

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:

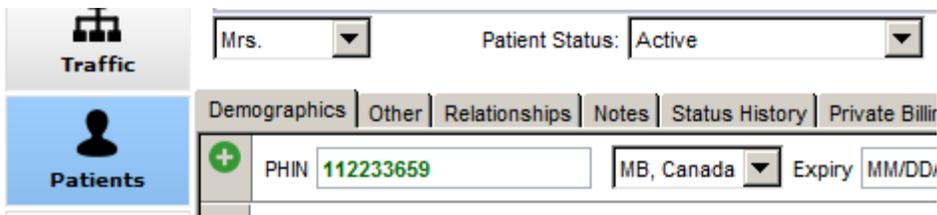
PATIENT STATUS	DEFINITION
Active Default status	A patient who meets criteria for being considered a current patient of the clinic
Inactive	A patient who has exceeded the 36 month time-since-last appointment parameter and is not active in ANY Community EMR site.
Deceased	Patient is deceased

 **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.

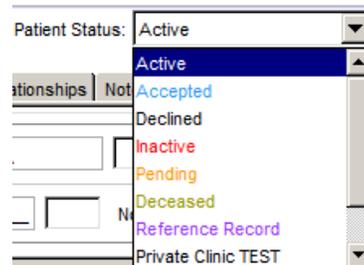
This information is maintained in the **Patient section** in the **Demographics** tab.



The screenshot shows a patient record interface. At the top, there is a 'Traffic' button and a 'Patients' button. The 'Patients' button is selected. Below it, there are tabs for 'Demographics', 'Other', 'Relationships', 'Notes', 'Status History', and 'Private Billing'. The 'Demographics' tab is active. In the 'Demographics' section, there is a dropdown menu for 'Mrs.' and a dropdown menu for 'Patient Status' which is currently set to 'Active'. Below this, there is a green plus sign icon, a text field for 'PHIN' containing '112233659', a dropdown menu for 'MB, Canada', and a text field for 'Expiry' with the format 'MM/DD/YY'.

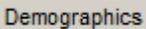
Select the drop down arrow by the **Patient Status** and update the patient status accordingly.

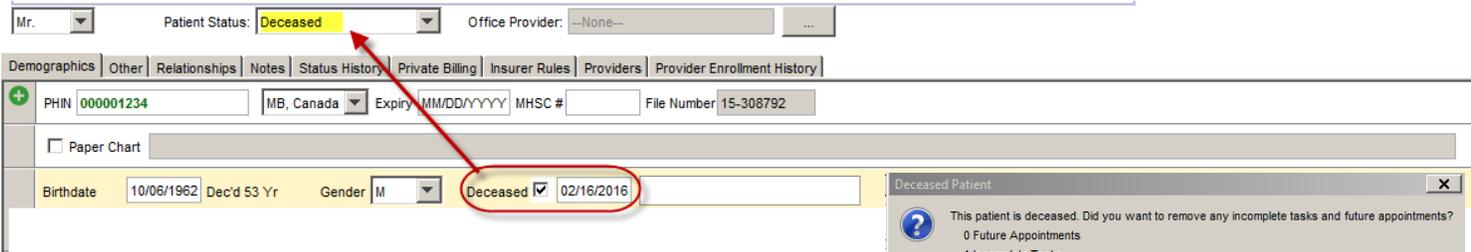
 **Note:** The color of the new status determines the color of the Patient Tag Line.



The screenshot shows the 'Patient Status' dropdown menu open. The current selection is 'Active'. The dropdown menu lists the following options: 'Active' (highlighted in blue), 'Accepted' (blue), 'Declined' (black), 'Inactive' (red), 'Pending' (orange), 'Deceased' (green), 'Reference Record' (purple), and 'Private Clinic TEST' (black).

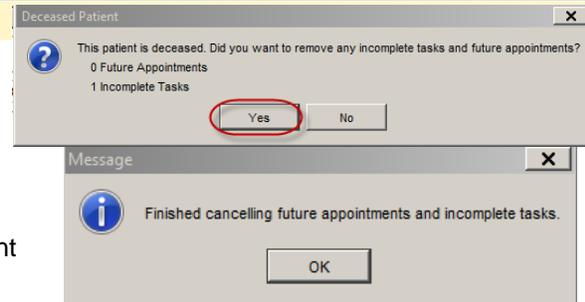
DECEASED PATIENT STATUS

1. From the **Patient** section  within the **Demographics** tab  , click the deceased check box indicator.
2. Enter the date of death.



The screenshot shows the patient demographics form. At the top, the 'Patient Status' dropdown is set to 'Deceased'. Below this, the 'Deceased' checkbox is checked, and the date '02/16/2016' is entered in the adjacent field. A red arrow points from the 'Deceased' dropdown to the 'Deceased' checkbox. Other fields include PHIN (000001234), Birthdate (10/06/1962), and Gender (M).

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.

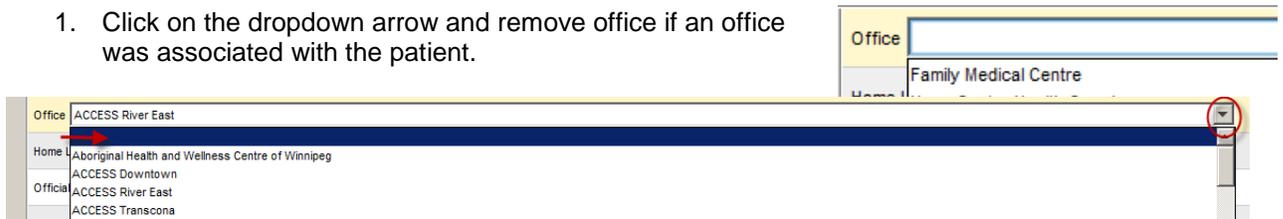


The 'Deceased Patient' dialog box asks: 'This patient is deceased. Did you want to remove any incomplete tasks and future appointments?' It shows '0 Future Appointments' and '1 Incomplete Tasks'. The 'Yes' button is circled in red. Below it, a 'Message' dialog box states: 'Finished cancelling future appointments and incomplete tasks.' with an 'OK' button.

