



Temporary Registration User Guide

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by TruBridge



Clear the way for care.

Temporary Registration User Guide

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Chapter 1 Introduction

1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. The TruBridge Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on TruBridge's interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client's attestation, TruBridge bears no responsibility for attestation information submitted by the client.

1.2 What's New

This section introduces the new features and improvements for the **Temporary Account Registration** menu for release Version 22.01. A brief summary of each enhancement is given referencing its particular location if applicable. As new branches of Version 22.01 are made available, the original enhancements will be moved to the Previous Work Requests section. The enhancements related to the most current branch available will be listed under the main What's New section.

Each enhancement includes the Work Request (WR) Number and the description. If further information is needed, please contact **Client Services** Support.

NOTE: *Version 22.01 does not include any new enhancements.*

Chapter 2 Overview

This user guide provides the steps necessary to perform a Temporary Registration. Temporary account registration is designed to provide a quick mechanism to register patients with temporary accounts.

Chapter 3 Temporary Account Registration

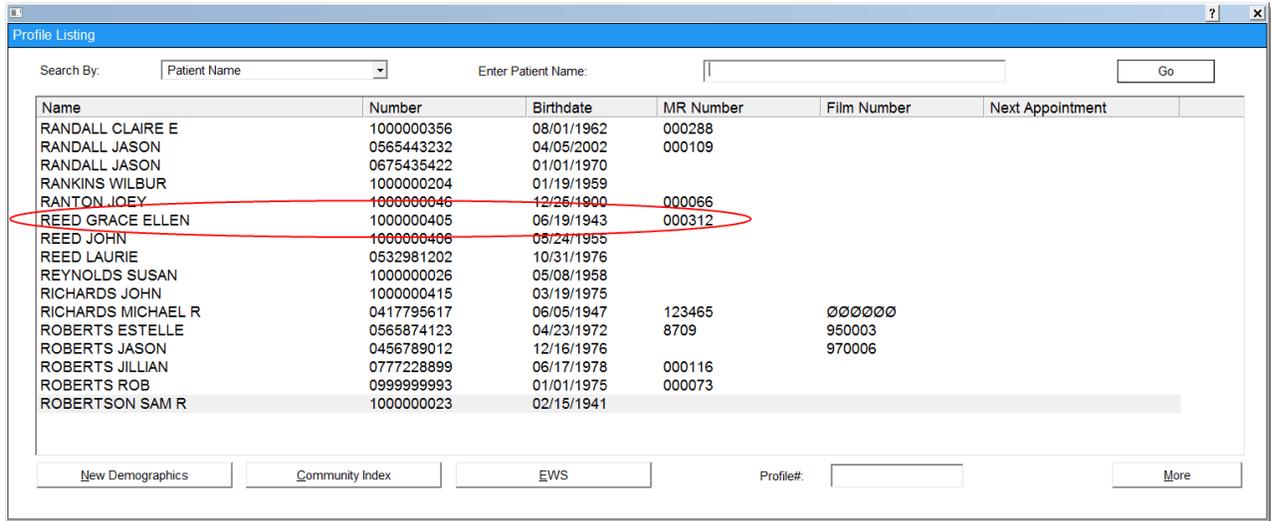
3.1 Overview

Temporary account registration is designed to provide departments with a quick mechanism to register patients with temporary accounts. This is a useful tool when a physician's office wants to schedule a patient procedure for a future date. In the laboratory, temporary accounts may be created to place orders on patient specimens received from clinics, physician offices or home health agencies. It is recommended that temporary accounts be created through the Patient Profile in order to capture previous account information. Patients that do not have an existing Patient Profile, will have one created upon the completion of the temporary registration process. The registration department will be responsible for completing the registration for these accounts.

Features:

- Creates an account with patient name, sex, date of birth, physician name and date of service.
- Allows Contract Billing codes to be entered for appropriate accounts.
- Allows the patient's financial class for this account to be updated.
- Allows the patient's report location to be entered.
- Displays a message that the patient's previous admission was in isolation.
- Displays a message when the patient has an existing account with the same pre-admit date.
- The business office may print exception reports to monitor and complete temporary accounts.

Select Web Client > System Menu > Hospital Base Menu > Temporary Account Registration > 1-Enter > Select search icon > Search by Name



Profile Listing

- If a profile is found, select the patient's name. The Patient Name, Sex, Birth Date, Phone Number, Service Date, Service Code, Financial Class and Social Security Number will be copied from the selected profile to the Patient Functions - Temporary Patient Registration screen.
- If no profile is found under the profile listing, then close the search window and continue to register the patient. The Temporary Registration information screen will create a profile for this patient.

