MedSoft
The Complete Office Solution

Account Linking Guide

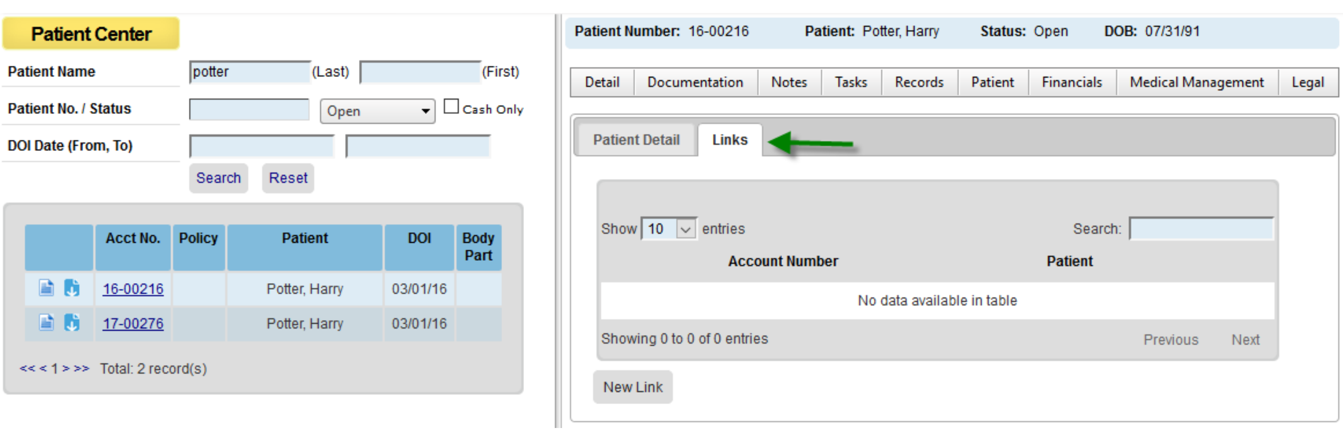
MedSoft Account Linking involves three components:

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.

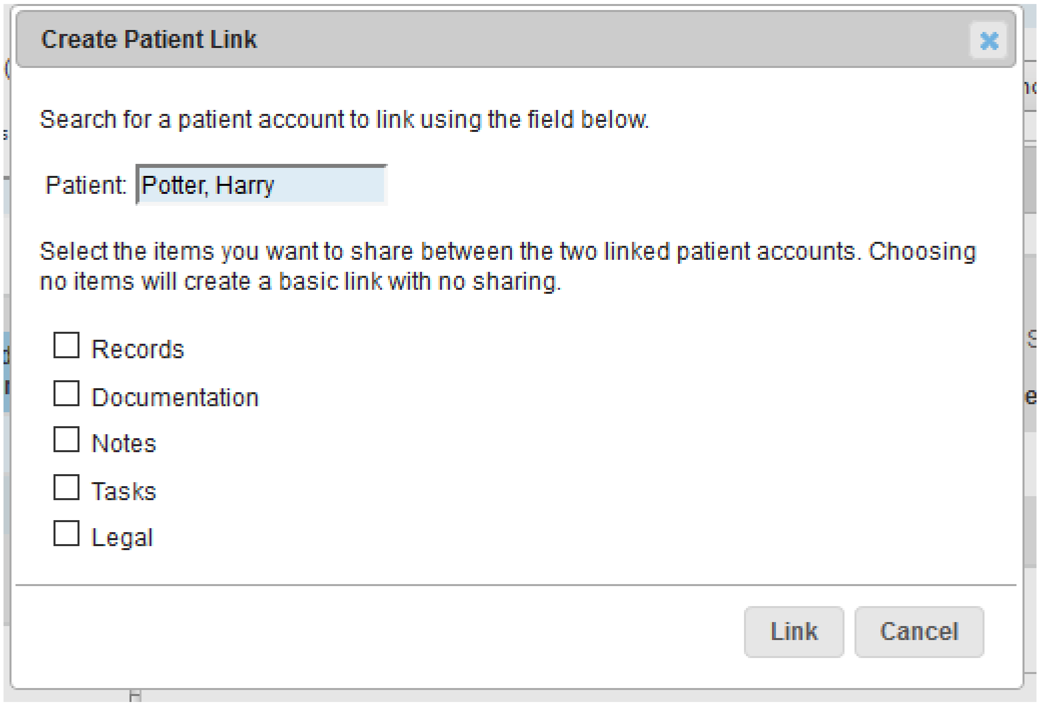
Linking

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.

