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I. ACE AIM Intro

Patient Management is the program used by Registration personnel to show the Admission, Discharge, and Transfer information for patients at UKMC.

The Registration Workstation (RWS) is the windows interface for PM. The RWS integrates 2 programs:

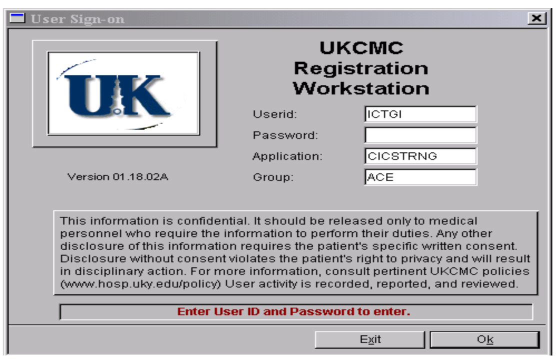
ACE—Ambulatory Care Enhancement) which is the registration system

AIM (Automated Insurance Manual).

When you sign on to ACE, it automatically signs you on the AIM as well. This allows you to enter the Insurance for the patient seamlessly during the registration process

II. Logging On

After you have taken the class, you will be given a userid which will give you access to PM Intro, OP Registration functions, and Medifax or EIMC (Eligibility Inquiry for Medicaid) functions.



1. Click on the RWS icon on your desktop
2. This will display the UKMC Registration Workstation LogOn Screen
3. Type your userid
4. Type your password
5. Application should be: CICSPROD
6. Group should be: ACE
7. Click OK

Setting New Passwords

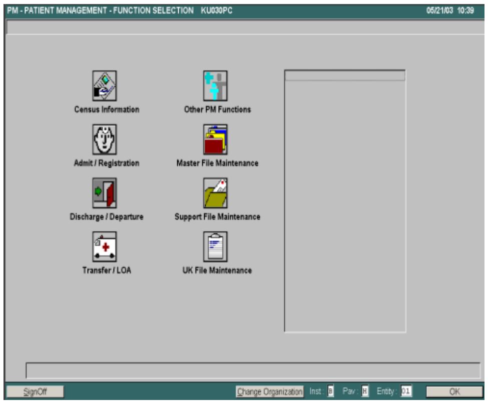
The first time you sign on, the system will prompt you to type a new password by displaying the message that "**Password has expired.**" You will have to make up a new password, **6-8** characters long using alpha and/or numeric characters. **The passwords expire every 90 days** and the system will prompt you to enter a new password when the old password expires. The system remembers the **last 10** passwords so you cannot reuse a password until you use 10 different passwords.

When you sign on to RWS, you will also be signing to the AIM system.

III. Logging Off

1. From the Main Menu, click on Signoff
2. This will return you back to the Sign-on Screen. At the sign on screen, click on Exit.

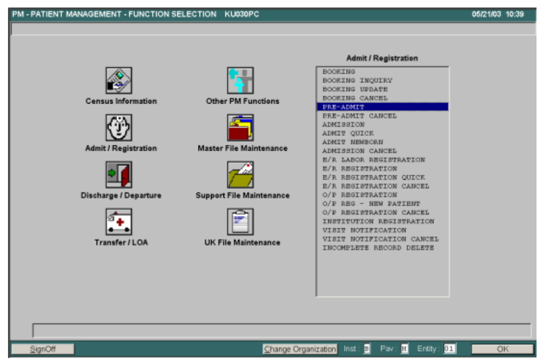
IV. Main Menu Screens



Once you sign on the Main Menu Screen will be displayed. The icons on the left hand side are categories of functions. To see the specific function such as OP Registration, click on ADMIT/REGISTRATION icon.

Once you click on this icon, all the functions pertaining to that category will be displayed on the right hand side as seen below:

To select a function, double click on the description



CATEGORY	**Frequently Used Functions**
ADMIT/REGISTRATION	**All the registration functions for Clinic Areas (i.e Outpatient Registration including Booking Functions), Admitting Department and Emergency Department areas**
OTHER PM FUNCTIONS	**Include Patient Update and Bed Assignment functions**
MASTER FILE MAINTENANCE	**CPI Update, Visit History Inquiry**
UK FILE MAINTENANCE	**Chart Location Inquiry and Chart Location Update**
DISCHARGE/DEPARTURE	**Discharge and Cancellation functions**

Moving around in ACE

In order to navigate from one screen to another, do one of the following:

- Click on OK button (same as the ENTER key)
- Click Page Fwd-Page Bwd buttons at the bottom of the screen
- Click Back Button (same as F3 key)
- Use Drop Down Menus (opens up the code tables for a particular field)
- Select Menu Bar from any screen and choose functions/keys

Important Keys

F1 – Help Screen on Column Heading Abbreviations
? -- Displays the codes for that field
F3 – Back-up to previous category
Escape key – Return back to PM Function Selection Screen

Changing Pavilions: From the Main Menu, click on Change Organization button, type the Pavilion and click OK

There are 3 pavilions: **H** for Hospital, **C** for Markey Cancer Ctr., **M** for KY clinics

NOTE: On most Screens, you can use the function keys, the keyboard or click on the icon/button on the screen to access patient information.

Jump Return Window

Allows you to jump to another function then return back to the screen you were on

To access Jump Return Function

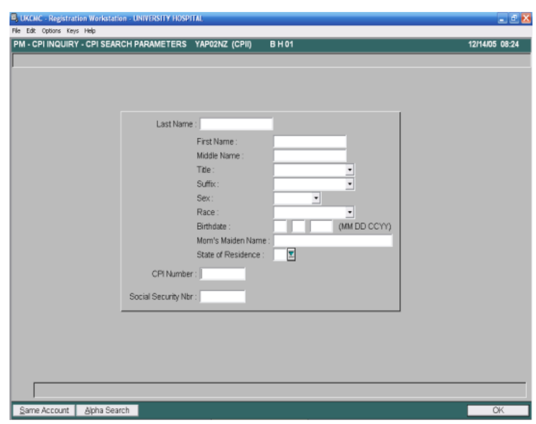
1. Click on Options Menu
2. Select Jump Return Window
3. Type the code for the function
4. Check off Return
5. Click OK

To Return back:
Press the F2 key to return to the previous screen you were on

V. ACE Inquiry Functions

CPI Inquiry/CPI Update

CPI (Corporate Person Index Inquiry) includes all patients seen at UK since 1962. A CPI number is the Medical Record Number for the patient. Any patient who has been seen, has paid the bill for someone (GU) or born at UK Hospital has a CPI #. CPI search displays Patient Demographic and employer information.



Searching for Patients:

From the Main Menu, click on **Master File Maintenance Category**, **double click on CPI Inquiry (or CPI Update)** function displayed on the right hand side to open the search parameters. Search for a patient using the following criteria:

1. ***CPI number (if you have the CPI number and you get the message patient not found then use the CPIX function in case their CPI number was merged.)***
2. If the CPI# is not available, search by the patient's ***Social Security #*** (obtain that number from the patient). Do not enter dashes nor leave spaces. Leave all other fields blank when searching by SS#. If a duplicate social security number is identified, this information should be forwarded to the Medical Records Department.

If the CPI and the Social Security numbers are not available, search by:

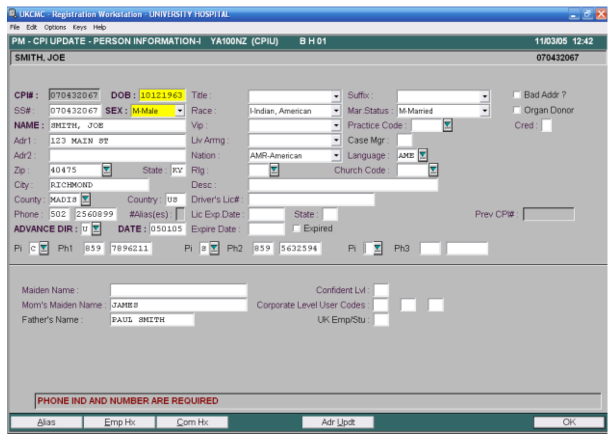
3. ***Legal*** name and ***Date of Birth*** (Enter for soundex search)
4. ***Legal*** name and ***Mother's Maiden Name*** (Enter for a soundex search)
5. ***Legal*** Name only with Alpha search (Press F10)
6. Full ***Legal*** name or Last Name only with the ***year of birth*** and press Enter (in case there is a typo with the birth date.)
   - Remember to use the proper naming convention. The suffix is part of the first name field. For example: Jones, William Jr or Jones, William III

- **You may need to do the alphabetical search several times. Try the wildcard (*) after the last name in case the proper naming convention was not used or to find hyphenated last names.**

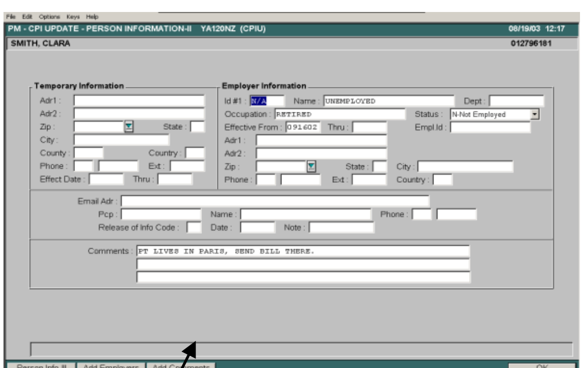
Click on the OK button once you have typed in the Search Criteria.

Identify and Select the patient using the following criteria:

a) Pt CPI #
b) DOB
c) SS#
c) Full Name
d) Mother's Maiden Name

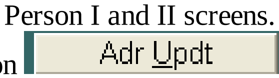


Once you have identified your patient, the Person Information I screen as shown on the right will display. The Person Information screens provide basic demographic information for the patient. The fields included are CPI #, name, DOB, address, phone #, sex, race, mother's maiden name and father's name.



