ENTERING NEW PATIENT INFORMATION INTO EAGLESOFT

When a new patient calls to schedule an appointment, there are several key pieces of information that we need to obtain during the phone conversation and in person. This document is designed as a step-by-step guide to entering the patient’s information into Eaglesoft and assuring that our office has all of the required information to facilitate the transition for the patient and the front office staff.

TO CREATE THE APPOINTMENT:

1. Open the schedule and find an open spot. Double click directly on the schedule where you’d like to appoint the new patient.
2. This will open a Patient Appointment screen. In the upper left corner, double click on the blue, underlined word “Patient”. A Patient List screen will appear, click the “New” button.
3. The New Person screen is where you will enter the patient’s information. The most critical pieces of info you will need to obtain are:
   - First and Last Name
   - Date of Birth
   - Phone number
   - Email address
4. Ask the patient where they heard of us. Enter their answer in the referral section of their New Patient info screen by selecting the “Referral” button along the right-hand side.
5. If the patient has insurance information to give you, that’s great! Ask the patient if they are the policyholder/subscriber. If they are, select the policy holder box and the responsible party box located on the left side of the New Person Screen and select “Has Primary Insurance”. You’ll need the following information:
   - First and Last Name
   - Date of Birth
   - Social Security Number OR Insurance ID#
   - Employer and Group Number if possible

If the patient doesn’t have these things on hand, that’s OK. Just let them know to bring the info with them to their first appointment.
6. If they are not the policyholder/subscriber, you’ll need to create another New Person for the policyholder. To do this, select the “Has Primary Insurance” box, click on the blue, underlined words “Policyholder”. This will bring up the Policyholder List, select “New” from the bottom and fill in the necessary information:
   ● First and Last Name
   ● Date of Birth
   ● Social Security Number OR Insurance ID#
   ● Employer and Group Number if possible

   O If the patient doesn’t have the SSN/ID# and Group Number on hand, that’s OK. Just let them know to bring the info with them to their first appointment.

When you’ve entered the appropriate info for the policyholder, click “OK”. Another box will pop up and select, “OK” again. Finally, the Policyholder list will have the person highlighted, select “Use”. This will bring you back to the New Person screen for the new patient, click “OK”.

7. You will now be back in the Patient Appointment window. Again, select the blue, underlined word “Patient” and type in the last name of the person you are scheduling. Highlight the patient’s name and select, “Use”.

8. Next, you’ll need to select the Appointment Type from the drop down menu. Scroll down and select “New Patient”.

9. Click the “Add Service” button on the bottom of the Patient Appointment window. This will bring up the Service Code List.
   ● Select the “Service Code” bubble on in the upper left corner
   ● Search “NP”, hit tab
   ● Select either NPA (new patient adult) or NPC (new patient child) – whichever applies – and finally, click “Use”

10. In the Notes section of the Patient Appointment window, type your initials and any notes about your conversation into this box. Some examples include; how they heard of us, any special circumstances/concerns, if they need directions to our office, etc.
** IF THE DESIRED DATE/TIME FOR THEIR APPOINTMENT IS NOT AVAILABLE, LET THEM KNOW THAT YOU WILL ADD THEM TO THE SOONER IF POSSIBLE LIST AND WILL CONTACT THEM IF AND WHEN THEIR PREFERRED SPOT OPENS UP **

1. To do this, simply select the “Sooner if Possible” box under the date of the appointment in the Patient Appointment window.

11. Click “Save” and verbally confirm the appointment date and time to the patient. You should also direct them to our website to fill out their “New Patient Forms”. Remind them to click “Submit” at the end in order to assure the paperwork is available to us when they come in.

12. Finally, go to your desktop and enter the Excel workbook called “New Patient List” and enter the patient’s information.

IF THE NEW PATIENT IS A CHILD AND THE PARENTS ARE NOT PATIENTS

In some cases, a parent who is not a patient will call to schedule their child. Here are the steps to follow in order to assure that you enter the information appropriately.

1. Open the schedule and find an open spot. Double click directly on the schedule where you’d like to appoint the new patient.

2. This will open a Patient Appointment screen. In the upper left corner, double click on the blue, underlined word “Patient”. A Patient List screen will appear, click the “New” button.

3. The New Person screen is where you will enter the patient’s information. The most critical pieces of info you will need to obtain are:
   - First and Last Name
   - Date of Birth

4. Because the patient is a child, you’ll need to create a New Person for their parent/responsible party and enter their insurance information (if applicable)
   - In the Patient Information screen, click on the blue, underlined words “Resp. Party”, then click “New”
   - Fill out required info (name, DOB, email, phone number) and insurance if necessary.
• Remember if the parent is not a patient to unclick the “Patient” box but to select the “Responsible Party” and/or “Policy Holder” boxes.
• When you have finished entering the information, select “Use” so that the responsible party is assigned to the child.

5. You will now be back in the Patient Appointment window. Again, select the blue, underlined word “Patient” and type in the last name of the person you are scheduling. Highlight the patient’s name and select, “Use”.

6. Next, you’ll need to select the Appointment Type from the drop down menu. Scroll down and select “New Patient”.

7. Click the “Add Service” button on the bottom of the Patient Appointment window. This will bring up the Service Code List.
   - Select the “Service Code” bubble on in the upper left corner
   - Search “NP”, hit tab
   - Select either NPA (new patient adult) or NPC (new patient child) – whichever applies – and finally, click “Use”

8. In the Notes section of the Patient Appointment window, type your initials and any notes about your conversation into this box. Some examples include; how they heard of us, any special circumstances/concerns, if they need directions to our office, etc.

** IF THE DESIRED DATE/TIME FOR THEIR APPOINTMENT IS NOT AVAILABLE, LET THEM KNOW THAT YOU WILL ADD THEM TO THE SOONER IF POSSIBLE LIST AND WILL CONTACT THEM IF AND WHEN THEIR PREFERRED SPOT OPENS UP **

   - To do this, simply select the “Sooner if Possible” box under the date of the appointment in the Patient Appointment window

9. Click “Save” and verbally confirm the appointment date and time to the patient. You should also direct them to our website to fill out their “New Patient Forms”. Remind them to click “Submit” at the end in order to assure the paperwork is available to us when they come in.

10. Finally, go to your desktop and enter the Excel workbook called “New Patient List” and enter the patient’s information.