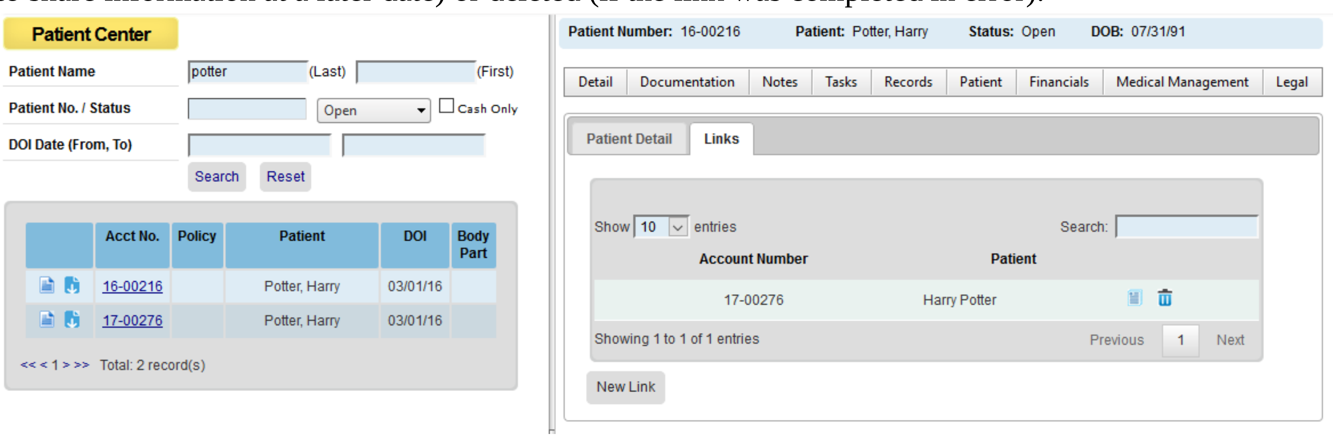
To link two existing patients, look up one of the accounts in the Patient Center. Click on the "Links" tab under the Detail section.



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.”



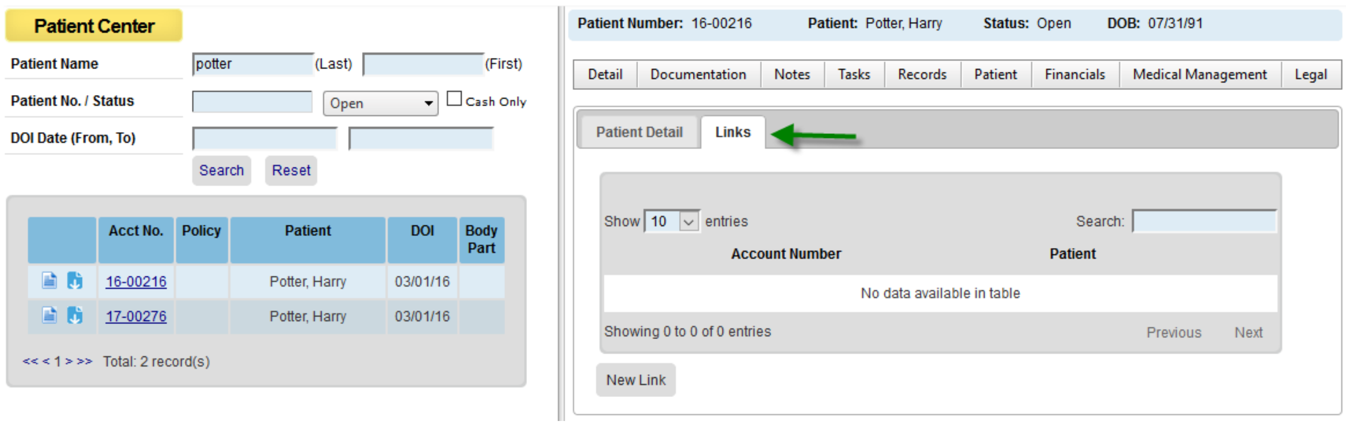
You will now be able to see your linked account on the Links tab. The link can be edited (if you choose to share information at a later date) or deleted (if the link was completed in error).



