# TOC

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# Patient Information Management System

## User Guide

Welcome to the user guide for the Patient Information Management System (PIMS). PIMS users fall under one or more of four categories:

1. Physicians
2. Medical Personnel (e.g. Nurses)
3. Office Staff
4. Volunteers

Click the links or check the table of contents to scroll to the guide specific to your user type!

# Physician Guide

Welcome to the PIMS guide for physicians!
Here you will find all the instructions you need to create an account, log in, and manage patient information.

## About Physicians

Physicians include doctors, surgeons, and practitioners. They do not include nurses. If you are a nurse, please go to the Guide for Medical Personnel for the appropriate instructions.
As a physician, you will have access to prescription and treatment information about a patient. You alone will have the authority to make additions or changes to Doctor's Notes.

Get Started!
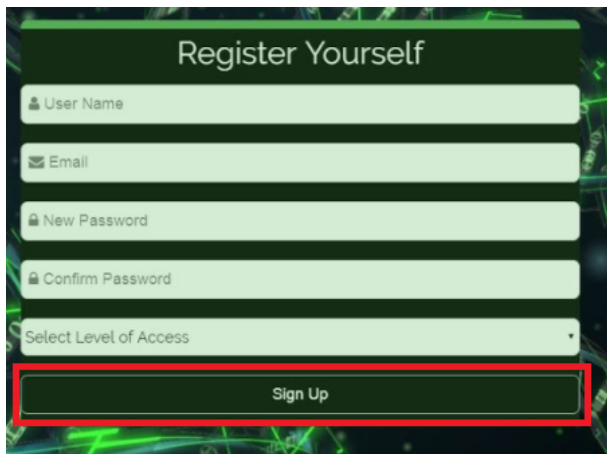
# Create New Account

## Physician

From the New User screen, you will enter your information in the appropriate blanks to get started using PIMS.



1. Click on **Register** on the **Log In** screen.
2. Enter a new user name of your choice in the **User Name** field.
3. Enter a valid e-mail address in the **E-Mail** field.
4. Choose a secure password and enter it in the **New Password** field.
5. Re-enter your password exactly as you did before in the **Confirm Password** field.
6. Select **Physician**from the **Select Level of Access** drop menu.
7. Click on **Sign Up**.

# Log In

## Physician

1. Enter your user name in the **User ID** field on the **Log In Screen**.
2. Enter your password in the **Password** field.
3. Click on **Log In**.



*If you have forgotten your password, click here or scroll to the Recover Password section of this guide.*

# Recover Password

## Physician

**If you forget your password, don't worry! You can recover it easily.**



1. Click on **Forgot Password**.
2. Enter your email in the **Your Email** field.
3. Click on **Send My Password**.
   *Your password will be sent to your e-mail.*



[Return to Log In](#)

# Add or Edit Treatment Notes
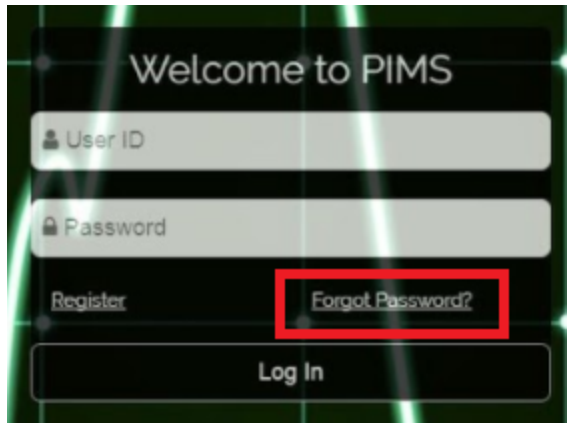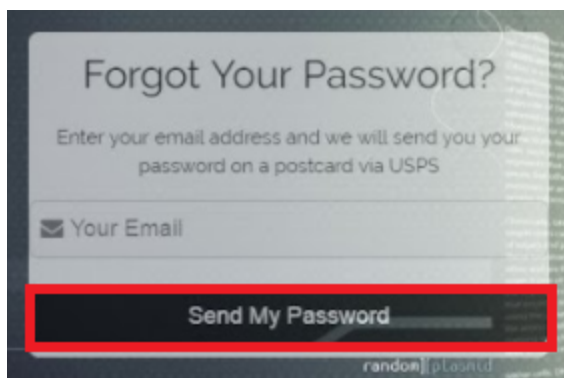
## Physician

Once you have pulled up a patient's information, you can update six different fields.
*Note: Physicians cannot add or edit Nurse's Treatment Notes.*



## To update the Reason for Admission...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Reason for Admission**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Scheduled Procedures...

Under the **Update Patient Info** table on the <u>right hand side</u>.

1. Click on the empty field next to **Scheduled Procedures**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Prescription Name...

