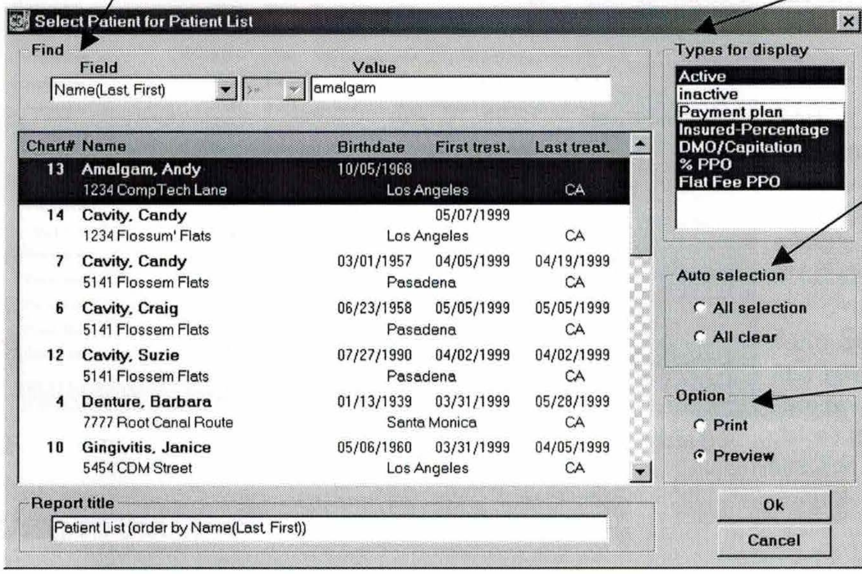
<u>Search Options</u> are available in most files for locating individual patients in the Patient List. Figure A below is an example Patient Find screen. Please note the function of this feature for use during application of the Files and Reports.

Find
Select from the listed 'Fields' (name, chart number, etc.) and enter the proper 'Value' to activate the search option.



Types
Only highlighted patient types will be displayed. To add or delete types from this list, refer to the maintenance files.

Auto Selection (Reports)
To view all patients in the patient list, select 'All selection'. To undo selections, select 'All clear'.

Option
To print immediately, select 'Print'. To view selections first, select 'Preview'.

(Figure A)

To Find a Patient in the Patient List:

1. Highlight only those patient types ('Types for Display') that are relevant to your search. For instance, do not highlight 'inactive' if you only wish to view active patients.
2. Click on the extended window button next to the 'Field' box to access the list of options.
3. Select a field option [the option selected in this example is *Name (Last, First)*].
4. Input the 'Value' [in this example the 'Value' is the last name *Amalgam*].
5. Press 'Enter' to activate the Find function.
6. CDM will sort the patient list according to the specifications you entered. The selection that most closely matches the entered value will be highlighted.

****Note:** Only values equal to or higher than the value entered will appear in the 'Patient List' box. For instance, if the value selected is 'Name', the system will sort the list alphabetically and only names equal to or higher in the alphabetical list than the one entered will remain in the list. If the value entered is 'Chart #5', only chart numbers 5 and above will remain on the list.

7. If the patient highlighted by system as the closest candidate to the value entered is correct, click 'Ok'. If not, highlight the correct patient name and then click 'Ok'.
8. If the desired patient did not appear during this initial search, you might need to enter a more specific value or try a different field. Try scrolling down the list until you locate the patient if you are having difficulty with the 'Find' option.

IX. FILES

FILE INTRODUCTION

A selection of Files for basic and more complex office functions is available through CDM. The Files are used for storage and access of Patient and Provider information, Insurance Groups, Daily Scheduling, and Accounting processes. Every File has a designated application that is listed and described in greater detail within this section.

ACCESSING FILES

All files can be accessed by clicking 'File' on the main menubar and then selecting the desired sub-directory. Some files can be accessed by pressing the control key plus a designated letter or by clicking on the appropriate picture icon from the left-hand side of the main menu. These short-cuts will be noted in the file descriptions in the following pages.

BEFORE YOU BEGIN

The Patient File acts as the main file for Patient information. Each patient's personal information must be entered into the Patient File before Procedure or Treatment information can be entered in the Treatment Card File. Please build your Patient Files before attempting to access any of the other available files.

REQUIRED FIELDS

Some sections within the Files will indicate 'required fields' with a star and the 'required field' message in the bottom right-hand corner of the file. These sections must be completed in order to save the file. If the requested information is not available please enter a specific code, designated by your office, that denotes false or missing information, save the file, and return to modify this section when correct information is available.

DELETING FILES

Files cannot be deleted unless all information within the individual files is deleted first. For instance, patient files cannot be deleted unless the patient's Treatment and Payment history are also deleted. This feature is included in the system as an additional verification of all 'delete' activities.