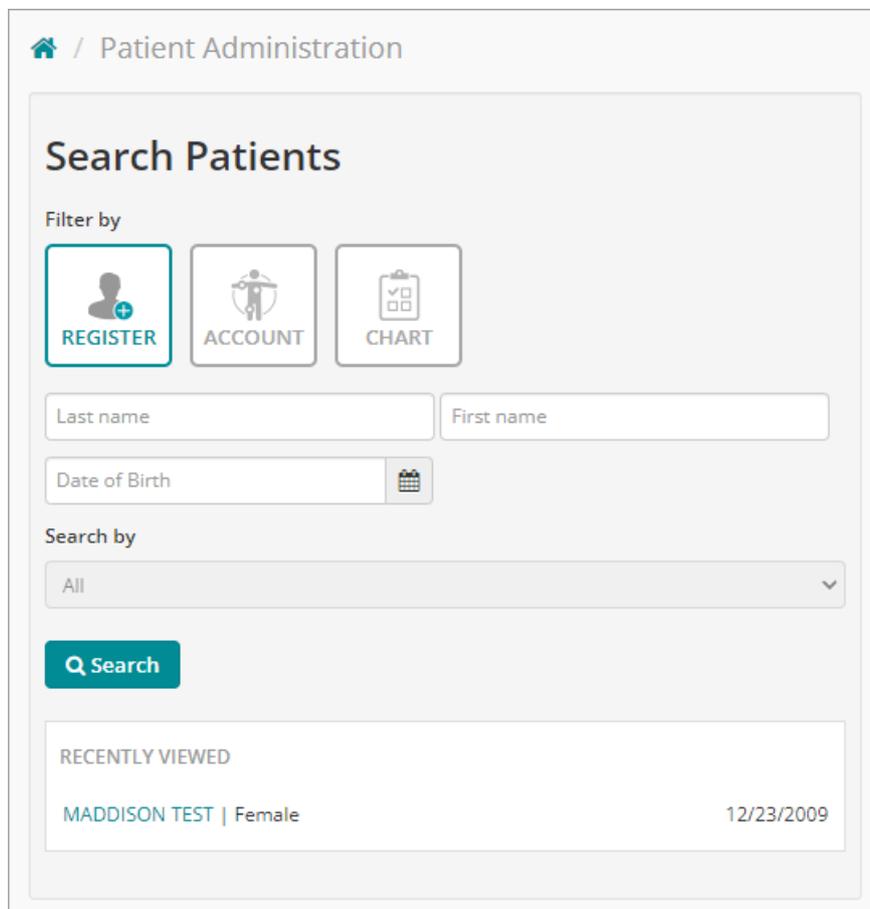
Patient searches in the Practice Portal are conducted in Patient Administration, located in the Practice Portal's Navigation Panel.



User Permissions: Only Practice Portal users who have been given Patient Administration **permissions** can access Patient Administration.

Search Patients

1. In the Practice Portal, navigate to Patient Administration: **Navigation Panel > Patient Administration**. The Patient Administration window is displayed with the search filters and fields on the left side of the window.



The screenshot shows the 'Patient Administration' search interface. At the top, there is a home icon and the text 'Patient Administration'. Below this is the 'Search Patients' section. Under 'Filter by', there are three buttons: 'REGISTER' (with a person icon and a plus sign), 'ACCOUNT' (with a person icon and a shield), and 'CHART' (with a clipboard icon). Below the filters are three search fields: 'Last name', 'First name', and 'Date of Birth' (with a calendar icon). Under 'Search by', there is a dropdown menu currently set to 'All'. A blue 'Search' button is located below the search fields. At the bottom, there is a 'RECENTLY VIEWED' section showing a patient entry: 'MADDISON TEST | Female' with the date '12/23/2009'.

2. Depending on the portal status of the patient you're searching for, select how you would like to filter your search:
 - **Register:** searches patients that have a portal status of Unregistered or Pending Registration
 - **Account:** searches patients who are Registered or Unregistered. This search filter also includes accounts that are unaffiliated to the Practice, meaning that they are not patients but rather the parents/guardians of patients.
 - **Chart:** searches in the same way as the Account filter
3. Enter information into at least one of the three search fields: Last Name, First Name, and/or Date of Birth. The more

information entered, the more narrowed down the search results will be.

4. *(Optional, only available with Account or Chart search)* Select a **Search by** option. By default, all patients are searched, but you can use the drop-down to select a different status option.
5. Click the **Search** button. Patients matching your search criteria are listed on the right side of the window.



Tip: To easily navigate to patients you've recently viewed, refer to the Recently Viewed section of the window. From there, you can click the patient's name to get to their account.