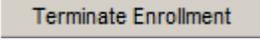
At the same time as marking the client deceased ensure to update these fields.

Remove the Office and Office Provider fields

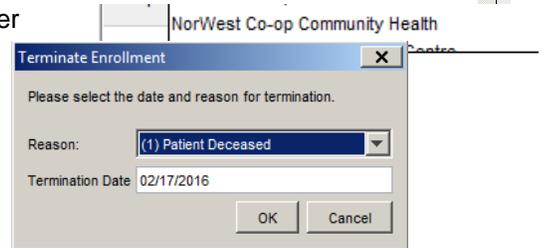
1. Click on the dropdown arrow and remove office if an office was associated with the patient.



The screenshot shows a dropdown menu for 'Office'. The current selection is 'ACCESS River East'. A red arrow points to the dropdown arrow on the right side of the menu. Other options include 'Aboriginal Health and Wellness Centre of Winnipeg', 'ACCESS Downtown', 'ACCESS River East', and 'ACCESS Transcona'.

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

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



The 'Terminate Enrollment' dialog box prompts the user to 'Please select the date and reason for termination.' The 'Reason' dropdown is set to '(1) Patient Deceased' and the 'Termination Date' is '02/17/2016'. 'OK' and 'Cancel' buttons are at the bottom.

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

Patient Status: Deceased Office Provider: Provider09, Jamie

Provider Search

Last Name: Provider09
 First Name: Jamie
 Prac #: 2101
 Specialty:
 Office Name: Clinic B
 Address:
 City:
 Province/State: MB
 Country: Canada
 Phone: () - - Ext:
 Alternate: () - - Ext:
 Fax: () - - LD
 Email:

Search Results

Provider09 Jamie 2101
 Provider10 Payton 2101
 Provider11 Avery 2103
 Provider12 Jordan 2104
 Provider13 Alex 2105
 Provider14 Parker 2106
 Provider15 Morgan 2107
 Provider16 Cameron 2108
 ProviderA Shea 1000

Client Services

2015-Jan-01 Access Winnipeg West [HART]

- Click the **Clear** button at the bottom of Provider Search window.

- 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

- Open the EMR section
- Locate the client services band
- Double click to open the current band items
- 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.

Client Services

History: Access Winnipeg West
 Details: HART
 Note:
 Date: 01/01/2015
 End Date: MM/DD/YYYY
 Life Stage: Adult: 18 years or older
 Negative

Delete Save and Close Cancel

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

- From the **Patient** section **Patients** within the **Demographics** tab **Demographics**
- Select the Other Tab
- Locate the Global Messages, your message remove the

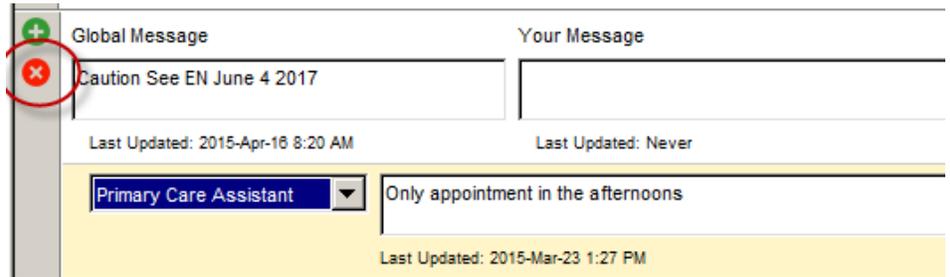
Global Message Your Message

Caution See EN June 4 2017

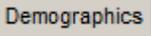
Last Updated: 2015-Apr-16 8:20 AM Last Updated: Never

content within the message

4. If a role based message- highlight message to be deleted
5. Select the  option to delete.



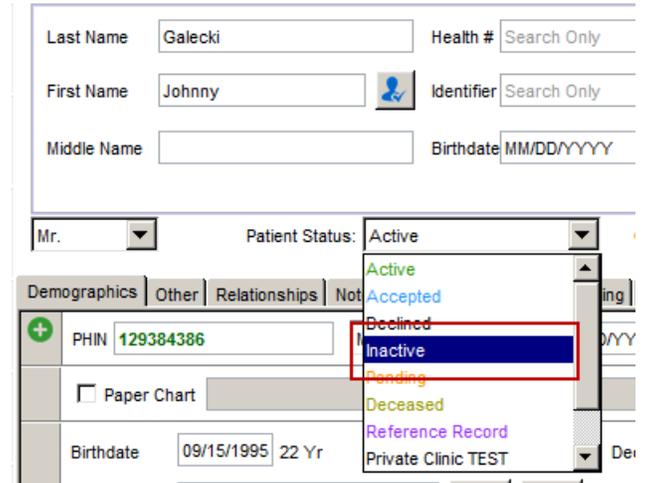
INACTIVE PATIENT STATUS

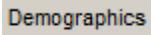
1. From the **Patient** section  within the **Demographics** tab 
2. From the Patient Status drop down menu select the **Inactive** status.

 **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

 **Patient: Galecki, Jonhny 1995-Sep-15 (22 Yr male) 12**
Flag Details Only in the afternoons



- 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.

