Alberta Health Services

ADM 5.67

Quick Reference Guide & Training Scenarios

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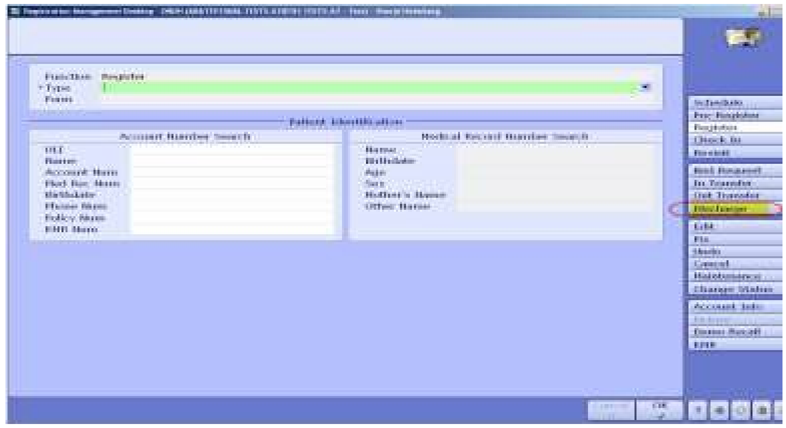
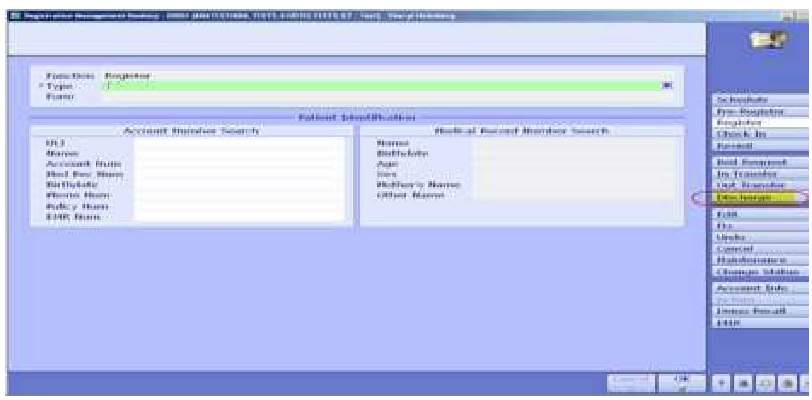
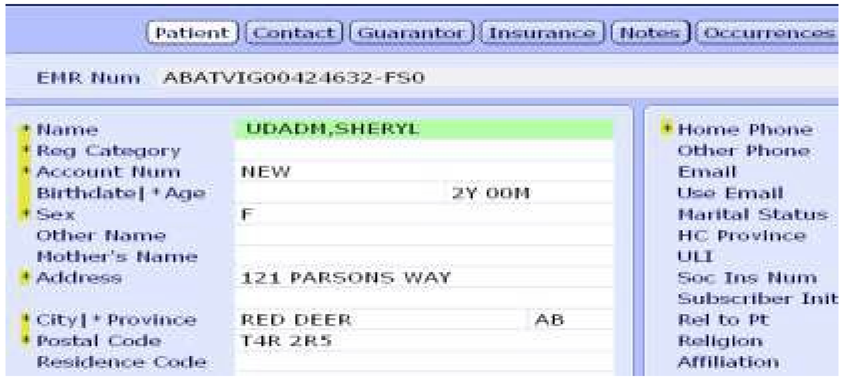
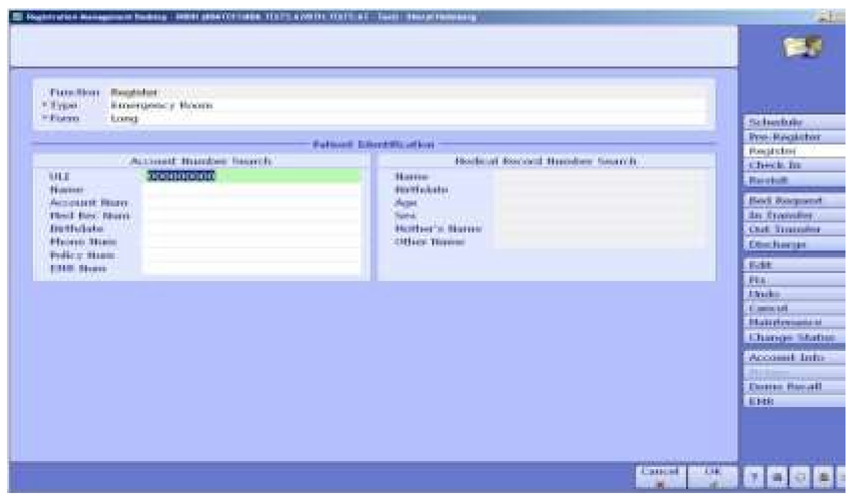
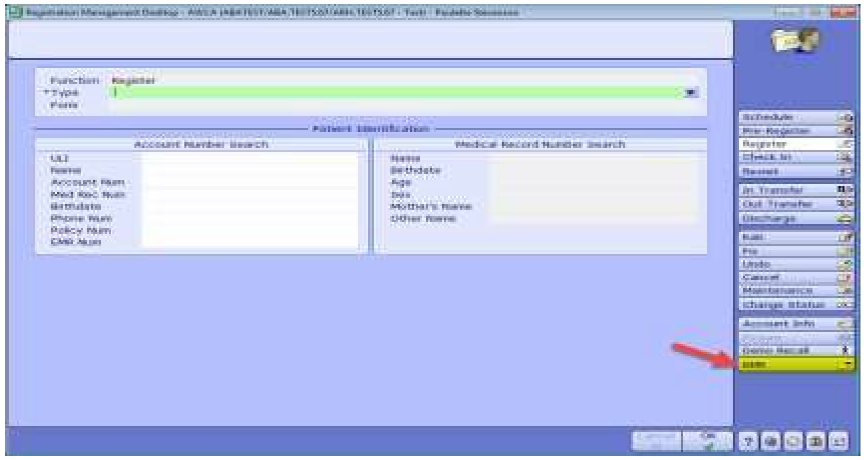
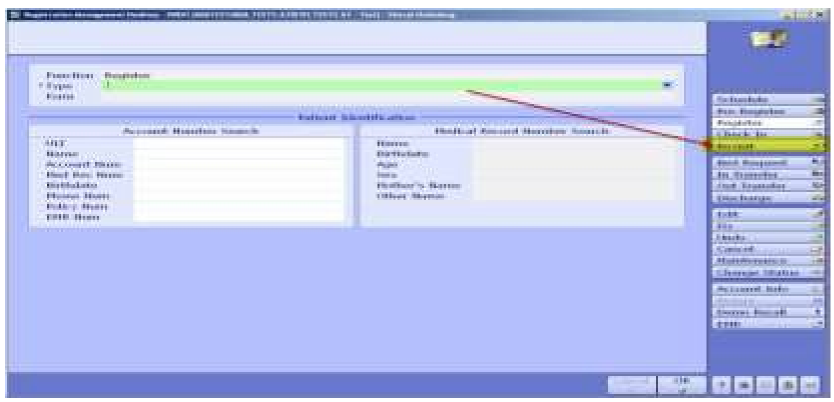
Quick Reference Guide