PN 5-01-06 FM (clinic service code)

The Person Information II screen gives information on Patient Employer and contains Permanent Comments and HIPAA documentation.

CPIU function is used to change or update the information on Person I and II screens. Be sure to use the Adr Update icon 

to update demographics. Also, there are 3 new fields to capture additional phone numbers. The Nation and Language fields need to be entered, too.

CPI Combine History or CPIX

If patients do have duplicate numbers, Medical Records combines these numbers, keeps one and discards the duplicate. If you can't find the Medical record number, try CPIX function.

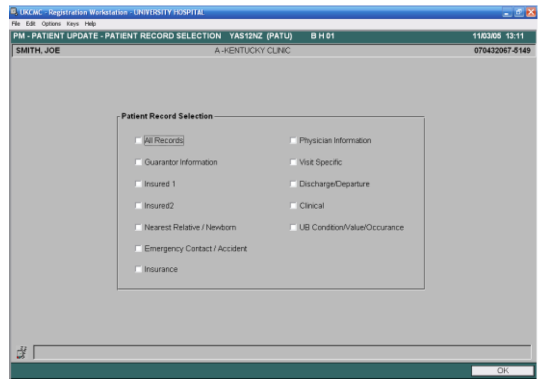
1. Select CPI Combine History function (CPIX)
2. Type the medical record number for the patient and press the Enter key
3. The system will display the discarded and the retained medical record numbers on the screen.

PT Inquiry / PT Update

JULIAN DATES
Every time the patient comes to UK Hospital, the patient is registered. In order to differentiate between visits, the registration adds 4 digits to the end of the CPI #.

These 4 digits comprise of the last digit for the year, and the actual calendar day of the year:
Example: 7078 = Year 2007, 78th day of the year = March 19, 2007

Another name for Julian Date is VISIT Suffix that will display on the Patient Inquiry and the Visit Inquiry screens.

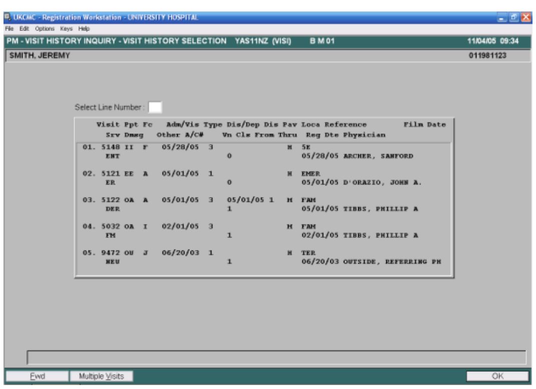


Patient Inquiry displays visit specific information for at least 13 months.
To access Pt Inquiry/Pt Update:

a) From the Main Menu, click on **Other Patient Functions Category**
b) Double click on Patient Inquiry (or Patient Update)
c) Type the patient's CPI # or name, click OK
d) This will display all the visits for the Patient. Click on the desired visit
e) This will display the Patient Record Screen. Choose an option by clicking on the box to check mark it and click OK

The Patient specific information displays guarantor, insured, physician, nearest relative, emergency contact, insurance and visit specific information.
Pt Update allows you to update all visit specific information.

Visit History



You can inquire about all the visits for the patient as well multiple visits on the same day using the Visit History function
Visit History screen has all of the visits listed since 1994.

a) From the Main Menu click on Master File Maintenance Category and double click on Visit History Inquiry (update)
b) Type the patient's CPI # or name, click OK
c) The Visit History screen will be displayed

Multiple Visits: If the patient has been to more than one clinic on the same day, the visits can be viewed by clicking on the ***Multiple Visits*** button.

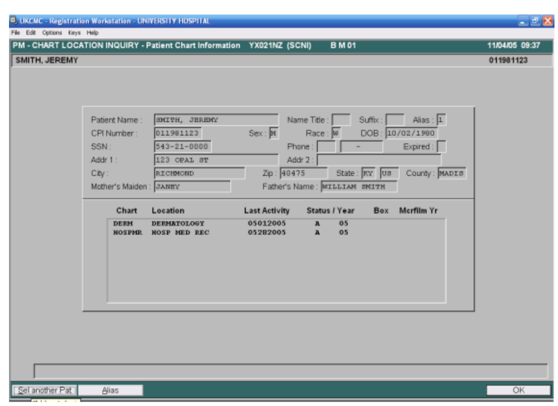
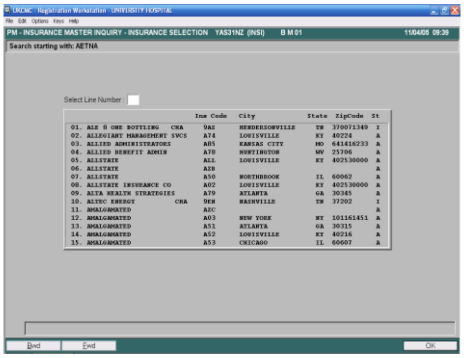


Chart Location Inquiry

The Chart Location Inquiry identifies all locations and status for patient's chart.
To access it, click on the UK File Maintenance Category and double click on Chart Location Inquiry.

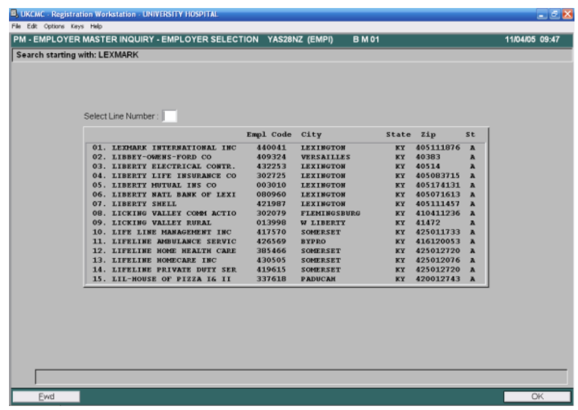
Insurance Inquiry



Displays a list of Insurances codes, and the status for the insurances.
A: Active insurance which can be attached to cases
I: Inactive Insurances which can no longer be attached to new cases.

a) To access Insurance Inquiry screen, click on the Support File Maintenance Category and double click on Insurance Master Inquiry function.
b) Type the Insurance Company name and click OK

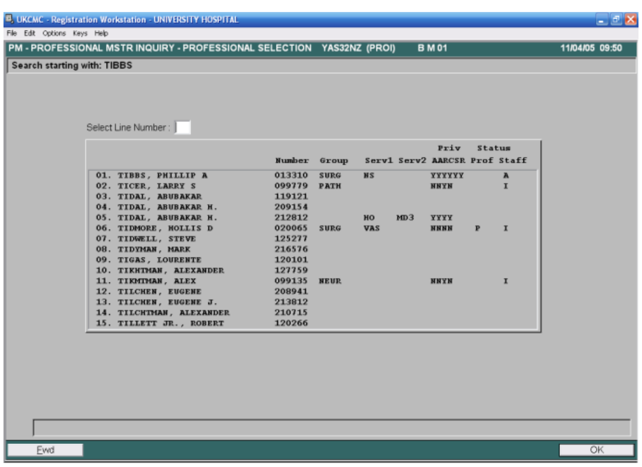
Employer Inquiry



The Employer Inquiry function displays all the state-registered employers and their addresses.

a) To access Employer Inquiry screen, choose the Support File Maintenance category and double click on Employer Master Inquiry.
b) Type the Employer name and click OK.

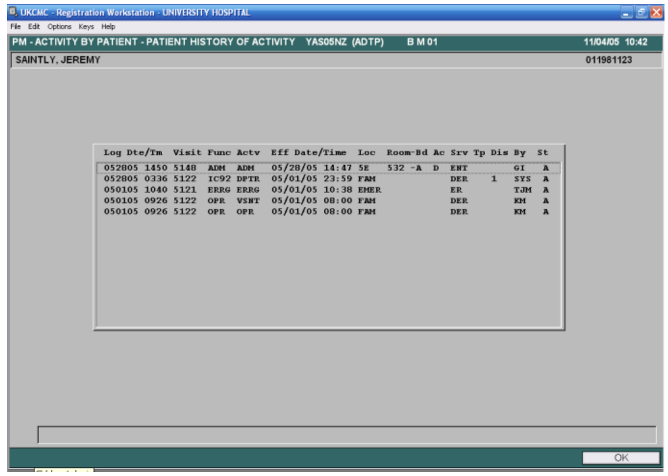
Professional Inquiry



The Professional Inquiry function displays the list of all licensed physicians in Kentucky including the UK physicians.

a) To access the Professional Inquiry screen, Click on Support File Maintenance category then, click on Professional Mstr Inquiry function.
b) Type the physician name and click OK.

Activity by Patient



You can see patient admissions, discharges and transfers for one visit or for all of the patient's visits by using this function. Check the upper right corner of the screen to see if the medical record number or account number is displayed. If the longer account number is displayed, then you are seeing activity for only a specific visit. If the medical record number is displayed, you are seeing activity for all of the patient's visits, <u>at least for the last **13 months**</u>.

Here are some abbreviations used in the Function and Activity columns:
ADM - inpt admission; ADMN - inpt newborn admission; PAD - preadmission; XFER - transfer; LOA - leave of absence; DSCG - discharge inpt; OPR - outpt registration; OPRN - new outpt registration; VSNT - visit notification; DPTR - discharge of outpt or ED pt; ERRG - registration of ED pt; ERLB - registration of emergency labor pt. Also note that a C at the end of most codes denotes a cancellation.

VI. Outpatient Registration

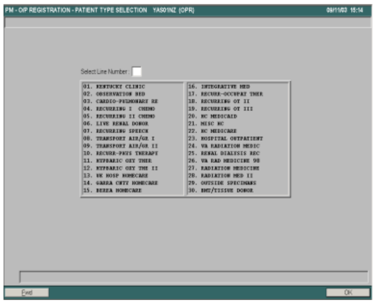
A registration is an official entry of a patient's demographic information into the UK Medical Center's computer system. In addition, information regarding where the patient was seen, by whom, and where to send the medical bills is also entered. Because registration information is part of the patient's medical record, outpatient registration requires ***complete and accurate*** information.

