

# Registration Management

## WORKBOOK: FOUNDATIONAL

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## Exercise 1 – Instructor demo and Users follow

### Search/Add new patient record with 'colour' as last name

Patient arrives at Lion's Gate Hospital as an Outpatient admission in the LGH Outpatient Laboratory to get bloodwork done. The patient presents a Ministry of Health (MoH) Outpatient Laboratory Requisition with Lab Orders for lab registration. The patient does not have any other pieces of identification on their person.

1. Select the **Register Outpatient** conversation
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Click on **Add Person**
4. Complete the *Request PHN* window using the patient information provided
5. Click on **Submit**
6. Use the following information to complete the patient's record

<b>Last name</b>	Gold
<b>First name</b>	Eleanor
<b>Preferred Name</b>	Ellie
<b>Date of birth</b>	30 Jan 1982
<b>Gender</b>	F
<b>Permanent Address</b>	7-654 21st St NE, Calgary, AB T6C 2A5, Canada
<b>Preferred Phone</b>	Mobile Phone Number
<b>Mobile Phone Number</b>	604 875 2345
<b>Encounter Type</b>	Outpatient
<b>Medical Service</b>	Laboratory Medicine
<b>Reason for Visit</b>	Lab
<b>Source of ID</b>	None
<b>Facility/Building</b>	LGH Laboratory
<b>Unit/Clinic</b>	LGH Laboratory
<b>Primary Care Provider (PCP)</b>	Train, General Medicine-Physician8
<b>Referring Provider</b>	Train, General Medicine-Physician8
<b>Status in Canada</b>	Unknown
<b>Accident Related Visit?</b>	No
<b>Primary Insurance</b>	<b>Guarantor/Relationship to Patient:</b> Self
	<b>Search for Health Plan:</b> Non-Resident of Canada--SELF

	<b>Jurisdiction Form Signed?:</b> Yes
<b>Emergency Contact</b>	<b>Relationship to Patient:</b> Partner Name: Chris Gold Address: Same address Preferred Phone: 604 299 1234
<b>Next of Kin</b>	<b>Relationship to Patient:</b> Partner Select 'Partner's name' from <i>Relationships</i> pop-up window Name: Chris Gold Address: Same address Preferred Phone: 604 299 1234

7. Click on **Complete**

## Exercise 2 – Instructor demo and Users follow

### Search/Add encounter to existing patient with ‘Reg-Foundation’ as last name

Patient is an expected Inpatient admission to Lion’s Gate Hospital under General Internal Medicine.

1. Select the **Pre-Register Patient To A Bed** conversation
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Select the corresponding patient record from *Person Search* window
4. Click on **Add Encounter**
5. Use the following information to complete the patient’s record

<b>BC PHN</b>	9876394277
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Katherine
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F
<b>Pre-Reg Status</b>	Incomplete
<b>Permanent Address</b>	201-590 8th Ave W, Vancouver, V5Z 1C5, Canada
<b>Preferred Phone</b>	Home Phone Number
<b>Home Phone Number</b>	604 688 2424
<b>Encounter Type</b>	Pre-Inpatient
<b>Medical Service</b>	General Internal Medicine
<b>Reason for Visit</b>	Pneumonia
<b>Admit Category</b>	Elective
<b>Admit Source</b>	Direct
<b>Facility/Building</b>	LGH Lions Gate
<b>Unit/Clinic</b>	LGH Endoscopy
<b>Admitting Provider</b>	Train, General Medicine-Physician5
<b>Attending Provider</b>	Train, General Medicine-Physician5
<b>Primary Care Provider (PCP)</b>	Train, General Medicine-Physician8
<b>Referring Provider</b>	Train, General Medicine-Physician8
<b>Estimated Arrive Date</b>	Today’s Date

<b>Estimated Arrive Time</b>	12:30pm
<b>Accident Related Visit?</b>	No
<b>Primary Insurance</b>	<b>Guarantor/Relationship to Patient:</b> Self
	<b>Search for Health Plan:</b> BC Resident MSP PHN--MSP
<b>Emergency Contact</b>	<b>Relationship to Patient:</b> Father Name: Robert Sheep Address: Same address Preferred Phone: 604 875 2323
<b>Next of Kin</b>	<b>Relationship to Patient:</b> Father Click on 'New Person' from <i>Relationships</i> pop-up window Name: Norman Reg-Foundation Address: Same address Preferred Phone: 604 875 2423

## Exercise 3 – Instructor demo and users follow

### Admit patient with pre-registration

Patient presents at Lion's Gate Hospital for a direct admission to an Inpatient unit without the recommended two pieces of ID: Government-issued photo ID and provincial/territorial insurance card.