How do I enter a depart date/time on an Emergency Registration? **No longer an ER /Depart routine?**	ADM – Facility - Registration Management Desktop -Discharge 
How do I Discharge a New Born?	ADM – Facility - Registration Management Desktop –Discharge - Type NB 
What is the "NOTES" tab in the registration routine?	Note tab is Finance related and once an entry is madecannot be removed. **Do not make entries into thisTAB**
What is the "Occurrence" Tab in the registration routine?	As is current process. **Do not make entries into thisTAB**

What is the (*) asterisk beside some data fields?	* indicates this is a Required Field and must be filled in prior to filing the Registration. 
Why when I enter "#" before a ULI am I not finding the patient or accounts?	"#" is no longer required to search by ULI. Enter ULI in first, search without # 
Should I update Demo Recall within the Insurance Tab?	**NO** – for WCB related visits. **YES** - Insurance is demo recall updated if the patient has PERMANENTLY changed Health care insurance IE: moved from Alberta to Ontario etc.
Where did the copy / paste buttons go?	Meditech has now moved to more of a Windows based application. CRTL "C " for copy and CRTL" V " for paste. Windows shorts cuts

Schedule: Do Not Use
Pre-Register: Create Pre/ SCHPRE
Register: Register a PRE, SCH or direct Registration
Check In: Register a PRE account
Revisit: RCR add Revisit to RCR registration
Bed Request: Do Not Use
In Transfer: Inpatient room, Physician or Service changes
Out Transfer: Place an Outpatient in a room or make changes to an outpatient room/bed
Discharge: Depart any Registration
Edit: Make changes to Registration
Fix: Change admit date, admit time, room assignment, bed assignment, room rate & service
Undo: undo last registration event
Cancel: Cancel accounts
Maintenance: Edit Newborn's mother or set to VIP/Confidential
Change Status: Change pre-registration category: i.e. PRECLI to PREREF
Account info: review patient activity /re-print etc.
Picture: Do Not Use
Demo Recall: update patient demographics in demo recall file
EMR: initiate EMR Launch