Step 1: Patient Type Selection Screen

The first screen you will see in the registration is the ***Patient Type Selection*** screen (which assigns a cost center). Be careful! **Choose your area i.e Kentucky Clinic, Hospital Outpatient, Outside specimens.**

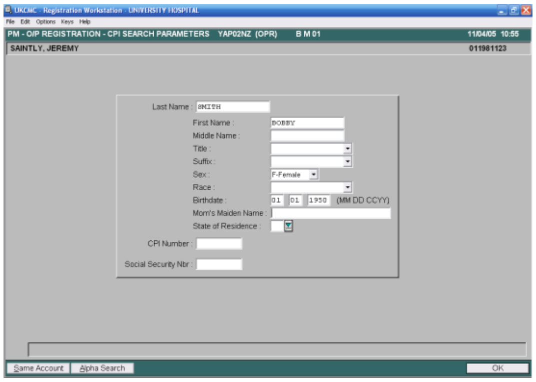
NOTE: Pay careful attention to your selection as this table is subject to change, which may change the line number for your usual selection.

DO NOT SET PATIENT TYPE UNDER PREFERENCES. LEAVE IT BLANK UNDER PREFERENCES AND SELECT THE PATIENT TYPE FOR EACH REGISTRATION.



Step 2: Patient CPII Search

The second screen is the ***CPI Search Parameters*** screen. You must search a minimum of 6 times before adding a new CPI Number. The six different types of searches are:



1. CPI Number
2. SS #
3. Legal Name and Birthdate
4. Legal Name and Mother's Maiden Name
5. Legal Name with Alpha search (press F 10)
6. Legal or Last Name and birth year only

Why Search CPII: A patient is assigned one medical record number and should not be assigned another one for continuity of charting. We have to make sure that we search the CPI database several times so that we don't issue duplicate numbers to the same patient. I you find that the patient does have a duplicate medical record number, report it to Medical Records and to the RSS Office.

NOTE: the CPI # will be on the RSS appointment listing if your area is using RSS.
If you can not find your patient ***see page 28 STEP 2A*** for instructions.

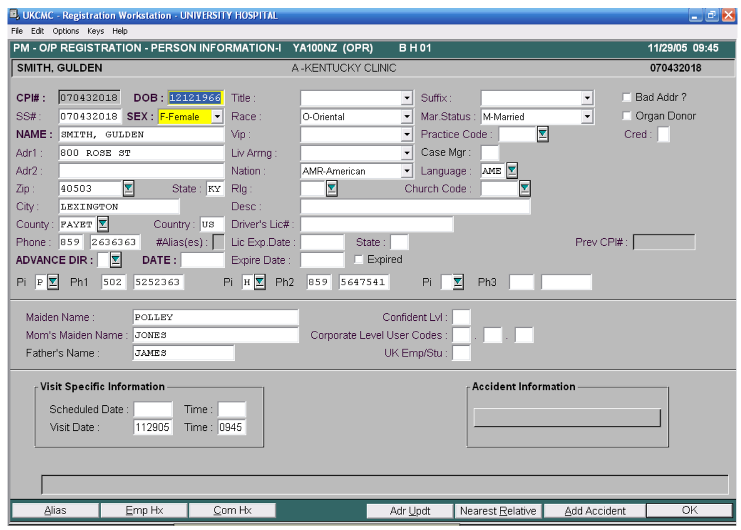
NOTE: Use the following criteria to identify patients: **Full name**, **sex**, **SS #**, **mother's maiden name** and **date of birth**. If you are doing a **SS#** or **Medical record #** search, do not populate other fields. If you complete too many fields at one time, you will trick the computer and not find a patient that has a CPI number.

You can update all data in the White fields on the Person Information I screen seen below. You cannot change CPI Number or any other grayed out field. Call Medical Records to report duplicate numbers at 3-6622.

Gray Down Arrow: Displays a list of codes in a drop down menu
Green Down Arrow: Puts a Question Mark in the field and opens a new table screen with codes.

Date of Birth: In ACE, birthdays must always include 4 digits for the year of birth. (Most other dates such as effective dates for insurance, and employment include only 2 digits for the year.)

September 30, 2003 **09302003**



Social Security Numbers: If the patient or guarantor does not have a social security number, leave this field blank. When this field is left blank, the computer system will generate a fake social security number for a patient. You can easily recognize a fake ("systems-generated") social security number, because it ends with a **G**. Always try to get social security numbers and enter them. Use CPIU or OPR to add social security numbers whenever you can.

Names: All names on screen must be typed as **last name, comma, space, first name**, except for father's name which can be entered in any format.
If the patient's name has changed, enter the **alias name** in the system. The system will keep track of the name change as long as you are updating during a registration.

Naming Conventions: Do NOT use a period within the name.

One Letter Names: Some names are a single letter long. Don't add a period after the one-letter-long name.

A Martinez **Martinez, A**

Middle Initials: If the person's middle name cannot be obtained, or if the name field is not long enough to accommodate the entire middle name, enter the middle initial without a period

Joyce M. Casey **Casey, Joyce M**

Name Suffixes: If the person has a suffix such as Junior, Senior or the Third, enter the suffix in the CPI name field following this format:

William John Carter, III **Carter, William John III**
Jo Dan Baker, Junior **Baker, Jo Dan Jr**

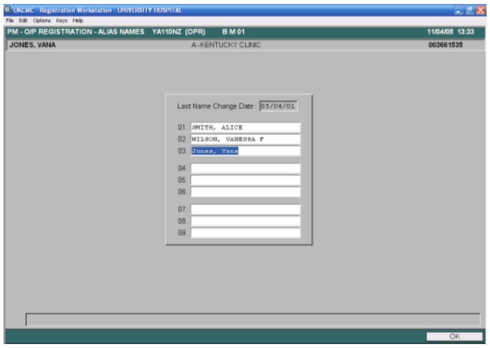
Hyphenated Names: Hyphenated names are entered in the format as seen below:

Deborah Ann Ashlock-Jones **Ashlock-Jones, Deborah Ann**

Names with Apostrophes: Names with apostrophe's are entered in the format as seen below.
John Paul O'Malley **O'Malley, John Paul**

Alias Names

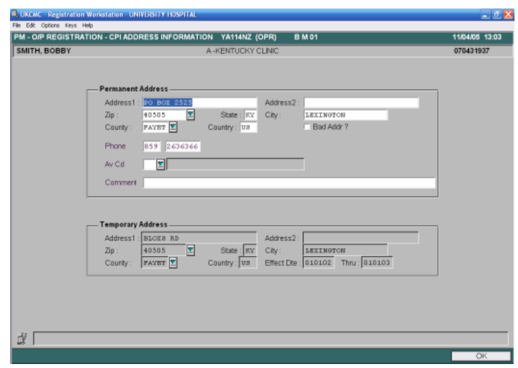
If a patient comes in with a different name you must change the name by:



- Start OPR or CPI Update function
- Type the patient's new name on the Personal Information I screen
- Click on the **Alias button** at the bottom of Person Information I screen

- Type the old name as it appears on the top left of the screen in the first blank line
- Click OK or press Enter until you return to the CPI Search Parameter screen; it will say CPI Update complete.

Address Updates



Always verify to make sure the patient's address is correct in the system. If the patient's address has changed:

- Click on the **Adr Updt** button at the bottom of Person Information I screen

- At the CPI Address Information Screen, type over the old address and the phone number if necessary
- Click OK to return back to CPI Person Info I Screen
- This will change the address on the Person Information I screen

Zip Code Tricks: If you enter a 5 digit Kentucky zip code and press Enter the city, state, county and country information will be automatically updated for you. Some areas such as Northern KY and West VA are also included in the Zip Code table. You could then add the last 4 digits to the Kentucky zip code, if you have that information.

Country: Use the abbreviation US for United States. Be careful not to put county in this blank. You may use a ? to get help with other country codes.

County: This holds the first five letters of the Kentucky county name.

Phone: Phone number fields have a 3-digit field for the area code, followed by a 7-digit field for the telephone number.

There are 3 additional phone number fields that can be obtained. The **PI** field indicates what type of a phone followed by the phone number field for these additional phone numbers.

Sex and Race Codes: These are vital for the lab system. **NEVER GUESS!** If the patient does not want to give you this information, you can enter "unknown". If a patient asks why we ask for this information, you can politely tell them that the Federal government wants to ensure that we do not discriminate on the basis of sex or race, and that this information in important for analyzing lab tests correctly.

Title and Suffix: Normally these are not completed.

Marital Status: Obtain and enter this information at each visit. This field is important for filing insurance claims and for home health providers.

Language: JCAHO requires us to obtain information on language.

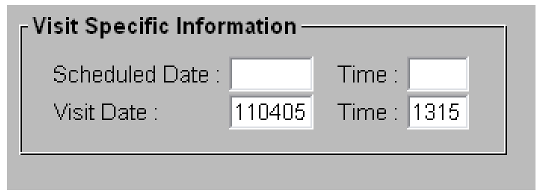
Advance Directive: The Advance Directive field must be completed and should be recorded on the Authorization and Agreement form.

Date Last Asked: This refers to the Advanced Directive. If you are asking them now, then enter today's date. You can't leave this field blank.

Maiden Name: A male will not have one! If the female is divorced or considers herself single or married she may have a maiden name.

Mother's Maiden Name: All or most people will have a mother's maiden name even males.

Father's Name: This could be an identifier. It may be entered in any order.

