Patient / Client Status

Patient/Client status always defaults to ACTIVE status. The patient status ensures each unique patient is associated with only one medical record within the Community EMR.

PATIENT STATUS DEFINITIONS

To determine the patient status on Primary Care Providers panel, patient status options are:

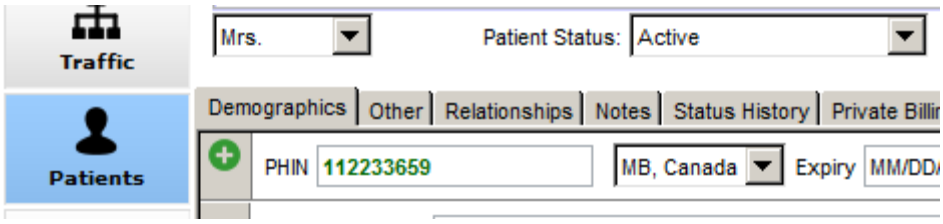
PATIENT STATUS	DEFINITION
Active **Default status**	A patient who meets criteria for being considered a current patient of the clinic
Inactive	A patient who has exceeded the 36 month time-since-last appointment parameter and is not active in ANY Community EMR site.
Deceased	Patient is deceased

Note: *For all active clients receiving Primary Care Services ensure the* ***Office Provider, Office, Provider Enrollment*** *and* ***Client Services band*** *(if applicable) are populated. See PCOG# 10 for more* details.

ACTIVE PATIENT STATUS

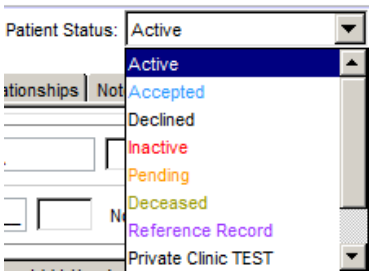
To change a patient status, the Patient section will need to be updated to accurately reflect the required Patient/Client status.

This information is maintained in the **Patient section** in the **Demographics** tab.



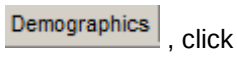
Select the drop down arrow by the **Patient Status** and update the patient status accordingly.

Note: *The color of the new status determines the color of the Patient Tag Line.*

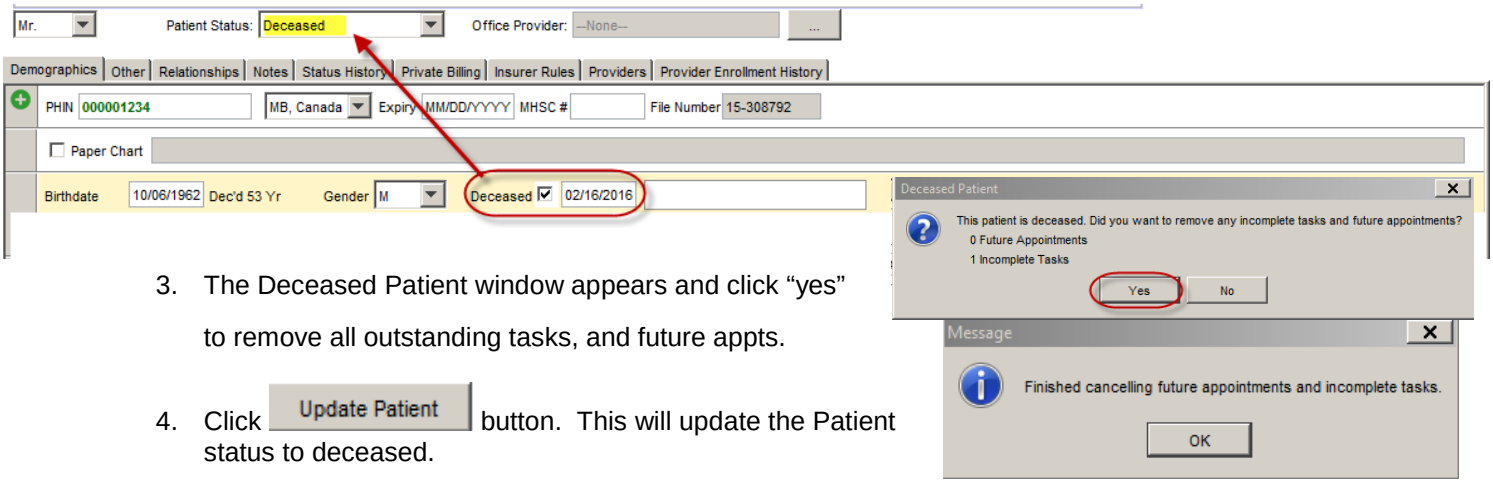


DECEASED PATIENT STATUS

1. From the **Patient** section 

within the **Demographics** tab 

, click the deceased check box indicator.
2. Enter the date of death.