Under the **Update Patient Info** table on the <u>right hand side</u>.



1. Click on the empty field next to **Prescription Name**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Prescription Schedule...

Under the **Update Patient Info** table on the <u>right hand side</u>.

1. Click on the empty field next to **Prescription Schedule**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Prescription Amount...

Under the **Update Patient Info** table on the right hand side.



1. Click on the empty field next to **Prescription Amount**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

# Search For a Patient

## Physician

To locate a patient within the database, you can search by their first name, last name, or an initial.

### If you know the patient's first name...



1. Click on **First Name** and enter the patient's first name in the field.
2. Click on the **Search** button directly to the right of the **First Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.

## If you know the patient's last name...



1. Click on **Last Name** and enter the patient's last name in the field.
2. Click on the **Search** button directly to the right of the **Last Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.



## If you want to search by a letter or initial...

1. Click on **First Name** or **Last Name** and enter a letter or initial in either field.
2. Type an asterisk (*) directly after the letter in the field.
3. Click on the **Search**button directly to the right of the field you have completed.
4. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
5. Double click on the patient's name to display his/her information.

# Medical Personnel Guide

Welcome to the PIMS guide for medical personnel!
Here you will find all the instructions you need to create an account, log in, and manage patient information.

## About Medical Personnel

Medical personnel include nurses, medical technicians, and aides that have direct access to patient care alongside a physician. They do not include physicians. If you are a physician, please go to the Guide for Physicians for the appropriate instructions.
As a member of the medical personnel, you will have access to prescription and treatment information about a patient. You alone will have the authority to make additions or changes to Nurse's Notes.

Get Started!

# Create New Account

## Medical Personnel

From the New User screen, you will enter your information in the appropriate blanks to get started using PIMS.
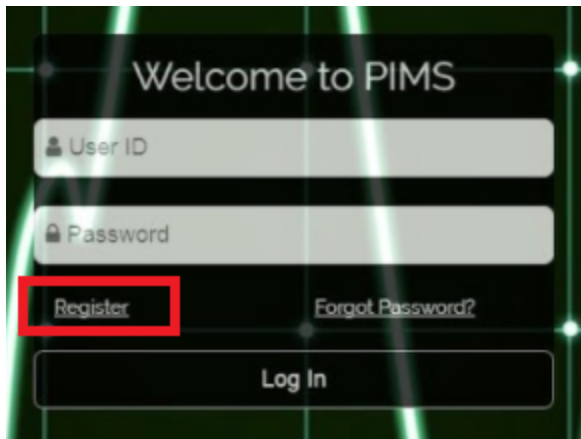


1. Click on **Register** on the **Log In** screen.
2. Enter a new user name of your choice in the **User Name** field.
3. Enter a valid e-mail address in the **E-Mail** field.
4. Choose a secure password and enter it in the **New Password** field.
5. Re-enter your password exactly as you did before in the **Confirm Password** field.
6. Select **Medical Personnel**from the **Select Level of Access** drop menu.
7. Click on **Sign Up**.
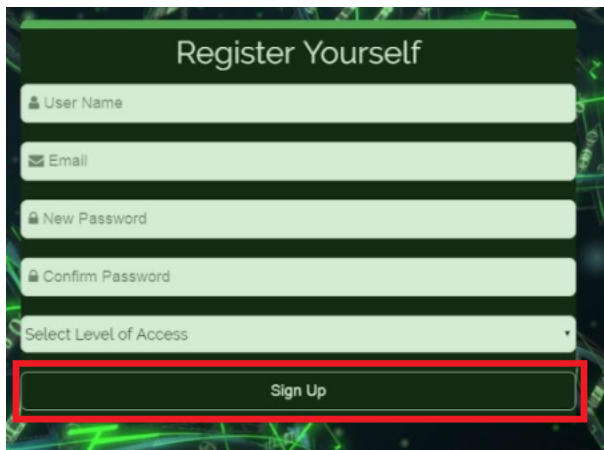
# Log In

## Medical Personnel

1. Enter your user name in the **User ID** field on the **Log In Screen**.
2. Enter your password in the **Password** field.
3. Click on **Log In**.
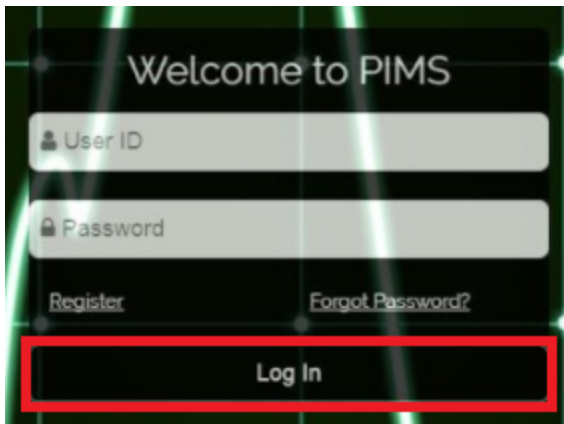