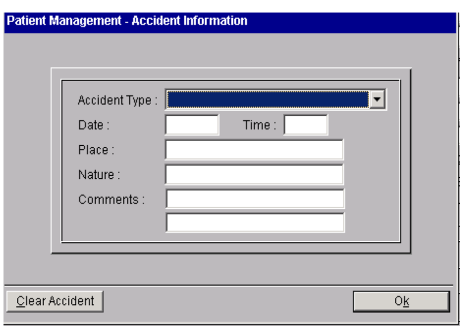


Visit Specific Info: The correct date and time should be showing. If you need to register for an earlier time in the day, you may change the time. If you need to Pre-schedule for a date in the future, ***see page 30a STEP 10a***

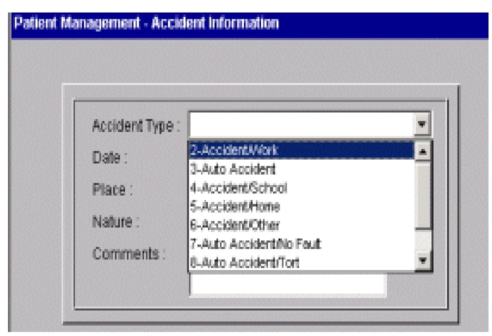
Bad Address Field: If this field is marked, make sure that you obtain a different and a valid mailing address for the patient and unmark the field afterwards.

Once you have completed the Person Information I screen click OK or hit the ENTER key.

Step 3: Accident Information

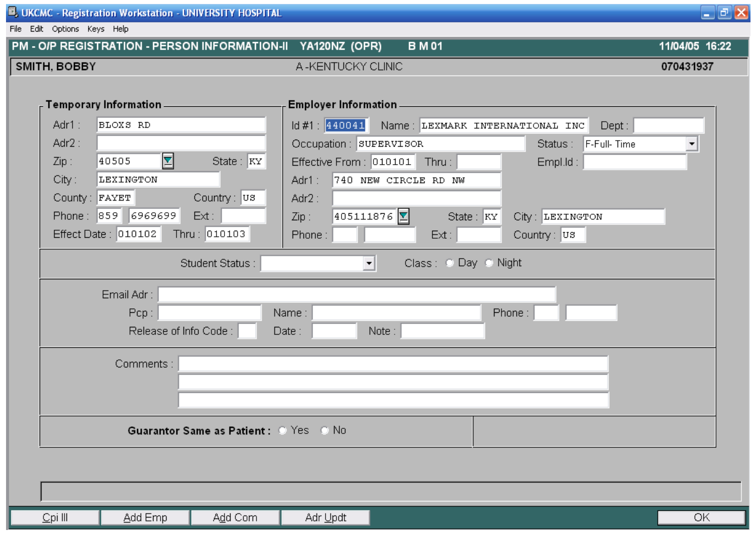


You will be asked if this registration *is due to an accident* before continuing to the next screen. If yes then complete the ***Accident Information Screen***.



Note: There are several types of accidents so click on the drop down arrow to see the choices.

Step 4: Person Information II Screen



This screen indicates the patient's employer. There are 3 possibilities for Employers:
1) They are on the employer master list;
2) They are not on the employer master list or
3) They are unemployed.

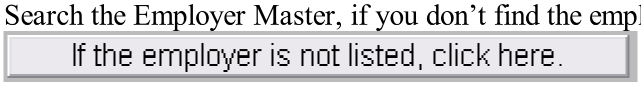
To change an employer, click on Add Emp button

Always search the Employer Master first:

I. Search the Employer Master:

1) Enter all or part of the employer's name, and press Enter.
2) The alphabetized Employer list appears. Type the employer line number and press Enter.
3) Type the occupation and the status.
4) Type the effective date, department and phone number.

II. If the employer is not on the Employer Master:

1) Search the Employer Master, if you don't find the employer on the Employer Master click on the 

button
2) This will fill the ID # field with 9's
3) Then enter the data on occupation, status, employer name, address, phone number, etc.

III. If the person is unemployed:

1) In the Id # field, enter **N/A**.
2) Tab to the Status field and enter the letter **N**.

Employment Dates: Enter the first date of employment in the **Effective From** field. Do NOT enter anything into the Thru field unless the patient is no longer employed there.

Phone: Enter the correct phone number. Do not use hyphens, slashes or press the TAB key.

Dept: Always try to enter the name of the department for which the person works.

Temporary Information: If the patient will be at a temporary address for at least 30 days, enter the address in the **Temp Information fields**. If a person is at a temporary address for a one-time stay, enter the year as well as the month and day. If the person will be at a temporary address for certain times each year, enter only the month and day.

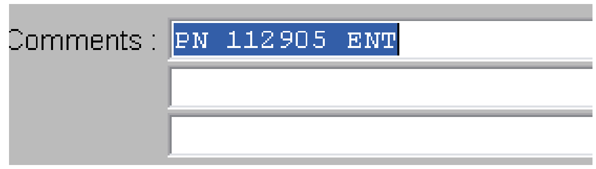
From 6/1/02 to 9/1/02	**Effect Dte 060102**	**Thru 090102**
From 6/1 to 10/1 every year	**Effect Dte 0601**	**Thru 0901**

The Temporary Information fields are used if patient is expected to remain at a temporary address for more than 30 days..

E-mail Address: Ask the patient if they a email address and record it.

Comments: Type important ***non-temporary*** information here. Use **Add Com button for more lines**, if needed.

Privacy Notice: HIPAA regulations require that each patient receive a Privacy handout and sign it. In the Comment section, make sure to type the PN information as shown (the clinic service code is the last part).



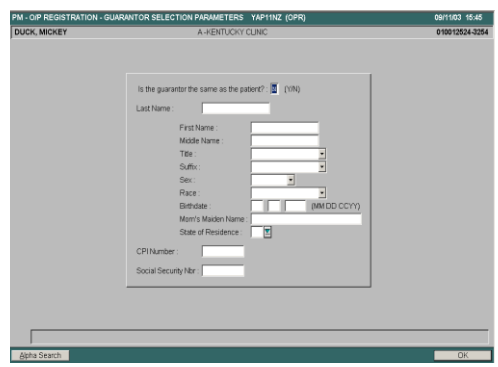
Step 5: Guarantors

A guarantor is person responsible for the bill. You will be prompted to select a Guarantor. A guarantor is determined by whoever signed the Authorization and Agreement Form.

Select the ***OK*** button, then if the patient is the guarantor, click in the circle next to Yes.

If the Guarantor is someone other than the patient, click in the circle next to **No**. **Guarantors are assigned medical record numbers same as patients** so you will be prompted to search the CPI database to see if the guarantor has a UK medical record number. **<u>You must search the CPI using the search criteria outlined earlier for the guarantor</u>**.

When you find the guarantor on the CPI database, select the line number to make that person the guarantor for the patient.

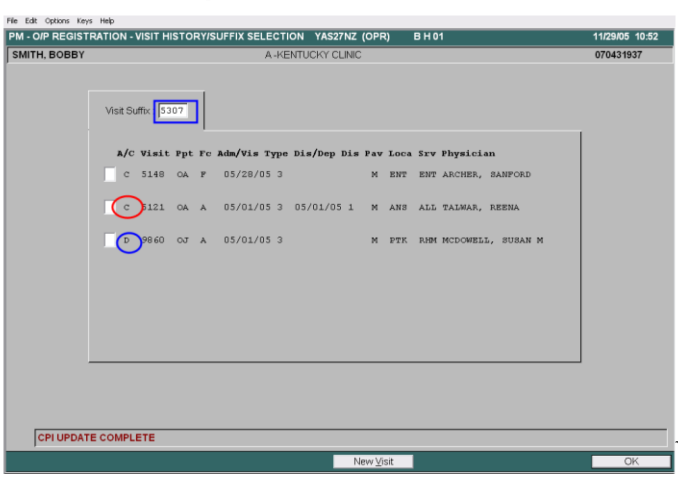


If the guarantor is not found in the CPI log after ***6*** searches you can assign them a medical record number. **Be sure to search thoroughly to avoid duplicate medical record numbers for the same person.**

Click on **Add CPI** which will issue the guarantor a CPI number.

Enter all the Guarantor information ***including employer on the next screen.***

Step 6: Visit History/Suffix Screen



When registering a patient, you will encounter the **Visit History/Suffix Selection screen**, which has the Visit Suffix (Julian date) at the top of the screen. Under perfect conditions, the Julian date at the top of the screen will be the Julian date for that actual day.

Julian Date Principles

A Julian date has 4 digits. The first digit represents the year. The next three digits represent the number of days that have elapsed during that year.

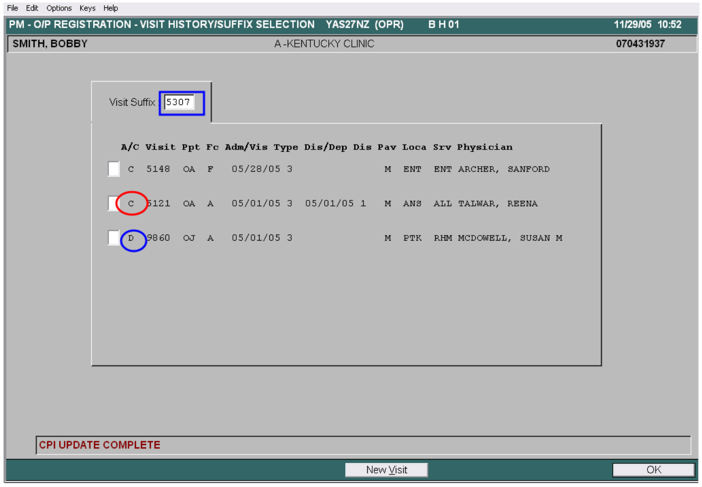
e.g., Julian date **7032** represents February 1, 2007

Julian dates cannot be re-assigned or changed!

Why are Julian Dates Necessary? As you register a patient in PM, a case is built by combining the patient's Medical Record Number and the Julian date. This MR# plus Julian date is called an account number. The account number is needed by computer systems. For instance, the Lab system cannot build a case and post the patient's lab results until the patient has been registered and has an account number.

If the Julian Date for today is not shown in the window at the top, ***see page 28 STEP 6 A*** for exceptions.

