

Cerner Registration

QUICK GUIDE



Online Manual is located at:

www.c3project.ca/epr_priv/education/index.htm

Email training requests to:

eHIMEducation@lhsc.on.ca

Registration Conversation



Registration

The Registration Conversation has a banner section at the top of the screen that must be reviewed. **Remember to select the patient type** prior to moving on to the rest of the registration in order to **activate the mandatory fields**.

If the patient has a middle name, do not forget to enter it. It is part of the patient's legal name.

The **HCV Icons** are located in the upper left and must be used when any part of the HC number or Version code is altered to **revalidate** the HC number with the Ministry of Health.

Under this banner section is a series of tabs with more detailed patient information. Move from tab to tab to complete all the necessary information for the registration.

Mandatory Fields in Registration

If the required fields are not highlighted in yellow once you enter a conversation from the conversation launcher, right click in grey area and select **Highlight Required Fields**.

Patient Tab – Temporary Address

This is to be used if the patient resides at an address for only a specific time during the year and has another permanent address elsewhere. An example would be a patient who resides at a cottage for the summer months. In this scenario, enter the permanent address at the top of the screen under address and enter the cottage (temporary) address at the bottom of the screen.

Guarantor Tab

If the patient is under 18, the Guarantor tab will be blank and the legal guardian information must be filled in for each registration. Once the patient has turned 18, the information will default to **Self**.

Primary Insurance Tab

Common insurance companies other than Ontario Health:

- Workplace Safety and Insurance Board (WSIB)
- Out of Province Insurance – listed under Province name
- Interim Federal Health – for refugees
- Cowan Wright Beauchamp – used for Fanshawe **UHIP** patients
- Sunlife Assurance Group – used for UWO **UHIP** patients
- Dept. of National Defense – used for military (need to enter dept. in order to find this plan)
- RCMP
- Selfpay (other country) – used for out of country patients

Third Party Payor

To enter a third party billing, click on the 'by Carrier' tab and select the appropriate company under Third Party Payor. If the company is not in the list, select 'Third Party Payor-GENERIC PLAN -Use When Third Party Payor Not Set Up' from the list, then e-mail finance to add the company to the table.

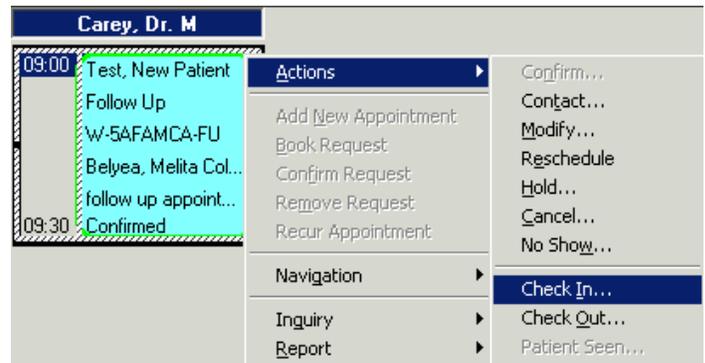
Visit Tab

The Patient Service field only shows services offered at the facility you are registering for such as Complex Care will not be seen by LHSC staff at VIC and UH as this service is offered at Parkwood only and Parkwood will not see any services preceded by Pediatric as these services are not offered at Parkwood

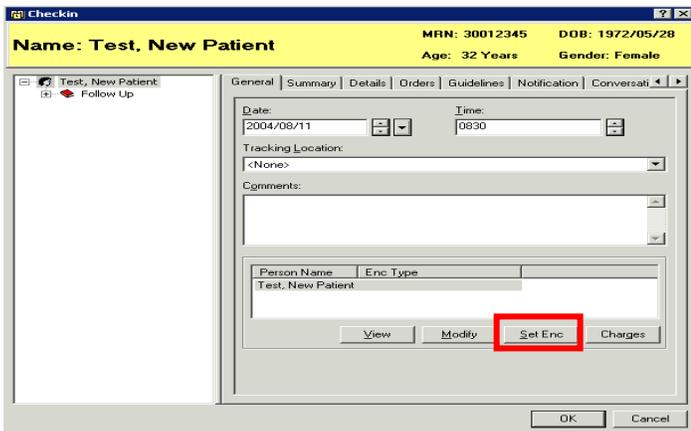
Patient Service needs to reflect both adult and pediatric services. Consult your site-specific regulations for the age of a pediatric patient.