*If you have forgotten your password, click here or scroll to the Recover Password section of this guide.*
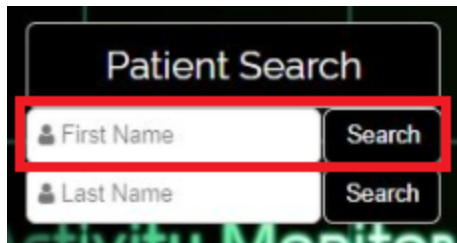
# Search for a Patient
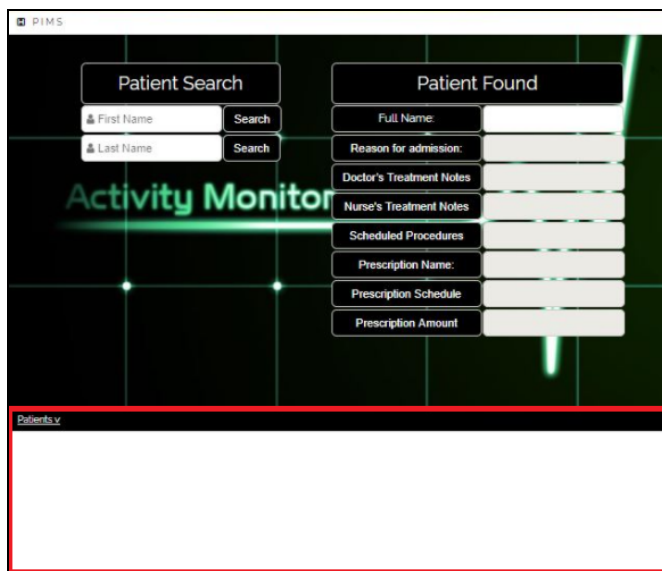
## Medical Personnel

To locate a patient within the database, you can search by their first name, last name, or an initial.

### If you know the patient's first name...



1. Click on **First Name** and enter the patient's first name in the field.
2. Click on the **Search** button directly to the right of the **First Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.

## If you know the patient's last name...



1. Click on **Last Name** and enter the patient's last name in the field.
2. Click on the **Search** button directly to the right of the **Last Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.



## If you want to search by a letter or initial...

1. Click on **First Name** or **Last Name** and enter a letter or initial in either field.
2. Type an asterisk (*) directly after the letter in the field.
3. Click on the **Search**button directly to the right of the field you have completed.
4. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
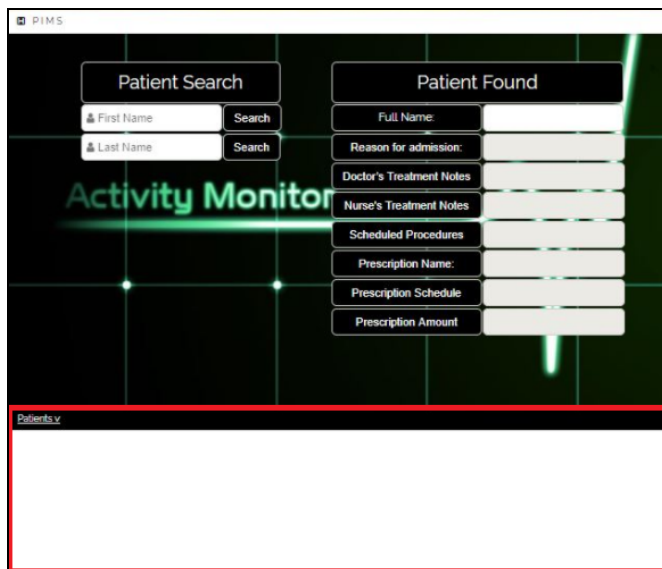5. Double click on the patient's name to display his/her information.

# Add or Edit Treatment Notes

## Medical Personnel

Once you have pulled up a patient's information, you can update six different fields. *Note: Medical Personnel cannot add or edit Doctor's Treatment Notes.*



## To update the Reason for Admission...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Reason for Admission**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Nurse's Treatment Notes...

Under the **Update Patient Info** table on the <u>right hand side</u>.

1. Click on the empty field next to **Nurse's Treatment Notes**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Scheduled Procedures...

Under the **Update Patient Info** table on the <u>right hand side</u>.



1. Click on the empty field next to **Scheduled Procedures**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Prescription Name...

Under the **Update Patient Info** table on the <u>right hand side</u>.

1. Click on the empty field next to **Prescription Name**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Prescription Schedule...

Under the **Update Patient Info** table on the <u>right hand side</u>.



1. Click on the empty field next to **Prescription Schedule**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Prescription Amount...