Carrying Forward Cases: Copying cases is a shortcut used in registration. If there are no cases, use the **New Visit button** at the bottom of the screen to create a new case. ***<u>There are 2 ways to carry forward existing information.</u>***



- D= Demographic Carry forward this will allow you to only bring the demographic, nearest relative, emergency contact forward. All insurance and guarantor information will need to be re-entered; this new enhancement can be used in place of PF 9 –New Visit. The "D" will allow you to carry forward from all visits.

- C= Carry Forward this will still allow all information including insurance that was attached on that visit to be brought forward. ***The "C" can only be used from a registration from your own clinic within the last 180 days.***

Warning: Do not carry forward a Recurring Account case to register a patient.

To carry forward a case, type a C or a D in the box to the left of the visit.

<u>Be Careful with Asterisks</u>. An asterisk indicates a registration was started but not finished. If the incomplete registration is the correct Julian date you need ***see page 29 STEP 6 A3***. If there is an incomplete case with the incorrect Julian date, leave it as is.

<u>Be Careful with S-dates</u>. A date such as **S05/01/02** represents a visit that has been pre-scheduled by a clinic. Use **Visit Notification Icon in the Visit Information Section of Menu1** to show that your patient did arrive at their pre-scheduled visit. If your clinic did not pre-schedule your patient, ***see page 29 STEP 6A4.***

<u>Be Careful with Recurring Account numbers</u> (9400-9800). In the visit column a recurring account number would be too large to be a Julian date (9400-9800) as the last 3 digits of a Julian date could be at most 366 (for leap years). ***See page 29 STEP 6 B or C*** for more on recurring accounts.

NOTE: If the patient was registered on a Recurring account the same day, reregister the patient with the registration function and select your clinic's patient type and assign a Julian date.

Warning! This screen is a "**point of no return**" in the sense that you can't back up to prior screens of the registration and because if you back out *after* this point you create an incomplete registration. If you think there is a mistake on a prior screen, make a note to check the information after you complete the registration, by using CPI Inquiry. If any information is incorrect, correct it by using CPI Update.

Step 7: Nearest Relative

Type the name of the nearest relative and follow the naming rules. Tab to the Adr 1 field. Use following features to copy forward information, if appropriate:

=	**copies forward the patient's address and phone number**
= =	**copies forward guarantor's address and phone number**

If address is different from patient or guarantor, enter the data according to the address rules listed earlier. You must enter the ***relationship to patient*** in order to continue.

Step 8: Emergency Contact and Accident Screen

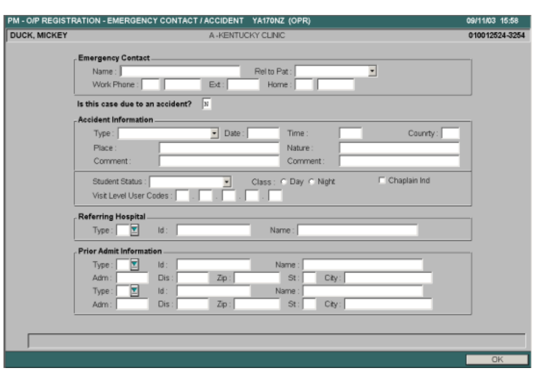
Emergency Contact: This information is very important! If the emergency contact person is the guarantor or nearest relative, use following features to copy forward information.

= =	**copies forward guarantor's name and phone number**
= = =	**copies forward nearest relative's name and phone number**

NOTE: Always tab back to the **work phone number** and enter it.

If the emergency contact is not the guarantor nor nearest relative or if your clinic wants 2 different contacts, enter all of the information.

Accident Information: If the patient's visit to the clinic is due to an accident, the accident information you enter is very important to billing/insurance and patient care. Enter the full details of every accident. If you don't enter accident information, then billing to accident coverage will be incorrect, including billing to car, truck, and boat insurance, workman's comp and home owner's insurance. If you responded earlier that it was not an accident, the computer has already answered the question with a **N** for No. However, you can change now to a **Y,** if you have learned it is from an accident. Then you must complete the accident information requested below.



Once you have entered all the information on the Emergency Contact/Accident screen, press the Enter key or click on OK button to display the Physician/Clinical Information Screen.

Step 9: Physician/Clinical Screen

You will have to enter the UK number for physicians or tab to the Name field to complete it (or at least the last name), then choose the physician off the list. The ADM physician must have admitting privileges to see a patient. For instance, if you try to enter a Resident for Attending Physician, you'll see the message that the physician does not have Attending privileges.

Make sure you also enter any other physicians that might be taking care of the patient.
Admitting Physician: Enter the physician's UK Doctor's number. If you don't know the UK number for the physician:

1) Tab once. Enter the physician's last name and press **Enter**.
2) An alphabetized list of physicians appears. **Type the physician's line number** and press **Enter.**
3) The physician's name and number will default into both Admitting and Attending Physician fields.

Attending Physician: Automatically defaults from the Admitting Physician field. Clinics do not change this.

If the Admitting and Attending Physicians are different:

1) Tab to the Admitting Physician's name field. Type his or her name, but do NOT press Enter.
2) Tab to the Attending Physician's name field and type his or her last name. Then press Enter.
3) Choose first the Admitting physician, press ENTER and choose the Attending physician name from the Physician Master.

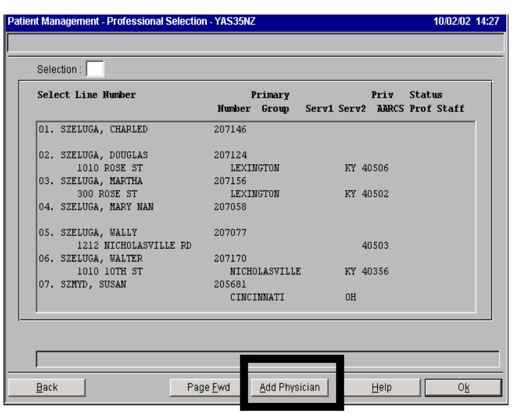
To correct wrong Physicians, erase number and name. Then search by name to select the correct one.

Resident Physicians: Follow the steps above to enter Residents, if your clinic reports Residents.

Primary Physician: Follow the steps above to enter the Primary physician. If the physician is not on the UK Professional Master

UK Referring Physician: Follow the steps above to enter UK Referring Physician.

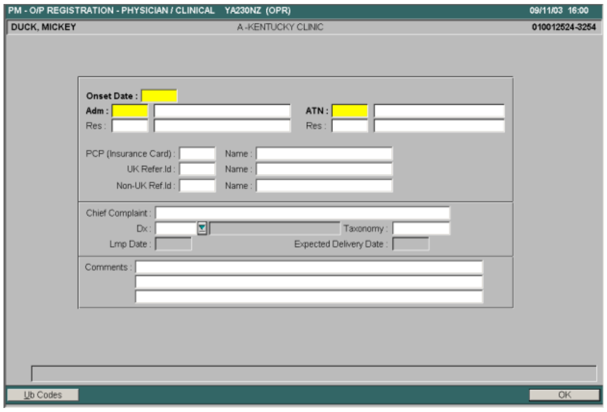
Non-UK Referring Physician: Follow the steps above to enter a **non-UK Referring Physician**. If the physician is not on the Non-UK Professional Master, then:



1) Click on the **Add Physician** Button to add them to the Professional Master.
2) A UK MD number will be assigned to the physician, type the last and the first name.
3) Type the address and phone number for the physician.

NOTE: If you don't have at least this much data, do NOT add them. Enter a comment lower on the screen with the information you have. For instance, "DR. SMITH IN HAZARD IS PT'S REFERRAL MD."

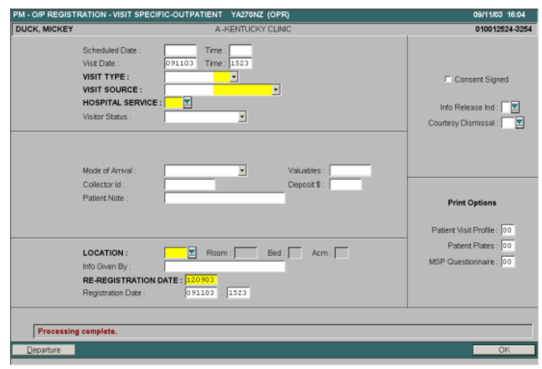
Chief Complaint: Check with your supervisor to see what, if any Chief Complaints is used in your clinic.



Onset Date: This is date of the visit or date of the first symptoms of illness. If the visit is due to an accident, match the onset date to the accident date. Ask about your clinic's usage.

Comments: Enter visit-specific data such as info about family MD, insurance, temporary disability, etc.

Step 10: VISIT Specific Screen



Next, the Visit Specific screen appears, as pictured.

Scheduled Date: This is used for entering future dates. ***See page 30 Step 10 A.***

Visit Date. Signifies the date the patient was seen. Complete the date and time fields. The time that you type must match the time in the registration field at the bottom of the screen. You can **NOT** enter future dates or times in these fields. ***See page 30 STEP 10 A*** for entering future dates.

Visit Type: Most clinics enter 3 for Elective here. Use the ***drop down list*** for help with other options.

Visit Source: The most common codes used by the clinics are C for KY Clinic referral and O for Outside physician. Complete the visit source field depending on where the patient was referred. Check with your supervisor to see if other codes are commonly used in your clinic. Use the ***drop down list*** for other options.

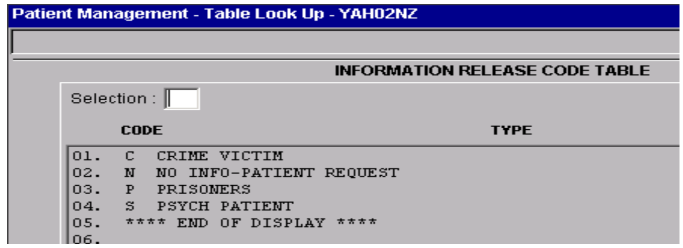
Hospital Service: This reflects the service of physician who is treating the patient. For instance, if Dr. Kang, an Allergist in the Internal Medicine clinic sends a patient to the hospital Radiology location for a CAT Scan, the hospital service will be **ALL** for allergy. Hospital Service also is used for CHART LOCATION AND ROUTING OF test results and other patient documents.

