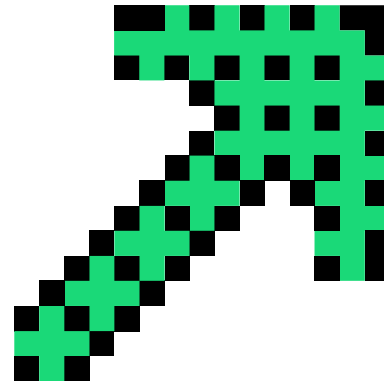


PNC

REGISTRATION INSTRUCTIONS



These instructions are intended to help clinical workers understand how to successfully add and edit clients into the PNC system. Please follow the instructions as best as you can in order to achieve accurate records.

1

GETTING STARTED

1. Login to PNC
2. Choose Open Registration
 - ▶ Check for client in system
 - ▶ If client is not there, choose *New Client* to begin registration

OpenRegistration v12.10

Client: Test, Patient 25 (Billy) - Client #: N0019400 1/1/2016 - M - 14 mos

Test, Patient 25 (Billy) - N0019400 - M

Registration

DOB: 1/1/2016 (14 mos)
Sex: Male
Race: Unknown
SSN: 555-12-3333
Marital: Single
First Known: 3/9/2017
Preferred Name: Billy
Patient Type: Community Member
Internal ID: 1953

Emergency Contact

Name: John Smith
Relationship: Father
Telephone: (435) 797-2222
Mobile Phone: 4355551212
Address: PO Box 101, 1259 S 100 E, Any City, UT 80000
Email: callme@yahoo.com

Name: Sally Smith
Relationship: Mother
Telephone: (435) 797-2222
Mobile Phone: 4355551212
Address: PO Box 101, 1259 S 100 E, Any City, UT 80000
Email: callme@yahoo.com

Eligibility Summary

Status: **Not Eligible**

Alerts

Agreement to Treatment: --unspecified--
Privacy Notice: --unspecified--

Address/Tel

Local Addr: PO Box 101, Any City, UT 80000
Local Tel: (435) 797-0000

Perm Addr: PO Box 101, Any City, UT 80000

Mobile: (435) 797-1000
Mobile Carrier: Unknown (Appt Reminder Disabled)
Email #1: www.callme@yahoo.com
Email #2: usu.edu

Pref Comm Method: Secure Message

Academic

Registration Comment

New Client

Please Note: All items with ** must be completed on all input fields.