Check In and Register an Appointment

1. Right-click on the Patient Appointment.
2. Select **Actions** then **Check In**.



The Check In screen appears with the detailed information for the patient's appointment.

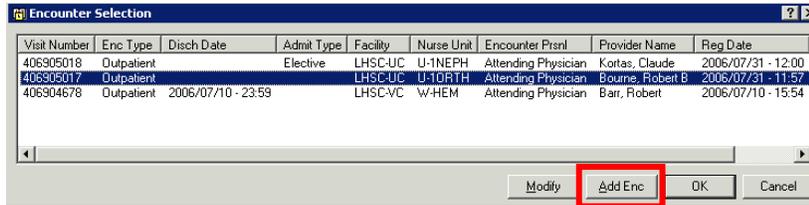


Note:

The check in time defaults to the current date and time. This can be changed if the check in process is not occurring in real time.

Check In With Registration:

3. Left-click Set Enc.



The Encounter Selection window will open. Make sure an Encounter for today does not already exist for your clinic.

4. Left-click **Add Enc**.

The Registration Conversation will launch.

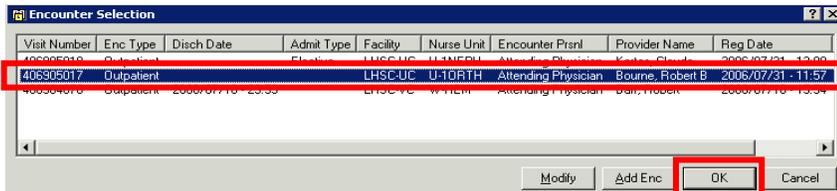
5. Complete all appropriate fields.
6. Left-click **OK**.

The Check In screen will return.

7. Left-click **OK** to complete the process.

Check In Without Registration:

3. Left-click Set Enc.



The Encounter Selection window opens.

4. Select the appropriate encounter and left-click **OK**.

The Check In screen will return.

5. Left-click **OK** to complete the process.

Many records exist in the Cerner EPR's Central Patient Index (CPI), some with incomplete or incorrect information. To find an existing record it is important to do a complete patient search.

Note : *You must perform 2 separate searches to ensure that all person records for the patient are found. Many records from 16 hospitals comprise the CPI and therefore duplicates do exist.*

Conduct the 2 separate searches in this order:

Search #1: Last name, first name

Search #2: Ontario health card number

DO NOT combine the above 2 into 1 search

Should you NOT find your patient record, continue searching using the following filters:

3. Hospital PIN specific to your site or Hospital RMRN (LRCP only)
4. Last name, first name **initial**
5. Last name, middle name in the first name field
6. Last name, age range of 10 years (based on given date of birth)
7. Other last name (e.g. maiden, previous), first name
8. Last name, abbreviated first name or common nickname (e. g. for Elizabeth try Betty)
9. Last name, first name of "Baby", "Male" or "Female"

Important Notes to Remember when Searching:

- Searches done with too many filters (search fields) entered might prevent your patient record from being found
- If the result of a search is "too many persons found", add a *limited* amount of information to the search screen so that the search is narrowed
- Punctuation (e.g. hyphens, quotation marks) and letter case do not effect the search
- An age range search will not find matches on the minimum and maximum of the range, only ages in between
- Do **not** search a PIN and/or HCN along with a patient Name as this will slow your search
- Do **not** select any of the following person records to schedule or register:
 - 1) **"900" series PIN** record (represents *referred-in lab patients, research patients etc.*)
 - 2) **Employee Personnel** record (PIN, birth date and sex fields are all blank) if selected displays the following error message; "The record you have selected to add this visit to is a personnel record. Please do another search to find appropriate person or create a new record."
 - 3) **Historical Blood Bank** record (patient name displayed all in **UPPER CASE**, PIN is blank)
- When patient record is found and selected for scheduling or registration, enter all parts of the patient's name (Last Name, First Name **AND Middle Name**)
- If your search finds multiple valid records for the same patient (excluding above types), contact your CPI Auditor

Guidelines for Naming Convention

The patient's full legal name must be used. The legal name is defined as the first or given name, middle name (if applicable) and the surname as is entered on the patient's birth certificate or as altered via a legal name change event such as marriage, adoption or court approved name changes.