How do I launch the EMR?	ADM - Registration Management Desktop - "EMR"  EMR Launch
How do I enter a Re Visit for a Recurring registration?	ADM – Facility - Registration Management - RCR Type -Revisit 

<table>
<tr>
<td>QUICK KEYS</td>
<td>
<table>
<tr><td>F1</td><td>-Screen Help</td></tr>
<tr><td>F2</td><td>-Netcare</td></tr>
<tr><td>F9</td><td>-Lookup</td></tr>
<tr><td>F12</td><td>-File</td></tr>
<tr><td>Esc</td><td>-Exit</td></tr>
<tr><td>Shift F12</td><td>-Suspends</td></tr>
<tr><td>Spacebar Enter</td><td>-Patient Recall</td></tr>
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<tr>
<td>SCREEN ICONS</td>
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<table>
<tr><td>Screen Icons</td><td></td></tr>
<tr><td>Function</td><td>Icon</td></tr>
<tr><td>Help</td><td></td></tr>
<tr><td>External Links</td><td></td></tr>
<tr><td>Print/Printer Preference</td><td></td></tr>
<tr><td>Suspend Session</td><td></td></tr>
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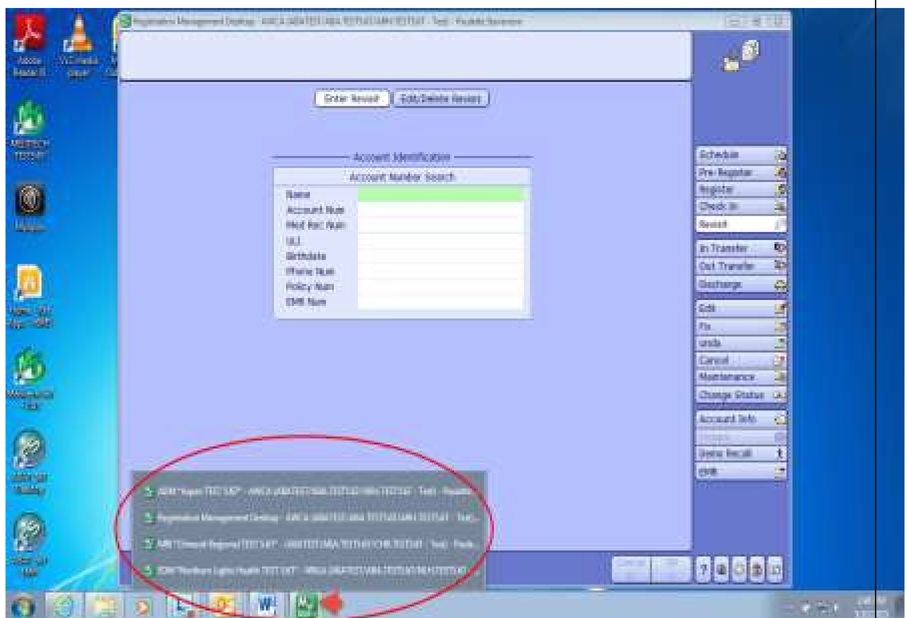
How many Meditech Applications can I have opened at one time?	You can have more than one Meditech application opened at once. When you hover over the icon at the bottom of your screen it will tell you how many and which applications you have opened. 

Admission Short Cuts

SP	*Same as Patient*
SNOK	*Same as Next of Kin*
SPTN	*Same as Person to Notify*
SG	*Same as Guarantor Entry*
SPE	*Same as Patient Employer Entry*
T	*Defaults to Today's date*
T+1	*Defaults to Tomorrow's date*
T-1	*Defaults to Yesterday's date*
N	*Defaults to the current time*
Esc	*Exit the screen, window or function (F8)*
F1	Help
F8	Hot Keys/Letter Shortcuts for top or right side menu
F9	Lookup
F11	Opens the EMR
F12	Save/File Information

Entering the **Postal Code into the City Field** will populate the City, Province, Residence Code and Postal Code fields.

Space Bar Enter will bring up the last patient you were working on.

Patient Search

To search for a patient, the system will automatically look through three systems to find the closest match to the information put entered.

1. The **Active Account File**. This is a listing of any of the patient's previous visits to your facility within the last 90 days.
2. The **Master Patient Index**. The system will search the facility Medical Records module.
3. The **Enterprise Medical Record File**. The system will search the Provincial EMR for the patient.

To search for a patient in the system, these are the most commonly used Patient Identification methods. Using more than one of these unique search fields increases the chances of finding the correct patient.

