Registration Management

WORKBOOK: FOUNDATIONAL

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Patient Search Criteria

Search exhaustively using the following **Clinical Information System (CIS)** and **Enterprise Master Patient Index (EMPI)** search criteria in the order listed below until you find your patient. If you have found your patient after using one of the search criteria, ask open-ended questions to confirm their identity and proceed with the registration.

If you do not find your patient after using all the CIS and EMPI search criteria, then add a new patient in the system and continue with the registration.

CIS Search Criteria

1	Search by **BC PHN** *if you do not find your patient, then*
2	Search by full **Last Name** and full **First Name** *if you do not find your patient, then*
3	Search by **Birth Date** and **Gender** *if you do not find your patient, search the EMPI*
	NOTE: Be sure to click **Reset** between searches.

If you are unable to find your client, search the EMPI.

EMPI Search Criteria

4	Search by **BC PHN** *if you do not find your patient, then*

5	Enter two or more MPI search criteria:
	   1. 1st criteria
	     a. <u>Full</u> **Last Name** and <u>Full</u> **First Name**
	   2. 2nd criteria – one of the following:
	     a. Birth Date
	     b. Postal Code
	     c. Phone Number

	NOTE: Do not enter **Gender**.
	NOTE: Be sure to click **Reset** between searches.

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

Last name	Red
First name	Rebecca
Preferred Name	Becky
Date of birth	01 Jan 1980
Gender	F
Permanent Address	2423 37th St NE, Calgary, AB T2A 6K3, Canada
Preferred Phone	Mobile Phone Number
Mobile Phone Number	604 875 2345
Encounter Type	Outpatient
Medical Service	Laboratory Medicine
Reason for Visit	Lab
Source of ID	None
Facility/Building	LGH Laboratory
Unit/Clinic	LGH Laboratory
Primary Care Provider (PCP)	Train, General Medicine-Physician8
Referring Provider	Train, General Medicine-Physician8
Status in Canada	Unknown
Accident Related Visit?	No
Primary Insurance	**Guarantor/Relationship to Patient**: Self
	Search for Health Plan: Non-Resident of Canada--SELF

	Jurisdiction Form Signed?: Yes
Emergency Contact	**Relationship to Patient**: Partner Name: Richard Red Address: Same address Preferred Phone: 604 123 4567
Next of Kin	**Relationship to Patient:** Partner Select 'Partner's name' from *Relationships* pop-up window Name: Richard Red Address: Same address Preferred Phone: 604 123 4567

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

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andrea
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F
Pre-Reg Status	Incomplete
Permanent Address	12-45 Sandy Beach Ave, Vancouver, BC V5Z 3X7, Canada
Preferred Phone	Home Phone Number
Home Phone Number	604 875 6789
Encounter Type	Pre-Inpatient
Medical Service	General Internal Medicine
Reason for Visit	Pneumonia
Admit Category	Elective
Admit Source	Direct
Facility/Building	LGH Lions Gate
Unit/Clinic	LGH Endoscopy
Admitting Provider	Train, General Medicine-Physician5
Attending Provider	Train, General Medicine-Physician5
Primary Care Provider (PCP)	Train, General Medicine-Physician8
Referring Provider	Train, General Medicine-Physician8

Estimated Arrive Date	Today's Date
Estimated Arrive Time	12:30pm
Accident Related Visit?	No
Primary Insurance	**Guarantor/Relationship to Patient**: Self
	Search for Health Plan: BC Resident MSP PHN--MSP
Emergency Contact	**Relationship to Patient**: Father Name: Patrick Monkey Address: Same address Preferred Phone: 604 875 2323
Next of Kin	**Relationship to Patient:** Father Click on 'New Person' from *Relationships* pop-up window Name: Manny 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