1. Click on **Worklist**
2. Select **Today's Expected Arrivals**
3. From the available column click on LGH Lions Gate > LGH Lions Gate > LGH Endoscopy
4. Right-click on the correct patient and select **Register Patient To A Bed**
5. Use the following information to complete the patient's record

<b>BC PHN</b>	9876394277
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Katherine
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F
<b>Permanent Address</b>	102-590 8th Ave W, Vancouver, V5Z 1C5, Canada
<b>Preferred Phone</b>	Home Phone Number
<b>Home Phone Number</b>	604 688 2424
<b>Encounter Type</b>	Inpatient
<b>Medical Service</b>	General Internal Medicine
<b>Reason for Visit</b>	Pneumonia
<b>Admit Category</b>	Elective
<b>Admit Source</b>	Direct
<b>Arrival by Ambulance</b>	No ambulance
<b>Source of ID</b>	None
<b>Facility/Building</b>	LGH Lions Gate
<b>Unit/Clinic</b>	LGH Endoscopy
<b>Room</b>	Endoscopy wait
<b>Bed</b>	13
<b>Patient Accom Requested</b>	Semi Private
<b>Accom Form Signed</b>	Yes
<b>Admitting Provider</b>	Train, General Medicine-Physician5

<b>Attending Provider</b>	Train, General Medicine-Physician5
<b>Primary Care Provider (PCP)</b>	Train, General Medicine-Physician8
<b>PCP Verified?</b>	Yes
<b>Referring Provider</b>	Train, General Medicine-Physician8
<b>Visitor Status</b>	No visitors
<b>Patient Admit Date</b>	Registration Date
<b>Patient Admit Time</b>	Registration Time
<b>Accident Related Visit?</b>	No
<b>Primary Insurance</b>	<b>Guarantor/Relationship to Patient:</b> Self
	<b>Search for Health Plan:</b> BC Resident MSP PHN--MSP
<b>Extended Insurance</b>	<b>Relationship to Patient:</b> Self
	<b>Search for Health Plan:</b> Pacific Blue Cross--Extended
<b>Emergency Contact</b>	<b>Relationship to Patient:</b> Father Name: Robert Sheep Address: Same address Preferred Phone: 604 875 2323
<b>Next of Kin</b>	<b>Relationship to Patient:</b> Father Name: Norman Reg-Foundation Address: Same address Preferred Phone: 604 875 2423

6. Click on **Complete**



## Exercise 4 – Instructor demo and users follow

### Edits to Primary Identification

Patient's name was misspelled in the EMPI database and the patient presented with no ID at the time of registration. The patient's family member returns with a piece of government-issued ID, the patient's passport.

1. Click on **Bedboard**
2. Expand LGH Lions Gate > LGH Lions Gate
3. Click on LGH Endoscopy
4. Right-click on the corresponding patient
5. Mouse over **Conversation**
6. Select **Register Patient To A Bed**
7. Use the following information to update the patient's record

#### Previous Primary Identification

BC PHN	9876394277
Last name	Reg-Foundation
First name	Katherine
Preferred Name	Katie
Date of birth	02 Feb 1982
Gender	F

#### Updated Primary Identification

BC PHN	9876394277
Last name	Reg-Foundation
First name	Kathryn
Preferred Name	Katie
Date of birth	02 Feb 1982
Gender	F

8. Click on **Complete**
9. Read the message prompt '*The person's name has changed from <Patient's Previous Name>. Would you like to commit this change?*' and click on **Yes**

## Exercise 5 – Instructor demo and users follow

### Reprint updated documents & labels

Patient's name was misspelled in the EMPI database and the patient presented with no ID at the time of registration. The patient's family member returns with a piece of government-issued ID, the patient's passport.