- ULI (Unique Lifetime Identifier)
- PATIENTS NAME
- ACCOUNT NUMBER
- MEDICAL RECORD NUMBER
- BIRTH DATE
- PHONE NUMBER
- POLICY NUMBER
- EMR NUMBER

EXAMPLE

Mark Zentski arrives to the Emergency Department with stomach pain and he wants to see a doctor. All he has for ID is a driver's license and has said he has forgotten his AHC at home. He is not sure if he has been seen at this facility before.

1. Enter as much information as you have available in the search fields by using the ID and confirming the demographics with the patient. Press Enter.

2. If the exact match is not found in your facility, it will attempt to check the Master Patient Index. Click on the green OK button to continue search.

3. The Master Patient Index has found a patient with the exact birthdate. Confirm with patient if the demographics are correct.

4. If this is the correct patient, press F12 to accept. If you're not sure if this is the correct patient, use the F11 (Next Search) button at the bottom of your screen to searchfor further patients. We are not sure so we will try the F11 button.

5. The system has found two patients with similar birthdates. You can use yourarrow buttons to highlight the patient in green. Again the demographics will show atthe bottom of the screen, confirm with patient. If this is the correct patient, press enter or F12 to select.

6. The registration field will then appear and auto populates all the demographics into the correct fields. Continue with registration.

Registration Rules

1. No Personal or Family identifiers when creating patients in test
2. No ULI or Health Care insurance –leave blank
3. Test Patient Rule – always use TRAIN as middle name
    - BROWN, BUSTER TRAIN
4. Demographics
    - Valid postal codes only

1. Contacts
    - No personal or family identifiers

1. Provider/Physician
    - No manual entries
    - Select from Pick List , same as current practice

7. Do Not Print
    - Registration forms
    - Labels
    - Armbands

Training Scenarios

Clinical Registration

Create CLI registration by creating a NEW patient IE: BROWN,BUSTERTRAIN

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type CLINICAL or use F9/pull down menu
4. Fill in **Form* box - Type Long or use F9/pull down menu
5. *Patient Identification* Search using ***one** of the following:
   - ULI: 9 digit identifier – "#" not required
   - Name: LAST,FIRST – no spaces
   - Account : enter Alpha characters followed by number/YR
   - Medical Records Number: enter numerals – "U#" not required
   - Birthday: DDMMYY ('**/**' not required)
   - Phone Number: 10 digit, system will auto format
   - Policy Number: Health Care Policy number – "P#" not required
   - EMR Number: Alpha character followed by number identifier
6. Press F12 or Click "Ok" to start patient search
7. Patient Found – Select (F12 or OK)
8. Patient Not Found – Next/F11 through searches – Create New patient if necessary
9. **Patient** Tab – type in **Reg Category* or use F9. Update demographic information as needed.
10. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.
11. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).
12. ***Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian
13. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a Provincial Health Care is not primary, it or a 'SP' option should be secondary, e.g. 1. WCBAB 2. AHC

14. **Provider** tab – Use Mnemonic to enter *Attending & Family Physician (e.g. Dr. Mary Aird is AIRDMARY – F9 lookup is also available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.
15. **Visit** tab – Enter *Service Date, *Service Time and *Location. *Arrived by (AG, AA, AC) and *By Ambulance ((Y or N) fields also need to be completed for Clinical Registrations.
16. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Inpatient Registration

Create NEW inpatient registration select patient from Client Registry

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type INPATIENT or use F9/pull down menu
4. Fill in **Form* box - Type Long or use F9/pull down menu
5. *Patient Identification* Search using ***one** of the following:
   - ULI: 9 digit identifier – "#" not required
   - Name: LAST,FIRST – no spaces
   - Account : enter Alpha characters followed by number/YR
   - Medical Records Number: enter numerals – "U#" not required
   - Birthday: DDMMYY ('**/**' not required)
   - Phone Number: 10 digit, system will auto format
   - Policy Number: Health Care Policy number – "P#" not required
   - EMR Number: Alpha character followed by number identifier
6. Press F12 or Click "Ok" to start patient search
7. Patient Found – Select (F12 or OK)
8. Patient Not Found – Next/F11 through searches – Create New patient if necessary

9. **Patient** Tab – type in **Reg Category* or use F9. Update demographic information as needed. Some sites require the **Religion* field to be completed, if so it will be marked with an '*'.

10. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.

11. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).

12. **Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian

13. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a patient does not have Provincial Health Care, SPAB (AB=province/country of residency, e.g. BC, NRES, CAN) for Self Pay should be entered. If the visit pertains to a work injury, WCBAB (AB=province of employer) be would be primary and their Provincial Health Care would be secondary. *WCB visits have a CDS with required fields. E.g. 1. WCBAB 2. AHC or SP

14. **Provider** tab – Use Mnemonic to enter *Admitting, *Attending & Family Physicians (e.g. Dr. Mary Aird is AIRDMARY – F9 lookup is also available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.

