SOP on Adding a Patient to a Clinic Database

The purpose of this document is to demonstrate how to add a patient to a clinic's database using FDM or FDM Lite.

Before continuing, readers will need to have an active clinic registered to IQV Nexus Corporation's Front Desk Manager Application as well as have an active account with said application to register patients.

Note: Whether you're using the FDM or FDM Lite application, the directions provided below apply to both applications. As well as the directions below are assuming you have already logged into your account and you're starting on the home page of your respective application.

Registering a Patient

Procedure:

1. Locate the tab named "Appointments" at the top of your screen and hover over it to see the options portrayed
2. Click on the option in the top left named, "New Patient" to be taken to the patient registration form
3. Now you're on the registration page where some fields presented are more important/required to be filled out to successfully register a patient.

Note: Email field requires a valid email domain in order to be correct. For example, using something like, @gmail.com, @icloud.com, @yahoo.com, etc. Unless the email submitted has a custom domain, make sure emails provided are accurate and have an @. Lastly, ALL EMAILS have to be unique for each patient, so patients can use it to log into our other application called My Front Desk Connection and see their test results.

Note: Date of Birth field is very sensitive with its formatting. The proper format to not cause an error is mm/dd/yyyy (example: 01/08/1987). If you don't want to type out the date, you can use the small calendar in the far right of the field where you can choose the date off a calendar with correct formatting.

Note: Cellphone field has more specific formatting as well. Readers need to ONLY provide the numbers of the phone number rather than number and characters. For example, instead of (123) 456-7890, it should be 1234567890.

Note: Payment Type field refers to how the patient's order will be handled in the system. Where Client Pay refers to the clinic footing the bill, Self Pay refers to the patient footing the bill, Research refers to the patient being more of a volunteer for further testing and developments, and the other options refer to the type of insurance the patient has.

4. Once you fill all of the patient’s information to the best of your ability, review all the information entered then click the register button.
5. Congratulations you successfully registered a patient, if you encountered an error after clicking register, refer to the notes above to view possible errors.

Editing Patient Information

Procedure:

1. If you need to view or edit a patient’s information, locate the tab named “Appointments” at the top of your screen and hover over it to see the options portrayed
2. Click on the option in the top left named, “Existing Patient” to be taken to your patient database
3. You can use the search fields like the patient’s email, name, or phone to narrow your search and click filter.
4. Then scroll down to see the results and use the arrows at the bottom to navigate between patients with similar information.
5. Once you find the patient you're looking for you can add/change their profile to match current information.
6. Once you’ve made your changes click the save button.