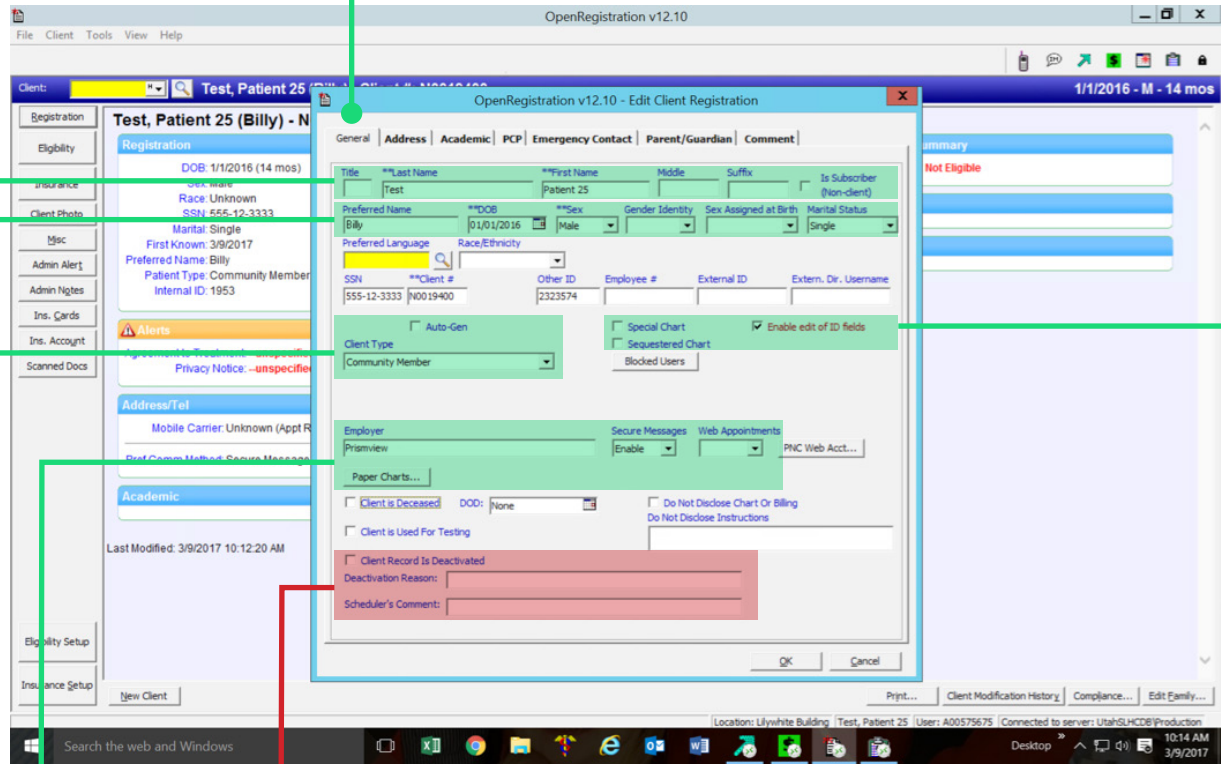
2

GENERAL TAB

- ▶ Last Name
- ▶ First Name
- ▶ Middle **Initial Only** (optional)
- ▶ Is Subscriber: **Ignore**

- ▶ Preferred Name (optional)
- ▶ DOB 01/01/2001 (must enter slashes)
- ▶ Sex
- ▶ Marital Status

- ▶ Auto Gen box **must** be clicked. This may refer to other id (old patient Chart)
- ▶ Client Type: (if applicable, typically community member)



▶ Deactivate: Do **NOT** use this field

- ▶ Paper Charts: 0
- ▶ Employer (optional)
- ▶ Web Appts: Open Communicator
- ▶ Secure Messages: Only works with open communicator

- ▶ Special Chart
- ▶ Sequestered Chart (for pending legal issues)
- ▶ Enable edit of ID Fields must be check in order to go back in and edit

3

ADDRESS TAB

- ▶ If you have the patients local address, enter it.
- ▶ Down arrow can choose permanent address.
- ▶ COMDDE uses local only.

- ▶ Please Note: Use USPS guidelines for entering an address. **ZERO PUNCTUATION** should be used (except after city)