Under the **Update Patient Info** table on the <u>right hand side</u>.

| Patient Found | | Update Patient Info | |
|---|---|---|---|
| Full Name: | | Reason for admission: | |
| Reason for admission: | | Nurse Treatment Notes | |
| Doctor's Treatment Notes | | Scheduled Procedures | |
| Nurse's Treatment Notes | | Prescription Name: | |
| Scheduled Procedures | | Prescription Schedule | |
| Prescription Name: | | Prescription Amount | |
| Prescription Schedule | | Submit Changes! | |
| Prescription Amount | | | |

1. Click on the empty field next to **Prescription Amount**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

# Office Staff Guide

Welcome to the PIMS guide for office staff!
Here you will find all the instructions you need to create an account, log in, manage patient information, and print reports.

## About Office Staff

Office staff includes front desk receptionists, cashiers, and any paid staff members who do not have direct access to patient care. They do not include volunteers. If you are a volunteer, please go to the Guide for Volunteers for the appropriate instructions.
As a member of the office staff, you will have access to prescription and treatment information, as well as personal contact information about a patient. You alone will have the authority to make additions or changes to their contact information.
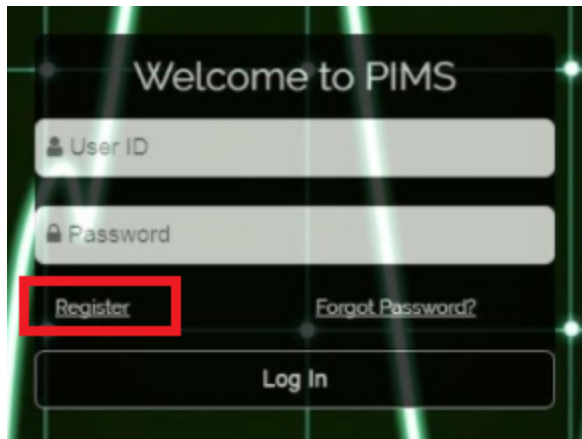
Get Started!
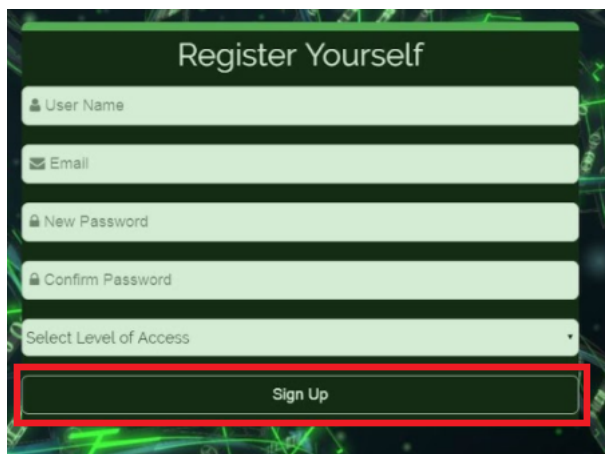
# Create New Account

## Office Staff

From the New User screen, you will enter your information in the appropriate blanks to get started using PIMS.



1. Click on **Register** on the **Log In** screen.
2. Enter a new user name of your choice in the **User Name** field.
3. Enter a valid e-mail address in the **E-Mail** field.
4. Choose a secure password and enter it in the **Password** field.
5. Re-enter your password exactly as you did before in the **Confirm Password** field.
6. Select **Office Staff** from the **Select Level of Access** drop menu.
7. Click on **Sign Up**.
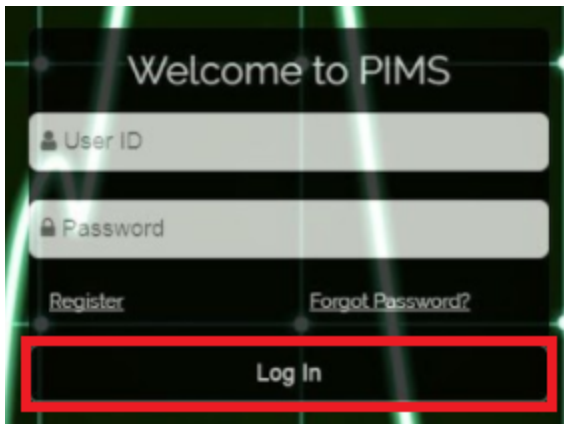
# Log In

## Office Staff

1. Enter your user name in the **User ID** field on the **Log In Screen**.
2. Enter your password in the **Password** field.
3. Click on **Log In**.



*If you have forgotten your password, click here or scroll to the Recover Password section of this guide.*

# Search for a Patient

## Office Staff

To locate a patient within the database, you can search by their first name, last name, or an initial.

### If you know the patient's first name...



1. Click on **First Name** and enter the patient's first name in the field.
2. Click on the **Search** button directly to the right of the **First Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.