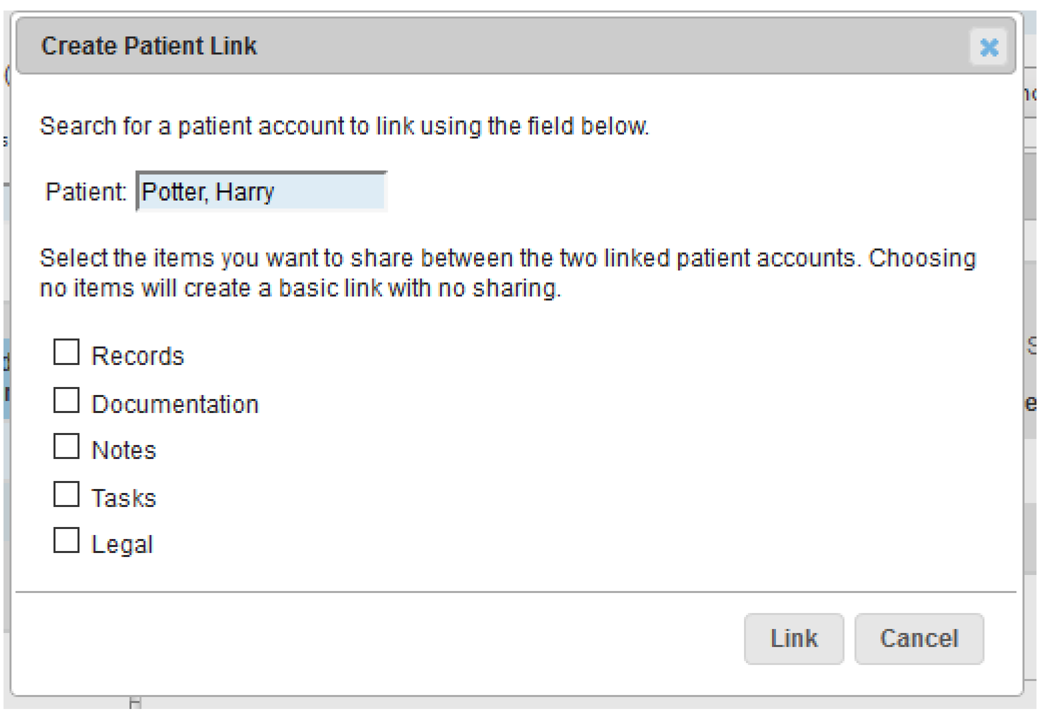
Sharing

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.



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.”



Tips for Shared Accounts

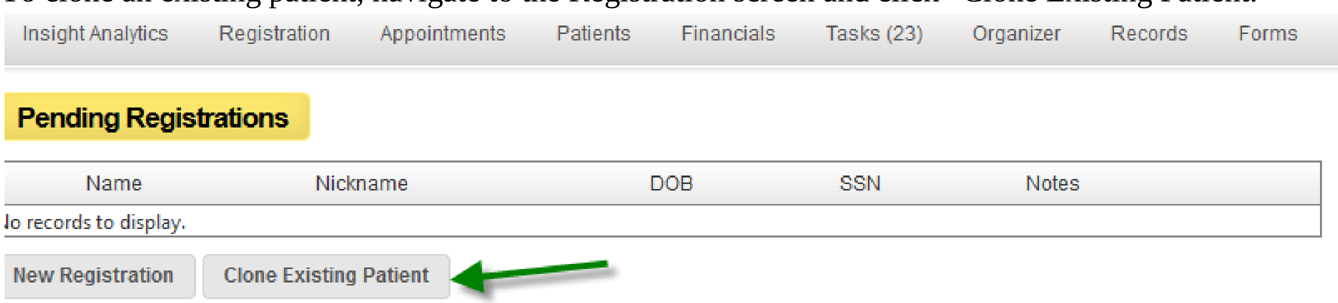
A shared account allows a view of patient data from either account. To prevent confusion, the following safeguards are built in:

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."



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.