Location: This is the physical location that the patient visits. For instance, if Dr. Kang, an Allergist in the Internal Medicine clinic sends a patient to the hospital Radiology location for a CAT Scan, the location code will be RADH for Diagnostic Radiology Hospital location. Remember location codes vary according to your pavillion.

Info Given By: It is in your best interest to enter this. If there is an inquiry about the accuracy of the data, you can see who provided the data. You can enter short items like PT., MOM, DAD, SPOUSE, POLICE. NEIGHBOR, etc. and quickly document this.

Consents Signed: It's best to enter this information. Click in the box for Yes.

The **Info Release Ind** drop down list will give you the choices shown on the screen print shown. The Info Release Indicator must be marked as **"P"** for prisoners.



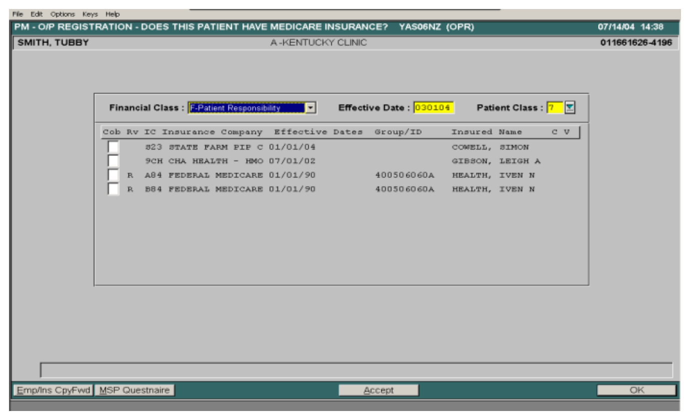
Courtesy Dismissal: Clinics do not report this information.

Print Options: Determine whether you need a profile and a plate and put in 01 to print and 00 if not printing. MSP Questionnaire is the Medicare Questionnaire if you need to print it.
Press the ENTER key or click OK to continue.

Step 11: Insurance screen

There are many details regarding entering insurance. Some are listed below.

Please use AIM; your Automated Insurance Manual to obtain the correct insurance plan code, patient class, and COB order for the insurances you are entering. Remember the insurance screen appears at different times during a registration depending if the patient is new or the guarantor is new.



Financial Class: This code represents the general category of the insurance types such as Medicaid, commercial insurance, Medicare A or B, UKHMO, etc. **To add additional insurances to the patient's case, type the corresponding Financial Class Code and click OK to open AIM**.

You can now find and add the insurance, complete the script then return to the ACE system. The insurance screens must be completed and the COB numbers must be entered. Once you do this, the individual insurances will be listed on this screen.

When you have added COB numbers click **Accept.**

Effective Date: This date is system generated and should not be changed.

Patient Class: This code indicates billing information such as whether or not a billing statement should be mailed. For some patients such as UKHMO patients, a statement is not mailed. The 2 most common codes used here are 7 for General billing (Send them a bill!) and N for No Statement (Do not send a bill!).

Cob: Coordination of Benefits. Several agencies may provide "benefits" or coverage for the patient's bill, and we must coordinate who gets billed first, second, third, fourth, and fifth. The Coordination of Benefits Rules are established by insurance governing agencies and must be followed by all healthcare institutions.

Rv: The Review column indicates whether an insurance has to be reviewed, the date changed or that it is a new insurance:

- ***** New entered Insurances
- **R** The insurance screens have to be verified and viewed
- **D** Dates are out of range, the THRU date has to be changed

Not Seeing Insurance Card: If the patient does not bring an insurance card, make them a full pay patient for the visit. You can type a comment on the Physician/Clinical screen such as "PT. WILL BRING IN MEDICAID CARD TOMORROW." Then if the patient does bring in an insurance card, use ***Pt Update icon on Menu1*** to update the visit's insurance information.

NOTE: FOR MORE INFORMATION ON INSURANCE, CONTACT KMSF.
Insurance Hotline (for staff not patients): 222-6328

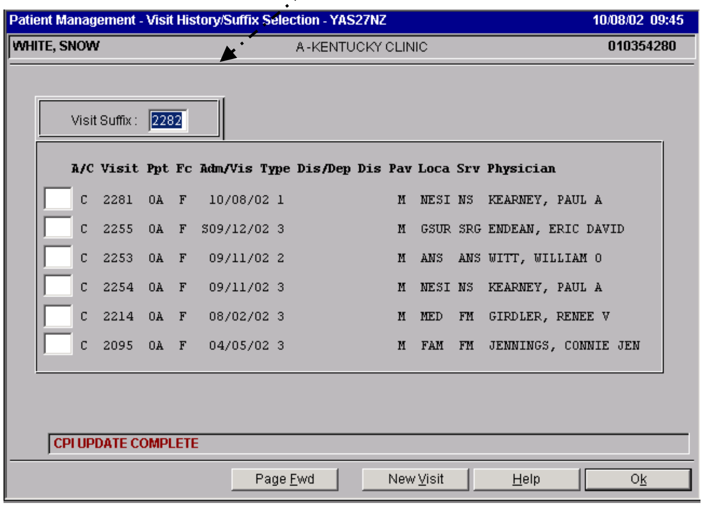
VII. Completing Prescheduled Registrations

Pre-scheduled Registrations are created by using OPR function. The patient can be registered for a future visit using the ***Scheduled Date*** field and by matching the visit date and the Julian date, **see page 27g.**

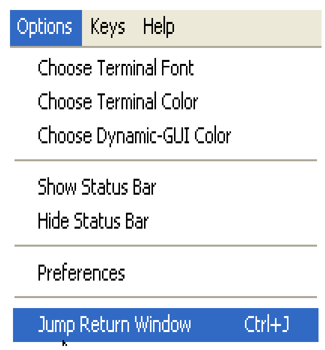
When doing an OPR and you get to the Visit History/ Suffix Selection screen that shows the Julian Date to attach,

Please check:

1. If the Julian date is greater than today's date, look to see if there is a registration for today's Julian date whether prescheduled with an "**S**" in front of it or a completed registration.



2. Investigate the insurance information by doing the jump and return function PATI and checking the box to return. ***Jump and Return*** is in the Options menu at the top of the screen. Then **follow one of the Steps (#3) below**.



<u>Same Insurance:</u>

3. If the insurance is the same (and doesn't require a separate precertification), return using F2 to the Julian date (visit suffix) screen.

4. Either switch functions right from that screen to VSNT or Pause out and do a VSNT. **<u>Pick up on the prescheduled registration even if it wasn't from your pavilion or clinic and complete it</u>** with your clinic and doctor information.

OR

<u>Different Insurance or needs Referral/Pre-certification:</u>

3. **If the insurance was not the same then return using F2 and backdate the Julian date before continuing with the OPR.**

If the insurance was a managed care and your clinic is not their primary care clinic, check your insurance manual for referral/pre-certification rules. If the insurance needs a referral/pre-certification for your clinic, then you must complete the OPR by backdating the Julian date.

VIII. Registering New Patients

Overview: Your patient may not have a CPI number. Always search exhaustively in CPII to find your patient by name, social security number, date of birth, and mother's maiden name. Search phonetically and alphabetically. Ask the patient if they might have been registered under another name such as a nickname or maiden name. Once you are sure the patient has no CPI#, then you may use **OPRN** or OPR to register the patient. You might have the central registration desk in KY Clinic register your patient, if appropriate. They may give you a CPI number for the patient, so that you can register the patient with OPRN. Just because the patient has never been to UKMC before, does not mean they don't have a CPI #. If you try OPRN and get the message "**NO RECORDS FOUND FOR SPECIFIED PARAMETERS**", then register the patient with OPR.

Why Search CPII: If a patient states that he/she has never before been a UKMC patient, you should still search CPII to see if the patient has a CPI number.

1) The person may have been a patient at UKMC and not remember it.
2) The patient may have been born here and is thus given a CPI number.
3) The person might have been a guarantor for a UKMC patient--Guarantors receive CPI numbers.

If you find a CPI number for the patient, use OPR to register them under that number.

When to Use OPRN: If you don't find a CPI number for the patient, always try OPRN next. If the patient was booked in RSS computer system for any clinic visit (not just a visit to your clinic), then it's vital that you pick up on the booking log record for the patient by using OPRN.

> **Behind the screens:** If a person without a CPI number is booked for a visit to a clinic, the RSS system grants a temporary CPI number to the patient. This temporary CPI number will be updated with the true CPI number after the patient is registered in PM with OPRN. If you don't register the patient with OPRN, then that temporary number in RSS will never be updated.

OPRN Details: OPRN function is used for patients who don't have a CPI number but have an appointment booked with a temporary number so that clinic schedule printouts for the day include all the patients.

The first screen of OPRN is the Patient Type Selection screen, just as in OPR. Be careful to select the right number.
If you are in the Kentucky Clinic, then the type will be KENTUCKY CLINIC. If you are in the C pav, then the type will be HOSPITAL OUTPATIENT.

The second screen, Patient Selection Parameters, is pictured below.

You search by name to see if your patient is in the booking log. If you find the patient, select him/her and proceed to register the patient just as you do with OPR.

> NOTE: If you try OPRN and get the message "NO RECORDS FOUND FOR SPECIFIED PARAMETERS" on the screen shown above, that means the person has never been booked for a clinic appointment at UKMC, and you must register that patient with OPR.

The next screen is the CPIU Patient Selection Parameters screen. This enables you to search the CPII log to make sure that the patient was not seen previously at UK. If the patient was seen at UK before, **DO NOT ISSUE A NEW NUMBER** for the patient, use the old number.