15. **ARO Risk** – this will be in different areas depending on the region you are working in; it will be marked as mandatory and if you miss it a pop up will inform you.

16. **Visit** tab – Enter *Service, *Admit Priority, *Admit Date │ *Time, *Requested Accom and *Room │ *Bed information. *Entry Code, *Arrived by and *By Ambulance fields may also be required for Inpatient Registrations.

17. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Recurring

Create RCR recurring registration for a NEW Patient IE: COAT,DONTRAIN

17. Open Registration Management Desktop
18. Choose *Register* function
19. Fill in **Type* box - Type RECURRING or F9/use pull down menu
20. Fill in **Form* box - Type Long or F9/use pull down menu
21. *Patient Identification* Search using ***one** of the following:

- ULI: 9 digit identifier – "#" not required
- Name: LAST,FIRST – no spaces
- Account : enter Alpha characters followed by number/YR
- Medical Records Number: enter numerals – "U#" not required
- Birthday: DDMMYY ('/' not required)
- Phone Number: 10 digit, system will auto format
- Policy Number: Health Care Policy number – "P#" not required
- EMR Number: Alpha character followed by number identifier

22. Press F12 or Click "Ok" to start patient search
23. Patient Found – Select (F12 or OK)
24. Patient Not Found – Next/F11 through searches – Create New patient if necessary
25. **Patient** tab – type in **Reg Category* or use F9 . Update demographic information as needed.
26. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.
27. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).
28. ***Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian
29. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a Provincial Health Care is not primary, it or a 'SP' option should be secondary, e.g. 1. WCBAB 2. AHC
30. **Provider** tab – Use Mnemonic to enter *Attending & Family Physician (e.g. Dr. Mary Aird is AIRDMARY – F9 lookup is also available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.
31. **Visit** tab – Enter *Service Date, *Service Time and *Location. Some types of visit also require *Arrived by (AG, AA, AC) and *By Ambulance ((Y or N) fields to be completed.
32. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Referred

Create REF registration for any patient

33. Open Registration Management Desktop
34. Choose *Register* function
35. Fill in **Type* box - Type REFERRED or F9/use pull down menu
36. Fill in **Form* box - Type Long or F9/use pull down menu
37. *Patient Identification* Search using ***one** of the following:
    - ULI: 9 digit identifier – "#" not required
    - Name: LAST,FIRST – no spaces
    - Account : enter Alpha characters followed by number/YR
    - Medical Records Number: enter numerals – "U#" not required
    - Birthday: DDMMYY ('**/**' not required)
    - Phone Number: 10 digit, system will auto format
    - Policy Number: Health Care Policy number – "P#" not required
    - EMR Number: Alpha character followed by number identifier
38. Press F12 or Click "Ok" to start patient search
39. Patient Found – Select (F12 or OK)
40. Patient Not Found – Next/F11 through searches – Create New patient if necessary
41. **Patient** Tab – type in **Reg Category* or use F9 . Update demographic information as needed.
42. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.
43. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).
44. ***Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian
45. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a Provincial Health Care is not primary, it or a 'SP' option should be secondary, e.g. 1. WCBAB 2. AHC
46. **Provider** tab – Use Mnemonic to enter *Attending & Family Physician (e.g. Dr. Mary Aird is AIRDMARY – F9 lookup is also available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.
47. **Visit** tab – Enter *Service Date, *Service Time and *Location. Some types of visit also require *Arrived by (AG, AA, AC) and *By Ambulance ((Y or N) fields to be completed.

48. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

ER Registration

Create ER registration by using existing patient found in Client Registry

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type EMERGENCY or use F9/pull down menu
4. Fill in **Form* box - Type Long or use F9/pull down menu
5. *Patient Identification* Search using ***one*** of the following:
    - ULI: 9 digit identifier – "#" not required
    - Name: LAST,FIRST – no spaces
    - Account : enter Alpha characters followed by number/YR
    - Medical Records Number: enter numerals – "U#" not required
    - Birthday: DDMMYY ('**/**' not required)
    - Phone Number: 10 digit, system will auto format
    - Policy Number: Health Care Policy number – "P#" not required
    - EMR Number: Alpha character followed by number identifier
6. Press F12 or Click "Ok" to start patient search
7. Patient Found – Select (F12 or OK)
8. Patient Not Found – Next/F11 through searches – Create New patient if necessary
9. **Patient** Tab – type in **Reg Category* or use F9 . Update demographic information as needed.
10. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.
11. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).
12. ***Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian

13. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a Provincial Health Care is not primary, it or a 'SP' option should be secondary, e.g. 1. WCBAB 2. AHC
14. **Provider** tab – Use Mnemonic to enter *Emergency & Family Physician (e.g. Dr. Mary Aird is typed in as AIRDMARY – F9 lookup available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.
15. **Visit** tab – Enter through *Service Date & *Service Time, enter "T" for *Arrival Date & *Triage Date, & enter *Location. *Arrival Time & *Triage Time should already have times – that is when triage used the reception routine to initiate the ER visit in Meditech. *Arrived by (AG, AA, AC) and *By Ambulance (Y or N) fields also need to be completed for ER registrations.
16. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

ER Rollover

Create ER inpatient by using the previously registered ER account.

