

Case Change Patient Operations

Accounts Receivable Operations

How to update the patient name, age, and sex on a case that has already been scheduled or invoiced.

This guide explains how to use the **Case Change Patient** form to correct patient details on an existing case and make sure the updated information appears on any reprinted or re-emailed invoice or statement.

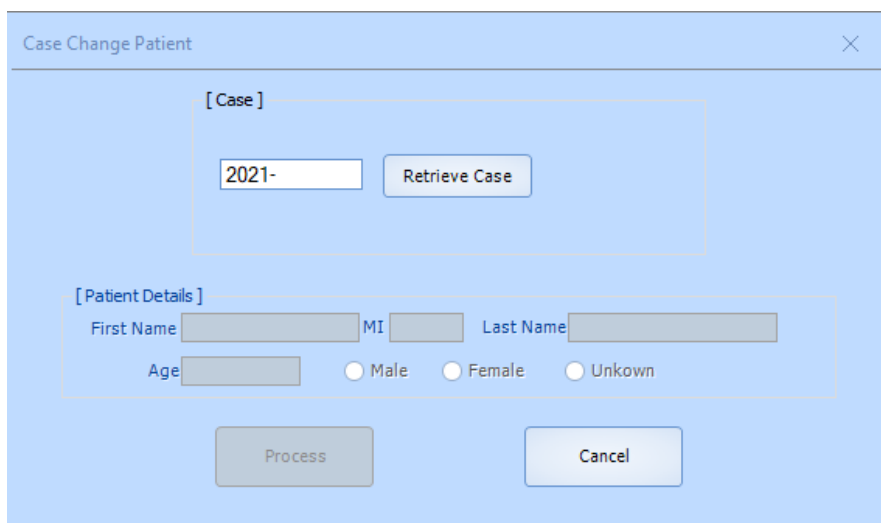
Overview

The **Case Change Patient** form lets you change the Patient Name, Age, and Sex on a case that has already been scheduled or invoiced. If the case was invoiced and already appeared on a statement, the information is updated so that the new patient details appear the next time the invoice or statement is printed or emailed. A link to the **Case Change Patient** form is also available on the **Pre-Invoicing** and **Invoicing** screens.

Note: Patient information can only be changed on cases that originate from EvoData.

Instructions

1. From the **A/R** menu, choose **Case Change Patient** to open the Case Change Patient form.



The screenshot shows the 'Case Change Patient' form. It has a title bar with the text 'Case Change Patient' and a close button (X). The form is divided into two main sections: '[Case]' and '[Patient Details]'. The '[Case]' section contains a text input field with '2021-' and a 'Retrieve Case' button. The '[Patient Details]' section contains fields for 'First Name', 'MI', 'Last Name', 'Age', and three radio buttons for 'Male', 'Female', and 'Unkown'. At the bottom of the form are two buttons: 'Process' and 'Cancel'.

2. Enter the case number and select **Retrieve Case**. The current patient information associated with the case displays.

Case Change Patient

[Case]

2021-284 Retrieve Case

[Patient Details]

First Name Henry MI Last Name Jones

Age Male Female Unkown

Process Cancel

3. Enter the new information as desired, then select **Process**.

Case Change Patient

[Case]

2021-284 Retrieve Case

[Patient Details]

First Name Harold MI R Last Name Green

Age 45 Male Female Unkown

Process Cancel

4. Depending on what you changed, you will receive a confirmation similar to the one below. Select **Yes** to save the change or **No** to abort.

Case Change Patient

? You are changing the following on 2021-284:

- * First Name
- * Middle Name
- * Last Name
- * Age
- * Gender

Are you sure you want to continue?

Yes No

Errors? If you receive any error message while processing, contact ABS Support before retrying the

change.

Need help?

Atlanta Based Systems Support (800) 476-2097

Adam Thomas, Sales Manager | (800) 476-2097 ext. 231 | adam@atlantabasedsystems.com

www.atlantabasedsystems.com