

The Family and Friends screen allows identifying people who are Emergency Contacts, Primary Caregivers, and Designated Alternate Signatory along with other designations.

Family and Friends

STEP 1: Tap Family/Friends tile.



➤ Add a new Family or Friend from existing resources:

STEP 1: Tap plus sign in lower right. 

STEP 2: Tap in Name/ID box, then enter at least first 3 letters of last name. Tap Search or Enter.

STEP 3: Scroll list. If found, tap name.

- If name not found, proceed to section below to add a new resource.

STEP 4: Add Relationship to Patient using dropdown.



STEP 5: Add applicable designations from optional fields list at right.

- **Primary Caregiver** – required for Hospice patients.
- **Same Address** as patient.
- **Next of Kin**
- **Emergency Contact**
- **Alternate Signatory** – allows designated person to sign at end of visit.
- **Power of Attorney** – Healthcare, legal, or both.



STEP 6: Add or Edit phone number(s) by tapping the box based on type of phone number. Always include area code.

NOTE: If Designated Alternate Signatory is not identified on the Family and Friends screen, the system will not allow it on the Patient Signature screen.

➤ Add a new Family or Friend resource to the database and to the patient chart.

STEP 1: After searching for and determining the Family or Friend is not in the database, tap the plus sign to the right of the Name/ID box.



STEP 2: Enter the following required information.

- Sex
- Last Name
- First Name
- Address 1 – enter “unknown” if patient cannot provide.
- Zip – enter 00000 if unknown. If warning states, **Invalid Zip Code**, tap **OK**.
- City – enter “unknown” if patient cannot provide.
- State
- Phone Number(s)
- **Tap Done.**

Add New Family and Friends

SEX: [dropdown] DOB: [dropdown]

LAST NAME: [text] FIRST NAME: [text]

MIDDLE NAME: [text]

ADDRESS 1: [text] ADDRESS 2: [text]

ZIP: [text] CITY: [text] STATE: [dropdown]

EMAIL: [text]

HOME: [(xxx) xxx-xxxx] EXT.: [text]

WORK: [(xxx) xxx-xxxx] EXT.: [text]

MOBILE: [(xxx) xxx-xxxx] EXT.: [text]

CANCEL DONE

STEP 3: Add **Relationship to patient** using dropdown.

RELATIONSHIP TO PATIENT

[dropdown arrow]

STEP 4: Add applicable designations at right.

Primary Caregiver

Same Address

Next of Kin

Emergency Contact

Designated Alternate Signatory

POWER OF ATTORNEY

[dropdown arrow]

STEP 5: Tap **Done**.

STEP 6: Tap arrow at top left next to **Family and Friends** to save.

NOTE: Once a family/friend has been added to the chart, it can only be deleted on the Host.