## If you know the patient's last name...



1. Click on **Last Name** and enter the patient's last name in the field.
2. Click on the **Search** button directly to the right of the **Last Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.



## If you want to search by a letter or initial...

1. Click on **First Name** or **Last Name** and enter a letter or initial in either field.
2. Type an asterisk (*) directly after the letter in the field.
3. Click on the **Search**button directly to the right of the field you have completed.
4. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
5. Double click on the patient's name to display his/her information.

# Add or Edit Patient Information

## Office Staff

Once you have pulled up a patient's information, you can update fifteen different fields. *Note: As a member of the Office Staff, only you have access to the patient's basic contact information, such as their address and phone number. Remember to practice confidentiality protocol as needed.*



### To update the patient's Full Name...
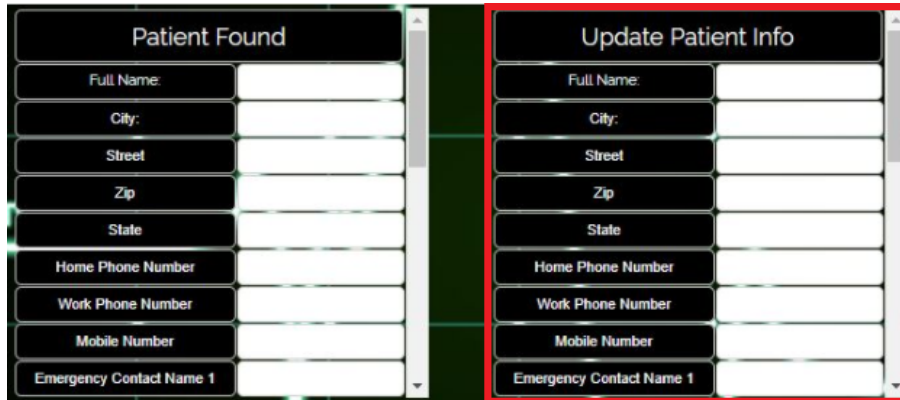
Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Full Name**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Address: City...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **City**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Address: Street...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Street**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Address: Zip Code...

Under the **Update Patient Info** table on the right hand side:



1. Click on the empty field next to **Zip**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Address: State...

Under the **Update Patient Info** table on the right hand side:



1. Click on the empty field next to **State**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Home Phone Number...

Under the **Update Patient Info** table on the right hand side:



1. Click on the empty field next to **Home Phone Number**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Work Phone Number...

Under the **Update Patient Info** table on the right hand side:



1. Click on the empty field next to **Work Phone Number**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Mobile Phone Number...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Mobile Phone Number**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update Emergency Contact Name 1...

Under the **Update Patient Info** table on the <u>right hand side</u>:
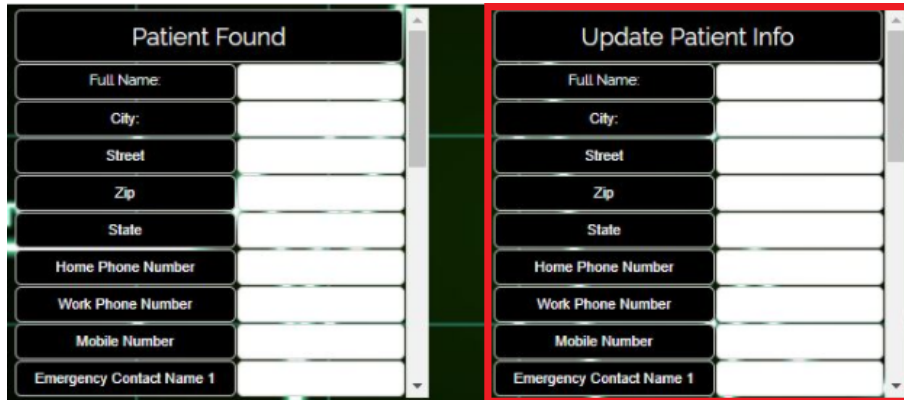


1. Click on the empty field next to **Emergency Contact Name 1**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Phone Number for Emergency Contact 1...

Under the **Update Patient Info** table on the <u>right hand side</u>:

| | | | | |
|---|---|---|---|---|
| Emergency Contact Name 1 | Ethel Ohern | | Emergency Contact Number 1 | |
| Emergency Contact Number 1 | 634548467 | | Emergency Contact Name 2 | |
| Emergency Contact Name 2 | Arron Bierbrauer | | Emergency Contact Number 2 | |
| Emergency Contact Number 2 | 9827222175 | | Admittance Date | |
| Admittance Date | 2011-12-03 | | Admittance Time | |
| Admittance Time | 12:04:12 | | Discharge Date | |
| Discharge Date | 11/30/2013 | | Discharge Time | |
| Discharge Time | 15:09:08 | | Family Doctor | |
| Family Doctor | Dr. Perruzzi, Agustin | | Facility: | |
| Facility: | the hospital | | Floor | |
| Floor | 8 | | Room Number: | |
| Room Number: | 92 | | Bed Number: | |
| Bed Number: | 4 | | Insurance Carrier | |
| Insurance Carrier | UnitedHealth Group | | Policy Account Number: | |
| Policy Account Number: | 538000000000 | | Policy Group Number: | |
| Policy Group Number: | 58937 | | Amount Paid By Insurance | 500 |
| Amount Paid By Insurance | 10 | | Submit Changes! | |

1. Click on the empty field next to **Emergency Contact Number 1**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Emergency Contact Name 2...

