IP - OP Registration for PHS Users Tip Sheet

- **Need Help?** For assistance with computer issues, Contact **HelpDesk, ext. 4357 (HELP)** or Email: **Help@uhn.ca**
- **Account Access:** Your personal EPR account will be available within 48hrs following training. Contact Helpdesk, ext. 4357, prompt 1 for Clinical Systems, prompt 1 for EPR Support

Logging in to the EPR

1. Double-click on EPR Icon
2. Enter ID and password
3. Click the "*OK*" button to proceed

Reading the Transaction Line

Select – anytime the transaction line says to "***Select***" it is telling you to select from above

Enter – anytime the transaction line says to "***Enter***" it is telling you to type in your text or accept default

Choose – anytime the transaction line says to "***Choose***" it is telling you to select from below

Patient Search Options

- Last name, First name → **Super, Cilia**
- Last name → **Rehab**
- MRN → **2003085**
- OHIP → **o1236545646**
- Visit → **v9876543212**
- Wildcard (use the dash "-") → **Re-, J-**

Commonly Used Terms

HK	Housekeeping
LOA	Leave of Absence
IP	Inpatient
OP	Outpatient
GoTo	Select field to edit
Keep	To go to Accept screen
Accept	Save information

Date and Time Formats

Full Date	ddmmyy (**210510** is May 21, 2010)
Time	24 hr clock (**1400** is 2 pm)
Combo	date *space* time (**210510 1400** is May 21, 2010 at 2 pm)

Special Formats:

N (Now)	current date and time
T (Today)	current date

MD Assignment

MD Assignment
During the Registration process, in the Visit Screens, complete the fields for Physician. (Admitting, Consulting, Referring)

To change a Physician Assignment
Go to the Patient Desktop> ADT Tab> Visit Processing > **Change Attending Physician**

Viewing and Editing Registration

Viewing:
- On the ADT tab of the patient's desktop, click **View Visit Information**
- Select **Visit/Accommodation Information** and click **OK**

Editing:
- On the **ADT tab** of the patient's desktop, click **Edit Reg/Demographics**
- Select **Patient Demographics** and click **OK**
- Select the **Field** you would like to make changes to and change the pertinent information
- Make sure you **Accept** the changes to **save** the information.

Editing (when the patient desktop is not accessible)
- From the **Main Desktop** under **Reg/ADT Tab,** select **OP Visit Registration**
- Enter the Patient's name or MRN
- Select the correct patient and click OK
- Choose Edit Visit Registration
- Select **Patient Demographics** and click **OK**
- Edit the appropriate **Field,** click **OK** and **Accept** to save changes

IP Waitlist Registration

- From the **Reg/ADT** tab select **IP Waitlist Registration**
- **Type** in the patient's name (last name, first name)
- If the name appears at the top it means they have already been registered (for those already registered, view the patient demographics screen to see if they have a TRI #, and if they do not, edit any field, even if only reentering the same information and accept to auto generate a TRI number)
- If no name appears, choose **Add** and the registration screen will appear
- Complete the fields that require information (**Note**: Mandatory fields are **bold**)
- Following the final screen, you must enter an application and estimated admission date
- Complete all the necessary information
- Select the **referral application order** and complete all the necessary information
- You will also be required to select on which application list the referral will be placed

IP Waitlist Management

Insurance Verification Queue (should be done before processing on **Approved**)**:**
- Open the **Inpatient Pending** list and choose **Process**
- Select the patient and click **OK**
- Select **Needs Ins Verification** and click **OK**
- Select **Comment** field, type comment and click **OK** and **Accept** the information

Approval of Referral:
- Open the **Inpatient Pending** list and choose **Process**
- Select the patient and click **OK**
- Select **Approved** and click **OK**
- Select **Approval Information** and click **OK** and **Accept** the information

Rejection of Referral:
- Open the **Approved Waitlist,** choose **Process**
- Select the patient and click **OK**; select **Denied** and click **OK**
- Select **Denial Information** from the list and then select **date denied/reason** for denial
- Click **OK** until you can **Accept** the information

IP Visit Activation

- In main desktop, click **Reg/ADT** tab, select **Day of Admit Processing** option
- Find the patient and the pending IP visit
- Verify the patient's registration info
- Activate Visit? **Yes**
- Accept Visit Activation? **Yes**
- Print Visit Reports? **Unit policies will determine printing**

** **Note:** Printing the visit reports will print the addressograph and facesheet **

Patient Check In and Bed Assignment

- Choose **Checkin** on the patient's desktop
- Select the **visit** from the list
- Choose the **Document** button at the bottom of the screen
- Click the **Expand** button to show a list of units
- Select the **unit**, **room** and **bed** and click **OK**
- Click **Accept** to save the information

Transfers & Discharges (Unscheduled)

Unscheduled Transfer:
- From the patient's desktop select **Unscheduled Transfer**
- Enter the time (ie., now)
- Select "**Checkin**" **very important*
- Enter the destination (click Expand or hit F8 to show the rooms)
- Select the transport method
- Click OK and then Accept

Unscheduled Discharge:
- From the patient's desktop select **Unscheduled Discharge**
- You will then be prompted to enter the date and time of the discharge, click **OK**
- Select the **discharge type**
- Select where the patient is being discharged to (ex. Home)
- Add any instructions or additional comments if needed
- Click **OK** and then **Accept** to save the information

Leave of Absence

Checkout:
- Select **LOA checkout** from the patient's desktop
- Enter the **date and time** for LOA
- If known, enter the **estimated return date** and **time,** click **NO** to release bed
- Enter **comment** (ex. Where the patient is going and with whom)
- Verify information and **Accept**

Checkin:
- Select **LOA checkin**
- Select the **event to process**
- Enter the **date and time** the patient returned
- Verify information is correct and **Accept**

Reports

From the Main EPR Desktop, **Print Functions** tab, click on the report that you want to generate *(e.g., Alpha Census)* and fill in the report parameters *(e.g., Visit Type, Start Date, etc.)*

To generate a hard copy Choose **Accept**.

To generate a Soft Copy:
- Choose **Continue Editing**
- Click on the **Print Queue** field
- Choose **Mail**, Click **OK**
- Choose **Accept**
- From the **Mail** link at the top-right of your EPR Desktop, highlight the report that you generated *(hint: it should be at the top of your list)*
- Click the **'Report'** button at the bottom of the screen

**** NOTE:** Reports may take several minutes or hours to generate and appear in your EPR Mail Account ******

Vital Signs Trend Report

The Vital Signs Trend Report displays all recorded vital signs for the patient.
If this information is required to accompany the patient to another facility, this report should be used due to the formatting and display of information.
This report is accessed from the Patient Desktop> Patient Shortcuts
- Select **Vital Signs Trend Report**
- Choose **Accept,** the report will display to screen
- To produce a hard copy, click the **Print** button

Out Patient-PHS user Registration

- From the Main Desktop, **Reg/ADT** tab select **Patient Registration for PHS**
- **Type** in the patient"s name (last name, first name)
- If the name appears at the top it means they have already been registered
- If no name appears, choose **Add** and the registration screen will appear
- Complete the four registration screens that require information (**Note**: Mandatory fields are **bold**)
- Always remember clicking **Accept**, saves your work

NOTE: If the patient is already registered, check that their demographics are correct. .