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type INPATIENT or use F9/pull down menu
4. Fill in **Form* box - Type Long or use F9/pull down menu
5. *Patient Identification* Search using ***one*** of the following:
    - ULI: 9 digit identifier – "#" not required
    - Name: LAST,FIRST – no spaces
    - Account : enter Alpha characters followed by number/YR
    - Medical Records Number: enter numerals – "U#" not required
    - Birthday: DDMMYY ('**/**' not required)
    - Phone Number: 10 digit, system will auto format
    - Policy Number: Health Care Policy number – "P#" not required
    - EMR Number: Alpha character followed by number identifier

6. Press F12 or Click "Ok" to start patient search

7. Patient Found – Select (F12 or OK)

8. Patient Not Found – Next/F11 through searches – Create New patient if necessary

9. **Patient** Tab – type in **Reg Category* or use F9. Update demographic information as needed. Some sites require the **Religion* field to be completed, if so it will be marked with an '*'.

10. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.

11. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).

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15. **ARO Risk** – this will be in different areas depending on the region you are working in; it will be marked as mandatory and if you miss it a pop up will inform you.

16. **Visit** tab – Enter *Service, *Admit Priority, *Admit Date | *Time, *Requested Accom and *Room | *Bed information. *Entry Code, *Arrived by and *By Ambulance fields may also be required for Inpatient Registrations.

17. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Obstetrical Inpatient Mom

Create OBS Inpatient registration

1. Open Registration Management Desktop

2. Choose *Register* function
3. Fill in **Type* box - Type INPATIENT or use F9/pull down menu
4. Fill in **Form* box - Type Long or use F9/pull down menu
5. *Patient Identification* Search using ***one** of the following:
   - ULI: 9 digit identifier – "#" not required
   - Name: LAST,FIRST – no spaces
   - Account : enter Alpha characters followed by number/YR
   - Medical Records Number: enter numerals – "U#" not required
   - Birthday: DDMMYY ('**/**' not required)
   - Phone Number: 10 digit, system will auto format
   - Policy Number: Health Care Policy number – "P#" not required
   - EMR Number: Alpha character followed by number identifier
6. Press F12 or Click "Ok" to start patient search
7. Patient Found – Select (F12 or OK)
8. Patient Not Found – Next/F11 through searches – Create New patient if necessary
9. **Patient** Tab – type in **Reg Category* or use F9. Update demographic information as needed. Some sites require the **Religion* field to be completed, if so it will be marked with an '*'.
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17. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Obstetrical Inpatient Mom

Create OBS Inpatient registration

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type <u>INPATIENT</u> or use F9/pull down menu
4. Fill in **Form* box - Type <u>Long</u> or use F9/pull down menu
5. *Patient Identification* Search using ***<u>one</u>** of the following:
   - <u>ULI</u>: 9 digit identifier – “#” not required
   - <u>Name</u>: LAST,FIRST – no spaces
   - <u>Account</u> : enter Alpha characters followed by number/YR
   - <u>Medical Records Number</u>: enter numerals – “U#” not required
   - <u>Birthday</u>: DDMMYY (‘**/**’ not required)
   - <u>Phone Number</u>: 10 digit, system will auto format
   - <u>Policy Number</u>: Health Care Policy number – “P#” not required

- EMR Number: Alpha character followed by number identifier

6. Press F12 or Click "Ok" to start patient search
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11. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).
12. **Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian
13. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a patient does not have Provincial Health Care, SPAB (AB=province/country of residency, e.g. BC, NRES, CAN) for Self Pay should be entered. If the visit pertains to a work injury, WCBAB (AB=province of employer) be would be primary and their Provincial Health Care would be secondary. *WCB visits have a CDS with required fields. E.g. 1. WCBAB 2. AHC or SP
14. **Provider** tab – Use Mnemonic to enter *Admitting, *Attending & Family Physicians (e.g. Dr. Mary Aird is AIRDMARY – F9 lookup is also available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.
15. **ARO Risk** – this will be in different areas depending on the region you are working in; it will be marked as mandatory and if you miss it a pop up will inform you.
16. **Visit** tab – Enter *Service, *Admit Priority, *Admit Date | *Time, *Requested Accom and *Room | *Bed information. *Entry Code, *Arrived by and *By Ambulance fields may also be required for Inpatient Registrations.
17. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Newborn

Create Newborn registration using Obstetrical MOM already Created.

