



User Guide

Pre-Registration



INTRODUCTION

Pre-Registration is completed when a patient outside of the hospital is scheduled to come in for a visit and requires orders to be activated or documentation to be placed on that visit prior to the patient arriving. It can be used for Inpatient, OR patients, or Ambulatory care. (Inpatient, Outpatient or One Day Stay patient types)

It is also used when orders need to be placed on a patient who is New to your facility and does not have an encounter in the system.

CREATING A PRE-REGISTRATION FROM A SCHEDULED APPOINTMENT

1. Open the **scheduling appointment book** to the appropriate patient.
2. Click on the appointment in the book or through the appointment inquiry.
3. Click on the Person Management Head icon.

The screenshot displays the 'Scheduling Appointment Book' interface. At the top, there is a menu bar (Task, Edit, View, Help) and a toolbar. A red box highlights the 'Person Management Head' icon in the toolbar. Below the toolbar is a calendar for February 2013. To the right of the calendar is a 'Bookshelf - LHSC Admission Bookshelf' with several colored tabs: 'e-Back', 'VH Adult Admission', 'Obstetrics Admissi...', 'ONE # Outcomes B', 'VH Reservations B', 'Paeds VH Admissi...', 'VH OR ADULT PBL', and 'VH OR P. AEDS PBL'. Below the bookshelf is a 'Work in progress' section with buttons for 'Open', 'Select', 'Schedule', 'Confirm', 'Recur', 'Suggest', 'Request', and 'Insert'. The main area shows a grid of appointments for '2013/02/27 - VH Adult Admission Services'. A red box highlights an appointment at 09:30 with the following details: 'Patent, Patient Henry', 'OR Gen Surg', 'VC Main OR', 'appendectomy', and 'Confirmed'. The status bar at the bottom indicates 'T0207 | CHANNONC2 | Wednesday, February 27, 2013 | 10:18'.

The Encounter Search window will open with the patient name highlighted.

The screenshot shows the 'Encounter Search' window. On the left, there are input fields for PIN, HCN, Last Name, First Name, Middle Name, Age, Sex, and Referring MRN, along with 'Search' and 'Reset' buttons. The main area contains a table with columns: Exp, Name, Birth Date, Sex, PIN, HCN, VC, Response Code, Referring MRN, Address, City, and Phone. The first row is highlighted. Below this is another table with columns: Anon, Visit Number, Pat Type, Med Service, Attending Phys, Reg Date, Disch Date, Building, Nurse Unit, and Roc. The 'Add Encounter' button at the bottom right is highlighted with a red box.

Note This requires the Add Encounter flex form to be set to Pre Registration conversation and not the Registration conversation for the PM Toolbar flex forms)

- Click on the Add Encounter button to launch the **Pre Registration** conversation.

The Pre-Registration Conversation will launch

The screenshot shows the 'PreRegistration' form. It contains various fields for patient information, including Last Name, First Name, Middle Name, PIN, Birth Date, Age, Sex, Visit Number, Patient Type, Street Address, City, Province, Postal Code, Country, Home Phone Number, Work Phone Number, Attending Physician, Medical Service, Referring Physician, Reason for Visit, Pre-Reg Date, Pre-Reg Time, Encounter Status, Estimated Arrive Date, and Estimated Arrive Time.

- Select the appropriate Pre-Reg **patient type** and complete the required fields shown above.
- Click **OK** to save the registration.

Pre-Registration is now complete. The patient now has a visit number and a PIN if they did not have one before. Orders can be activated at any time on this visit and documentation added.

CHECKING INTO THE PRE-REGISTRATION ENCOUNTER

When the patient arrives the Pre Registration needs to be attached to the appointment and completed by using the Modify button in the Check In window.

