

# Patient Chart: Family Contacts

Last Modified on 11/21/2022 8:41 am EST

Version 20.18



This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

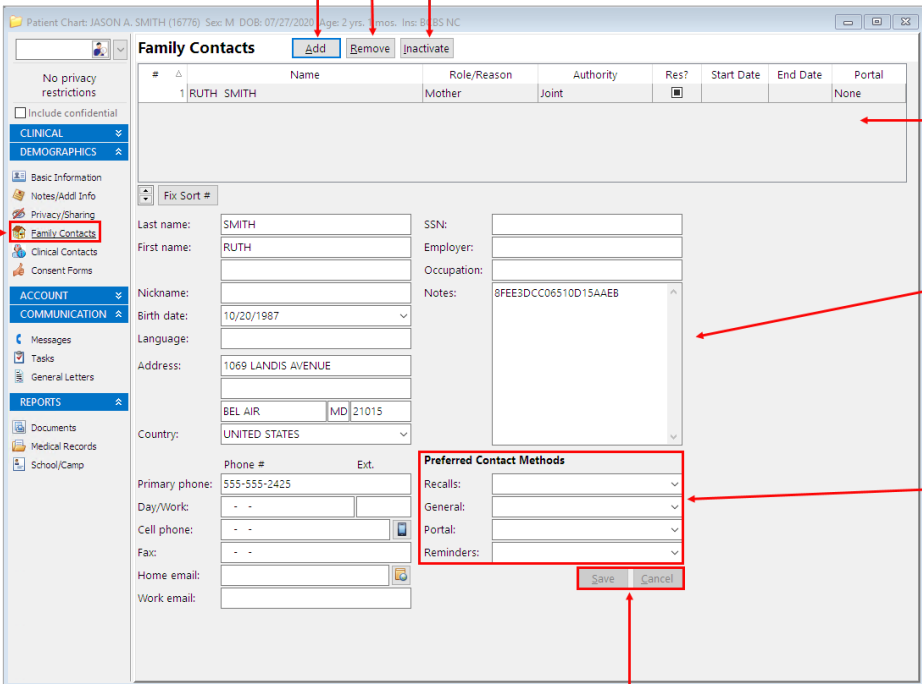
## About Patient Chart: Family Contacts

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

The Family Contacts window creates and lists the patient's relatives and/or other contacts. Contacts can be created, removed, activated, and merged from this tab. Families can also be socially linked from one patient to another here.



**Note:** Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.



The screenshot shows the 'Family Contacts' window for patient JASON A. SMITH. The window has a table at the top with columns for Name, Role/Reason, Authority, Res?, Start Date, End Date, and Portal. Below the table is a form for adding a new contact, including fields for Last name, First name, Nickname, Birth date, Language, Address, Country, and Phone numbers. There is also a 'Preferred Contact Methods' section with dropdown menus for Recalls, General, Portal, and Reminders. A 'Save' button is at the bottom right. Red callouts 1 through 8 point to various elements: 1 points to the 'Family Contacts' button in the left sidebar; 2, 3, and 4 point to the 'Add', 'Remove', and 'Inactivate' buttons at the top of the window; 5 points to the table; 6 points to the 'Notes' field; 7 points to the 'Preferred Contact Methods' section; and 8 points to the 'Save' button.

## Patient Chart: Family Contacts Map

Number	Section	Description
1	Family Contacts button	The Family Contacts button accesses the Family Contacts window in the patient's chart.

2	Add button	The <b>Add</b> button opens the Contact Finder window to link an already added contact or add a new contact.
3	Remove button	The <b>Remove</b> button removed the selected contact from the contact list.
4	Inactivate button	The <b>Inactivate</b> button deactivates the selected contact in the contact list. When the contact is inactivated, the end date field is entered with the date and time the contact was made inactive.
5	Contact List	The Contact List contains the patient's relatives or contacts. Contacts in this list can be added, removed, merged, and edited. The information for the selected contact is displayed in the Contact Information panel. The Portal column is only displayed if selected in Global Preferences and is informational only, according to the Practice's determination. It has no functionality for assigning portal access to contacts.
6	Contact Information panel	The Contact Information panel displays the information for the selected contact.
7	Preferred Contact Methods	The Preferred Contact Methods select the method by which the Practice will notify the patient's contact for a particular reason. Each contact method can be different based on the available reasons for contact. Available reasons for contacting the designated contact person are visible based upon if you are using the Patient Message Exchange (PMX) or IntelliChart (Portal or Notify).
8	Save and Cancel buttons	The <b>Save</b> and <b>Cancel</b> buttons save or cancel the changes to the contact information panel.

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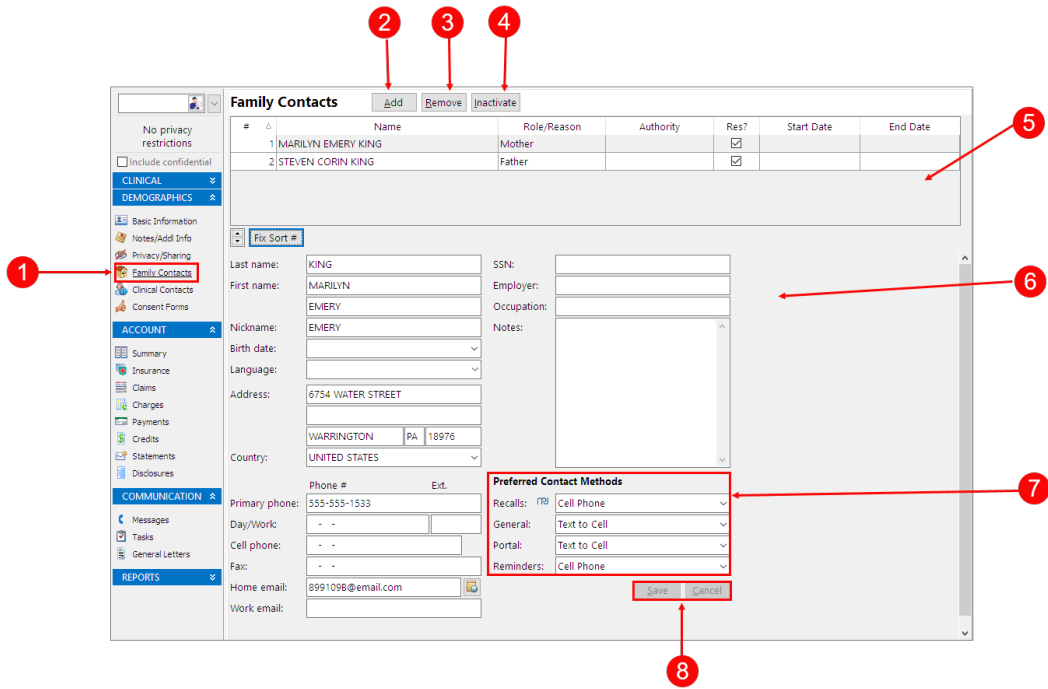
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