Patient Registration

Adding a Patient

Adding a new patient through SequelMed can be accomplished through just a few steps:

- Defining the Patient
- Attaching a Plan (optional)
- Attaching Documents (optional)

To begin the New Patient process:

- Click on the Patient menu
- Click on New
- Or use the CTRL + N shortcut key
- Or click on the New Patient short-cut icon 

Please note that at any time during the creation of a New Patient, you can click the Save Button to commit your data to the database.

Defining the Patient

The New Patient Window automatically opens with fields and areas to specify information about the patient and is broken up into three main areas:

- Patient Demographic
- Insured Party
- Plans

Patient Demographic

Required Fields	Hot Keys
• Social Security Number • Date of Birth • First Name • Last Name • Location • Provider • Practice • Relation of Insured Party • Plan • ID Number • Visit Co Pay	N—Social Security Number field B —Date of Birth Field F—First Name Field M—Last Name Field O—Location Field I—Provider Field L—Plan Field U—ID Number Field V—Visit Co Pay Field R—Relation of Insured Party Field T – New Patient Button Y – Resp Party Button E – Ref Prov Button P – New Plan Button A – Address Button W – Lawyer Button H – Help Button S – Save Button X – Exit Button

- Account #—Enter an account # for the patient. If you do not specify an Account #, the system will assign the next unique number for you when you hit the Save button.
- Chart #—Enter a chart # for this patient. If you do not specify a Chart #, this field will remain blank.
- Medical Record # - Enter a medical record # for the patient. If you do not specify a medical record #, this field will remain blank. However, if you are using hospital feeds, this field will self populate with a unique medical record # assigned by the hospital.
- SSN (required)—Enter the patient's nine digit Social Security Number. If you do not have the patient's SS#, then you must enter nine zero's as this field is required.
- DOB (required)—Enter the patient's date of birth in MM/DD/YYYY format. If you do not know the patient's DOB, then you must enter all zero's for the MM/DD/YYYY as this field is required.
- First Name (required)—Enter the patient's first name.
- Last Name (required)—Enter the patient's last name.
- MI—Enter the patients middle initial.
- Title—Enter the patient's title (i.e.: Mr. Mrs. Sr. Jr. MD DO)
- Sex—Select the gender of the patient using the drop-down menu or by hitting the first letter of the gender of the patient on your keyboard (i.e. Male, Female).
- Marital Status—Select the marital status of the patient by using the drop-down menu or by hitting the first letter of the marital status of the patient on your keyboard. Options include:
    - Married
    - Single
    - Other
- Email—You can enter a patient's email address.
- Address1—Enter the patient's street address (i.e., 12345 Oak Street)
- Address2—Enter additional address information here. Please note that nothing entered in this field will print out; used strictly for informational purposes.
- City—Enter the patient's city.
- State—Enter the patient's state
- Zip—Enter the patient's zip code and four-digit postal routing code (if applicable). Please note that if you enter the patient's zip code, SequelMed will automatically populate the city and state for you.
- Home Tel—Enter the patient's home telephone number (with area code). Please note that you do not need to enter parenthesis or dashes.
- Class—This home key driven field is used to define specific types of patients for internal reporting purposes only (i.e. Research Patient, Student).
- Work Tel—Enter the patient's work telephone number (with area code). Please note that you do not need to enter parenthesis or dashes.

  Ext—Enter the patient's work telephone number extension (if applicable).
- Location (required)—This home key driven field is used to specify a default location for the patient. Please note that the patient can be seen at numerous locations, which can be selected at the time of entering charges.
- Statement—This box should be checked if you want statements to be generated for the patient when he/she has any outstanding balance due. If you do not want to balance bill the patient EVER, the check mark should be removed.
- Provider (required)—This home key driven field is used to specify the default provider for the patient. Please note that the patient can be seen by other providers within the practice, which can be chosen at the time of entering charges.