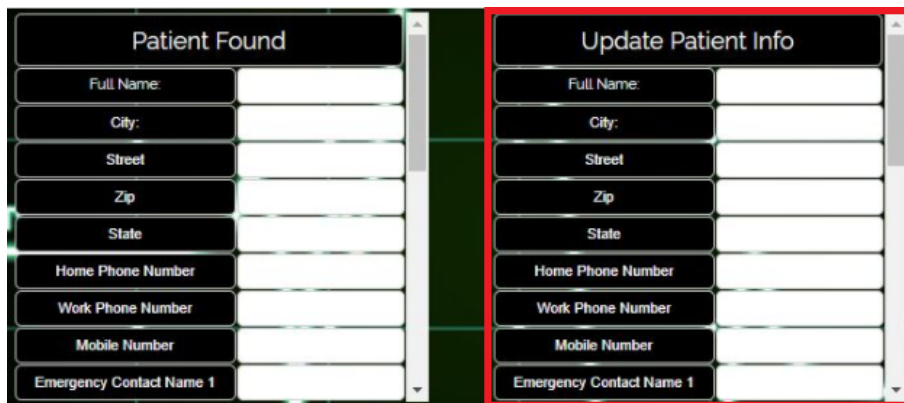Under the **Update Patient Info** table on the <u>right hand side</u>:

1. Click on the empty field next to **Emergency Contact Name 2**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Phone Number for Emergency Contact 2...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Emergency Contact Number 2**.
2. Re-enter any old information you wish you keep.

3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Admittance Date...

Under the **Update Patient Info** table on the right hand side:



1. Click on the empty field next to **Admittance Date**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Admittance Time...

Under the **Update Patient Info** table on the right hand side:

1. Click on the empty field next to **Admittance Time**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Discharge Date...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Discharge Date**.
2. Re-enter any old information you wish you keep.

3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the patient's Family Doctor...

Under the **Update Patient Info** table on the right hand side:



1. Click on the empty field next to **Family Doctor**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Facility...

Under the **Update Patient Info** table on the right hand side:

| | | | | |
|---|---|---|---|---|
| Emergency Contact Name 1 | Ethel Ohern | | Emergency Contact Number 1 | |
| Emergency Contact Number 1 | 634548467 | | Emergency Contact Name 2 | |
| Emergency Contact Name 2 | Arron Bierbrauer | | Emergency Contact Number 2 | |
| Emergency Contact Number 2 | 9827222175 | | Admittance Date | |
| Admittance Date | 2011-12-03 | | Admittance Time | |
| Admittance Time | 12:04:12 | | Discharge Date | |
| Discharge Date | 11/30/2013 | | Discharge Time | |
| Discharge Time | 15:09:08 | | Family Doctor | |
| Family Doctor | Dr. Perruzzi, Agustin | | Facility: | |
| Facility: | the hospital | | Floor | |
| Floor | 8 | | Room Number: | |
| Room Number: | 92 | | Bed Number: | |
| Bed Number: | 4 | | Insurance Carrier | |
| Insurance Carrier | UnitedHealth Group | | Policy Account Number: | |
| Policy Account Number: | 538000000000 | | Policy Group Number: | |
| Policy Group Number: | 58937 | | Amount Paid By Insurance | 500 |
| Amount Paid By Insurance | 10 | | Submit Changes! | |

1. Click on the empty field next to **Facility**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Floor Number...

Under the **Update Patient Info** table on the <u>right hand side</u>:



| | | | | |
|---|---|---|---|---|
| Emergency Contact Name 1 | Ethel Ohern | | Emergency Contact Number 1 | |
| Emergency Contact Number 1 | 634548467 | | Emergency Contact Name 2 | |
| Emergency Contact Name 2 | Arron Bierbrauer | | Emergency Contact Number 2 | |
| Emergency Contact Number 2 | 9827222175 | | Admittance Date | |
| Admittance Date | 2011-12-03 | | Admittance Time | |
| Admittance Time | 12:04:12 | | Discharge Date | |
| Discharge Date | 11/30/2013 | | Discharge Time | |
| Discharge Time | 15:09:08 | | Family Doctor | |
| Family Doctor | Dr. Perruzzi, Agustin | | Facility: | |
| Facility: | the hospital | | Floor | |
| Floor | 8 | | Room Number: | |
| Room Number: | 92 | | Bed Number: | |
| Bed Number: | 4 | | Insurance Carrier | |
| Insurance Carrier | UnitedHealth Group | | Policy Account Number: | |
| Policy Account Number: | 538000000000 | | Policy Group Number: | |
| Policy Group Number: | 58937 | | Amount Paid By Insurance | 500 |
| Amount Paid By Insurance | 10 | | Submit Changes! | |

1. Click on the empty field next to **Floor**.
2. Re-enter any old information you wish you keep.

3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Room Number...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Room Number**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Bed Number...