Once you have searched for the patient and cannot find it, Press the PF9 – ADD CPI key to issue the patient a new CPI or a medical record number. You will have to obtain a valid CPI number before you can continue with the registration. You may obtain this number from Medical Records, Central Registration or a list of Medical Records given for your area.

Adding a New CPI Number Patient with OPR. Begin OPR as usual. Select the patient type. On the next screen, search for the patient by name, social security number, and combinations including date of birth and mother's maiden name. When the search screen called the CPI Person Selection screen appears, as shown below, look for a patient match.

See page 9 for steps to search for CPII number. Once you have searched exhaustively and failed to find a match, you can return to this screen and press **F9 - ADD CPI** as noted at the bottom of the screen.

Registering A Patient Who Is Currently A Hospital Inpatient

If a patient who is an admitted patient to UK Hospital comes to your clinic during his/her hospital stay**, do not register the patient.** Send your fee sheets to KMSF so that you can be reimbursed for services provided, but do not register the patient in PM.

If a patient is an admitted patient and you need to register the patient for a past date, wait until the patient is discharged from the hospital before registering the patient. The system will not allow OP registrations while the patient is registered as an Inpatient. (Use either ADTP or INFO function to watch for discharge date.)

IX. Visit Notification (VSNT)

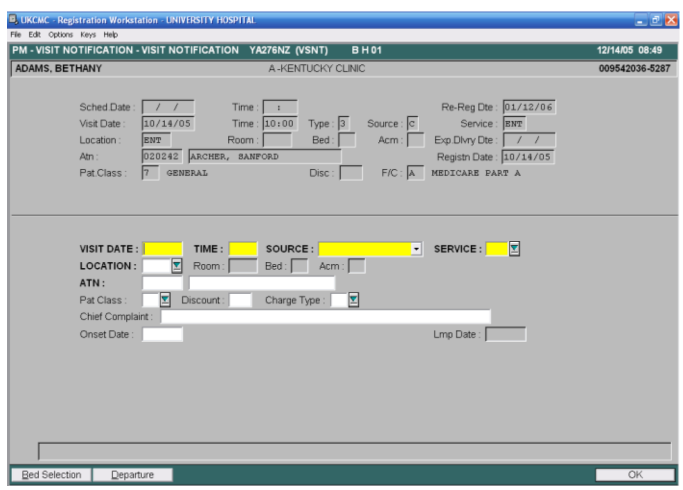
Use Visit Notification (VSNT) for the following reasons:

1) Patient has been to another clinic on the same day and the patient's insurance and accident information is the same.

2) Patient is on a Recurring Account and it is their second or later visit.

3) Patient has a scheduled registration for that day.

To complete scheduled –registrations, open Visit Notification screen shown on the right:



When completing the VSNT screen, you must fill out the date and time for the registration, service, location and the attending physician.

X. Recurring Accounts

Recurring accounts were created so that UK could meet the requirements of Medicare and other insurance companies. UK is only allowed to submit 1 bill per month for a plan of treatment on patient having some type of therapy (radiation, physical, occupational etc., which have **the last 4 digits from 9400 to 9950.**

If you see a four digit number that is 9400 or larger in the Julian date column, make sure that you do **not** copy that case, unless your patient is billing that visit to the recurring account that you copy.

NOTE: If the patient was registered on a Recurring account in another clinic the same day, reregister the patient for your clinic instead of using VSNT.

Rules for registering Recurring Accounts:

1. Each therapy registration area is responsible for creating an accurate recurring account based on the patient type they see in their area.
2. Pre-certification may be required from the payor for the initial/evaluation visit **and**/**or** the plan benefits (number of visits) may be limited. Call the payor (payors when applicable) to verify the plan specific pre-cert requirements and/or benefits.
3. After the initial visit, upon each date of service, the existing recurring account will be updated with a VSNT (Visit Notification) to track the number of visits for that course of treatment.
4. If during the plan of treatment the diagnosis changes, a new recurring account must be created to reflect the change. The Payor may also require a new pre-cert/authorization for a different/additional diagnosis. The old recurring case must be departed using the **DPTR** function and all visits after this change must be added to the new recurring account using **VSNT.**
5. Precert numbers issued for treatment should be entered on the "Certification" screen in AIM/PM. For Medicaid, on the Medicaid insurance screen. If a second pre-cert is issued, the number should be entered on the same (Certification) screen with the most current number entered in certification number field and a second in the "Comments" field on the same screen.

******There is no referral tracking system currently, so all referrals with numbers of visits will still have to be tracked in the medical record chart.

ADDING A VSNT (VISIT NOTIFICATION) TO A RECURRING ACCOUNT

All data fields/screens initially completed at the time of the (OPR) registration must be verified when adding any VSNT registration to the recurring account. VSNT doesn't allow you to view all the registration screens. To ensure that you are following the rules for registering recurring accounts, follow these steps:

1. Do Patient Update function ("PATU" in PM and "Patient Update" in ACE) to check Information to determine whether you need to update existing information for that specific recurring account or whether you need to re-register the patient .

Verify:

- Guarantor information
- Financial Class and Patient Class Code
- Insurance screen/s (plan code, insured name, ID#, Group #, claims address, etc)
- Accident screen (if applicable)
- Documentation requirements (possible Third Party coverage or Home Owners)
- Medicare Questionnaire
- Coordination of Benefits – if more than one payor or if accurate information has been obtained/entered or not entered (if auto PIP exhausted per CPII) as a result of an accident

2. If only the insurance claim address has changed, update the claim address and then do a VSNT
3. If patient's insurance is the same, but the ID # had changed, update the ID # first and then do a VSNT

Examples of when & when not to start a new recurring account:

⇒ If a patient's insurance has changed (had Aetna only but now has Humana only), depart the case, then reregister the patient.

⇒ If the diagnosis has changed or accident information has changed (injury not related to existing visits), depart the case, then create a new recurring account.

⇒ If you need to update current insurance information or add a secondary insurance, do PATU to update the information, then do a VSNT to indicate the date of service.

Auto Insurance – PIP exhausted – if Patient Accounts or KMSF have added "PIP Exhausted" on the "CPIU" screen during the course of treatment, registrar can enter a thru date/end date on the auto insurance screen and do a VSNT to indicate the date of service.

NOTE: To depart a case you need to have special training in DPTC and VSNC.

XI. What Ifs?/ How Tos?

A. How do I set Preferences?

ANSWER: The reason to set preferences is if your area registers under the same patient type, location, and physician service code each time. To set your preferences:

1. From the Main Menu, move the cursor to the tool toolbar and click "Options".
2. Move the cursor down to the Preferences line and left click to select.
3. The System Preferences-Registration screen appears.

<u>Rules for setting Preferences</u>

1. **Setting Print Functions**: If your registration area always prints a profile or patient plate, then set it to "01". If you only print profiles and occasionally print plates, then set the profile to "01" and the plate to "00". Each area or patient type will be different.
2. **Setting your Patient Type**. Do not set Patient Types at all
3. **Setting the Visit Type**: This relates to the type of visit for the patient at UK.
   1= Emergency, 2= Urgent, and 3= Elective
4. **Setting the Visit Source**: This source relates to where, from or how the patient was referred to UK.
5. **Setting the Patient Class**: This class should ***never be set to one code***, due to each patient's code will be different based on the health/third party payer.
6. **Setting the Hospital Service**: This service is based on the two or three-digit code that is assigned to each UK physician based on what service they provide. In a registration area if only one (1) service code is used for all physician than this can be set.

(i.e. ENT, PLA, URO, PED, etc.)

7. **Setting the Location**: This location can be set for areas that use the same location for all registration done in that clinic, or hospital area (i.e. SCOR, FAM, NESI, KCN, etc.).
8. When all preferences are set click "**O<u>k</u>**". You have now set/ saved the preferences for that computer.
9. Now you can continue with your registration.

NOTE: The preferences set are based on computer, not sign on, so they will not travel with you.

B. How do I get back to the Main Menu?

ANSWER: From any location, you can always go to the toolbar at the top and click on "Keys" and "Main Menu" to get back to your Main Menu screen. You can also press the **ESCAPE** key to get back to the Main Menu.

C. How do I change Pavilions?

ANSWER: For general registrations, the pavilion will default to the correct letter based on your sign-on code. If you need to change to a different pavilion to register a patient you would click on the "**Change Organization**" button at the bottom of the Main Menu Screen and change to the appropriate Pavilion.

M - KY Clinic; C – Markey Cancer Center; H – UK Hospital

D. How do I register a New Patient?

ANSWER: See page 17 under STEP 2.

E. What if I get the message that my patient is currently an Inpatient?

ANSWER: If the patient was seen in the clinic but is an Inpatient now, send the fee sheet based on the Inpatient case and do not register the patient in the clinic.

F. How do I register a patient for a past visit?

ANSWER: Begin with ***Out Patient Registration*** or ***Registration New Pt*** which ever is appropriate. On **STEP** 2, (page 6 has a screen print), change the visit date and time in the box labeled "Visit Specific Info." Continue with the registration. On **Step** 6, Visit History/Suffix Screen, change the Julian date to match the date of the visit. If that Julian date is already in use, then follow the directions below, for **STEP** 6 help.

G. How do I register a patient for a future visit?

ANSWER: Begin with ***Out Patient Registration*** or ***Registration New Pt*** which ever is appropriate. On **STEP** 2, (page 6 has a screen print), delete the visit date and time in the box labeled "Visit Specific Info" and put the future date in the "Scheduled Date and Time" fields. Continue with the registration. On **Step** 6, Visit History/Suffix Screen, change the Julian date to match the date of the future visit. When the patient arrives, complete this registration with a Visit Notification. For more details see the help in **STEP** 6, item 4 below.

STEP 1: Patient Type Selection Screen

A. What if I register using a recurring account?

ANSWER: If this is the first time the patient has been seen in your clinic with a recurring account, you need to do a complete registration. In STEP 1 you would be choosing the cost center for your clinic and it assigns the recurring account number. (See next what if for more instructions.) This means that when you get to STEP 6 (Visit History/Suffix Screen), your recurring account will be seen as the Visit Suffix and you will not be able to change it. You must choose new visit. Each therapy registration area is responsible for creating an accurate recurring account based on the ***patient type*** they see in their area. Complete the rest of the registration as explained above.