3. The Deceased Patient window appears and click "yes" to remove all outstanding tasks, and future appts.

4. Click

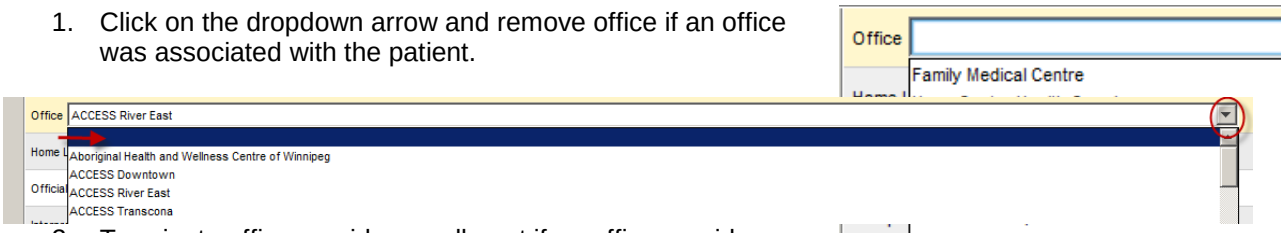
button. This will update the Patient status to deceased.

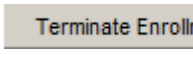
5. Reconcile or delete any outstanding requisitions or referrals with F7.

At the same time as marking the client deceased ensure to update these fields.

<u>Remove the Office and Office Provider fields</u>

1. Click on the dropdown arrow and remove office if an office was associated with the patient.



2. Terminate office provider enrollment if an office provider was enrolled. Click on the Terminate Enrollment button 

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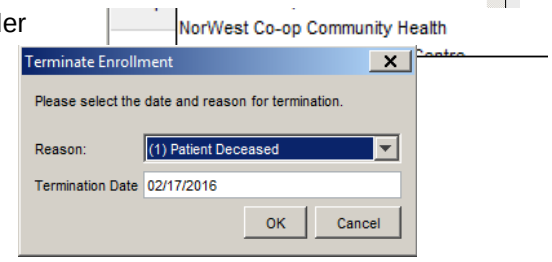
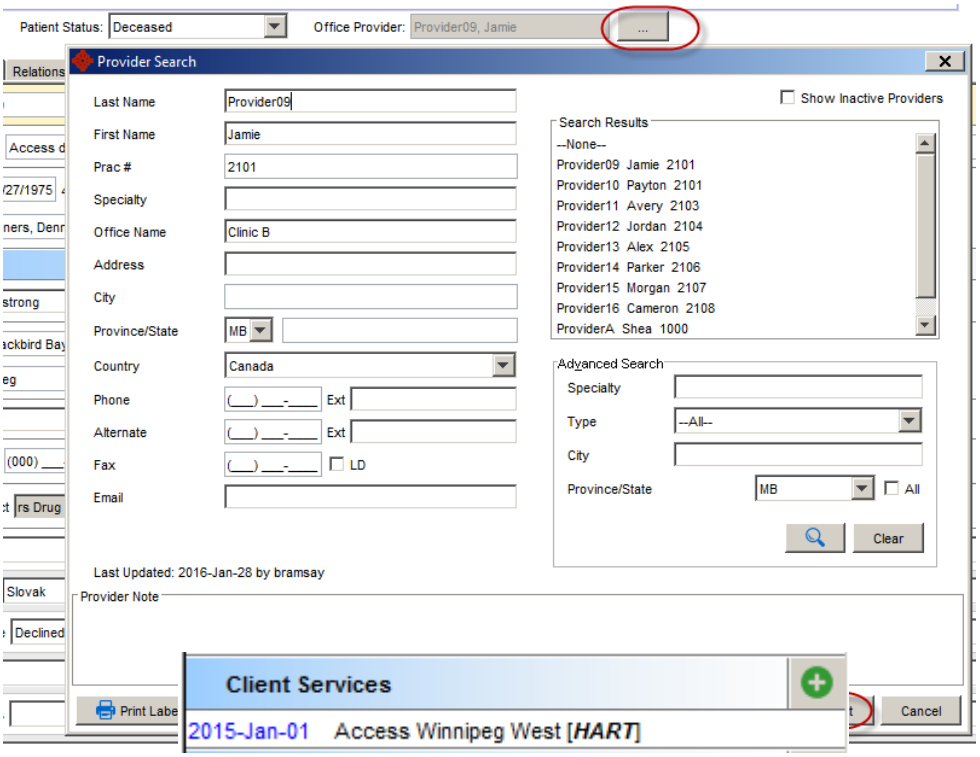


3. Within the Terminate Enrollment window indicate reason and date of termination and press "ok".

4. Under the Office Provider field within the **Patient Demographics** tab click the ellipse button

5. Click the Clear button at the bottom of Provider Search window.

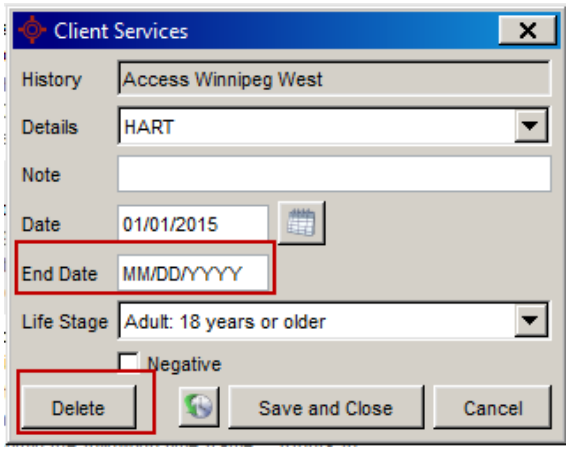
6. Click the Select button. Now the Office Provider field is blank and the patient is no longer associated with a provider.



