

### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

# Patient Status

Last Modified on 06/26/2020 2:53 pm EDT

Version 20.4

**Path: Practice Management tab > Appointments button**

## Overview

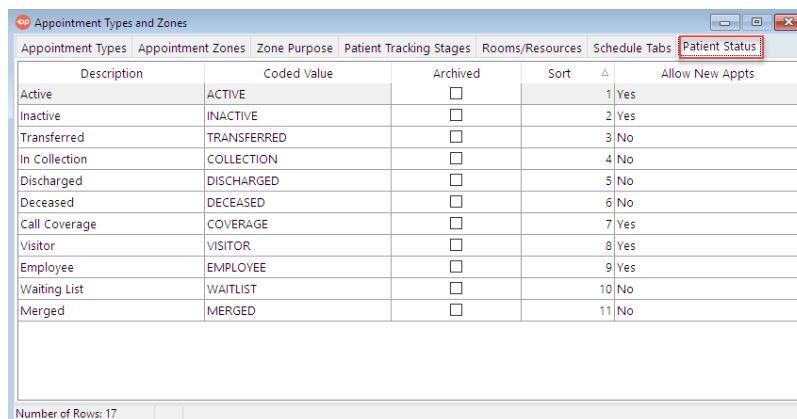
Patient Status is used to indicate a patient's standing within the practice. The below areas can be changed to meet the needs of your practice:

- Archive statuses that are not being used in your office
- Sort statuses so that they appear in a particular order in the Patient Chart > Basic Information > Status drop-down menu
- Determine whether new appointments are allowed for each status

The creation of additional patient statuses must be edited through the **Code Table** form (see below). Additionally, the Demographic Analysis/Recall report can be used to run a report based on a particular patient status.

## View Patient Status

1. From the ribbon, click **Practice Management**
2. Click the **Appointments** button.
3. Click the **Patient Status** tab. All of the patient statuses available for use are displayed. Only the Archived, Sort, and Allow New Appointments columns can be edited from this window.



Description	Coded Value	Archived	Sort	Allow New Appts
Active	ACTIVE	<input type="checkbox"/>	1	Yes
Inactive	INACTIVE	<input type="checkbox"/>	2	Yes
Transferred	TRANSFERRED	<input type="checkbox"/>	3	No
In Collection	COLLECTION	<input type="checkbox"/>	4	No
Discharged	DISCHARGED	<input type="checkbox"/>	5	No
Deceased	DECEASED	<input type="checkbox"/>	6	No
Call Coverage	COVERAGE	<input type="checkbox"/>	7	Yes
Visitor	VISITOR	<input type="checkbox"/>	8	Yes
Employee	EMPLOYEE	<input type="checkbox"/>	9	Yes
Waiting List	WAITLIST	<input type="checkbox"/>	10	No
Merged	MERGED	<input type="checkbox"/>	11	No

4. Select the **Archived** checkbox for any patient status that will not be used in your practice. Archiving a status can be undone at any time if it is determined the status is needed. Selecting the Archived checkbox will hide the status from the **Patient Chart > Basic Information > Status** drop-down menu.
5. Select the **Sort** order to determine how the patient status list will be displayed in the drop-down menu by clicking the Sort field and editing the sort number.
6. Select whether or not you would like to allow new appointments for patients with each status:
  - **Yes:** Allows new appointments to be made, without providing a pop-up showing the patient status.
  - **No:** Does not allow new appointments to be made. An error message is displayed: *Cannot book new appointments for patients with status....* The patient's status must be changed to one that would allow new appointments in order to

continue scheduling but should only be done after confirming with a practice administrator or manager.

- **Warn:** Will not immediately allow a new appointment to be made, it will give a Confirmation pop-up *Patient status = ... OK to continue.*





**Note:** While considering the use of patient statuses in your office, it is important to know how your office runs their Clinical Recall reports. If reports are being run to recall Active patients only, you will want to use another status, such as Visitor, for patients who are not typically seen in your office, such as parents who receive flu shots or patients who may be visiting from out of town.