Legal names will be entered with proper punctuation, i.e., periods, commas, hyphens etc., as well as upper and lower case letters when applicable. For patients with only ONE legal name, the name is entered into the Last Name field, and NONE is entered into the First Name field.

Abbreviations of a first name will not be used unless this is the patient's legal first name. If a patient prefers to be called something other than their legal name, enter this into the preferred name field.

The following exceptions may apply to naming convention:

- i. Newborns are entered using the mother's last name (unless otherwise informed) and the first name will be 'Baby'. In the case of multiple births, use letters to distinguish between babies of the same sex. For example, Baby A Smith and Baby B Smith.
- ii. Titles such as Dr. or Reverend and name suffixes such as Junior are recorded ONLY in the preferred name field unless documented as a legal name.
- iii. Last names that include Saint will be entered as St.

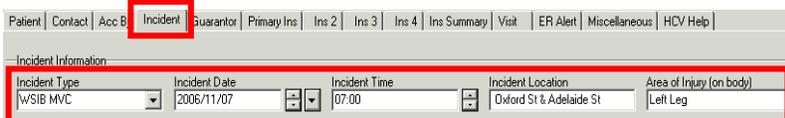
No punctuation is permitted in the Address Fields. Abbreviated names may be entered in full or without punctuation (e.g., St Thomas, First St or First Street, Queens Ave or Queens Avenue

Register a WSIB Related Encounter

Register the WSIB encounter as you would any other encounter, with the following changes:

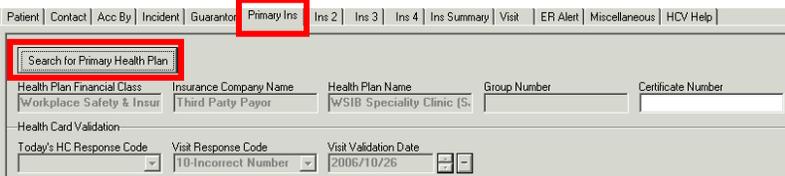
Incident Tab

Complete the Incident Tab fields with details about the WSIB incident that the visit is related to.



Patient Contact Acc B Incident Guarantor Primary Ins Ins 2 Ins 3 Ins 4 Ins Summary Visit ER Alert Miscellaneous HCV Help				
Incident Information				
Incident Type	Incident Date	Incident Time	Incident Location	Area of Injury (on body)
WSIB MVC	2006/11/07	07:00	Oxford St & Adelaide St	Left Leg

Primary Insurance Tab



Patient Contact Acc By Incident Guarantor Primary Ins Ins 2 Ins 3 Ins 4 Ins Summary Visit ER Alert Miscellaneous HCV Help				
Search for Primary Health Plan				
Health Plan Financial Class	Insurance Company Name	Health Plan Name	Group Number	Certificate Number
Workplace Safety & Insur	Third Party Payor	WSIB Speciality Clinic (S)		
Health Card Validation:				
Today's HC Response Code	Visit Response Code	Visit Validation Date		
	10-Incorrect Number	2006/10/26		

1. Left-click **Search for Primary Health Plan**.
2. Left-click **By Plan Name** tab to select insurance company.
(Note: If this is not the first registration for this WSIB incident, left-click **By Eligible Plan** to select insurance).
3. Select **Workplace Safety & Insurance Board**.
4. Enter Certificate Number (if one has been issued).
(Note: If WSIB insurance was selected from **By Eligible Plan** tab, then the certificate number will populate from a previous registration. Verify that this is the correct certificate number.)
5. Left-click **Employer at Time of Incident OR current employer for Out of Country patients**.
6. Enter the Employer Name and left-click **Search**.
7. Select appropriate employer from list.
8. Remember to select **Yes** in the "Is This a WSIB Related Visit" field.

