Edit an Address Book Entry

Last Modified on 12/30/2019 3:43 pm EST

Version 14.19

The following describes the procedure for locating a contact in the Address Book form, whether the form is opened directly, or accessed through another form, such as the Patient Register or Staff Directory, in order to transfer the contact's information to a patient's record.

> **Note**: If the contact needs to be entered in the Address Book, skip to Step 3.

1. If the contact is already in the Address Book, locate the contact by entering one of the search criteria listed below.

    -   **Search for Field:** - Contact's last name, company name or phone number
    -   **Search by Category Descriptor** - Click the down arrow button to the right of this field and select a descriptor category from the drop-down menu. A list of all contacts with that descriptor will appear. Narrow your search by entering part or all of a name, company name or phone number.
    -   **Search by Insurance Affiliation** - Click the down arrow button to the right of this field and select an Insurance Carrier from the drop-down menu.
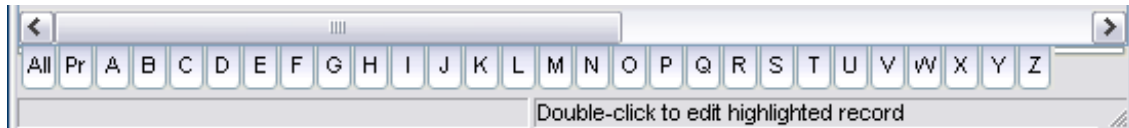
> **Note**: If a carrier is not listed in the drop-down menu, no Address Book entries have been affiliated with this carrier yet, and/or the carrier is not stored in the database. To add this carrier to the database, refer to the procedure in the Billing Module for Insurance Carrier Records

    -   **Search by Hospital Affiliation** - Click the down arrow button to the right of this field and select a hospital name from the drop-down menu.

- **Search by first letter of last/company name** - Click a letter on the horizontal **Letter Index** at the bottom of the screen. A list of names beginning with that letter are displayed.

2. Click the **Search** button .

3. If your search does not yield a match, click the **New** button, to the left of the **Exit** button, and follow the procedure for **entering a new contact in the Address Book**, beginning with Step 3). Once you have saved the new contact or room name, close the Address Book and repeat your search for the staff member/room name.

4. Once you have found the desired entry, you may view or edit the contact's complete information by double-clicking on the entry. The entry will open in a separate Edit Address window.

5. If you are selecting a contact to enter in a patient's record, select the desired listing by checking the box in the far left **Print** column. Then click the **Use** button in the lower left corner to transfer the name and contact information to the record.

6. To print a contact's information, click the check box in the **Print** column on the far left. Then click the **print** icon in the upper right corner.

7. Click the **Exit** button to close.

Version 14.10

The following describes the procedure for locating a contact in the Address Book form, whether the form is opened directly, or accessed through another form, such as the Patient Register or Staff Directory, in order to transfer the contact's information to a patient's record.

> ℹ If the contact needs to be entered in the Address Book, skip to Step 3.

1. If the contact is already in the Address Book, locate the contact by entering one of the search criteria listed below.

- **Search for Field:** - Contact's last name, company name or phone number
- **Search by Category Descriptor** - Click the down arrow button to the right of this field and select a descriptor category from the drop-down menu. A list of all contacts with that descriptor will appear. Narrow your search by entering part or all of a name, company
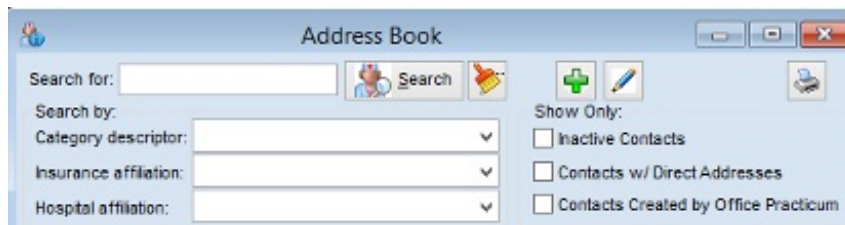
name or phone number.

- **Search by Insurance Affiliation** - Click the down arrow button to the right of this field and select an Insurance Carrier from the drop-down menu.
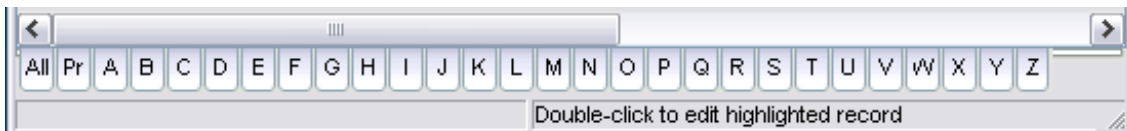
⚠️ **Note**: If a carrier is not listed in the drop-down menu, no Address Book entries have been affiliated with this carrier yet, and/or the carrier is not stored in the database. To add this carrier to the database, refer to the procedure in the Billing Module for Insurance Carrier Recordsl.

- **Search by Hospital Affiliation** - Click the down arrow button to the right of this field and select a hospital name from the drop-down menu.

- **Search by first letter of last/company name** - Click a letter on the horizontal **Letter Index** at the bottom of the screen. A list of names beginning with that letter will appear.

2. Click the **Search** button .

3. If your search does not yield a match, click the **New** button, to the left of the **Exit** button, and follow the procedure for **entering a new contact in the Address Book**, beginning with Step 3). Once you have saved the new contact or room name, close the Address Book and repeat your search for the staff member/room name.

4. Once you have found the desired entry, you may view or edit the contact's complete information by double-clicking on the entry. The entry will open in a separate Edit Address window.

5. If you are selecting a contact to enter in a patient's record, select the desired listing by checking the box in the far left **Print** column. Then click the **Use** button in the lower left corner to transfer the name and contact information to the record.

6. To print a contact's information, click the check box in the **Print** column on the far left. Then click the **print** icon in the upper right corner.

7. Click the **Exit** button to close.