

Copy a Sibling's Basic Information

Last Modified on 05/05/2021 8:50 am EDT

Version 14.19

Path: Clinical, Practice Management, Billing tab > Patient Chart button > Basic Information

About

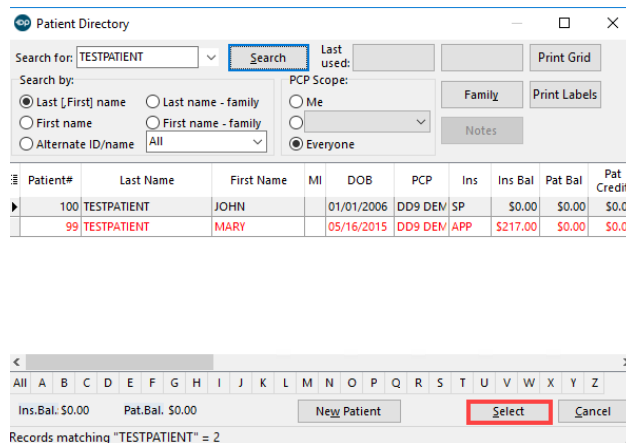
To make it easier to register siblings in OP, a **Copy From** feature is available in the Basic Information section of the Patient Chart. This feature copies the following fields from one patient to another:

- Language
- Address
- Home phone
- PCP
- Family Contacts

After completing the steps below, it is recommended to review and confirm the information that has been copied. To **copy Insurance information**, use the Copy From button located in the Insurance section of the Patient Chart.

Copy Basic Information

1. Confirm the new patient does not already have a Patient Chart created in OP, and click **New Patient** in the Patient Search window to begin creating a new chart.
2. Enter the patient's:
 - Name (last, first, middle)
 - Birth date
 - Sex
3. Click the **Copy From** button. The Patient Directory window opens with a last name search already performed.
4. Select the sibling to copy from, or search for and select the patient to copy from.
5. Click the **Select** button.



6. Complete the remaining demographic information for the new patient.
7. Click the **Save** button.
8. Proceed with entering the Family Contacts and Insurance information for the patient.

Version 14.10

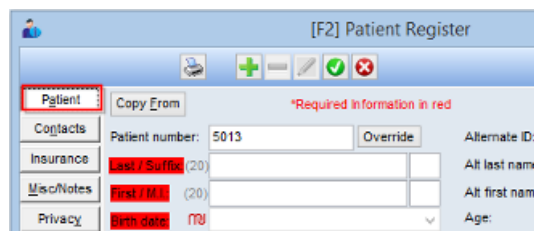
Path: Smart Toolbar > Register Button

Overview


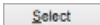
This page will instruct you on how to copy a sibling's register record to another sibling. If a new record needs to be created for a sibling, follow these steps [Register a New Patient](#).

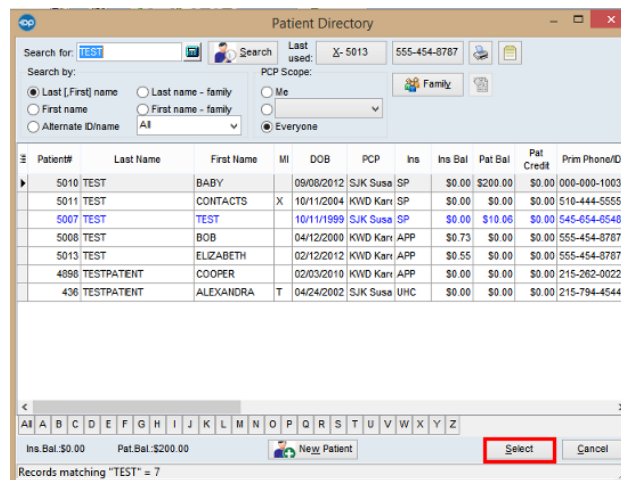
Copy a Sibling's Register Record

1. On the **Patient** tab, enter the patient's first name, date of birth, and sex. These fields are required before information can be copied.



Patient Register: Patient Register window

2. Click the **Copy From** button . This will open the Patient Directory.
3. Search for the sibling to copy from and click the **Select** button .



Patient#	Last Name	First Name	MI	DOB	PCP	Ins	Ins Bal	Pat Bal	Pat Credit	Prim Phone/D
5010	TEST	BABY		09/08/2012	SJK Susa	SP	\$0.00	\$200.00	\$0.00	000-000-1003
5011	TEST	CONTACTS	X	10/11/2004	KWD Karri	SP	\$0.00	\$0.00	\$0.00	510-444-5555
5007	TEST	TEST		10/11/1999	SJK Susa	SP	\$0.00	\$10.06	\$0.00	545-654-6548
5008	TEST	BOB		04/12/2000	KWD Karri	APP	\$0.73	\$0.00	\$0.00	555-454-8787
5013	TEST	ELIZABETH		02/12/2012	KWD Karri	APP	\$0.55	\$0.00	\$0.00	555-454-8787
4986	TESTPATENT	COOPER		02/03/2010	KWD Karri	APP	\$0.00	\$0.00	\$0.00	215-262-0022
436	TESTPATENT	ALEXANDRA	T	04/24/2002	SJK Susa	UHC	\$0.00	\$0.00	\$0.00	215-794-4544

Patient Register: Select Record

4. Click the **Post Edit** button .
5. Click the **Exit** button .

i The insurance record will not transfer over when using the copy function. Follow these instructions to copy a sibling's insurance record: [Copying Insurance Information From a Family Member](#).