

Patient/Client Status

Last updated: April 20, 2022

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.

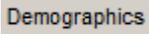
The screenshot shows a patient record interface. On the left, there are two buttons: 'Traffic' (with a building icon) and 'Patients' (with a person icon). The 'Patients' button is highlighted in blue. The main form area has a 'Demographics' tab selected, with other tabs for 'Other', 'Relationships', 'Notes', 'Status History', and 'Private Billing'. The 'Patient Status' dropdown menu is open, showing 'Active' as the selected option. Below the status dropdown, there are fields for 'PHIN' (112233659), 'MB, Canada' (with a dropdown arrow), and 'Expiry' (MM/DD).

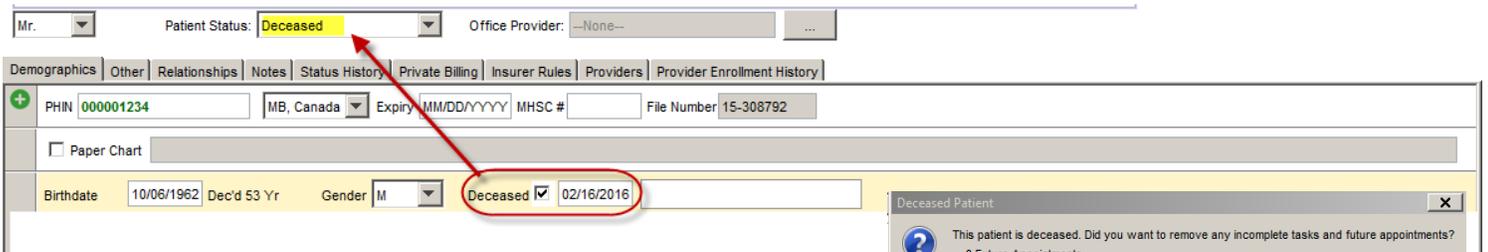
Select the drop down arrow by the **Patient Status** and update the patient status accordingly.

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

A close-up of the 'Patient Status' dropdown menu. The menu is open, showing a list of status options with corresponding color-coded text: 'Active' (blue), 'Accepted' (light blue), 'Declined' (grey), 'Inactive' (red), 'Pending' (orange), 'Deceased' (green), 'Reference Record' (purple), and 'Private Clinic TEST' (black). The 'Active' option is currently selected and highlighted in blue.

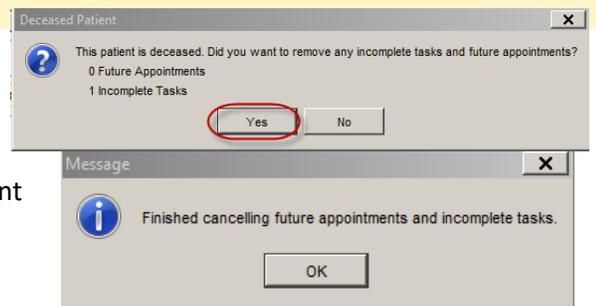
DECEASED PATIENT STATUS

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. The 'Patient Status' dropdown is set to 'Deceased'. 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. A red circle highlights the 'Deceased' checkbox and the date field.

3. The Deceased Patient window appears and click “yes” to remove all outstanding tasks, and future appts.
4. Click **Update Patient** button. This will update the Patient status to deceased.
5. Reconcile or delete any outstanding requisitions or referrals with F7.

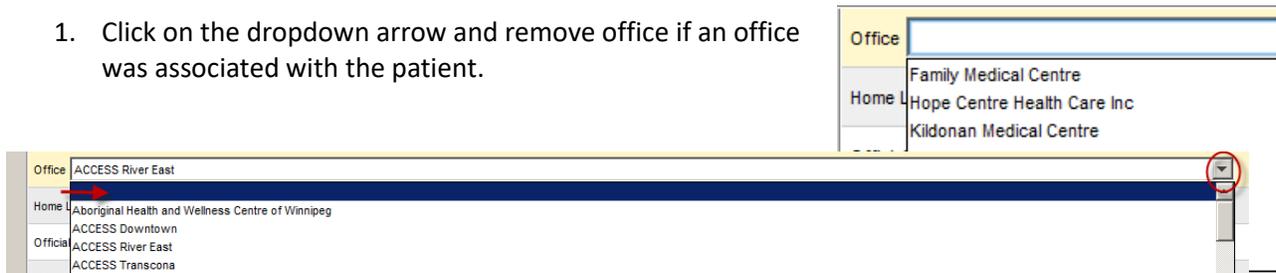


The screenshot shows two dialog boxes. The 'Deceased Patient' dialog asks: 'This patient is deceased. Did you want to remove any incomplete tasks and future appointments?' with '0 Future Appointments' and '1 Incomplete Tasks'. The 'Yes' button is circled in red. Below it is a 'Message' dialog that says: '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

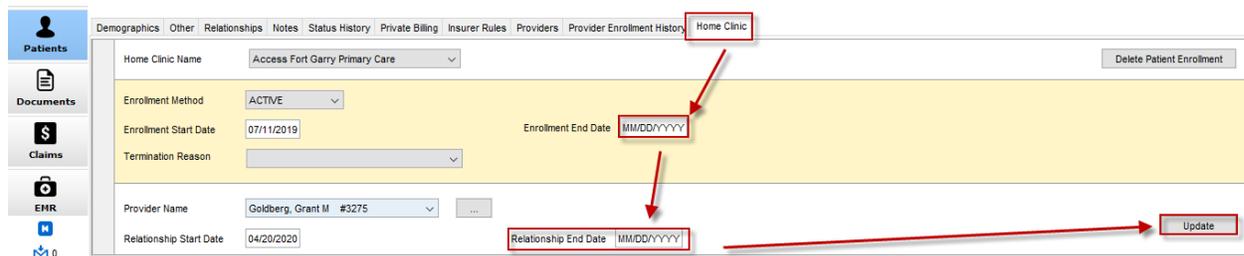
1. Click on the dropdown arrow and remove office if an office was associated with the patient.