Under the **Update Patient Info** table on the <u>right hand side</u>:

1. Click on the empty field next to **Bed Number**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Insurance Carrier...

Under the **Update Patient Info** table on the right hand side:



1. Click on the empty field next to **Insurance Carrier**.
2. Re-enter any old information you wish you keep.

3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.
5.

## To update the Insurance Policy Account Number...

Under the **Update Patient Info** table on the right hand side:

| Emergency Contact Name 1 | Ethel Ohern | | Emergency Contact Number 1 | |
|---|---|---|---|---|
| Emergency Contact Number 1 | 634548467 | | Emergency Contact Name 2 | |
| Emergency Contact Name 2 | Arron Bierbrauer | | Emergency Contact Number 2 | |
| Emergency Contact Number 2 | 9827222175 | | Admittance Date | |
| Admittance Date | 2011-12-03 | | Admittance Time | |
| Admittance Time | 12:04:12 | | Discharge Date | |
| Discharge Date | 11/30/2013 | | Discharge Time | |
| Discharge Time | 15:09:08 | | Family Doctor | |
| Family Doctor | Dr. Perruzzi, Agustin | | Facility: | |
| Facility: | the hospital | | Floor | |
| Floor | 8 | | Room Number: | |
| Room Number: | 92 | | Bed Number: | |
| Bed Number: | 4 | | Insurance Carrier | |
| Insurance Carrier | UnitedHealth Group | | Policy Account Number: | |
| Policy Account Number: | 538000000000 | | Policy Group Number: | |
| Policy Group Number: | 58937 | | Amount Paid By Insurance | 500 |
| Amount Paid By Insurance | 10 | | Submit Changes! | |

1. Click on the empty field next to **Policy Account Number**.
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Insurance Policy Group Number...

Under the **Update Patient Info** table on the right hand side:

1. Click on the empty field next to **Policy Group Number.**
2. Re-enter any old information you wish you keep.
3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

## To update the Amount Paid By Insurance...

Under the **Update Patient Info** table on the <u>right hand side</u>:



1. Click on the empty field next to **Amount Paid By Insurance**.
2. Re-enter any old information you wish you keep.

3. Enter the new information in the same field.
4. Click on **Submit Changes** at the bottom.

# Print Reports

**Single Patient Report**

**Summary Report**

# Volunteer Guide

Welcome to the PIMS guide for volunteers!
Here you will find all the instructions you need to create an account, log in, and search for patient information.

## About Volunteers

Volunteers include interns, students, community service workers and any other staff members who do not have direct access to patient care. They do not include office staff such as receptionists and cashiers. If you are a member of the office staff, please go to the Guide for Office Staff for the appropriate instructions.
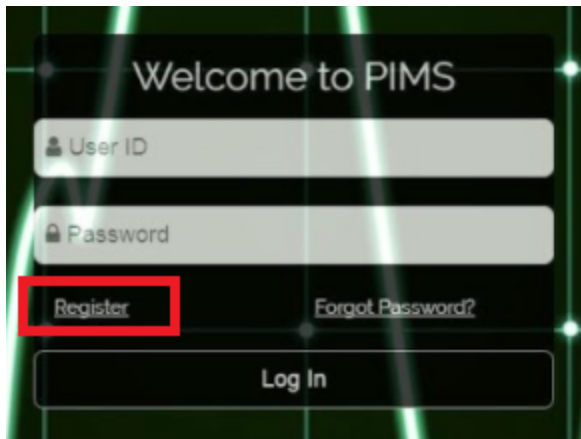As a volunteer, you will have limited access to information about a patient and you do not have the authority to make additions or changes. In a specific situation where you need access to information, you must consult with a physician or medical personnel.
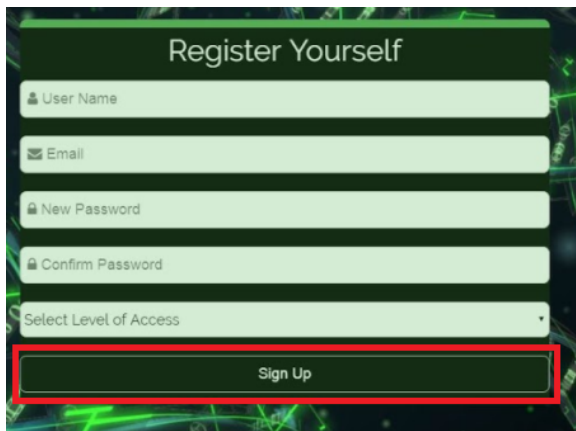
Get Started!