B. What if the patient has been seen in my clinic using a recurring account but the first diagnosis has changed?

ANSWER: If during the plan of treatment the diagnosis changes, a new recurring account must be created to reflect this change to the insurance. The payer also may require company and a new precert/authorization. All visit after this change will be a Visit Notification on to the new recurring account.

C. What if the insurance changes on the patient who is registered with a recurring account in my clinic?

ANSWER: If the insurance changes during the course of treatment, a new recurring account must be created to reflect the insurance change. This new recurring account will start billing to the new insurance. All visits after this change will be a Visit Notification on to the new recurring account.

STEP 2: CPI Search Parameters Screen

A. What if I don’t find my patient on the CPI Search screen?

ANSWER: Please be sure you have searched thoroughly on the CPII screen and asked the patient if they have had a name change.

Your patient may be a new patient and not have a Medical Record Number, however they may have made an appointment and have a temporary Medical Record Number. You need to choose the ***OPR New Patient*** icon. It searches to see if the patient has a Booking, meaning an appointment by last name, first name. If you see the patient, choose the correct line number and click OK. The next screen has a button at the bottom to select Add New CPI, choose it. To get a new CPI number (Medical Record Number) you must call the first or third floor information desk at 7-9805 or 7-9807. Continue with the registration. When you get to ***STEP 10*** (***Visit Specific Screen***), there will be a date in the Scheduled Date field that you should delete. (This date was a result of the booking of an appointment but not needed in your registration.)

B. What if my patient has had a name change since their last visit?

ANSWER: Find your patient by their Medical Record number or their previous name. In STEP 2, on the patient demographic screen, change the patient’s name. Continue the registration and the computer will record the old name as an alias; you do not need to do this.

C. What if I don’t find my patient after trying on the CPII Search Screen and OPR New Patient screen?

ANSWER: This means your patient does not have a Medical Record Number or an appointment. Go back to the main menu and choose OPR Registration and after entering their name again on the CPI Search screen, click OK then on the next screen click on the button to Add CPII. Call the first or third floor information desk to get a CPI number.

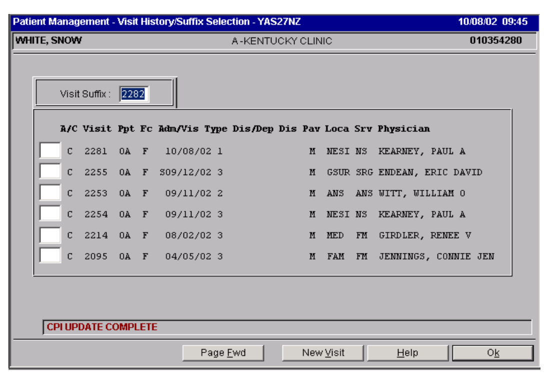
DO NOT ASSIGN A CPI # WITHOUT THOROUGHLY SEARCHING THE SYSTEM.

STEP 4: Person Information II Screen

A. What if the employer shown on this screen is not the current employer?

ANSWER: Do not type over the existing employers. If they no longer are employed at the company shown, then complete the ***Thru date*** field. Choose the ***Additional Employers*** button at the bottom of the screen. This will give you a chance to complete the information on the new employer or additional employer.

STEP 6: Visit History/Suffix Screen



A. What if the Julian date in the *Visit Suffix* field is tomorrow’s Julian date or higher?

ANSWER: If the Julian date is tomorrow’s, then it could mean one of four scenarios.

1. The patient was in the emergency room within the last 24 hours and thus today’s Julian date will not be available. In this case, <u>*back date*</u> the Julian date to the first date available and continue with your registration. Be sure to keep the correct date as your visit date.

2. The patient was registered in another clinic today. Investigate the Insurance and accident information on the other visit using the ***Jump and Return*** feature and ***PATI***. If the patient has the same insurance, same accident information, and does not require a separate pre-certification number, go back to the main menu and do a ***Visit Notification***. This will add a second, third or more visit for the patient on the same day with the same insurance and accident information. If the insurance or accident information is different or a referral/pre-certification is needed, when you return to the Visit History/Suffix screen, then <u>back date</u> the Julian date to the first date available and continue with your registration. Be sure to keep the correct date as your visit date.

3. The Julian date you need is listed on your screen with an ***** (asterisk) in front of it. This means someone created an incomplete registration. You need to put an "**X**" in the box in front of this Julian date to complete the registration with your clinic information.

4. The patient has been prescheduled for a visit today. The Julian date for today will be listed below and the calendar date will have an "**S**" in front of it.
   a. If the patient was prescheduled by your clinic, then go to the ***Main Menu*** and use the ***Visit Notification*** icon to complete the registration.
   b. If the visit information is <u>*not*</u> from your clinic you need to use the ***Jump and Return*** feature with ***PATI*** to investigate the insurance and the accident information. If the insurance and accident information are the same and don't require a separate pre-certification then return to the ***Main Menu*** and do a ***Visit Notification.*** If the insurance or accident information is different or a referral/pre-certification is needed, when you return to the Visit History/Suffix screen, then <u>back date</u> the Julian date to the first date available and continue with your registration. Be sure to keep the correct date as your visit date.

B. What if my patient has been previously registered under a recurring account number by my clinic?

ANSWER: If your clinic has already registered your patient on a recurring account within the last 90 days, and the diagnosis and the insurance have not changed, then do NOT do a complete registration. Go to the Main Menu and do a ***Visit Notification***.

C. What if another clinic has previously registered my patient under a recurring account number?

ANSWER: You would choose your own patient type in **STEP 1** and if it is a recurring account for your clinic then it will create the correct recurring number. If the patient is coming to your clinic and it is not a recurring account, then on **STEP 6** (***Visit History/Suffix Screen***) you would be using the **Visit Suffix** for the day of your registration. If the **Visit Suffix** is greater than today's (or the day you need to register them for) then see instructions above for registering when the Julian date is tomorrow's or higher (page 27 Step 6a).

D. What if I see and Asterisk in front of the Julian date I need?

ANSWER: An asterisk indicates a registration was started but not finished. Type an X in front of the incomplete registration and click OK. This will allow you to finish the registration with that Julian date. You will need to erase the Service and Location code, and enter your physician and clinic information.

E. What if I completed the registration and now notice the Julian date is wrong?

ANSWER: Notify your supervisor or whoever has access in your clinic to do a visit cancellation. If the patient needs to be re-registered, register them with the correct Julian date.

F. What if I get a message the Julian date is already in use but I don't see it on the Visit History screen?

ANSWER: First check the Patient Activity History (Main Menu 3) to see if the patient has been admitted and discharged within the past 24 hours. Check the Visit History Inquiry on Main Menu1 to see if the patient has had a visit on the same day 10 years ago. In both instances, you back date the Julian date to the first available one and use the correct visit date.

STEP 10: Visit Specific Screen

G. What if I am pre-scheduling a patient for a future date?

ANSWER: You need to complete the **Scheduled Date** and **Time** fields and erase the Visit Date and Time. (Don't forget you should have changed the Julian date to match your visit date on the Visit History/Suffix screen.) When your patient does arrive, complete the registration with the ***Visit Notification*** and do not do a complete registration again.

H. What if the Scheduled Date is already filled in?

ANSWER: If the patient was a new patient, the date comes with the Booking of an appointment. Just erase it and leave the **Visit Date** and Time completed, unless you are pre-scheduling and then you would correct the date and time in the scheduled date fields.

Class Exercises I

NOTE: Change your pavilion to the location of your clinic if needed.

1. Register a patient using OPR for today. (the patient's name will be given during class) Use your own clinic location, and one of the physicians in your area. Do not attach any insurance, the patient is a Full Pay patient.

2. The same patient is being seen in Pain Management because of an accident at work today. Register the patient with Dr. William Witt as the physician in ANS clinic location, the service as ANS.

   If you work in MCC and are in the C pavilion, use MCO location, Dr. Romond as the physician and HO as the service.(C pavilion)
   If you work in the Hospital and use H pavilion, use RADH location and Dr. William Witt in ANS service (H pavilion).

3. Add a visit to the registration in Question # 1 using VSNT. The patient was seen in the Surgery Clinic with Dr. Kenady as the physician, GSUR as the location, and SGO as the Service today. The registration information is the same as in question #1.

   You will have to change your pavilion to M if that's not your default pavilion

4. Register the patient for a visit tomorrow in your clinic.(Don't forget to change your pavilion if needed)

5. Change the above named patient's middle name to Kelley.

6. Change patient address and employer. The employer for the patient is IBM. The patient has been working there full time since 09201999 and works in the Quality Management Department

7. Add Non-UK referring physician to this particular case. Enter your own name as the physician. Make sure that you enter the address for the physician.

8. The patient's PCP is Dr. Dale Toney. Update patient's record with this information.

Class Exercises II

1. Register ____________________ ___________. This patient has never been in our institution but may have an appointment to be seen. Complete the demographic information. This patient is unemployed and their guarantor is Tom Cruise who is an acquaintance. Use your own clinic area and one of the physician's in your area to register this patient as a full pay patient.

2. This same patient also went to the Orthopedics' Clinic today. All the information is the same with the previous registration.

3. Register this patient in Physical Therapy Clinic using a recurring account. The physician is Dr. Darren Johnson.

4. Pre-schedule this patient for another clinic visit in your clinic next Wednesday.

5. Change the Julian date for the above registration (trick question).

6. How do you enter a non-UK referring physician if you don't know all the information?

7. Change the last name of the patient

8. Add yourself as the guarantor for the patient. You're the patient's brother/sister.

9. Register _______________ (a different patient) for a visit in your clinic for yesterday. They have no insurance and no PCP. Your clinic sent them to the lab for blood workup.