The screenshot shows a dropdown menu for 'Office'. The current selection is 'ACCESS River East'. A red arrow points to the dropdown arrow. The menu lists several options: 'Family Medical Centre', 'Home L Hope Centre Health Care Inc', and 'Kildonan Medical Centre'.

Terminate Enrollment

1. Within the Home Clinic tab
 - a. Within the 'Enrollment End Date' field enter the end date
 - b. Within the 'Relationship End Date' field enter the end date
 - c. Select 'Update'



The screenshot shows the 'Home Clinic' tab. The 'Enrollment End Date' field is highlighted with a red box and a red arrow. The 'Relationship End Date' field is also highlighted with a red box and a red arrow. The 'Update' button is highlighted with a red box and a red arrow.

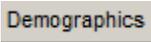
Update the associated client services band items

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

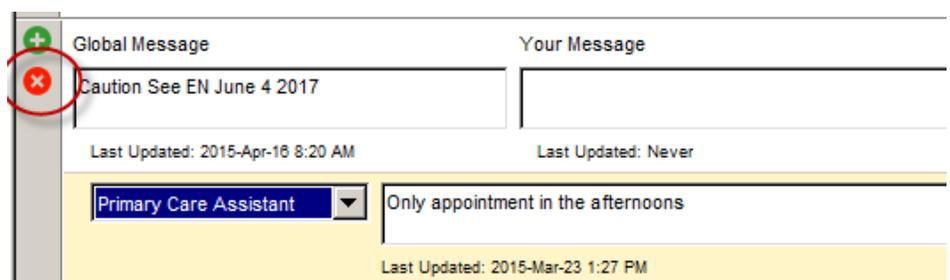
1. From the **Patient** section  within the **Demographics** tab 

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

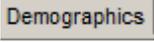
5. Select the  option to delete.



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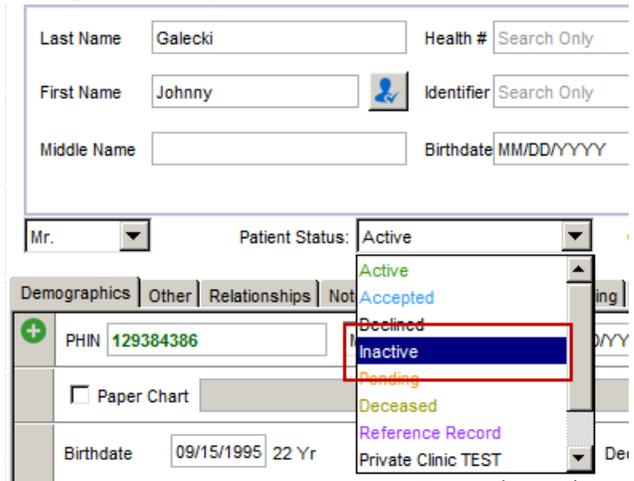
INACTIVE PATIENT STATUS

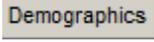
1. From the **Patient** section  within the **Demographics** tab 
2. From the Patient Status drop down menu select the **Inactive** status.

 **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, Jonnny 1995-Sep-15 (22 Yr male) 12**
Flag Details Only in the afternoons



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

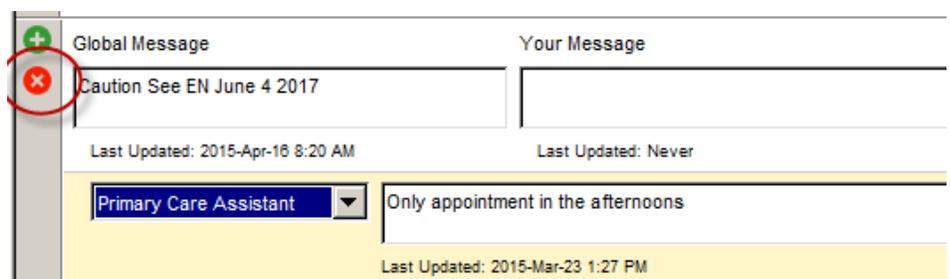
- b. Select the Other Tab

- 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.



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Remove the Office Provider field

There are two workflow options to remove the Office Provider field which are as follows:

Open the portal and remove the Office Provider

OR:

1. Send a future dated task **ONE MONTH LATER** (due to Primary Care Data Indicators) to remove the Office Provider by completing the following:
2. Under the Office Provider field within the **Patient Demographics** tab click the ellipse button

2. Click the  button at the bottom of Provider Search window.

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

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

Advanced Search

Specialty:
Type: --All--
City:
Province/State: MB All

Last Updated: 2016-Jan-28 by bramsay

Provider Note

Print Label Update Clear Lookup Select Cancel