1. Click on **Run Documents** icon
2. Click on **Find Person** icon
3. **Search** for the patient exhaustively using the CIS and EMPI search criteria
4. Select the appropriate encounter with the information provided

<b>BC PHN</b>	9876394277
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Kathryn
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F

5. Select "Armband Label" and click on the **Print document** icon
6. Select the designated printer from the printer selection drop-down
7. Click on **OK**

## Exercise 6 – Instructor demo and users follow

### Transfer patient

Patient current accommodation requires maintenance and the patient needs to be transferred to another room and bed in the same unit.

1. Click on **Bedboard**
2. Expand LGH Lions Gate > LGH Lions Gate
3. Click on LGH Endoscopy
4. Right-click on the corresponding patient
5. Mouse over **Conversation**
6. Select **Bed Transfer**
7. Use the following information to complete the patient's record

<b>BC PHN</b>	9876394277
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Katherine
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F
<b>Medical Service</b>	General Internal Medicine
<b>Building</b>	LGH Lions Gate
<b>Unit/Clinic</b>	LGH Endoscopy
<b>Room</b>	Endoscopy wait
<b>Bed</b>	26
<b>Accommodation</b>	Ward
<b>Attending Provider</b>	Train, General Medicine-Physician5
<b>Transfer Date</b>	Today's Date
<b>Transfer Time</b>	Now

8. Click on **Complete**

## Exercise 7 – Instructor demo and users follow

### Discharge patient

Patient has been medically approved to be discharged home.

1. Click on **Bedboard**
2. Click on LGH Lions Gate > LGH Lions Gate > LGH Endoscopy
3. Right-click on the corresponding patient
4. Mouse over **Conversation**
5. Select **Discharge Encounter**
6. Use the following information to complete the patient's record

<b>BC PHN</b>	9876394277
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Kathryn
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F
<b>Discharge Disposition</b>	Discharged Home without Support Services
<b>Discharge Date</b>	Today's Date
<b>Discharge Time</b>	Now

7. Click on **Complete**

## Exercise 8 – Users only exercise

### Modify Discharge

The wrong discharge time has been entered for a discharged patient. The unit clerk discharged the patient as the date and time entered in the system rather than the time the patient physically left the ward.

1. Click on **Modify Discharge**
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Select the appropriate discharged encounter
4. Click on **OK**
5. Use the following information to complete the patient's record

<b>BC PHN</b>	9876394277
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Kathryn
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F
<b>Discharge Disposition</b>	Discharged Home without Support Services
<b>Discharge Date</b>	Today's Date
<b>Discharge Time</b>	12:01pm

6. Click on **Complete**

## Exercise 9 – Users only exercise

### Cancel Discharge

The wrong patient has been discharged and needs to be returned to the tracking board.

1. Click on **Cancel Discharge**
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Select the appropriate discharged encounter
4. Click on **OK**
5. Use the following information to complete the patient's record

<b>BC PHN</b>	9876394277
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Kathryn
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F
<b>Building</b>	LGH Lions Gate
<b>Unit/Clinic</b>	LGH Endoscopy
<b>Room</b>	Endoscopy wait
<b>Bed</b>	26

6. Click on **Complete**

## Exercise 10 – Users only exercise

### Direct Inpatient Admission

Patient is a direct admission and by-passes the registration desk. The registration clerk receives a verbal confirmation that the patient was expected and has arrived directly to the unit/clinic.

1. Select **Register Patient To A Bed**
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Select the corresponding patient record from *Person Search* window
4. Click on **Add Encounter**
5. Use the following information to complete the patient's record

Last name	Gold
First name	Eleanor
Preferred Name	Ellie
Date of birth	30 Jan 1982
Gender	F
Permanent Address	22-654 21st St NE, Calgary, AB T6C 2A5, Canada
Preferred Phone	Mobile Phone Number
Mobile Phone Number	604 875 2345
Encounter Type	Inpatient
Medical Service	Critical Care
Reason for Visit	Sepsis
Admit Category	Elective
Admit Source	Direct
Arrival by Ambulance	Ground Ambulance Only
Source of ID	None
Transferred From	Tofino General Hospital
Facility/Building	LGH Lions Gate
Unit/Clinic	LGH MTR
Room	MTR Wait
Bed	13
Patient Accom Requested	Ask Patient
Accom Form Signed	No
Admitting Provider	Train, General Medicine-Physician5
Attending Provider	Train, General Medicine-Physician5