Select **Web Client > System Menu > Hospital Base Menu > Temporary Account Registration > 1-Enter > Select search icon > Search by Name > Select the Patient**

The screenshot shows a web application window titled "Patient Functions - Temporary Patient Registration". The patient number is 358231. The patient name is REED GRACE ELLEN. The birth sex is F, birth date is 09/19/1943 (78 YEARS), and the physician is BROWNA. The guarantor name is also REED GRACE ELLEN, with address 6800 WALL ST and state AL. The insurance coverage table shows two entries: BCBS OF ALA - I/P and BLUE CROSS OF ALA-O/P, both marked as primary.

Select	Code	Insurance Name	Primary
<input type="checkbox"/>	B	BCBS OF ALA - I/P	Y
<input checked="" type="checkbox"/>	BB	BLUE CROSS OF ALA-O/P	Y

Patient Functions - Temporary Patient Registration

Make any necessary changes or additions to the displayed patient information.

Listed below is an explanation of each field:

- **Patient Name:** Enter the patient's name in Last, First, Middle Name order. Do not use any punctuation.
 - **Birth Sex:** Enter **M** for male, **F** for female or **U** for unknown.
 - **Birth Date:** Enter the patient's Birth Date in MMDDYYYY format. For example, September 30, 1969, should be entered as 09301969. Once the date is entered, the age will calculate and appear to the right.
 - **Physician:** Enter the patient's attending physician. A lookup window is available.
- NOTE:** If a physician number that has been inactivated is manually entered in the Physician field, the message "Inactive Physician" will display, and the field will revert back to its original state.
- **Phone Number:** Enter the area code and phone number. Do not use any punctuation marks.
 - **Service Date:** Enter the date of service in MMDDYYYY format. This will default to today's date.
 - **Patient Type:** Enter the patient's Stay Type.
 - **Subtype:** Enter the patient's Sub Type. A lookup window is available.
 - **Service Code:** Enter the service code that best describes the patient's visit. To display a listing of service codes select the magnifying glass or enter a question mark (?) to see the listing. Select the correct service code.

NOTE: A temporary patient registration should mainly be used for outpatients that need a visit number. Inpatients should be entered by selecting the appropriate profile listing and creating a visit.

- **Contract Billing Code:** For contract accounts, select the Contract Billing Code that represents the company that has a contract with the facility. A lookup window is available.
- **Financial Class:** Enter the Financial Class Code that represents the patient's primary insurance carrier.
- **Report Location:** This field is used for automatic report distribution. Once a report location is assigned, it will display on the Ancillary Patient Functions screen, field E, and be utilized in Ancillary Report Distribution. A lookup window is available.
- **Social Security No.:** Enter the patient's Social Security Number. Do not use any punctuation marks.
- **Film Number:** Enter the patient's Film Number. Do not use any punctuation marks.

NOTE: If the Radiology department is tracking by MR# rather than Film#, the MR# will pull to this field. See the Radiology table, field 1, in the Business Office Tables.

- **MR Number:** Enter a Medical Record number. For Medical Record numbers that are assigned automatically by the system, select the **NEW** button or enter a question mark (?). A message will appear that states "About to assign a new Med Rec Number. Do you wish to continue?" If **Yes** is selected, the system will assign the next available medical record number loaded in AHIS page 5, Automatic MR#. If **No** is selected, the cursor will remain in the medical record number field.
- **Initials:** The initials of the person entering the temporary registration information should be entered. If utilizing employee sign on, the initials will pull automatically for that employee.
- **Guarantor Name:** Enter the Guarantor's name in Last, First, Middle name order. Do not use any punctuation.
- **Guarantor Address 1:** Enter the Guarantor's street address.
- **Guarantor Address 2:** Enter the Guarantor's apartment number or P.O. Box.
- **Guarantor City:** Enter the Guarantor's city.
- **Guarantor State/Zip:** Enter the Guarantor's state and five or 9-digit zip code.
- **Guarantor SSN:** Enter the Guarantor's Social Security Number. Do not use any punctuation marks.
- **Restrict Payer Disclosure:** If selected, the Fin Class field will auto populate **P** for Private Pay. The insurance coverages listed will no longer be active for selection.
- **Select insurance coverage for this visit:** Select each insurance that will apply to this visit. Insurance information would only be listed if the Temporary Registration is created using an existing profile.