1. Highlight the patient in the scheduling appointment book or on the appointment inquiry list.
2. Right click and select check in or click on the check in icon.
*The **Check In** dialog box is displayed.*

Check In

Name: Logan, Martha Lynn MRN: 1184 22 79:RL6... DOB: 1951/09/13
Age: 61 Years Gender: Female

Logan, Martha Lynn
OR, Oncology

General Summary Details Orders Guidelines Notification Conversation Summaries Itineraries

Date: 2013/02/27 Time: 2014
Tracking Location: <None>
Comments:

Person Name	Enc Type
Logan, Martha Lynn	

Guar Pmt Enc Pmt View Modify **Set Enc** Charges

Request Information
Medical Record Requested: No
Status of Medical Record Request:

OK Cancel

3. Click on Set Enc.
The Encounter Selection dialog box is displayed.

Encounter Selection

Visit Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name
420703444	Inpatient		Elective	LHSC-VC	V-B92	Attending Physician	Test, Doc
420703230	Inpatient	2012/12/16 - 10:36	Emergency	LHSC-UC	U-5CCU	Attending Physician	Test, Doc
420703224	Emergency	2012/12/11 - 08:00		LHSC-VC	V-AED	Attending Physician	Test, Doc
420699541	Outpatient	2012/03/26 - 23:59		RMHC-LONDON	RL-SAL AMB	Attending Physician	Bush, Haydn
420704774	PreReg Inpatient			LHSC-VC	VC Main OR	Attending Physician	Bertrand, Monique

Modify Add Enc **OK** Cancel

4. Highlight the Pre-Registration encounter (denoted by **PreReg Inpatient** in **Enc Type** column) and click **OK**.

The **Check In** dialog box is displayed.

- Click the **Modify** button to launch the **Registration** conversation and complete the registration.
Once you click on **OK** after completing the registration conversation, the appointment will be checked in (turn green) and the window will close.

Note: If a specific patient appointment will require all patients to have a Pre-Reg in order to place and activate orders prior to the patient being registered, then that appointment type can have the Pre Registration attached to the appointment.

This will prompt the user to add the Pre-Reg when confirming the appointment and will attach that encounter to the scheduled appointment automatically.

This type of set up will also fill in the Estimated Date and Time and will update this date and time if the appointment needs to be rescheduled.

CREATING A PRE-REGISTRATION ATTACHED TO A SCHEDULED APPOINTMENT

This is for appointments that require the completion of a Pre-Registration as part of the appointment scheduling process.

1. Start the scheduling process as usual selecting the date and time of the appointment. Click **Confirm** and **OK**.
*Because the Pre-Registration is attached to the appointment type, once you click **Confirm**, the **Encounter Selection** dialog box opens*

VIP	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name	Reg Date	Arrive Date
	Inpatient	2014/02/11 - 10:00	Urgent	LHSC-UC	U-2	Attending Physician	Test, Doc	2013/05/29 - 20:29	
	Outpatient	2013/04/03 - 23:59		LHSC-UC	U-1PRAD	Attending Physician	Paul, Terri Louise	2013/04/03 - 11:35	

2. Click **Add Enc** to add the **Pre-Registration**.
The Pre-Registration dialog box opens.

Note You must have changed your scheduling settings in order to have this conversation open instead of the regular registration conversation.

If you do not see Pre-Registration in the top left corner of the window, cancel and refer to the Scheduling Preferences document to change your settings.

3. Complete the mandatory fields ensuring that **Pre-Registration Outpatient** or **Pre-Registration One Day Stay** is selected from the the **Patient Type** dropdown list.

4. Click **OK** to save the registration and complete the Confirm process.
5. The appointment will be confirmed and blue. To view the encounter, double click on the appointment. The encounter information will be in the center of the Appointment View window as shown below.

The screenshot shows the 'Appointment View' window with the following details:

Appointment information:
Appointment Type: Admission - Inpatient (via Clinic first)
Scheduled as: Admission - Inpatient (via Clinic first)
Location: U-ADT

VIP	Person Name	Enc Type	Visit Number	MOH Code	HCN	VC	Reg Date	Disch Date	Building	Nurse Unit	Med Service
	Hugo, PreRegistration	PreReg Outpatient	422349880						UH Main	U-ADT	Cardiology

Current state information:
State: Confirmed
By: Channon, Carrie Ann 2014/03/07 17:16
Medical Record Requested: No
Status of Medical Record Request:

Close