Adding Contacts to a Patient's Chart

Last Modified on 07/09/2024 2:57 pm EDT

OP sets **all defaults to share all information** Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 20.17

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

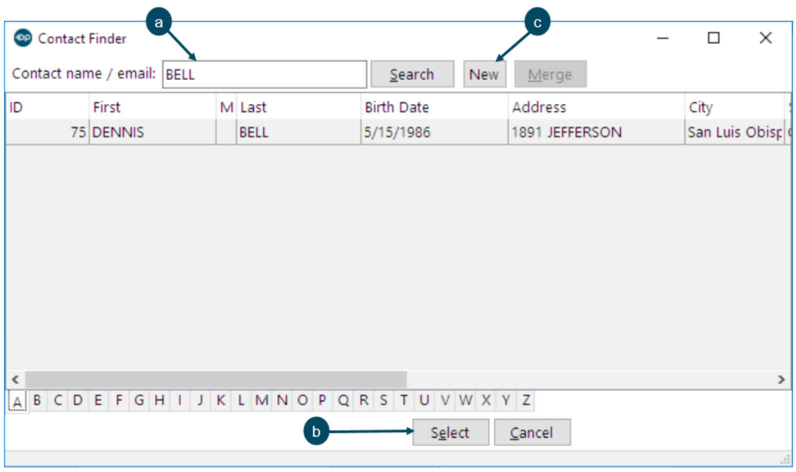
About

Family Contacts are entered into a patient's chart to keep a record of who is responsible for the patient, who may bring the patient in for their appointments, and/or who should receive information regarding the patient, including billing statements.

When a patient turns 18 and they'd like to receive their own communications, their Family Contacts record should be updated so that they are set up as their own contact with the Role/Reason set to **Self**. Additionally, they should have the Preferred Contact Methods selected. Any previous Primary Contacts should also be updated to **No Contact**.

Add a New Contact

1. Navigate to the Family Contacts section of the chart by following the path above.
2. Click the **Add** button. The Contact Finder displays contacts with the patient's last name.



   a. If the contact has a different last name, enter the name in the Contact name/email field.
   b. Click the **Select** button to choose a name in the Contact Finder list.
   c. If no match is displayed, click the **New** button to add a new contact.

Note: If multiple entries for the same Contact are displayed, the records need to be merged to avoid running into issues when you are trying to link patients. See **Merging Contacts** for more information.

3. Enter and/or confirm the Contact's **first** and **last** name.
4. *(Optional)* Enter the Contact's **Nickname, Birth date, and Language**.
5. Enter the Contact's address and Primary phone, if creating a new Contact who shares the same home address as the patient, simply double-click in the **Address** field to populate the address on file for the patient and the **Primary phone** field.
6. *(Optional)* Enter the Contact's **Day/work, cellphone, and fax** numbers.

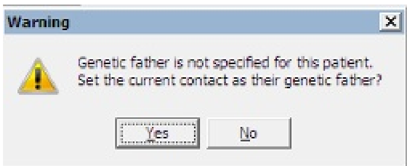
7. *(If applicable)* Enter a **Home email** that will be used for registering and communicating through the Patient Portal.
8. *(Optional)* Enter the Contact's **work email, SSN, Employer, Occupation, and Notes**
9. Complete the **Preferred Contact Methods** for the contact record.
10. Click the **Save** button. The Contact is saved and added to the list of Family Contacts displayed at the top of the window.
11. At the top of the window where the Contact is now listed, complete the following information:

   - **Role/Reason:** Click the drop-down and select the Contact's relationship to the patient.

> **Note**: If the relationship needed for the Contact you are adding is not listed, it can be added to the **Contact Relationship code table**.

   - **Authority:** The type of authority this Contact holds regarding the patient's care. Click the **Authority** drop-down and select from the list.
   - **Res?:** Select the checkbox to indicate the Contact resides with the patient or leave it deselected if he/she doesn't live with the patient. Selecting the checkbox prompts a confirmation pop-up asking if you would like to synchronize the address and primary phone for the Contact with the patient. This checkbox is also used to socially link family members who share the same Contact for the purpose of easily documenting patients' Social History.
   - **Start/End date:** These fields can be used to record the beginning/ending of the Contact's relationship with the patient.
   - **Portal:** This column is for information only, and there is no relationship between selections in this field with granting portal access. It can be **hidden from view** if your Practice isn't using it to record Family Contacts to which they've provided a portal registration PIN. If the column is displayed, you may choose from one of the following options:
     - **None**: The Contact should have no access to patient information via a portal account.
     - **Minor**: The Contact can have access until the patient is 18 years of age.
     - **Full**: The Contact can have access after the patient reaches 18 years of age. This should be selected for Contacts who have been given Proxy access to the patient's portal account.