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type NEWBORN or use F9/pull down menu
4. Fill in **Form* box - Type Long or use F9/pull down menu
5. *Patient Identification* Search using ***one** of the following of the **MOTHER'S** information:
   - ULI: 9 digit identifier – "#" not required
   - Mother: LAST,FIRST – no spaces
   - Account Number: enter letter prefix & numerals – e.g. **AL**2151/15
   - Medical Records Number: enter numerals – "U#" not required
   - Birthday: DDMMYY ('**/**' not required)
   - Phone Number: 10 digit, system will auto format
   - Policy Number: Health Care Policy number – "P#" not required
   - EMR Number: Alpha character followed by number identifier
6. Press F12 or Click "Ok" to search; select current Admission for mother in pop-up by pressing 'Enter' when it is highlighted in green, or clicking on the line.
7. Pre-Admitted/Admitted Newborns Lookup screen appears; should say "No matches found" for first baby (if entering multiples, any previously entered/attached to this inpatient visit for the mother will show in this Lookup. Press Esc or click the Cancel button.
8. **Patient** Tab – Complete the name line for the baby by going to the end of the typing already there & enter a comma, then NBF/M (NewBorn Female/Male) and the Mother's first name; e.g. UDADM ORANGETRUCK,NBM LENORE. – Type "IP" for **Reg Category* or use F9.
   – Enter **Sex* for Newborn (Male, Female, or Unkown)
   – Enter "0" for **ULI* as Newborn does not have one yet
9. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.
10. **Contact** tab – Mothers information will auto-populate into the *Next of Kin* and *Person to Notify*.

11. **Guarantor** tab – Mothers information will auto-populate into the *Guarantor Demographics* as the patient is under 18 years of age.

12. **Insurance** tab – Mothers coverage, usually AHC, will auto-populate into line 1.

13. **Provider** tab – Use Mnemonic to enter *Admitting, *Attending Physicians (e.g. Dr. Mary Aird is typed in as AIRDMARY – F9 lookup available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.

14. **Visit** tab – Enter through *Service & *Admit Priority (they will both populate with NB), *Admit Date │ *Time (called will inform you of time of birth, that is what is entered), *Requested Accom (N for Nursery will populate) and *Room │ *Bed information (usually overflow for LDR or NICU). *Room Rate Accom will populate an entry you enter through. Reason for Visit and Entry code are not mandatory, however, they will auto-populate as Newborn & NB respectively.

15. Press F12, or click Save on the bottom of the screen, to save & file the information. Do not print any forms/labels until a ULI number has been obtained & entered**. Print only Admission form and labels after that has been completed.

> **Note:** Once a ULI number has been assigned to the Newborn, you will have to edit their registration using the *Edit* function and entering <u>Newborn</u> as the type or just enter the Name, Account # or Medical Records # in the Search area (with no Type identified).

Surgical Day Care

Create Surgical Daycare Registration searching for existing patient

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type <u>SURGICAL DAY CARE</u> or F9/use pull down menu
4. Fill in **Form* box - Type <u>Long</u> or F9/use pull down menu
5. *Patient Identification* Search using ***<u>one</u>** of the following:
   - <u>ULI</u>: 9 digit identifier – “#” not required
   - <u>Name</u>: LAST,FIRST – no spaces
   - <u>Account</u> : enter Alpha characters followed by number/YR
   - <u>Medical Records Number</u>: enter numerals – “U#” not required
   - <u>Birthday</u>: DDMMYY (‘**/**’ not required)
   - <u>Phone Number</u>: 10 digit, system will auto format

- Policy Number: Health Care Policy number – “P#” not required
- EMR Number: Alpha character followed by number identifier

6. Press F12 or Click “Ok” to start patient search
7. Patient Found – Select (F12 or OK)
8. Patient Not Found – Next/F11 through searches – Create New patient if necessary
9. **Patient** tab – type in **Reg Category* or use F9 . Update demographic information as needed.
10. Enter through to next “TAB” or use F8 (Hot Keys) or the mouse to navigate.
11. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).
12. ***Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian
13. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a Provincial Health Care is not primary, it or a ‘SP’ option should be secondary, e.g. 1. WCBAB 2. AHC
14. **Provider** tab – Use Mnemonic to enter *Attending & Family Physician (e.g. Dr. Mary Aird is AIRDMARY – F9 lookup is also available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.
15. **Visit** tab – Enter *Service Date, *Service Time and *Location. Some types of visit also require *Arrived by (AG, AA, AC) and *By Ambulance ((Y or N) fields to be completed.
16. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Rollover Inpatient from Day Surgery