Cancel a Discharge

Outpatient encounters are automatically discharged at 2359 daily.

1. Left-click on the **Conversation Launcher** on the AppBar.
2. Double-left-click the **Cancel Discharge** icon.



The Patient Search screen will open.

3. Search for the appropriate patient.
4. Highlight the patient name on the list.
5. Select the appropriate discharge from the list on the screen.
6. Left-click **OK**.

Visit Number	Pat. Type	Med Service	Attending Phys	Reg Date	Disch Date	Building	Nurse Ur
406930529	Outpatient	Nephrology	Muirhead, Norman	2006/10/26 09:16	2006/10/26 23:59	VH Main	W/WPT
406930516	Outpatient	Oncology	Ash, Robert	2006/10/23 08:02	2006/10/23 23:59	LRCF Main	V-CL2
406930549	Outpatient	Lardology	Plugfelder, Peter w	2006/10/18 13:51	2006/10/18 23:59	UC Main	U-5NIC
406930544	Outpatient	Cardiology	Bergin, Margaret Lynn	2006/10/12 15:41	2006/10/12 23:59	St Josephs Main	J-CVI
406930537	Outpatient	Psychiatry	Isaac, Isaac F	2006/10/04 08:22	2006/10/04 23:59	SSC Main	S-PPV
406930532	Outpatient		Isaac, Isaac F	2006/10/04 08:00	2006/10/04 23:59	UC Main	U 4 TU
406930537	Outpatient	Psychiatry	Isaac, Isaac F	2006/10/03 14:41	2006/10/03 23:59	SSC Main	S-PPV
406930536	Outpatient	Psychiatry	Isaac, Isaac F	2006/10/03 08:00	2006/10/03 23:59	SSC Main	S-PPV
406930508	Inpatient	Orthopaedic Surgery	Bourne, Robert B	2006/09/13 08:36	2006/10/03 09:26	UC Main	U-9

OK Cancel Preview...

The Cancel Discharge screen will open.

7. Left-click **OK** to cancel the discharge.

Cancel a Registration

1. Left-click the **Conversation Launcher** button on the AppBar.
2. Double-left-click the **Cancel Registration** icon.



The Encounter Search screen will open.

3. Search for the appropriate patient.
4. Highlight the patient name on the list.
5. Select the appropriate encounter.
6. Left-click **OK**.

The Cancel Registration screen will open. A warning message will be displayed.

7. If you are certain you have selected the correct encounter, left-click **OK** on warning message.

Left-click **OK** to cancel the registration

Post Downtime Registration



Used as a quick entry to register patients after a downtime has occurred. **This conversation must be used when a new PIN has been given during the downtime.**

Post Downtime
Registration

For an existing patient:

1. Enter the search criteria for the patient and click **Search**.
2. Highlight the correct patient name in the upper portion of the Person Search screen and click **Add Encounter**.
3. Enter the required information for the downtime registration.
4. Click **OK** to update and save the patient record.

For a new patient who is not in the system or a patient new to your hospital (patient has a PIN from another hospital):

1. Enter the search criteria for the patient and click **Search** to verify that this patient is new.
2. If the patient has a PIN number from another hospital and is in the system, highlight the correct patient name in the upper portion of the Person Search screen and click **Add Encounter**.
3. If the patient is not in the system, click **Add Person** and add the information requested in the Post Downtime conversation.
4. The PIN number field will be blank so that the user can enter the PIN given during the downtime.
5. After entering all the required information click **OK** to update and save the patient record.
6. When all post downtime registrations are complete you must then go to the **Registration** and complete the full registration, choose **OK** do not add encounter as this was done in the Post Downtime Registration.