# Create New Account

## Volunteer

From the New User screen, you will enter your information in the appropriate blanks to get started using PIMS.
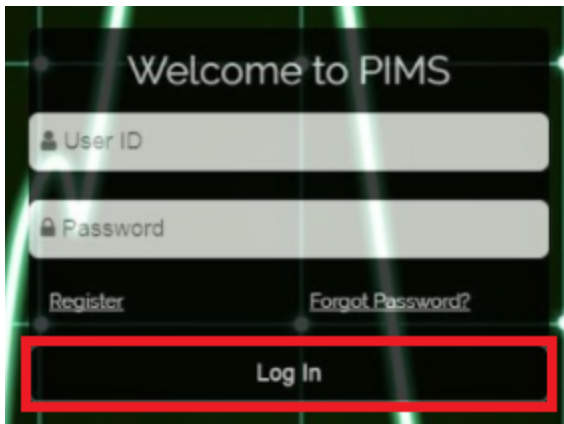


1. Click on **Register** on the **Log In** screen.
2. Enter a new user name of your choice in the **User Name** field.
3. Enter a valid e-mail address in the **E-Mail** field.
4. Choose a secure password and enter it in the **Password** field.
5. Re-enter your password exactly as you did before in the **Confirm Password** field.
6. Select **Volunteer** from the **Select Level of Access** drop menu.
7. Click on **Sign Up**.

# Log In

## Volunteer

1. Enter your user name in the **User ID** field on the **Log In Screen**.
2. Enter your password in the **Password** field.
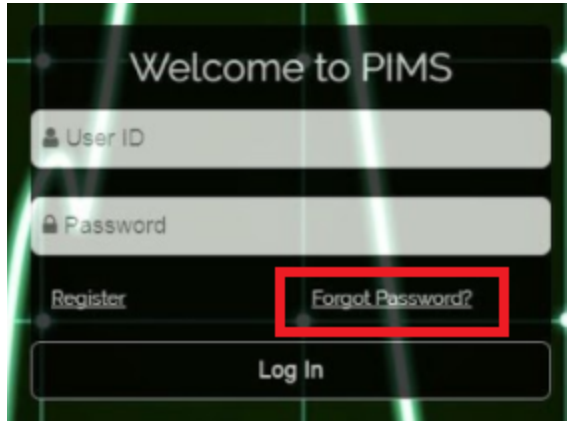3. Click on **Log In**.



*If you have forgotten your password, click here or scroll to the Recover Password section of this guide.*
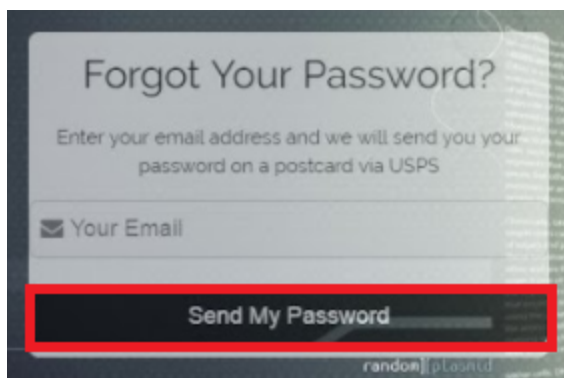
# Recover Password

## Volunteer

**If you forget your password, don't worry! You can recover it easily.**



1. Click on **Forgot Password**.
2. Enter your email in the **Your Email** field.
3. Click on **Send My Password**.
   *Your password will be sent to your e-mail.*



[Return to Log In](Return to Log In)

# Search For a Patient

## Volunteer

To locate a patient within the database, you can search by their first name, last name, or an initial.



## If you know the patient's first name:



1. Click on **First Name** and enter the patient's first name in the field.
2. Click on the **Search** button directly to the right of the **First Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.

## If you know the patient's last name:



1. Click on **Last Name** and enter the patient's last name in the field.
2. Click on the **Search** button directly to the right of the **Last Name** field.
3. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
4. Double click on the patient's name to display his/her information.

## If you want to search by a letter or initial:

1. Click on **First Name** or **Last Name** and enter a letter or initial in either field.
2. Type an asterisk (*) directly after the letter in the field.
3. Click on the **Search**button directly to the right of the field you have completed.
4. Scroll through the results under **Patients** at the bottom of the screen to find your patient.
5. Double click on the patient's name to display his/her information.