Create Inpatient by rolling over previously create SDC account

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type INPATIENT or use F9/pull down menu
4. Fill in **Form* box - Type Long or use F9/pull down menu
5. *Patient Identification* Search using ***one*** of the following – when rolling over an outpatient visit to Inpatient or Surgical Day Care/Day Surgery, enter the account number

of the outpatient visit, if known, to pick it up, or use one of the other options to find the current registration:

- ULI: 9 digit identifier – "#" not required
- Name: LAST,FIRST – no spaces
- *Account Number: enter letter prefix & numerals – e.g. **AL**2151/15
- Medical Records Number: enter numerals – "U#" not required
- Birthday: DDMMYY ('**/**' not required)
- Phone Number: 10 digit, system will auto format
- Policy Number: Health Care Policy number – "P#" not required
- EMR Number: Alpha character followed by number identifier

6. Press F12 or Click OK to search for the account.
7. Press F12 or Click "Yes" if the correct patient information shows in pop-up.
8. **Patient** Tab – type in **Reg Category* or use F9. Update demographic information as needed. Some sites require the **Religion* field to be completed, if so it will be marked with an '*'.
9. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.
10. **Contacts** tab – Confirm patient contacts, which consist of next of kin and person to notify. Shortcuts are available SP (same as patient). SNOK (Same as next of kin).
11. **Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrier and is ultimately responsible for payment therefore for under 18 Guarantor is parent or guardian
12. **Insurance** tab – will auto-fill with the same insurance that was entered for the outpatient visit.
13. **Provider** tab – Use Mnemonic to enter *Admitting Physician (mandatory for Inpatient's only). *Attending & Family Physicians will auto-fill with the same information as the outpatient visit. (Mnemonic e.g.: Dr. Mary Aird is typed in as AIRDMARY – F9 lookup available). Confirm address/location of physician at the bottom to ensure selection of the correct physician.

14. **ARO Risk** – this will be in different areas depending on the region you are working in;it will be marked as mandatory and if you miss it a pop up will inform you.

15. **Visit** tab – Enter *Service, *Admit Priority, *Admit Date │ *Time, *Requested Accomand *Room │ *Bed information. *Entry Code, *Arrived by and *By Ambulance fields may also be required for Inpatient Registrations/Day Surgery.

16. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.

Provider Office Visit

Create POV registration by searching for existingpatient

1. Open Registration Management Desktop
2. Choose *Register* function
3. Fill in **Type* box - Type PROVIDER OFFICE VISIT or F9/use pull down menu
4. Fill in **Form* box - Type Long or F9/use pull down menu
5. *Patient Identification* Search using ***one** of the following:
    - ULI: 9 digit identifier – "#" not required
    - Name: LAST,FIRST – no spaces
    - Account : enter Alpha characters followed by number/YR
    - Medical Records Number: enter numerals – "U#" not required
    - Birthday: DDMMYY ('**/**' not required)
    - Phone Number: 10 digit, system will auto format
    - Policy Number: Health Care Policy number – "P#" not required
    - EMR Number: Alpha character followed by number identifier
6. Press F12 or Click "Ok" to start patient search
7. Patient Found – Select (F12 or OK)
8. Patient Not Found – Next/F11 through searches – Create New patient if necessary
9. **Patient** tab – type in **Reg Category* or use F9 . Update demographic informationas needed.
10. Enter through to next "TAB" or use F8 (Hot Keys) or the mouse to navigate.
11. **Contacts** tab – Confirm patient contacts, which consist of next of kin and personto notify. Shortcuts are available SP (same as patient). SNOK (Same as next ofkin).

12. ***Guarantor** tab – Same as Patient (SP) unless patient is under the age of 18, The Guarantor is the person responsible for paying for services not covered by a carrierand is ultimately responsible for payment therefore for under 18 Guarantor is parentor guardian
13. **Insurance** tab – enter/edit *primary and secondary insurances as required. If a Provincial Health Care is not primary, it or a 'SP' option should be secondary, e.g. 1. WCBAB 2. AHC
14. **Provider** tab – Use Mnemonic to enter *Attending & Family Physician (e.g. Dr. Mary Aird is typed in as AIRDMARY – F9 lookup available). Confirm address/location of physician at the bottom of the screen to ensure selection of the correct physician.
15. **Visit** tab – Enter *Service Date, *Service Time and *Location. Some types of visit also require *Arrived by (AG, AA, AC) and *By Ambulance ((Y or N) fields to becompleted.
16. Press F12, or click Save on the bottom of the screen, to save & file the information and print the necessary forms and labels.