

Patient Search Tips

1. Start on the patient search screen
2. Enter the first two letters of the first name and last name, and DOB (This will avoid missing a patient records of a “Mathew” if the person searching types “Matthew”, for instance)
 - a. If too many results are returned, add a letter or two to the first and last name – hopefully, this narrows it down – then the address, county, etc. can be used as identifiers
3. If no results are returned, try removing the DOB and adding more letters to the first and last name
 - a. If it is a nickname, try using the legal name (Tim vs Timothy) and vice-versa
 - b. If it is a hyphenated last name, try a search with each name individually
 - c. If it is commonly misspelled last name, try an alternate spelling (i.e. Philip vs Phillip)
4. If still no results are returned, create a new patient (if able)