

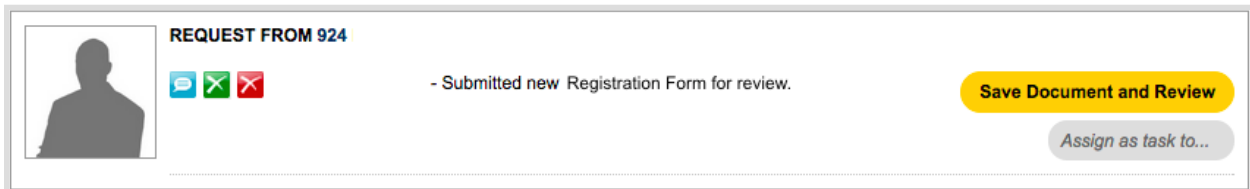
Process Registration Forms

PURPOSE

1. Complete patient registration process.
2. Move requests quickly and efficiently through the flow of the clinic.
3. Create continuity with document labeling and processing.

PROCEDURE

Forms will always show “Save Document and Review” as appears below:



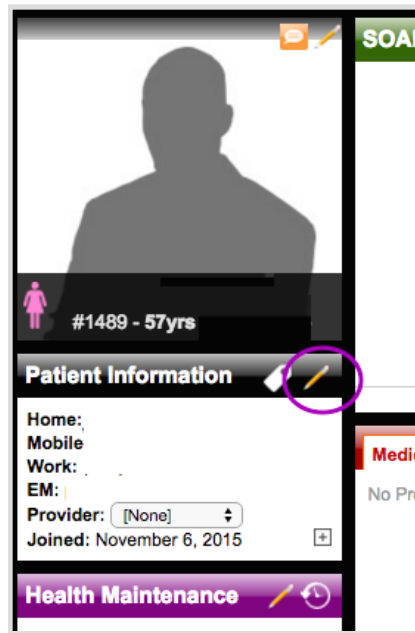
The screenshot shows a user interface for a registration form. On the left is a placeholder for a patient's profile picture. To its right, the text 'REQUEST FROM 924' is displayed. Below this, there are three small status icons: a blue speech bubble, a green checkmark, and a red X. Further right, a message states '- Submitted new Registration Form for review.' On the far right, there are two buttons: a prominent yellow button labeled 'Save Document and Review' and a smaller, greyed-out button labeled 'Assign as task to...'.


1. In the PPQ, click on the submitted Registration form and click “Save Document and Review.”
2. Select designated admin staff to review document.
3. Title: leave as it defaults.
4. Document Type: consent.
5. Patient Notification: leave to default (notification not needed).
6. Show in patient’s portal.
7. Review address provided. Take note if patient is a New York resident. If patient is a California resident, the county must be listed.

Note: If no county listed, use Google to determine the county with the ZIP code. In the Notes/Key Results box, enter the county information.

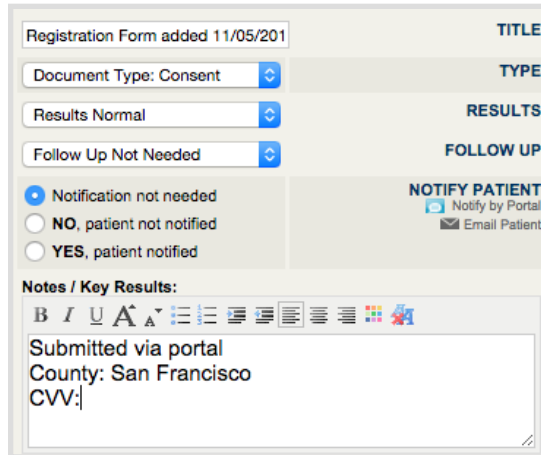
8. Save, unreviewed.
9. Go to the patient’s chart.

10. Click the pencil in the black Patient Information bar:



11. In the Basic Data tab, correct any capitalization or punctuation errors, delete duplicate phone numbers and email addresses, and add appropriate notices:
 - a. If a nickname is listed, notice should be: "Goes by [nickname]"; notice color: blue.
 - b. If patient is a resident of New York, notice should be: "NY Resident"; notice color: red.
12. In the Shipping Address tab, correct any capitalization or punctuation errors. If patient is a California resident, add the county in the Home Country field.
13. In the Billing Info tab, checkmark "billing address is different from primary home address." If an address is shown there, leave this box checked. If no address is shown, you can un-check the box again.
14. Click "edit patient."
15. Click the the pencil in the blue Admin Notes bar.
16. Cut the patient's response about how they heard about our clinic. Click the disk to save.
17. Click the pencil in the blue Need to Know bar.
18. Beneath the emergency contact info and above the line, paste the patient's response about how they heard about our clinic. Click the disk to save.
19. In the PPQ, click  to archive the message.
20. Designated admin staff will see filed form in the Uploaded Results tab of their task list and click on the patient's name to open it within the chart.

21. In the Notes/Key Results box, type “CVV:” and then save, unreviewed:



Registration Form added 11/05/2011

Document Type: Consent

Results Normal

Follow Up Not Needed

☒ Notification not needed
☐ NO, patient not notified
☐ YES, patient notified

NOTIFY PATIENT
☐ Notify by Portal
☐ Email Patient

Notes / Key Results:

Submitted via portal
 County: San Francisco
 CVV:

22. In the black Patient Information box, select the appropriate provider.
23. Click the tag in the black Patient Information bar and checkmark the Patient Guide & Informed Consent for the appropriate clinician, then click “save and close.”
24. Also review the patient’s birthdate to screen for potential mistakes in the year (i.e., if they entered their birth year as the current year).
25. Send a Secure Message to the patient with a warm welcome message letting them know their assigned provider, requesting the security code for their credit card, and requesting the correct birth year, if necessary. (Reference **Send Messages**)
26. Once response is received from patient with the requested information, designated admin staff enters the information into the Notes/Key Results box of the registration form.
27. Select the next designated admin staff to review document (billing).
28. Save, unreviewed.
29. Designated admin staff enters credit card information and shipping address into QuickBooks and selects “done, file document” to file the registration form in the chart.