- Practice (required)—This home key driven field is used to specify the practice for the patient. Please note that because there is a location already associated with a practice, the practice will default automatically once the location has been selected.
- Comments—This field is used to type any free form text pertaining to the patient's account. Please note that this text does not print out anywhere; used strictly for informational purposes. Additionally, you can use the drop-down arrow on the left to select a background color, which will follow the patient throughout the application as a reminder that there are comments attached.
- Bad-This field is used to document that the address on file for the patient is incorrect or 'bad'. If you check this field, SequelMed will prevent a statement from printing for the patient and the background of the patients name will appear in red within the statement printing bucket as a reminder of the bad address on file.
- Statement—This field is used to type free form text and will print out as a statement message on the statement that is mailed to the patient and/or responsible party for any outstanding balance held against his/her account.

Responsible Party

You can check this box if the patient has a Responsible Party (i.e., someone that is responsible for this patient's medical care such as a parent). Please note that if a responsible party is selected, all statements will be sent to the responsible party instead of the patient. If you check this box, you will need to define the Responsible Party.

Required Fields	Hot Keys
There are no required fields for this screen	M—First Name L—Last Name Field E—Relationship Field R—Retrieve All Records Checkbox S – Select Button F – Find Button T – Details Button N – New Button D – Delete Button P – Print Button H – Help Button X – Exit Button

- Clicking on the Resp Party button will open the following window:
  - Select Patient Resp Party Window
    - You have the option of searching by:
      - First Name—The first name of the responsible party
      - Last Name—The last name of the responsible party
      - Relationship—The relationship of the responsible party to the patient (i.e., spouse, parent, etc.)
      - Retrieve All—Check this box to retrieve all responsible party records
- Once you have specified the search criteria, click the Find Button to search the database.
- Once the data has been returned and you have located the RespParty, click on the name of the responsible party one time so that the blue bar covers the entire line. Then you can hit the Select

button. This will automatically close the window and return you to the new patient demographic screen. Please note that the Resp Party box is now checked.

- If you are unable to locate the responsible party you are looking for, you have the option of adding a new RespParty.
- To enter a new Responsible party, click on the New Button within the Select Patient Resp Party window. This will take you to the Patient Responsibility Party screen.

Required Fields	Hot Keys
• First Name • Last Name	F – First Name Field L – Last Name Field N – New Button D – Delete Button H – Help Button S – Save Button X – Exit Button

- In the Patient Responsible party Window, you can add/modify the responsible party information.
- First Name (required)—The responsible party's first name
- Last Name (required)—The responsible party's last name
- Relationship—The relationship of the responsible party to the patient (i.e. Parent, Spouse, Lawyer)
- DOB—The responsible party's date of birth
- Title—the responsible party's title (i.e., Mr., Ms., etc.)
- Home Tel— Enter a telephone # for the responsible party. Please note that you do not need to enter parenthesis or dashes.
- MI—Enter the responsible party's middle initial
- Tel 2— Enter a second telephone #. Please note that you do not need to enter parenthesis or dashes.
- SSN—The responsible party's social security number
- Fax— Enter a fax for the responsible party. Please note that you do not need to enter parenthesis or dashes.
- Address 1—Enter the address of the responsible party
- Address 2—Enter additional address information for the responsible party. Please note that nothing in this field will print out; used strictly for informational purposes.
- City—Enter the city of the responsible party
- State— Enter the state of the responsible party
- Zip— Enter the zip code of the responsible party
- Ext— Enter the four-digit postal routing code of the responsible party (if applicable)
- Email—Enter the email address of the responsible party
- Active—Check this box to indicate if this responsible party is active. The responsible party can become inactive for a number of reasons (i.e. deceased, legal matters).
- Family Index-
- Job Title—Enter the responsible party's job title
- Employer—Enter the name of the responsible party's employer
- Work Tel/Ext— Enter a work telephone and extension for the responsible party (if applicable). Please note that you do not need to enter parenthesis or dashes.
- Employer Adr—Enter the address of the responsible party's employer
- Click the Save Button to commit any changes and return to the New Patient Window.

School

You can check this box if this patient is currently attending school. If you check this box, you will need to define the School information.