12. Once all information has been entered, click the **Save** button.
13. Respond to the Warning pop-up to indicate if the contact is the genetic mother or genetic father. This will begin to build the patient's family history. If this is a genetic parent, click **Yes**. If this is not a genetic parent, click **No**. If you are unsure, click the **X** to close the warning window.



The newly saved contact will be automatically given the next sequential Sort number in the list of Contacts at the top of the window. If the order should be corrected to list the correct Primary Contact first, select that Contact and click the **Up** or **Down arrow,** and then click **Fix Sort #**. Non-sequential sort orders may prevent the Contacts from displaying while in the patient search window.

Version 20.16

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

About

Family Contacts are entered into a patient's chart to keep a record of who is responsible for the patient, who may bring the patient in for their appointments, and/or who should receive information regarding the patient.

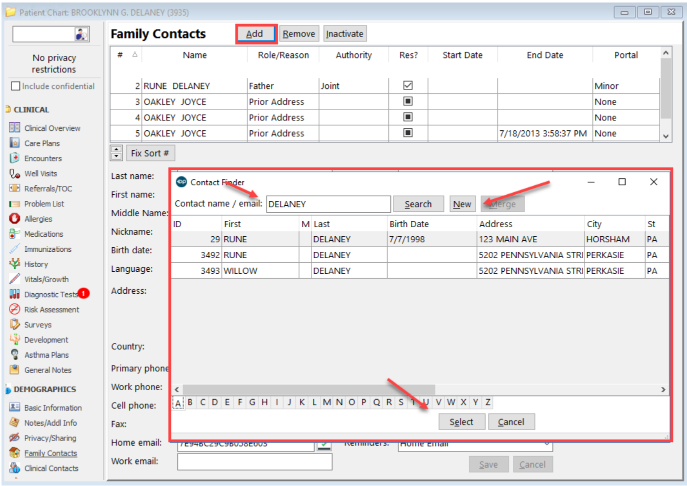
When a patient turns 18 and they'd like to receive their own communications, their Family Contacts record should be updated. The patient should be set up as their own contact with the Role/Reason set to **Self**. Additionally, they should have the Preferred

Contact Methods selected. Any previous Primary Contacts should also be updated to **No Contact**.

Add a New Contact

1. Navigate to the Family Contacts section of the chart by following the path above.
2. Click the **Add** button. The Contact Finder displays contacts with the patient's last name.

   - If the contact has a different last name, search for it in the Contact Finder window. If it appears, click the **Select** button.
   - If no match appears, click the **New** button to add a new contact.



> **Note**: If multiple entries for the same Contacts are displayed, the records need to be merged to avoid running into issues when you are trying to link patients. See **Merging Contacts** for more information.

3. Enter and/or confirm the Contact's information. If creating a new Contact who shares the same home address as the patient, simply double-click in the **Address** field to populate the address on file for the patient.
4. Indicate the Contact's relationship to the patient by completing the following fields:

   - **Role/Reason:** The Contact's relationship to the patient.

> **Note**: If the relationship needed for the Contact you are adding is not listed, it can be added to the **Contact Relationship code table**.

   - **Authority:** The type of authority this Contact holds regarding the patient's care.
   - **Res?:** Select the checkbox to indicate the Contact resides with the patient or leave it deselected if he/she doesn't live with the patient. Selecting the checkbox prompts a confirmation pop-up asking if you would like to synchronize the address and primary phone for the Contact with the patient. This checkbox is also used to socially link family members who share the same Contact for the purpose of easily documenting patients' Social History.
   - **Start/End date:** These fields were previously used to indicate portal access dates for the Contact. Since this **does not** apply to the InteliChart Patient Portal, your Practice may choose to use these fields to record the beginning/ending of the Contact's relationship with the patient.
   - **Portal:** This column is for information only, and there is no relationship between selections in this field with granting portal access. It can be **hidden from view** if your Practice isn't using it to record Family Contacts to which they've provided a portal registration PIN. If the column is displayed, choose from one of the following options:
     - **None**: The Contact should have no access to patient information via a portal account.
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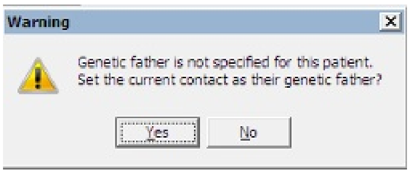
5. Once all information has been entered, click the **Save** button.

6. Respond to the Warning pop-up to indicate if the contact is the genetic mother or genetic father. This will begin to build the patient's family history. If this is a genetic parent, click **Yes**. If this is not a genetic parent, click **No**. If you are unsure, click the **X** to close the warning window.



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