<b>Primary Care Provider (PCP)</b>	Train, General Medicine-Physician8
<b>PCP Verified?</b>	No
<b>Referring Provider</b>	Train, General Medicine-Physician8
<b>Status in Canada</b>	Visitor
<b>Accident Related Visit?</b>	No
<b>Primary Insurance</b>	<b>Guarantor/Relationship to Patient:</b> Self
	<b>Search for Health Plan:</b> Non-Resident of Canada--SELF
	<b>Jurisdiction Form Signed?:</b> No
<b>Emergency Contact</b>	<b>Relationship to Patient:</b> Partner Name: Chris Gold Address: Same address Preferred Phone: 604 299 1234
<b>Next of Kin</b>	<b>Relationship to Patient:</b> Partner Name: Chris Gold Address: Same address Preferred Phone: 604 299 1234

6. Click on **Complete**



## Exercise 11– Users only exercise

### Cancel encounter admitted in error

Patient was pre-registered for 12:30pm and was admitted in error. The encounter does not have any orders, clinical events, and/or finance charges attached.

1. Select the **Cancel Encounter** conversation
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Select the appropriate encounter with the information provided

Last name	Gold
First name	Eleanor
Preferred Name	Ellie
Date of birth	30 Jan 1982
Gender	F
Encounter Type	Inpatient
Facility/Building	LGH Lions Gate
Unit/Clinic	LGH MTR
Room	MTR Wait
Bed	13

4. Click on **Complete**



*Pre-Registrations admitted and cancelled in error must be re-entered. The pre-registration encounter must be re-created and any orders, clinical events, and/or finance charges must be reattached to the new encounter.*

## Exercise 12 – Users only exercise

### Discharge encounter admitted in error

The wrong patient and encounter has been admitted. The encounter has orders, clinical events, and/or finance charges attached and cannot be cancelled.

1. Select the **Discharge Encounter** conversation
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Select the appropriate encounter with the information provided

BC PHN	9100008723
Last name	Reg-Foundation
First name	Kathryn
Preferred Name	Katie
Date of birth	02 Feb 1982
Gender	F
Discharge Disposition	No Further Service
Discharge Date	Patient Admit Date
Discharge Time	Patient Admit Time + 1 minute (e.g. Patient Admit Time: 12:32=Discharge Time: 12:33)

4. Click on **Complete**



*Attempting to cancel encounters with orders will prompt the message, 'This encounter cannot be cancelled because it has order activity associated to it'. These encounters must be discharged instead. Pre-Registrations admitted and cancelled in error must be re-entered. The pre-registration encounter must be re-created and any orders, clinical events, and/or finance charges must be reattached to the new encounter.*

## Exercise 13 – Instructor Demo and users follow

### Repeat Cancel Discharge

For the purpose of the next activity repeat cancel discharge activity.

1. Click on **Cancel Discharge**
2. **Search** for the patient exhaustively using the CIS and EMPI search criteria
3. Select the appropriate discharged encounter
4. Click on **OK**
5. Use the following information to complete the patient's record

<b>BC PHN</b>	9876502987
<b>Last name</b>	Reg-Foundation
<b>First name</b>	Kathryn
<b>Preferred Name</b>	Katie
<b>Date of birth</b>	02 Feb 1982
<b>Gender</b>	F
<b>Building</b>	LGH Lions Gate
<b>Unit/Clinic</b>	LGH Endoscopy
<b>Room</b>	Endoscopy wait
<b>Bed</b>	26

6. Click on **Complete**

## Exercise 14 – Instructor Demo and users follow

### Run a Report

Run an Inpatient Census of patient currently admitted to Lion's Gate Hospital MTR.

1. Open **Discern Reporting Portal**
2. Click on the arrow next to *Categories*
3. Click to mark the checkbox next to **Registration – Census**
4. Select **Admit List**
5. Click on **Run Report**
6. Use the following information to view/print an inpatient census

<b>Output Type</b>	Printable (PDF)
<b>Encounter Type</b>	Inpatient
<b>Health Organization</b>	Vancouver Coastal Health Authority
<b>Site</b>	Lions Gate Hospital
<b>Facility</b>	LGH Lions Gate Hospital
<b>Unit/Clinic</b>	LGH Endoscopy
<b>Begin Reg Date</b>	Today
<b>End Reg Date</b>	Today
<b>Service</b>	All Services

7. Click on **Execute**