- Clicking on the School button will open the following window:
- Select Patient School Window

Required Fields	Hot Keys
There are no required fields for this screen	H—School C—City R—Retrieve All Records Checkbox S – Select Button F – Find Button T – Details Button N – New Button D – Delete Button P – Print Button H – Help Button X – Exit Button

- You have the option of searching by:
- School—The name of the school
- City—The city where the school is located
- Retrieve All—Check this box to retrieve all school records
- Once you have specified your search criteria, click the Find Button to search the database. Please note that if you just click the Find Button without specifying any search parameters, SequelMed will return all Schools.
- Once the data has been returned and you have located the School, click on the name of the school one time so that the blue bar covers the entire line. Then you can hit the Select button. This will automatically close the window and return you to the new patient demographic screen. Please note that the School box is now checked.
- If you are unable to locate the School you are looking for, you have the option of adding a new School.
- To enter a new School, click on the New Button. This will take you to the New School window

Required Fields	Hot Keys
• School Name	H—School Name N – New Button D – Delete Button H – Help Button S – Save Button X – Exit Button

- In the School Window, you can add/modify specific school information
- School Name—The name of the school
- Tel 1, Ext—The telephone # for the school. Please note that you do not need to enter parenthesis or dashes.
- Tel 2, Ext— Enter a second telephone # and extension for the school. Please note that you do not need to enter parenthesis or dashes.

- Fax—Enter a fax # for the school. Please note that you do not need to enter parenthesis or dashes.
- Email—Enter an email address for the school
- Address 1—Enter the address for the school
- Address 2—Enter additional address information for the school. Please note that nothing entered in this field will print out; is it strictly for informational purposes.
- City—Enter the city for the school
- State, Zip, Ext—Enter the state, zip code, and four-digit postal routing code for the school.
- Website—Enter the school's website URL (i.e., http://www.schoolname.com)
- Comments—Enter any additional school comments. Please note that nothing entered in this field will print out; it is strictly for informational purposes.
- School—Select the appropriate radio button to indicate whether the patient is a part-time or full-time student
- Click the Save Button to commit any changes and return to the New Patient Window.

Referring Provider

SequelMed allows a referring provider to be attached within the patients account. Additionally, this referring provider information can be used in conjunction with Referral Management to keep track of the visits issued by the carrier when a referral was generated and flag the user when the referral has expired. If you check this box, you will need to define the Referring Provider information.

Required Fields	Hot Keys
There are no required fields for this screen	V—Referring Provider Field M—Last Name Field C—Specialty Field U—UPIN Field Z—Zip code Field A—Insurance Field I—City Field R—Retrieve All Checkbox

- Clicking on the Ref Prov Button will open the following window:
- Select Patient Referring Provider Window
- You have the option of searching by:
- Referring provider—The short name of the referring provider
- Last name—The last name of the referring provider
- Specialty—The referring provider's specialty
- UPIN—The universal provider identification number
- ZIP—The zip code where the referring provider is located
- Insurance—The insurance plan relation that links the referring physician to a specific plan
- City—The city where the preferring provider is located
- Retrieve All—Check this box to retrieve all referring provider records
- Once you have specified your search criteria, click the Find Button to search the database. Please note that if you just click the Find Button without any specified search criteria, SequelMed will return all Referring providers.
- To enter a new Referring provider, click on the New Button
- Once the data has been returned and you have located the Referring Provider, click on the name of the provider one time so that the blue bar covers the entire line. Then you can hit the Select

button. This will automatically close the window and return you to the new patient demographic screen. Please note that the Referring Provider box is now checked.

- If you are unable to locate the Referring Provider that you are looking for, you have the option of adding a new one.
- To enter a new Referring Provider, click on the New Button. This will take you to the New Referring Provider window.

Required Fields	Hot Keys
• Referring Provider Short Name • Last Name • First Name	• V - Referring Provider Short name • M- Last Name

- In the New Referring provider Window, you can add/modify specific referring provider information
- Referring provider Short Name—The short name of the referring provider
- Last Name—The last name of the referring provider
- First Name—The first name of the referring provider
- UPIN—Universal Provider Identification Number
- Qualification—(i.e. M.D. D.O. PhD.)
- Affiliation—What affiliation(s) the Physician has
- Hospital—The hospital at which the referring provider practices
- Provider Tel—The telephone # for the referring provider. Please note that you do not need to type parenthesis or dashes.
- Contact—Contact Person
- Sub Specialty—The referring provider's sub-specialty
- Specialty—The referring provider's specialty (i.e. Cardiology, Family Practice, Podiatry)
- License #—The referring provider's medical license number
- Tax ID— The referring provider's Federal Tax ID number
- Email—Enter an email address for this referring provider
- Website—Enter the referring provider's website URL (i.e., http://www.referring providername.com)
- Address 1—Enter an address for the referring provider
- Address 2—Enter an additional address information for the referring provider. Please note that any information entered in this field will not print out; used strictly for informational purposes.
- City—Enter the city for the referring provider
- State, Zip, Ext—Enter the state, zip code, and four-digit postal routing code (if applicable)
- Comments—Enter any referring provider comments. Please note that any information entered in this field will not print out; used strictly for informational purposes.
- Click the Save Button to commit any changes and return to the New Patient Window.