NOTE: For insurances selected from the Person Profile the insurance company's Name, Address-1, Address-2, City, State and Zip Code will copy from the Person Profile instead of the Insurance Company Table.

Select **Complete** once the patient's information is entered.

NOTE: Facilities have the option to have the Ebola Virus Initial Screening questionnaire display once **Complete** has been selected. Please refer to the [Person Profile and Registration](#) user guide for more information.

Select **Delete** to delete the temporary account entry. The cursor will return to the account number field on the Hospital Base Menu.

NOTE: This registration is not considered complete and must be completed through the Registration and ADT screen as soon as possible.

Select **Web Client > System Menu > Hospital Base Menu > Temporary Account Registration > 1-Enter > Select search icon > Search by Name > Select the Patient > Complete**

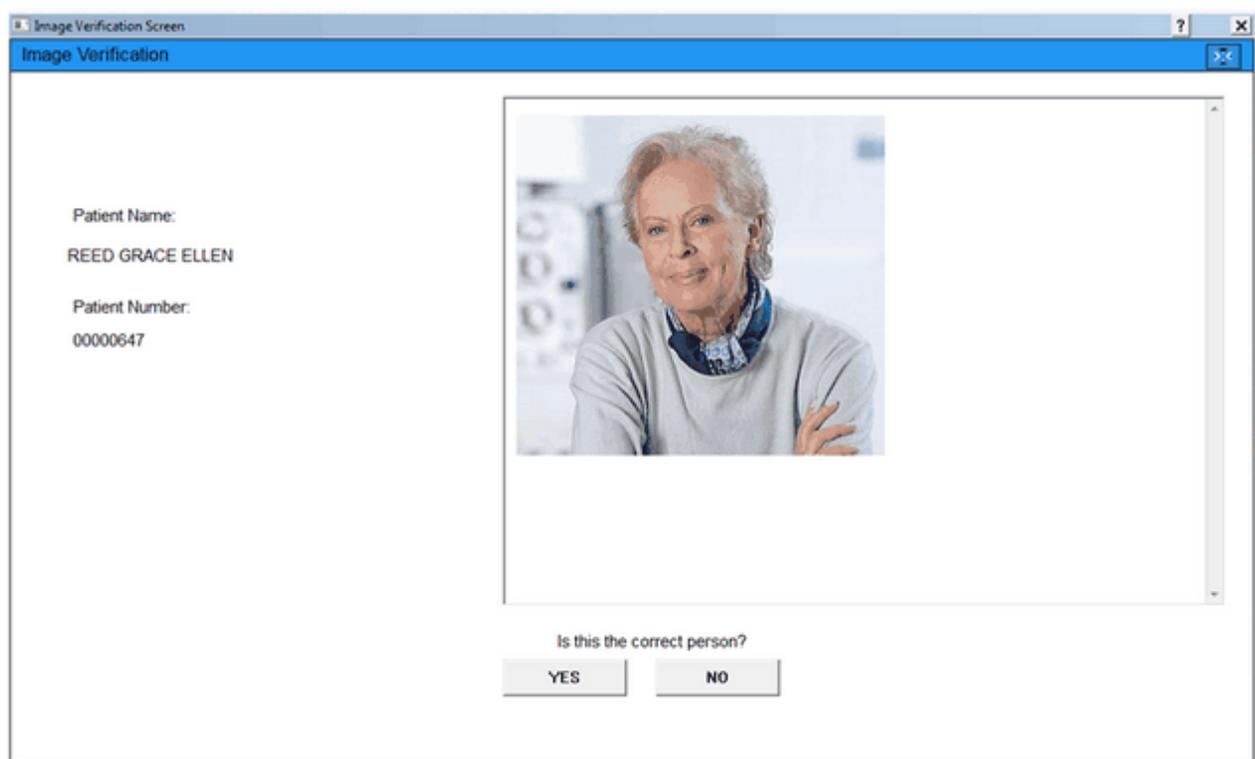


Image Verification Screen

- If Photo Verification is being used, the Image Verification screen will display. Photo Verification allows users the opportunity to verify a patient's identity by utilizing a previously scanned Chartlink Photo image. The system will prompt "Is this the correct person?" Select **Yes** if the image is correct and the Visit Information screen will display. Select **No** if the image is not correct and the system will return to the Person Profile.

