

Account Linking Guide

MedSoft Account Linking involves three components:

1. **Linking** – this feature allows two patient accounts to be linked. No data is shared between them, but there is a logical link between the two patients.
2. **Sharing** – this feature allows the sharing of data between two patient accounts so that account information for either account can be viewed from either account.
3. **Cloning** – this feature allows an existing patient’s data to be cloned at registration to a new patient file. Users can then choose whether or not to link and share the two files.

Linking

Linking is best used when showing a logical link between two patient accounts that are the same person; for example, to link a medical account and a non-medical account for the same patient.

To link two existing patients, look up one of the accounts in the Patient Center. Click on the “Links” tab under the Detail section.

The screenshot displays the MedSoft Patient Center interface. On the left, the 'Patient Center' search area includes fields for Patient Name (Last/First), Patient No. / Status (with a dropdown set to 'Open' and a 'Cash Only' checkbox), and DOI Date (From, To). Below these are 'Search' and 'Reset' buttons. A table lists two accounts:

	Acct No.	Policy	Patient	DOI	Body Part
	16-00216		Potter, Harry	03/01/16	
	17-00276		Potter, Harry	03/01/16	

At the bottom of the table, it says '<< 1 >>' and 'Total: 2 record(s)'. On the right, the patient detail view for 'Patient Number: 16-00216' is shown. The patient name is 'Potter, Harry', status is 'Open', and DOB is '07/31/91'. A navigation bar includes tabs for Detail, Documentation, Notes, Tasks, Records, Patient, Financials, Medical Management, and Legal. The 'Links' tab is selected and highlighted with a green arrow. Below the tabs, there is a search area with 'Show 10 entries' and a search input field. A table header shows 'Account Number' and 'Patient', but the table content is empty with the message 'No data available in table'. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons. A 'New Link' button is located at the bottom left of the detail view.

Click on the “New Link” button, and search for the patient you would like to link in the Find-As-You-Type Search box. Select the correct account from the drop down. For a link with no sharing, simply click “Link.”

Create Patient Link

Search for a patient account to link using the field below.

Patient:

Select the items you want to share between the two linked patient accounts. Choosing no items will create a basic link with no sharing.

- Records
- Documentation
- Notes
- Tasks
- Legal

You will now be able to see your linked account on the Links tab. The link can be edited (if you choose to share information at a later date) or deleted (if the link was completed in error).

Patient Center

Patient Name: (Last) (First)

Patient No. / Status: Open Cash Only

DOI Date (From, To):

	Acct No.	Policy	Patient	DOI	Body Part
	16-00216		Potter, Harry	03/01/16	
	17-00276		Potter, Harry	03/01/16	

<< 1 >> Total: 2 record(s)

Patient Number: 16-00216 Patient: Potter, Harry Status: Open DOB: 07/31/91

Detail Documentation Notes Tasks Records Patient Financials Medical Management Legal

Patient Detail **Links**

Show entries Search:

Account Number	Patient		
17-00276	Harry Potter		

Showing 1 to 1 of 1 entries Previous 1 Next

Sharing

Sharing is best used when it is necessary to share information between two patient accounts. This may be helpful when linking an Insurance account to a Cash account for the same patient, or when linking accounts for different body parts that still share the same medical records.

To link and share data for two existing patients, look up one of the accounts in the Patient Center. Click on the new “Links” tab under the Detail section.

The screenshot shows the Patient Center interface. On the left, there is a search form with fields for Patient Name (Last and First), Patient No. / Status (with an 'Open' dropdown and 'Cash Only' checkbox), and DOI Date (From, To). Below the search form is a table with 2 records:

	Acct No.	Policy	Patient	DOI	Body Part
	16-00216		Potter, Harry	03/01/16	
	17-00276		Potter, Harry	03/01/16	

At the bottom of the search results, it says '<< 1 >>' and 'Total: 2 record(s)'. On the right, the Patient Detail view is shown for Patient Number: 16-00216, Patient: Potter, Harry, Status: Open, and DOB: 07/31/91. The 'Links' tab is highlighted with a green arrow.

Click on the “New Link” button, and search for the patient you would like to link in the Find-As-You-Type Search box. Select the correct account from the drop down. Check the boxes next to the items you would like to share between the two accounts then click “Link.”

The screenshot shows the 'Create Patient Link' dialog box. It has a title bar with a close button. The main content area contains the following text and controls:

Search for a patient account to link using the field below.

Patient:

Select the items you want to share between the two linked patient accounts. Choosing no items will create a basic link with no sharing.

- Records
- Documentation
- Notes
- Tasks
- Legal

At the bottom right, there are two buttons: 'Link' and 'Cancel'.

Tips for Shared Accounts

A shared account allows a view of patient data from either account. To prevent confusion, the following safeguards are built in:

1. Pending Documentation is not shared. Documentation can only be completed from the appropriate account.
2. Completed Documentation is shared when requested. Account numbers are shown in the results grid to easily identify to which account the documentation belongs. To further clarify the account, the account number will show in black text for the account number currently selected and in red text for the shared account.

Cloning

Cloning is best used when creating a new account for an already existing patient. This may occur when creating an account for a new body part to be treated, for a new payment option, or for a new medical/nonmedical account.

To clone an existing patient, navigate to the Registration screen and click “Clone Existing Patient.”

The screenshot shows the MedSoft Registration screen. At the top, there is a navigation bar with the following tabs: Insight Analytics, Registration, Appointments, Patients, Financials, Tasks (23), Organizer, Records, and Forms. Below the navigation bar is a yellow header for 'Pending Registrations'. Underneath is a table with columns for Name, Nickname, DOB, SSN, and Notes. Below the table is a search box labeled 'to records to display.'. At the bottom of the screen, there are two buttons: 'New Registration' and 'Clone Existing Patient'. A green arrow points to the 'Clone Existing Patient' button.

In the Find-As-You-Type box, search for the patient you would like to clone, choose whether you would also like to link the accounts, then click “Clone.”

If, after creating a cloned patient, you would like to share data between the two cloned accounts, please see the steps above.