Active

The active check mark allows a user to classify the patient as active or inactive. If the patient becomes inactive (i.e. released from the practice, deceased) they can be flagged as inactive. Please note that all of the information within the patient account will remain the same, but when searching for the patient through the patient inquiry window you will have to change the active flag to inactive.

Docs

Attaching Documents

Scanned documents help create a more comprehensive patient file by attaching the documents directly within the patients account so that they can be easily accessed. To attach a document to a patient account:

- Click on the Docs Button in the New Patient Window. This will bring up the Patient Documents Window.

Required Fields	Hot Keys
There are no required fields for this screen	F – Find Button C – Scan Button P – Print Button X – Exit Button

- Find – The find button will find all of the documents associated with the document type that is highlighted.
- Scan – The scan button will open up the Batch Scan window. This window will allow the user to select the specific scanning parameters before scanning in a document.
- Print – The print button will print a screen shot of the Patient Documents window.
- From DOS Dt – Allows the user to search for all scanned documents
- To DOS Dt – Allows the user to search for documents within a specific date range
- From Entry Dt – Allows the user to search for documents within a specific date range
- To Entry Dt – Allows the user to search for documents within a specific date range
- Import File – This feature allows you to import a document directly into SequelMed.
- Import Dir – This feature allows you to import an entire directory into Sequelmed.
- Print Doc – This button will print the document that you have selected.
- Batch Print – This button will print all of the documents associated with the patients account.
- Document Type – The document type is associated to the document once it is scanned into the application. The primary use is to separate the documents into different categories, which create a more efficient way of looking up a specific type of patient document.

For more information about adding new documents or managing existing documents, see the Documents Section of the manual.

Ledger

The ledger displays all of the charges, ledgers (payments), submit dates, statements, and messages within the patients account. Additionally, the print report button will print the ledger in a presentable format

Required Fields	Hot Keys
There are no required fields for this screen	F – Find Button P – Print Button C – Call Button X – Exit Button

Eligibility

SequelMed can check a patient's insurance eligibility in real time. Please note that you must make sure that the correct Electronic Eligibility Insurance is linked to the plan profile.

Required Fields	Hot Keys
There are no required fields for this screen	N – New Button P – Print Button H – Help Button X – Exit Button

To check the eligibility of a specific patient, you must hit the Eligibility Button to open the Patient Eligibility window. If the eligibility has already been checked, this window will already be populated with information, that a user can double-click on to view the detailed report of the patient's eligibility status. If the eligibility has never been checked before a user will have to hit the new button. This will open the Patient Plan Eligibility window and show you a summary of the information that will be sent to the carrier for confirmation of eligibility.

Insured Party

SequelMed allows for an insured party to be associated within the account. In most cases, this will be the patient. But in some cases (such as with a minor), this may be a different person. Please note, that if you hit the Save button without filling out any of the insured party information, SequelMed will assume that the patient is a Self Pay and all charges will default to the patients responsibility.

- First Name—Enter the insured party's first name
- Last Name—Enter the insured party's last name
- SSN—Enter the insured party's Social Security Number (i.e., 123-45-6789). If you do not have the insured parties SS#, then you must enter nine zero's.
- Tel—Enter the insured party's home telephone number (with area code). Please note that you do not need to enter parenthesis or dashes.
- DOB— Enter the insured parties date of birth in MM/DD/YYYY format. If you do not know the insured parties DOB, then you must enter all zeros.
- Rel—Use the drop-down menu to select the relationship of the patient to the Insured party. Options include:
  - Child
  - Other
  - Self (Please note that if you select Self, the information entered on the left side of the screen will populate automatically)
  - Spouse
- Sex—Use the drop-down menu to select the gender of the insured party (i.e. Male, Female)
- Address1—Enter the insured party street address (i.e., 12345 Any Street)
- Address2—Enter additional address information (i.e., Apt. #100). Please note that any information entered in this field will not print; used strictly for informational purposes.
- City—Enter the insured party city
- State—Enter the insured party state
- Zip—Enter the insured party's zip code and four-digit postal routing code (if applicable)
- Comments—You can type additional comments about the insured party in this box. Please note that any information entered in this field will not print; used strictly for informational purposes.