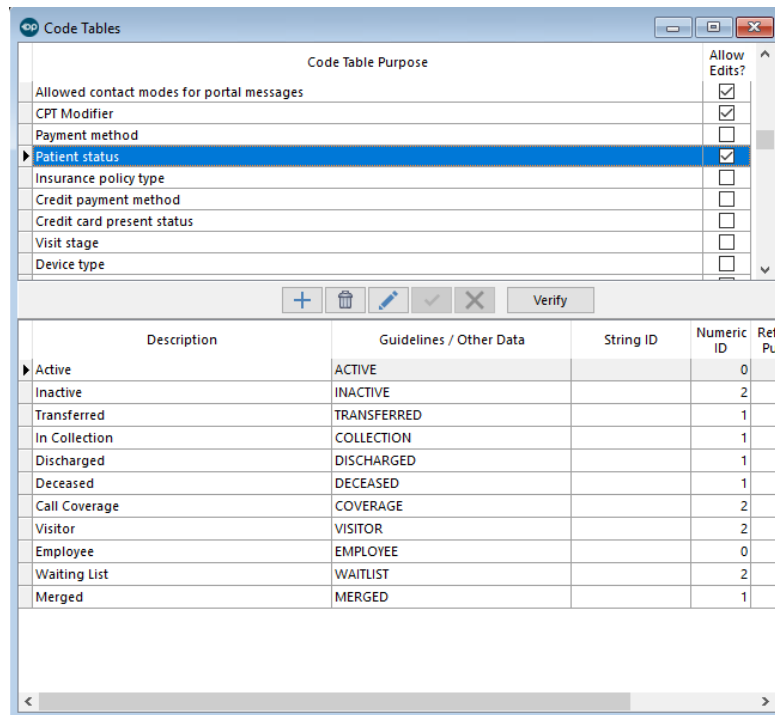
## Add a New Patient Status

**Path: Practice Management tab > Coded Values**



**Warning:** When creating a new status, the Guidelines/Other Data field **CANNOT** be duplicated. Creating multiple Patient Statuses with the same Guidelines/Other Data will result in service failures, such as that of ePrescribing and CDA generation. To check the Patient Status table for duplicates, click the **Verify** button.

1. In the Code Tables form, select **Patient Status** from the Code Table Purpose column.
2. To add a Patient Status, click the **Add** button  .
3. Complete the following fields:
  - **Description:** Enter name of the Patient Status.
  - **Guidelines / Other Data:** Repeat the **Description** in this field. The entry should not exceed 12 characters.
  - **Numeric ID:** Enter value of 0,1, or 2. A definition of each Numeric ID can be found below.
    - **0= Allow.** The system will not prevent the scheduler from making the appointment.
    - **1= Disallow.** The system will prevent the scheduler from making the appointment.
    - **2= Warn.** They system will alert the scheduler of the patient status, but will allow the scheduler to proceed with the appointment scheduling.
  - **Sort:** Determines what order the Patient Status will be displayed on the drop-down menu.
  - **Archived:** Leave this deselected for all new entries. Archive items no longer in use or to hide from view.
4. Click the **Save**  button
5. Once all items have been changed to fit your needs, click the **X** to close the window.




The screenshot shows the 'Code Tables' window with 'Patient status' selected in the 'Code Table Purpose' column. Below the list, a table displays the details for the selected code table.

Description	Guidelines / Other Data	String ID	Numeric ID	Ref Pu
▶ Active	ACTIVE		0	
Inactive	INACTIVE		2	
Transferred	TRANSFERRED		1	
In Collection	COLLECTION		1	
Discharged	DISCHARGED		1	
Deceased	DECEASED		1	
Call Coverage	COVERAGE		2	
Visitor	VISITOR		2	
Employee	EMPLOYEE		0	
Waiting List	WAITLIST		2	
Merged	MERGED		1	

## Edit a Patient Status

**Path: Practice Management tab > Coded Values**

1. In the **Code Tables** form, select **Patient Status** in the **Code Table Purpose** column.
2. Select the **Patient Status** that you want to modify.
3. Click the **Edit**  button. You can make updates to any of the fields (**Description**, **Guidelines / Other Data**, **Numeric ID**, **Sort**, or **Archive**).
4. Click the **Save** button.
5. Click the **X** to close to window.

## Report on a Patient Status

**Path: Practice Management tab > Demographic Analysis/Recall**

The **Demographic Analysis and Recall Report** displays all patients who have a particular status.

1. Click the **Search** button to run the Demographic Analysis and Recall Report.
2. Click the **Pat Status** column header to sort the report:
  - Click the **Pat Status** column header and drag it to the dark-grey area.
  - Click the **Column Header** to sort the grid in ascending or descending order by patient status.
  - Hover over the column header and click the **Filter** icon. Select the **Checkbox(es)** for the statuses you would like to see.

For more detail on report options, visit [Grouping Data](#), [Sorting Lists](#), [Filtering Data](#), and [Add, Remove, or Reorder Columns](#).