NOTE: Table maintenance must be completed to utilize Photo Verification at registration. An image title "Chartlink Photo" must be set up. To turn on the option access the **Pt. Main** table, select **Registration Control Table**. The field "Prompt for photo verification when Create New Visit" must be selected. This task will be performed by the financial software CPSI staff.

- Once the patient's identity has been confirmed, the Temporary Account has been created.

NOTE: When creating a temporary visit, if the patient has an existing visit with the same expect date or admit date, the system will prompt "Patient already has account XXXXXXXXXXXX for today's date of service. Continue?" Answer **Yes** to continue and create the temporary visit. Answer **No** to not create a temporary visit. Once the prompt is answered **No**, the system will go back to the Hospital Base Menu.

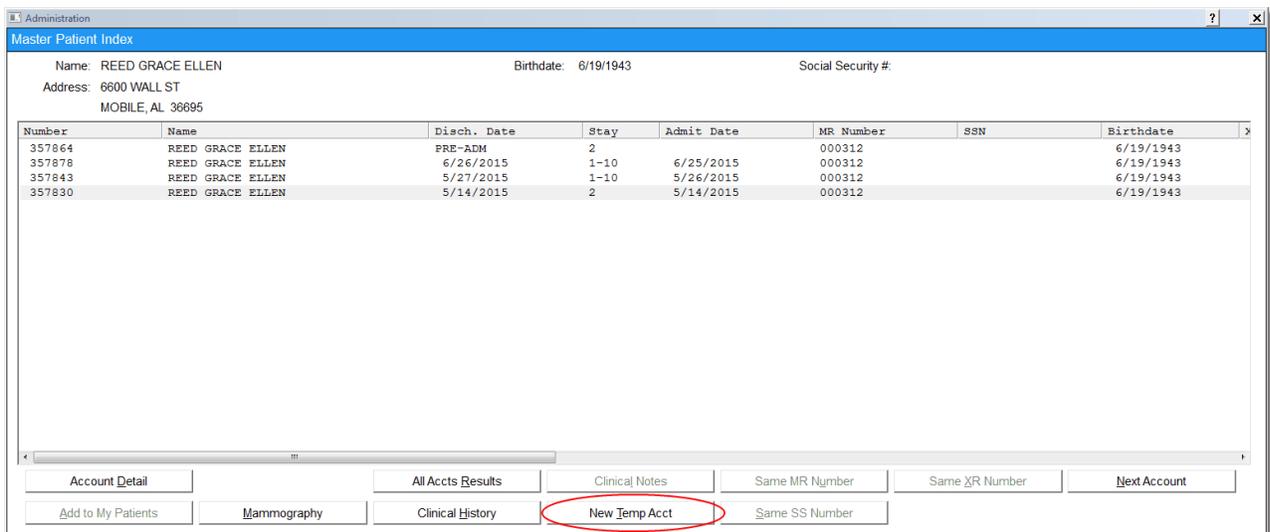
NOTE: Follow hospital registration policies regarding the change of information in any displayed fields.

- The Patient Functions menu will now display, allowing orders to be placed on this account. This account will be flagged **Temporary Account, registration needs to be completed!**

3.3 From Master Patient Index

Temporary Registration may still be performed via the Master Patient Index. When searching for a patient and it has been found as previously having an index file, select the patient name and select **New Temp Account** at the bottom of the window.

Select **Web Client > System Menu > Hospital Base Menu > Patient List > Master Patient Index > Select Patient**



Master Patient Index

- Follow the instructions to complete the temporary registration as listed in the previous section, [From Hospital Base Menu](#)

- If it is found that the patient does not have a Master Patient Index file, select **First Time Temp** from the Patient List search window. This function will create a person profile for this patient.