Plan

- Plan (required)—Click on the Plan field and press the home key on your keyboard. This will bring up the Find Plan Window.
  To select a plan, click on the plan name. The Find Plan Window will close and the plan you selected will be entered into the New Patient Window. If the plan does not currently exist, you can click on the P of plan, which will take you to the Plan Profile window. There you can click the New Button to create a new Plan. For more information about creating new plans, see the Create New Plan Section of the Plan Chapter.
- Date Signed—This field is to document when the practice has/had obtained the patients signature on file. This is what will print out in box 13 on a HCFA form. Please note that if you leave this field blank, SequelMed will print the each visit date as the signature on file date.
- ID Num (required)—Enter the ID number of the Insured Party for this plan. Please note that if you do not have the ID number for the plan you must enter zero, as this is a required field.
- Expiration Date—Enter a date when this plan will expire. Use a MM/DD/YYYY format.
- Visit Co Pay—Enter an amount for a visit copay as dictated by the plan. You have the option of either putting in a fee or leaving it as zero depending on whether the physician is in or out of network. Please note that if you add a co pay and the patient does not pay at time the services were rendered, a statement will automatically be generated for the patient.
- Group—A series of numbers and/or letters indicated on the insurance card.
- Accept Assg.—This field should be checked or unchecked depending on whether the treating physician is in or out of network Please note that the default pulls from the Provider PIN table.
- Address—Check this box to include a Plan Address. In doing so, you will need to select out the Plan Address Information. For more information about creating Plan Addresses, see the Plan Chapter. For more information about attaching a plan to a patient, see the Attaching a Plan Section that follows. Note: If you click the Address Button and select a plan address, this checkbox will be automatically selected.
- Employer- Check this box to include information about the Patient's employer. In doing so, you will need to select an employer from the database.
- Lawyer - Check this box to include information about the Insured Party's lawyer. In doing so, you will need to select a lawyer from the database.
- Active—this field is used to indicate whether an insurance plan is active. If you removed the check from the field the insurance plan would be indicated in yellow.

Attaching a Plan

To attach a plan to an Insured Provider for a New Patient, you must enter the plan information.

- Plan—Click on the Plan field and press the Home Key on your keyboard. This will bring up the Find Plan Window.

- To select a plan, click on the plan name. The Find Plan Window will close and the plan you selected will be entered into the New Patient Window. If the plan does not currently exist, you can click on the New Button to create a new Plan. For more information about creating new plans, see the Create New Plan Section of the Plan Chapter.
- Date Signed—Click the button next to the entry field to bring up a calendar by which you can easily select a date for when this plan was signed. Otherwise, enter a date in Month/Day/Year format (optional)
- ID Num—enter the ID number of the Insured Party for this plan (this field is required so you must enter zero if you do not have the patients actual ID number)
- Expiration Date—enter a date when this plan will expire. Use a Month/Day/Year format

- Visit Co Pay—enter an amount for a co-pay visit as dictated by the plan. You have the option of either putting in a fee or leaving it out depending on whether the physician is in or out of network. If you do put the copay in and the patient does not pay at time of visit then a statement will automatically be generated for the patient)
- Group—enter the group name if the plan is part of a group policy
- Accept Assg.— This field should be checked or unchecked depending on whether the treating physician is in or out of network
- Address—check this box to include a Plan Address. In doing so, you will need to select the Plan Address Information.