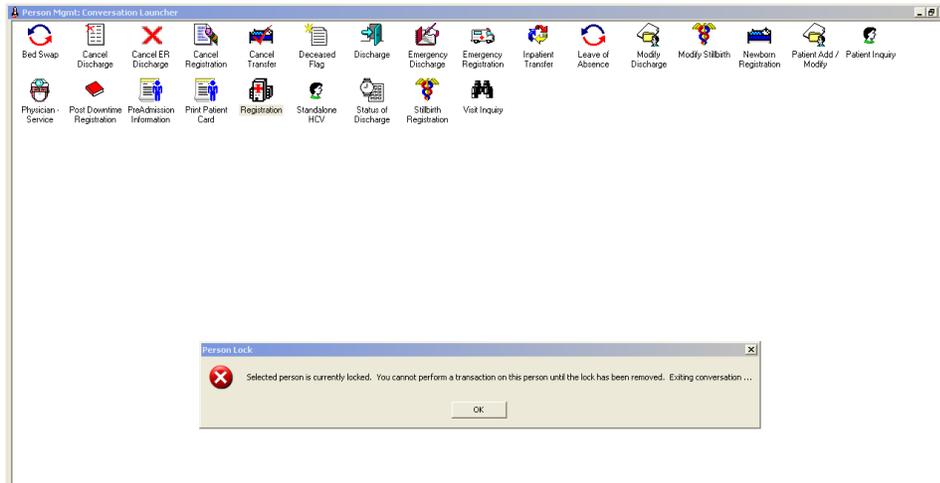
The screenshot shows a 'Post Downtime Registration' dialog box with the following fields and values:

Field	Value
PIN	[Blank]
Visit Number	403083953
Last Name	Search
First Name	Proper
Middle Name	Patient
Birth Date	1965/03/01
Age	39Y
Sex	Female
Patient Flag	[Blank]
Patient Type	[Blank]
Patient Service	[Blank]
Admitting Physician	[Blank]
Attending Physician	[Blank]
Facility	LHSC-UC
Building	[Blank]
Nurse/Ambulatory	[Blank]
Room	[Blank]
Bed	[Blank]
Arrival Date	[Blank]
Arrival Time	[Blank]
Triage	[Blank]
Triage Date	[Blank]
Triage Time	[Blank]
Registration Date	1965/03/01
Registration Time	[Blank]
Print Documents Indicator	No

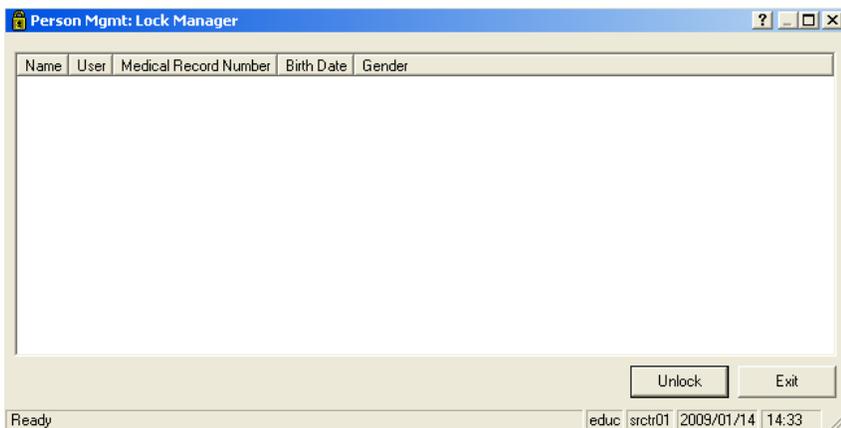
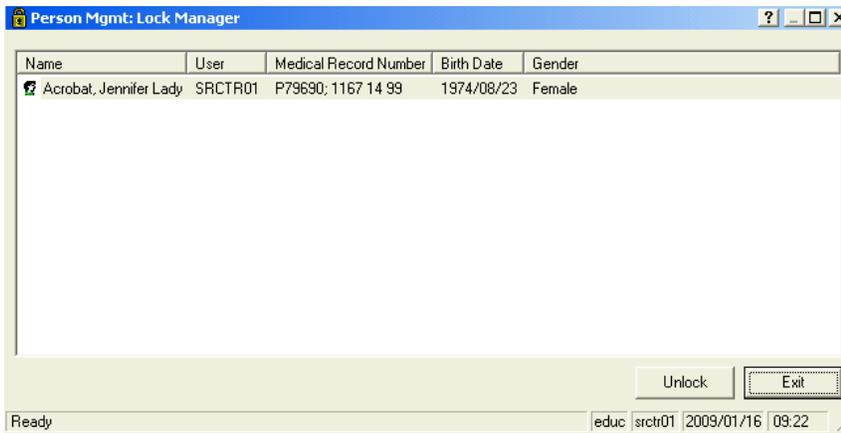
Things to Remember

- Make sure you look at all dialog boxes (pop-ups) before clicking OK.
- Highlighted Fields are mandatory. You cannot finish scheduling / registration without the minimal amount of information for your clinic.