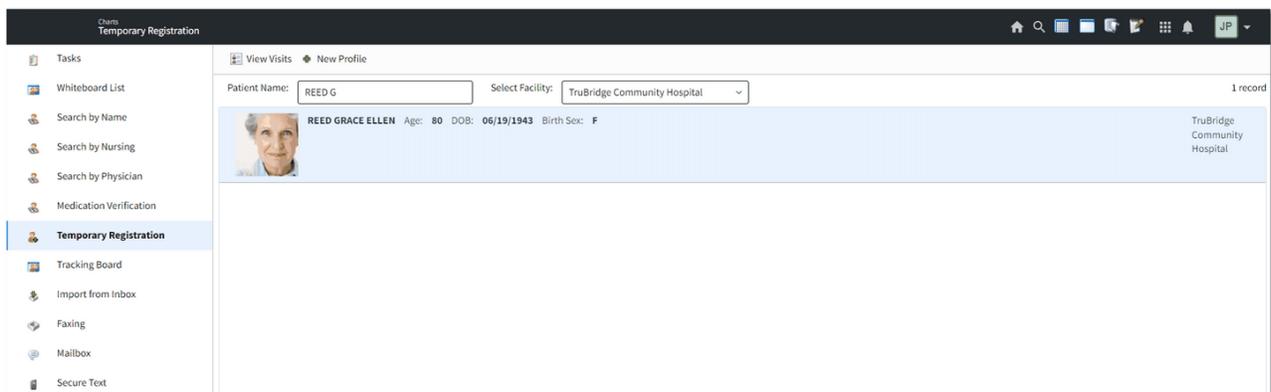
3.4 From Charts

The Temporary Registration feature within Charts gives authorized staff members the capability of creating a new Patient Profile and new visit, or a new visit from an existing profile.

Policy and procedures will need to be established to determine how and when this option should be used.

To begin, enter the Patient Name to search the Profile Listings for an existing profile. If the patient needing to be registered displays, select **View Visits** or double-click on the patient's name. If the patient has never been to the facility before, select **New Profile**.

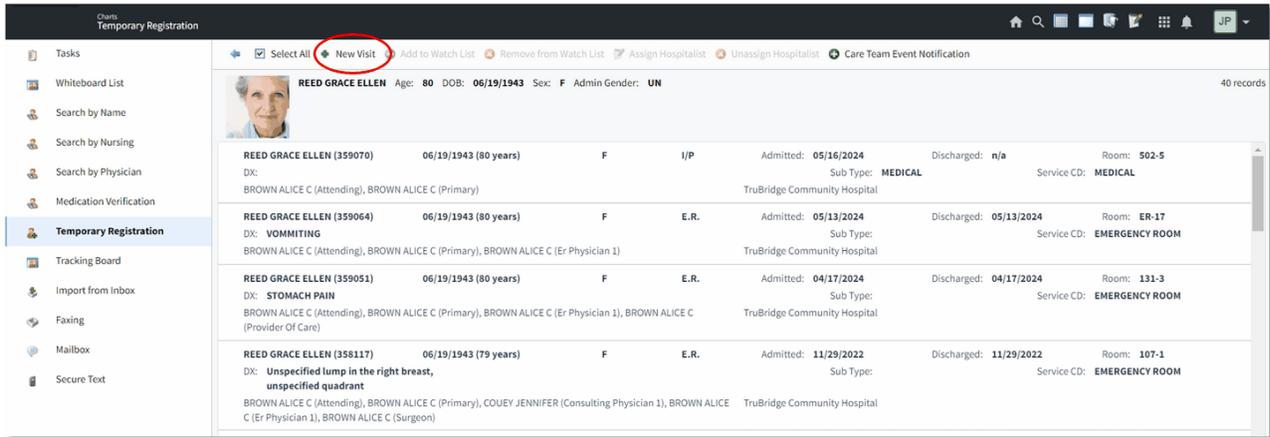
Select **Web Client > Charts > Temporary Registration**



Charts - Temporary Registration

Select **New Visit** to begin creating the temporary visit.

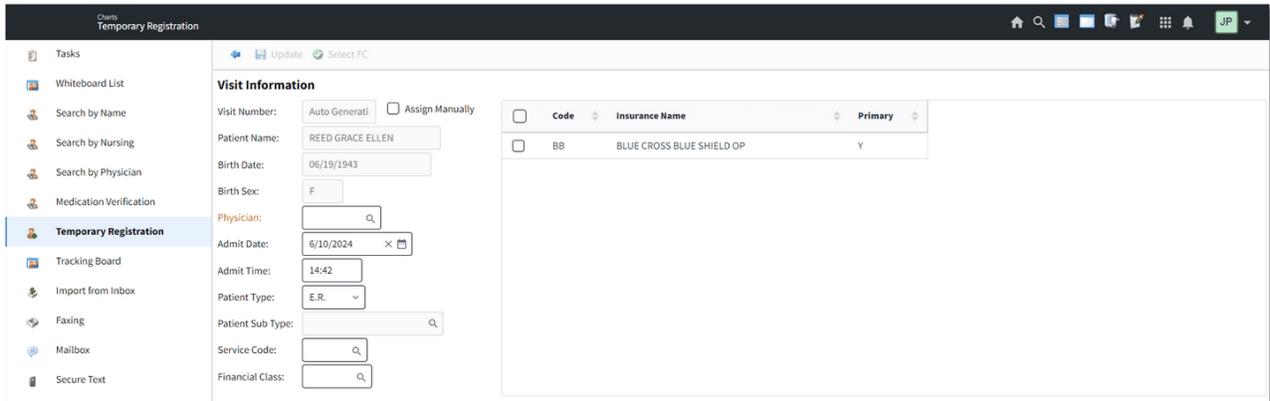
Select Web Client > Charts > Temporary Registration > View Visits



Charts - Temporary Registration

The Visit Information screen will then display. This screen will allow information that is related to the visit to be entered.