Required Fields	Hot Keys
There are no required fields for this screen	L—Plan field A—Address field C—City field Z—Zip code field

- Clicking the Address Button will open one of two windows
- Select Plan Address Window
- If you have not already selected a Plan Address, you will need to select a Plan Address from the available addresses in the database (or create a new Address for your plan). You can find available address by specifying criteria
- Plan—the name of the plan
- Description—a description of the plan
- Insurance—the name of the insurance
- Address—keywords in the plan address
- City—the plan address city
- Zip—the plan address zip
- When you have specified criteria, click the Find Button to search the database. Note: if you just click the Find Button without specifying data, SequelMed will return all Plan Addresses.
- To enter a new Address, click on the New Button. For more information about adding addresses, see the Addresses Section of the Plan Chapter.
- Once the data has been returned, select the Plan you want and click the Select Button. This will return you to the New Patient Window.
- Plan Address Window
- If you have already selected a Plan Address, clicking the Address Button will bring up the Plan Address Window.
- In the Plan Address Window, you can modify specific address information for this plan
- Plan—Click on the Plan field and press the Home Key on your keyboard. This will bring up the Find Plan Window.
- To select a plan, click on the plan name. The Find Plan Window will close and the plan you selected will be entered into the New Patient Window. If the plan does not currently exist, you can click on the New Button to create a new Plan. For more information about creating new plans, see the Create New Plan Section of the Plan Chapter.
- Tel 1, Ext—enter a telephone and extension for the plan
- Tel 2, Ext—enter a second telephone and extension for the plan
- Fax—enter a fax for the plan
- Contact—enter a primary contact at the plan
- Address—enter the street address for the plan

- City—enter the city for the plan address
- State, Zip, Ext—enter the state, zip code, and four-digit postal routing code
- Comments—enter any additional plan comments
- Click the Save Button to commit any changes and return to the New Patient Window.
- To remove the Plan Address, simply uncheck the Address Box. This will open a dialog confirming that you want to remove the Plan Address from the Insured Party. Click Yes to remove the address.

Buttons

- New Patient – This button allows the user to open a New Patient window without having to leave the current window.
- School – This button will display any school information that has been linked within the patients account.
- Resp Party – This button will display the responsible party information that is linked to the patients account
- Ref Prov – This button will display any referring provider information that is linked to the patient's account.
- New Plan – This button will allow you to add an insurance plan.
- Address – This button will open the address window, which displays the address that is associated with the plan that has been specified.
- Employer—check this box to include information about the Patient's employer. In doing so, you will need to select an employer from the database.

Required Fields	Hot Keys
There are no required fields for this screen	M—Employer field C—City field R—Retrieve All Checkbox

- Clicking the Employer Button will open one of two windows
- Select Employer Window
- If you have not already selected an Employer, you will need to select one from the employers in the database (or create a new Employer entry). You can find available employers by specifying criteria
- Employer—The name of the employer
- City—The city where the employer resides
- Retrieve All—Check this box to retrieve all employer records
- Once you have specified your search criteria, click the Find Button to search the database. Please note that if you just click the Find Button without specifying data, SequelMed will return all Employers.
- To enter a new Employer, click on the New Button. For more information about adding Employers, see the Additional Information Section of the Plan Chapter.
- Once the data has been returned, select the employer you want and click the Select Button. This will return you to the New Patient Window.
- If you have already selected an Employer, clicking the Employer Button will bring up the Employer Window.

Required Fields	Hot Keys
• Employer Name	M—Employer Name

- In the Employer Window, you can add/modify specific employer information
- Employer Name—The name of the employer
- Tel 1, Ext—Enter a telephone # and extension for the employer
- Tel 2—Enter a second telephone # for the employer
- Fax—Enter a fax # for the employer
- Email—Enter an email address for the employer
- Address—Enter the street address for the employer
- City—Enter the city for the employer
- State, Zip, Ext—Enter the state, zip code, and four-digit postal routing code
- Website—Enter the employer's website URL (i.e., http://www.employername.com)
- Comments—Enter any additional employer comments. Please note that these comments will not print.
- Click the Save Button to commit any changes and return to the New Patient Window.
- To remove the Employer, simply uncheck the Employer Box. This will open a dialog confirming that you want to remove the Employer from the Patient. Click Yes to remove the employer.
- For more information about adding new Employers, see the Additional Information Section of the Patient Chapter. Note: If you click the Employer Button and select an employer, this checkbox will be automatically selected.

Lawyer

- Lawyer—check this box to include information about the Insured Party's lawyer. In doing so, you will need to select a lawyer from the database.