Registration Locks



1. If the lock is your own lock this is what you would see
2. You then would highlight the lock click unlock and it would be removed
3. If the lock is some one else you would wait 10 minutes or so and try again if it is still locked call the Helpdesk and they can remove the lock



Patient Assistance and Privacy

What system should I be using to look up information to help visitors or family find patients?

In keeping with a patient-centered approach, the electronic patient care systems enable staff to help patients locate their appointment location and assist visitors or other hospital staff in finding patients.

For Outpatient Appointment Information

- The Scheduling Appointment Inquiry is an appropriate tool to use for providing patients with information about the time and place of their appointment

Inpatients / Emergency / Urgent Care / One Day Stays

- The Patient Locator is an appropriate tool to use for giving directions (way finding) to family and visitors to locate patients who are currently registered.

Audits

All patient system access is stamped with your electronic signature.

Regular audits are conducted to ensure that patient privacy has not been breached. You are only authorized to access the patient data required to perform your job.

Privacy Office staff are always willing to come to departments for discussion or in-service on any privacy-related topic. To request an in-service, call ext. 32996.

Cerner Terminology

AppBar	A toolbar to house the buttons to launch the Cerner Applications
Patient Type	These are defined as Emerge, Inpatient, Outpatient, and One Day Stay. All patient types listed, except Emerge can be used in the Registration Conversation. There is a separate Emergency Registration Conversation for this patient type.
Guarantor	Someone who is financially responsible for any outstanding fees acquired by the patient. If 18 and over, then the system will default to 'Self', if under 18, then the legal guardian, usually a parent is entered.
Nurse Ambulatory	The nurse unit or ambulatory clinic code within the building selected. This will default from scheduling into the registration if the registration is launched from the check in function in scheduling.

Recommended Websites for Quick Access

Canada Post for quick access to Postal Codes:

<http://www.canadapost.ca/cpotools/apps/fpc/personal/findByCity?execution=e1s1>

Residence Code web address

http://www.health.gov.on.ca/english/public/pub/ministry_reports/rescode_manual/res_code_manual.pdf

Shortcuts and Defaults

T = for today's date	Unknown age = 1875/01/01
N = for current time	S = to add self to a field
Pat = to fill in patient demographics in other tabs after it is initially entered in the patient tab	"" = enter double quotes in the preferred name field to delete a previous entry
Nok = next of kin	Unknown postal code = X9X9X9
Guar = Guarantor	Nfa = no fixed address and will fill in all necessary information
Clr = clear all associated fields	Unk = unknown address and will fill in all necessary information

Types of PIN numbers

Prefix	Number of Digits	Site
No PIN		DOB exists – Valid Patient Record – Must Use
900	6	Laboratory Referred Work
London Hospitals		
No Prefix 3000, 3100	8	London Health Sciences Centre Downtime PIN
LCP	6	London Regional Cancer Program
M	5	Mount Hope, London
P	5	Parkwood Hospital, London
RL	5	Regional Mental Health London
RS	5	Regional Mental Health St. Thomas
J J3	6 or 7	St. Joseph's Health Centre, London Downtime PIN
Historic PINS – no longer being issued		
U	6	University Hospital, London
V	6	Victoria Hospital, London
Regional Hospitals		
AH	6	Alexandra General Hospital, Ingersoll
FC	6	Four Counties Hospital, Newbury
LM	6	Listowel Memorial Hospital
SH	5	South Huron Hospital, Exeter
SE	6	St. Thomas Elgin General Hospital
SM	6	Strathroy Middlesex General Hospital
WD	6	Wingham & District Hospital
TG	6	Tillsonburg District Memorial Hospital
WH	6	Woodstock General Hospital