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andrea
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F
Permanent Address	10-45 Sandy Beach Ave, Vancouver, BC V5Z 3X7, Canada
Preferred Phone	Mobile Phone Number
Mobile Phone Number	604 875 6789
Encounter Type	Inpatient
Medical Service	General Internal Medicine
Reason for Visit	Pneumonia
Admit Category	Elective
Admit Source	Direct
Arrival by Ambulance	No ambulance
Source of ID	None
Facility/Building	LGH Lions Gate
Unit/Clinic	LGH Endoscopy
Room	Endoscopy wait
Bed	01
Patient Accom Requested	Semi Private
Accom Form Signed	Yes

Admitting Provider	Train, General Medicine-Physician5
Attending Provider	Train, General Medicine-Physician5
Primary Care Provider (PCP)	Train, General Medicine-Physician8
PCP Verified?	Yes
Referring Provider	Train, General Medicine-Physician8
Visitor Status	No visitors
Patient Admit Date	Registration Date
Patient Admit Time	Registration Time
Accident Related Visit?	No
Primary Insurance	**Guarantor/Relationship to Patient**: Self
	Search for Health Plan: BC Resident MSP PHN--MSP
Extended Insurance	**Relationship to Patient**: Self
	Search for Health Plan: Pacific Blue Cross--Extended
Emergency Contact	**Relationship to Patient**: Father Name: Patrick Monkey Address: Same address Preferred Phone: 604 875 2323
Next of Kin	**Relationship to Patient:** Father Click on 'New Person' from *Relationships* pop-up window Name: Manny 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	9876394252
Last name	Reg-Foundation
First name	Andrea
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F

Updated Primary Identification

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
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. The patient's registration has been updated and new documentation requires printing.

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

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	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

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F
Medical Service	General Internal Medicine
Building	LGH Lions Gate
Unit/Clinic	LGH Endoscopy
Room	Endoscopy wait
Bed	14
Accommodation	Ward
Attending Provider	Train, General Medicine-Physician5
Transfer Date	Today's Date
Transfer Time	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

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F
Discharge Disposition	Discharged Home without Support Services
Discharge Date	Today's Date
Discharge Time	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

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F
Discharge Disposition	Discharged Home without Support Services
Discharge Date	Today's Date
Discharge Time	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. Select the appropriate encounter with the information provided

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F
Building	LGH Lions Gate
Unit/Clinic	LGH Endoscopy
Room	Endoscopy wait
Bed	14

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** 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

Last name	Red
First name	Rebecca
Preferred Name	Becky
Date of birth	01 Jan 1980
Gender	F
Permanent Address	2423 37th St NE, Calgary, AB T2A 6K3, 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	01
Patient Accom Requested	Ask Patient
Accom Form Signed	No
Admitting Provider	Train, General Medicine-Physician5

Attending Provider	Train, General Medicine-Physician5
Primary Care Provider (PCP)	Train, General Medicine-Physician8
PCP Verified?	No
Referring Provider	Train, General Medicine-Physician8
Status in Canada	Unknown
Accident Related Visit?	No
Primary Insurance	**Guarantor/Relationship to Patient**: Self
	Search for Health Plan: Non-Resident of Canada--SELF
	Jurisdiction Form Signed?: No
Emergency Contact	**Relationship to Patient**: Partner Name: Richard Red Address: Same address Preferred Phone: 604 123 4567
Next of Kin	**Relationship to Patient:** Partner Name: Richard Red Address: Same address Preferred Phone: 604 123 4567

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	Red
First name	Rebecca
Preferred Name	Becky
Date of birth	01 Jan 1980
Gender	F
Encounter Type	Inpatient
Facility/Building	LGH Lions Gate
Unit/Clinic	LGH MTR
Room	MTR Wait
Bed	01

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	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
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

BC PHN	9876394252
Last name	Reg-Foundation
First name	Andreah
Preferred Name	Andy
Date of birth	02 Feb 1982
Gender	F
Building	LGH Lions Gate
Unit/Clinic	LGH Endoscopy
Room	Endoscopy wait
Bed	14

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

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

7. Click on **Execute**