

Important Content Update Message

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

Adding a Clinical Contact

Last Modified on 02/11/2021 9:20 am EST

Version 20.11

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

Overview

This page will instruct you on viewing and adding Clinical Contacts. Clinical Contacts are used for keeping track of what specialists, providers, pharmacies, etc. are taking part in the care of the mutual patient.

Adding a Clinical Contact

1. From the Clinical Contacts window, click the **Add** button.
2. Search for the contact using one of the methods listed below.
 - **Search for:** Type in the text field and search by last name, first name, company, or note.
 - **Category descriptor:** Select a category from the drop-down.
 - **Insurance affiliation:** Select an insurance from the drop-down.
 - **Hospital affiliation:** Select a hospital from the drop-down.
 - **Show Only:**
 - **Inactive Contacts:** Select to show only inactive entries.
 - **Contacts w/Direct Addresses:** Select to show every contact who has a direct address.
 - **Contacts Created by Office Practicum:** Select to show contact entries created by OP.
 - **Select a tab from the bottom of the window:**
 - **All:** Lists all contacts in the Address Book.
 - **Pr:** Lists all contacts that are providers in the Address Book. Providers will show in this tab if **Prv?** is checked.
 - **A-Z:** Lists all contacts whose first name or last name starts with the letter of the tab chosen.
3. Highlight the contact you want to choose.
4. Click the **Select** button.
5. The contact will now be part of the patient's Clinical Contacts.

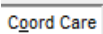

Version 14.10

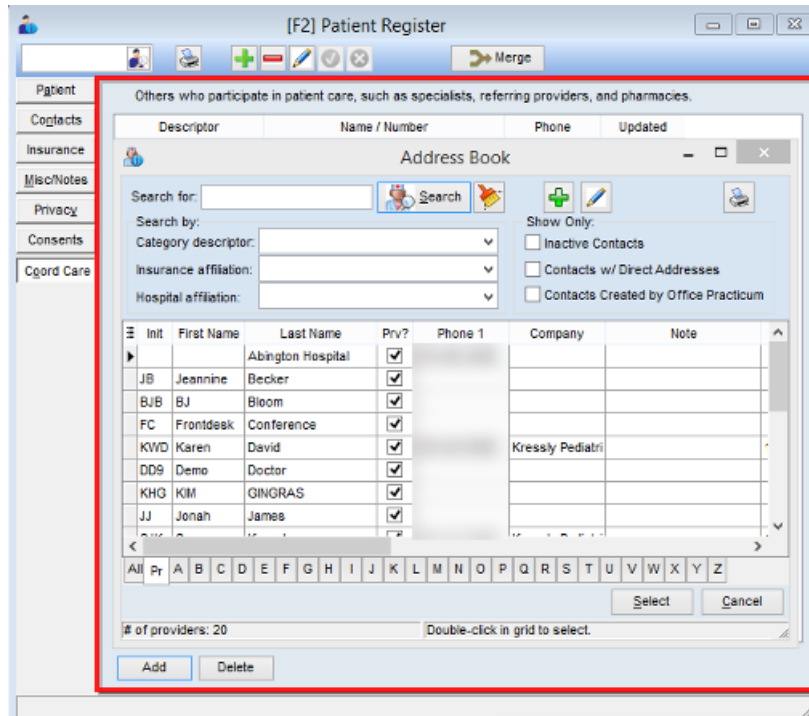
Path: Smart Toolbar > Register button > Coord Care tab

Overview

This page will instruct you on viewing and adding a Patient's Coordination of Care. The Coordination of Care tab is used for keeping track of what specialists, providers, pharmacies, etc. are taking part in the care of the mutual patient.

View and Add to the Coordination of Care

1. Click on the **Coordination of Care** tab  and input the necessary fields as required by office staff, for the patient.
2. Click on the **Add** button  at the bottom of the window.
3. Click on a contact from the Address Book.



Patient Register: Coordination of Care

4. Click the **Select** button .
5. The contact will now be part of the patient's coordination of care.



Patient Register: Coordination of Care