Update the associated client services band items

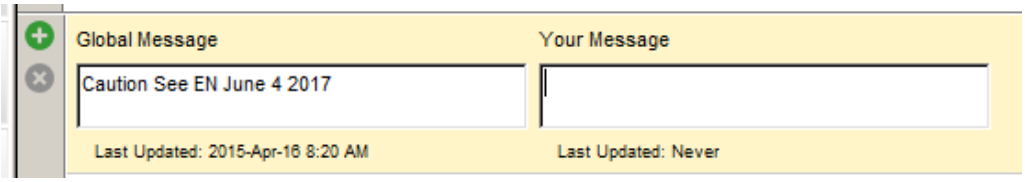
1. Open the EMR section
2. Locate the client services band
3. Double click to open the current band items
4. Add the **End date** to the history as per site practice.

***Caution**:* Please check with management prior to completing this step to ensure correct entry is made.



Delete any global message, your message or role based messages associated with the client from the Patient section

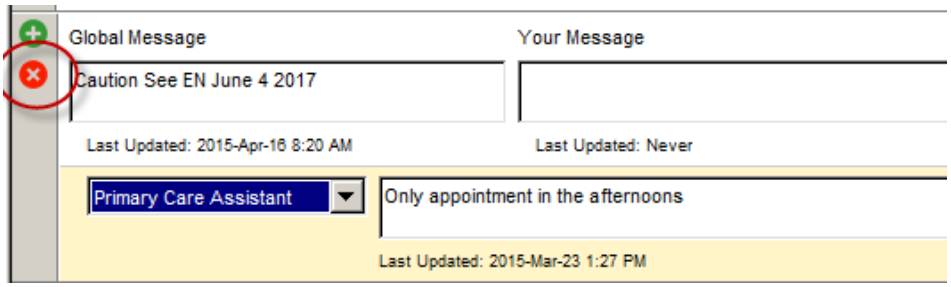
1. From the **Patient** section Patients within the **Demographics** tab Demographics
2. Select the Other Tab
3. Locate the Global Messages, your message remove the



content within the message

4. If a role based message- highlight message to be deleted

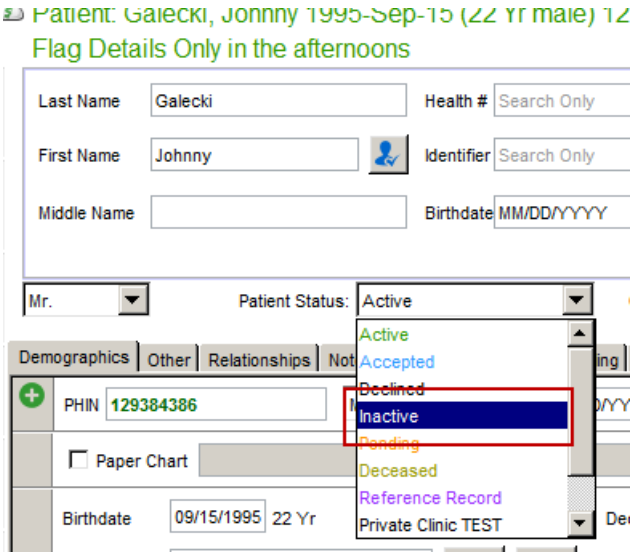
5. Select the option to delete.



INACTIVE PATIENT STATUS

1. From the **Patient** section within the **Demographics** tab

2. From the Patient Status drop down menu select the **Inactive** status.



Note: *Ensure the client is not receiving any additional services in the Community EMR prior to marking them inactive. Checking Client services band or F8 can provide the list of other active sites.*

3. Review any outstanding tasks associated with the client in F7. Deleting or completing as necessary.

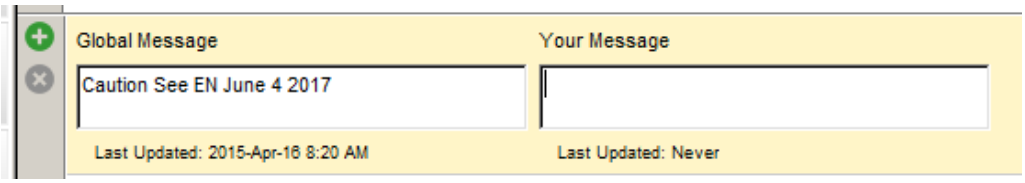
4. Reconcile or delete any outstanding requisitions or referrals with F7.

5. Delete any global message, your message or role based messages associated with the client from the Patient section

   a. From the **Patient** section within the **Demographics** tab

   b. Select the Other Tab

   c. Locate the Global Messages, your message remove the content within the message



   d. If a role based message- highlight message to be deleted

   e. Select the option to delete.