Select Web Client > Charts > Temporary Registration > View Visits > New Visit



Charts - Temporary Registration

Below is an explanation of each field:

- **Visit Number:** The visit number will default to Auto Generating. Selecting the Assign Manually check-box to the right of the Visit Number field will make the Visit Number field accessible so that the visit number may be manually assigned.
- **Patient Name:** This is the patient's name as it appears on the Patient Profile screen.
- **Birth Date:** This is the patient's date of birth as it appears on the Patient Profile screen.
- **Birth Sex:** This is the patient's birth gender as it appears on the Patient Profile screen.

- **Physician:** The user must select the attending physician from the physician look-up. If a physician is not selected, the prompt "Can't save. Please enter a valid Physician number" will display.
- **Admit Date:** This field will automatically pull the current date as the admit date when the temporary registration is created. This field may be changed if needed.
- **Admit Time:** This field will automatically pull the current time as the admit time when the temporary registration is created. This field may be changed if needed.
- **Patient Type:** This field will default to ER, but may be changed from the drop-down list.
- **Patient Sub Type:** Select the sub type from the drop-down list, if applicable.
- **Service Code:** The service code field may be edited by entering the desired service code or selecting the magnifying glass icon to open a look-up menu for service codes. Double-click the desired service code to add it to the Visit Information screen.
- **Financial Class:** Select the appropriate insurance coverage(s) from the insurance list that displays on the right, then choose **Select FC** from the action bar. Multiple insurance coverages may be selected all at once by holding down the **<Ctrl>** key on the keyboard while selecting with the mouse. Choose **Select FC**, or select each insurance coverage separately and choose **Select FC** after each selection. If the desired insurance coverage is not listed or there are not any insurance coverages listed, select the magnifying glass icon to access the Insurance List screen. Highlight the desired insurance coverage(s) and select **OK**.

Select **Update** once all of the information has been gathered. The system will then create a Temporary Visit and the Guarantor listed on the patient's profile will copy over as the Guarantor for the visit.

NOTE: All visits created, whether from a new Patient Profile or an existing Patient Profile, will be a Temporary Registration and must be completed by Registration or Business Office staff. Any incomplete registrations will pull to the Temporary Registration Reports, the Exceptions Report or the Incomplete Register report, until a full registration has been completed on the patient.

3.5 From Tracking Board

To complete a temporary registration from the Tracking Board, double-click on a room number with no assigned patient.

NOTE: Policy and procedures will need to be established to determine how and when this option should be used.

Select Web Client > Charts > Tracking Board

The screenshot shows the THRIVE Charts Tracking Board interface. The left sidebar contains navigation options like 'Tasks', 'Whiteboard List', and 'Tracking Board'. The main area displays a table of patient data under the 'Inpatient Nursing' filter. A red box highlights the room number '006-5' in the 'Room #' column of the table.

Room #	Full Name	Visit Number	Notifications	Medical Record Number	Attending	Status
00613	STEWART MARY	44440002		000225	Allison Mary D	
00614	JOHNSON MARK	44440003		000226	ALLISON MARGARET	
006-9	SMITH RONALD	44440001		000223	CRABTREE JASON C	
00615						
00610	ROTH OLIVER	358298		000442	BROWN ALICE C	Ready for Provider
00611						
006-6	PALMER MARY E	358056		000248	BROWN ALICE C	Radiology
006-8						
006-7	WHITE JACK	44440009		000232	BAYLOR ALLISON	
00612						
006-2	SMITH ELLA KATHERINE	358486		000265	BAXTER JAMES NBA	
006-5						
006-1						
006-4	JOHNSON JILLIAN PETERS	357586		000287	BROWN ALICE C	
006-3	WALTON KYLE	357813		000281	BAXTER JAMES NBA	

Tracking Board

The process for completing the temporary registration will follow the same steps as when creating one from [Charts](#) 10.