Search for a Patient

Last Modified on 08/08/2022 11:28 am EDT

Version 20.17

About

The Patient Search field is displayed in the upper left-hand corner of many windows throughout OP. From this field, you can search for a patient using a variety of options detailed in the hover-over. Upon basic search, the search grid displays matches for your search and also includes the patient ID, patient name (l,m,f), sex, DOB, home phone number, and primary contact. To the right of the Patient Search field in the Patient Chart, you can also quickly access the last five Patient Charts that you've recently closed by clicking the drop-down arrow.
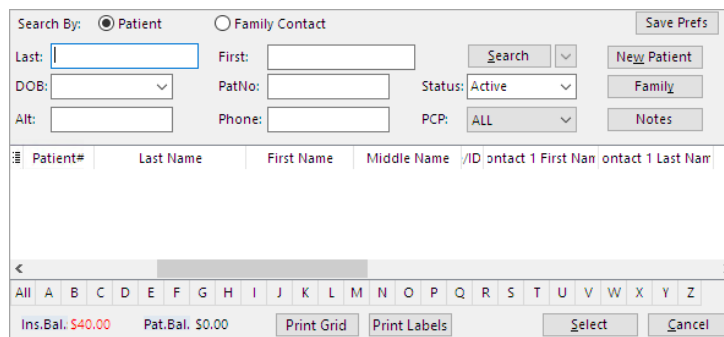
Basic Patient Search

To view the search options, hover over the **Patient Directory** button. A list of patients who match your search are displayed in the grid.
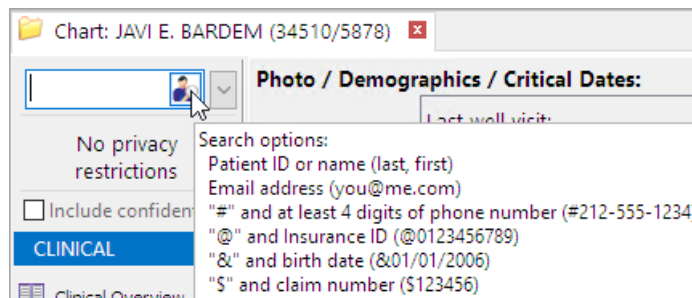
Full Patient Search

To conduct a full search of the Patient Directory, click on the **Patient Directory** button . If you already have text entered into the search field, you'll then need to click the **Full Search** button. You can use a combination of any of the fields displayed in the image below to conduct your search. Columns can be added to or removed from the search results grid by clicking the **Visible Columns** button to the left of the column headers and selecting or deselecting the checkboxes.
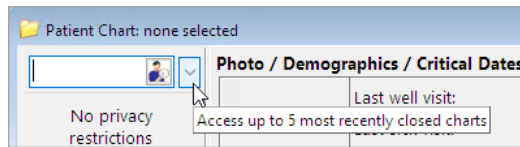
Access to the Last 5 Patients

Click the drop-down to the right of the Patient Directory button to see a picklist of the last 5 charts that were closed.
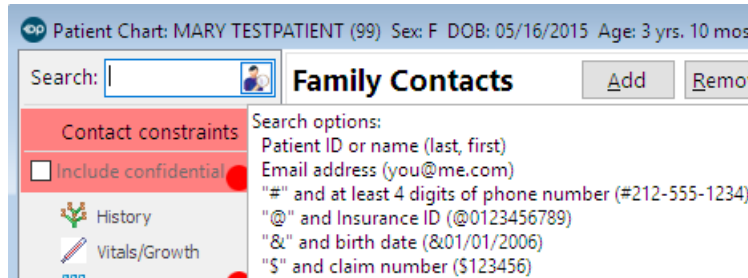
Patient Chart: none selected

Photo / Demographics / Critical Dates:

Last well visit:

No privacy restrictions

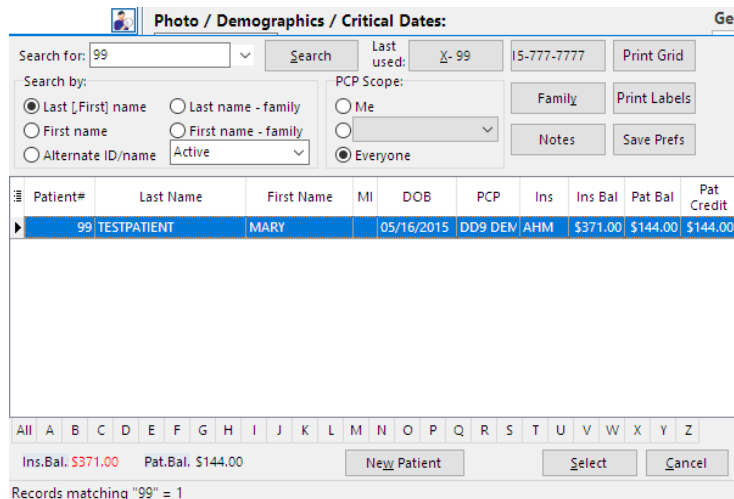Access up to 5 most recently closed charts

Version 20.16

Overview

The Patient Search field is displayed in the upper left-hand corner of many windows in OP.

- To view the search options, hover over the **Patient Directory** button.

OP Patient Chart: MARY TESTPATIENT (99) Sex: F DOB: 05/16/2015 Age: 3 yrs. 10 mos.

Search:

Family Contacts   Add   Remove

Contact constraints

☐ Include confidential

Search options:
Patient ID or name (last, first)
Email address (you@me.com)
"#" and at least 4 digits of phone number (#212-555-1234)
"@" and Insurance ID (@0123456789)
"&" and birth date (&01/01/2006)
"$" and claim number ($123456)

🌱 History

✏️ Vitals/Growth

- To conduct a full search of the Patient Directory, click on the **Patient Directory** button .

Photo / Demographics / Critical Dates: Ge

Search for: 99   Search   Last used: X- 99   I5-777-7777   Print Grid

Search by: PCP Scope:

◉ Last [First] name   ○ Last name - family   ○ Me   Family   Print Labels
○ First name   ○ First name - family   ○   Notes   Save Prefs
○ Alternate ID/name   Active   ◉ Everyone

	Patient#	Last Name	First Name	MI	DOB	PCP	Ins	Ins Bal	Pat Bal	Pat Credit
▶	99	TESTPATIENT	MARY		05/16/2015	DD9 DEM	AHM	$371.00	$144.00	$144.00

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Ins.Bal. $371.00   Pat.Bal. $144.00   New Patient   Select   Cancel

Records matching "99" = 1

You can search for patients by:

- Last name
- First name
- Alternate ID/name
- Patient Status
- PCP

Note: OP defaults to search for Active patients. If you are searching for a Patient who may have another status, such as Merged, Transferred, Inactive, etc., use the drop-down menu to select the appropriate status.

From full search of the directory, you can also view a snapshot of Patient and Insurance Balances, Demographic information, Contact information etc. The Columns can be edited by selecting the Visible Icons icon located to the far left of the window.

- You can also save your search preferences by clicking the **Save Prefs** button.