



Important Content Update Message

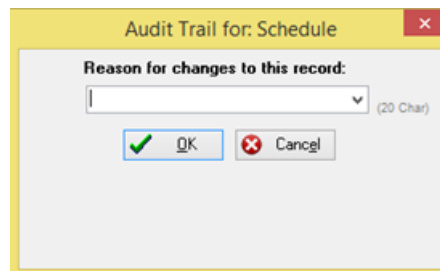
We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

How do I add reasons for record changes?

Last Modified on 02/08/2021 1:13 pm EST

Path: Practice Management tab > Coded Tables

When performing a deletion action in OP, such as the deletion of an appointment, you are prompted to select a reason for the record change that will be recorded in the Audit Trail.



OP comes installed with three reasons for change:






- Patient too old
- Setup
- Test

To add an additional reason, you can simply type the reason in the reason field (pictured above). After entering your reason and clicking **OK**, the reason will be saved for future use.



Note: Because all reasons entered in this field will be saved as they are entered, this drop-down menu may get very large. The following steps will show you how to perform maintenance on this list.

The record change reasons are all housed in a code table that will give you the ability to add reasons, delete reasons, and archive reasons. Your practice administrator or an authorized user should maintain this code table. To manage the code table:

1. Navigate to **Practice Management tab > Coded Values**. The Code Tables window is displayed.
2. In the Code Table Purpose pane, select **Record change/delete reason**.
3. The reasons in your database will be listed in the lower window pane. From this pane you can perform the following:
 - **Add** a reason: Click the **Insert Record** button  and enter a new reason description and sort number.
 - **Delete** a reason: Click the **Delete Record** button . The reason will be immediately deleted.
 - **Edit** a reason: Select the reason and click the **Edit Record** button . After you have completed your edit, click the **Post Edit** button .
 - **Archive** a reason, select the Archived checkbox for each reason you would like to archive and then click the **Post Edit** button .