Required Fields	Hot Keys
There are no required fields for this screen	C—Contact Field L—Lawyer Field M—Firm Field I—City Field R—Retrieve All Checkbox

- Clicking the Lawyer Button will open one of two windows
- Select Lawyer Window
- If you have not already selected a Lawyer, you will need to select one from the lawyers in the database (or create a new Lawyer entry). You can find available lawyers by specifying criteria
- Lawyer- The name of the lawyer
- City—The city the lawyer works in
- Retrieve All—Check this box to retrieve all lawyer records
- When you have specified criteria, click the Find Button to search the database. Please note that if you just click the Find Button without specifying data, SequelMed will return all Lawyers.
- To add a new Lawyer, click on the New Button. For more information about adding Lawyers, see the Additional Information Section of the Plan Chapter.
- Once the data has been returned, select the lawyer you want and click the Select Button. This will return you to the New Patient Window.
- If you have already selected a Lawyer, clicking the Lawyer Button will bring up the Lawyer Window.

Required Fields	Hot Keys
• Lawyer Name • Firm Name	L—Lawyer Name Field M—Firm name Field

- In the Lawyer Window, you can modify specific lawyer information
- Lawyer Name—The name of the lawyer
- Firm Name—The name of the law firm where the lawyer practices
- License #—The firm's license as required by the state in which they practice
- Tel 1—Enter a telephone #
- Tel 2, Ext—Enter a second telephone # and extension for the lawyer
- Fax—Enter a fax for the lawyer
- Email—Enter an email address for the lawyer
- Address—Enter the street address for the lawyer
- City—Enter the city for the lawyer
- State, Zip, Ext—Enter the state, zip code, and four-digit postal routing code
- Website—Enter the lawyer's website URL (i.e., http://www.lawyername.com)
  Comments—Enter any additional lawyer comments. Please note that these comments will not print out.
- Click the Save Button to commit any changes and return to the New Patient Window.
  To remove the Lawyer, simply uncheck the Lawyer Box. This will open a dialog confirming that you want to remove the Lawyer from the Patient. Click Yes to remove the lawyer.
- For more information about adding new Lawyers, see the Additional Information Section of the Patient Chapter. Note: If you click the Lawyer Button and select a plan address, this checkbox will be automatically selected.

Extra Info

You can access Extra Patient Information Details by clicking on the Extra Info Button in the Patient Details Window.

Required Fields	Hot Keys
There are no required fields in this window	H – Help Button S – Save Button X – Exit Button

- Wc Case #—the patient case #. The radio buttons provide further information if the case # is an accident case
- Injury (Accident) Date: This allows you to enter the injury/accident date for the patient. This will self populate within the Visit Detail
- Accident Hour: This field allows you to document the hour that the accident occurred.
- Injury Site: This field allows you to document the part of the body that has been injured (i.e. Right Shoulder, Left Leg).
- ICD- 9 1 – 4: This field allows you to enter up to 4 diagnoses for the patient. Please note that if the enter the diagnosis codes for the patient within the Extra Info window, they will self populate at the time of entering charges for the patient.
- Admission Date: This field allows you to document the date that the patient was admitted into the Hospital. Please note that if you enter the Admission date within the Extra Info window, it will self populate at the time of entering charges for the patient.

- First Illness: This field allows you to document the first date the illness incurred.
- First Symptom – This field allows you to document the first symptom date
- Initial Treatment – This field allows you to document the initial treatment date.
- Last Seen – This field allows you to document the last date the patient was seen.
- Last Eligibility Date – This field allows you to document the last date that eligibility verification was checked for the patient.
- Effective Date – This field allows you to document the plan effective date.
- Medicare Sec Plan Type –
- Possible Disability – This field allows you to document that there is possibility that the patient may be permanently disabled.
- Patient Status – This field allows you to document the status of the patient (i.e. Deceased, Care Terminated)

Delete

The delete button will allow a user to delete the plan that is referenced against the account. Please note that SequelMed will not allow a user to delete a plan if there is information already referenced against the plan. Additionally, the user has to have the appropriated rights to delete anything within the application.

Consolidate

The consolidate button allows a user to consolidate plans that are similar (i.e. same type of plan)

History

You can access Historical Details for the patient by clicking on the History Button. This will open the Patient and Patient Plan Audit Window. This window provides an audit trail of which user modified what information by date- and time-stamping all information.