Version 20.3

**Path: Practice Management tab > Appointments button**

## Overview

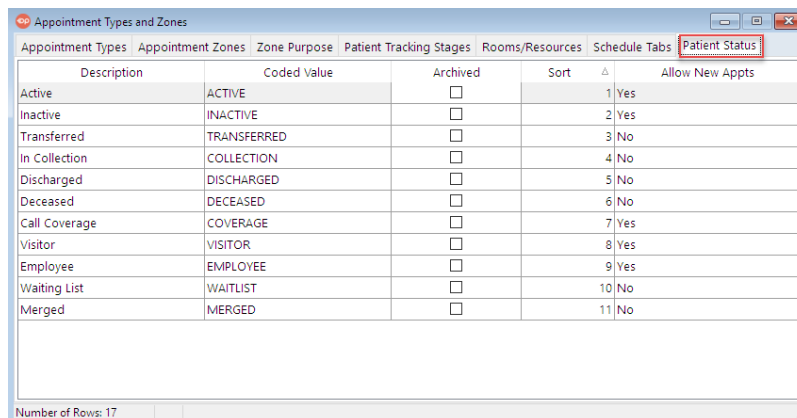
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- Determine whether new appointments are allowed for each status

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Discharged	DISCHARGED	<input type="checkbox"/>	5	No
Deceased	DECEASED	<input type="checkbox"/>	6	No
Call Coverage	COVERAGE	<input type="checkbox"/>	7	Yes
Visitor	VISITOR	<input type="checkbox"/>	8	Yes
Employee	EMPLOYEE	<input type="checkbox"/>	9	Yes
Waiting List	WAITLIST	<input type="checkbox"/>	10	No
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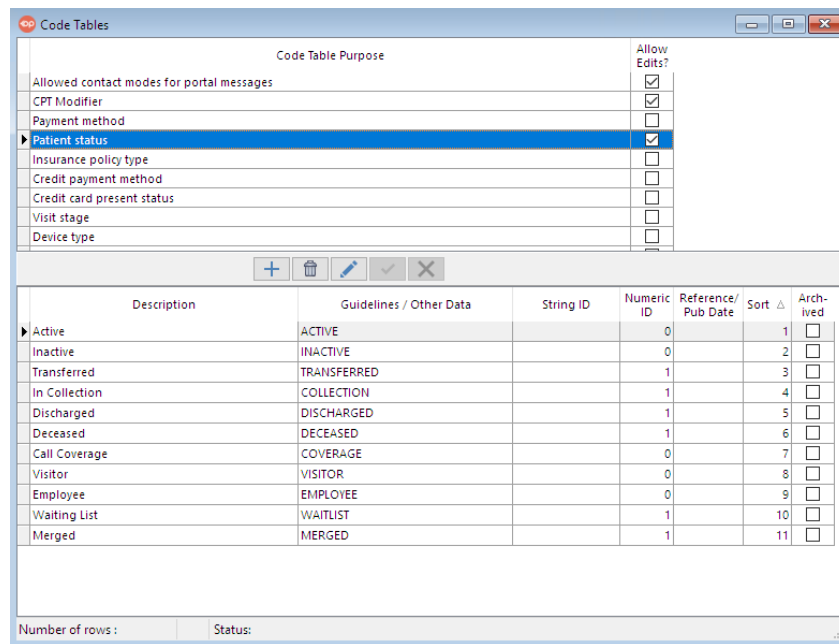
## Add a new Patient Status

**Path:** Practice Management tab > Coded Values



**Warning:** When creating a new status, the Guidelines / Other Data **CANNOT** be entered as ACTIVE. Only one Guidelines / Other Data can be in the table as ACTIVE and this must remain on the patient status description of Active. If more than one Guideline is entered as ACTIVE this will cause failure when ePrescribing.


1. In the Code Tables form, select **Patient Status** from the Code Table Purpose column.
2. To add a Patient Status, click the **Add** button .
3. Complete the following fields:
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  - **Guidelines / Other Data:** Repeat the **Description** in this field. The entry should not exceed 12 characters.
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  - **Archived:** Leave this deselected for all new entries. Archive items no longer in use or to hide from view.
4. Click the **Save**  button
5. Once all items have been changed to fit your needs, click the **X** to close the window.



Description	Guidelines / Other Data	String ID	Numeric ID	Reference / Pub Date	Sort	Archived
▶ Active	ACTIVE		0		1	<input type="checkbox"/>
Inactive	INACTIVE		0		2	<input type="checkbox"/>
Transferred	TRANSFERRED		1		3	<input type="checkbox"/>
In Collection	COLLECTION		1		4	<input type="checkbox"/>
Discharged	DISCHARGED		1		5	<input type="checkbox"/>
Deceased	DECEASED		1		6	<input type="checkbox"/>
Call Coverage	COVERAGE		0		7	<input type="checkbox"/>
Visitor	VISITOR		0		8	<input type="checkbox"/>
Employee	EMPLOYEE		0		9	<input type="checkbox"/>
Waiting List	WAITLIST		1		10	<input type="checkbox"/>
Merged	MERGED		1		11	<input type="checkbox"/>

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1. In the **Code Tables** form, select **Patient Status** in the **Code Table Purpose** column.
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