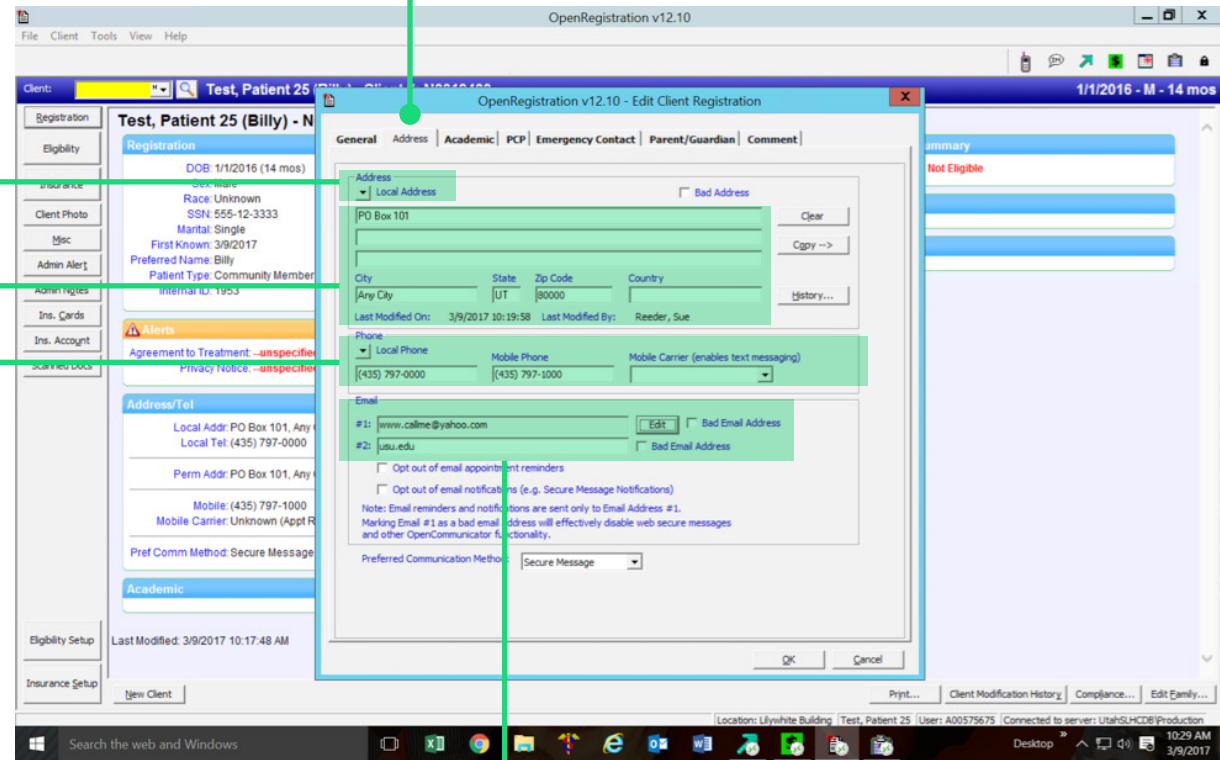
Example:
PO Box 123
Logan, UT 84322

- ▶ If you have both an address and PO Box, enter PO Box first with address underneath

Example:
PO Box 123
123 Meadow Drive
Logan, UT 84322

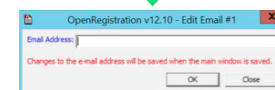
- ▶ State should be caps lock

Example:
UT



- ▶ Phone Number: Only enter the numbers. No special characters should be input by the user. Formatting will occur by the computer later.
- ▶ Do not put a 1 in front of a phone number

- ▶ Email #1: In order to add you must hit edit and then this warning sign will come up
- ▶ Email #2 does not require the same steps that email #1 does.



Academic Tab

- ▶ LEAVE BLANK

PCP Tab

- ▶ Only for internal staff members

The screenshot displays the 'OpenRegistration v12.10 - Edit Client Registration' window. The main window shows the 'Registration' tab for 'Test, Patient 25 (Billy) - N'. The 'Academic' and 'PCP' tabs are highlighted with green circles and lines pointing to the text boxes on the left. The 'Academic' tab is currently selected, and the 'PCP' tab is also visible. The form includes fields for Address, Phone, and Email. The 'Academic' tab is currently selected, and the 'PCP' tab is also visible. The form includes fields for Address, Phone, and Email. The 'Academic' tab is currently selected, and the 'PCP' tab is also visible. The form includes fields for Address, Phone, and Email.

Client: Test, Patient 25 (Billy) - N

Registration

DOB: 1/1/2016 (14 mos)
Sex: Male
Race: Unknown
SSN: 555-12-3333
Marital: Single
First Known: 3/9/2017
Preferred Name: Billy
Patient Type: Community Member
Internal ID: 1953

Alerts

Agreement to Treatment --unspecified
Privacy Notice --unspecified

Address/Tel

Local Addr: PO Box 101, Any
Local Tel: (435) 797-0000

Perm Addr: PO Box 101, Any

Mobile: (435) 797-1000
Mobile Carrier: Unknown (Appt R

Pref Comm Method: Secure Message

Academic

Address

Local Address Bad Address

PO Box 101 Clear

City State Zip Code Country History...

Any City UT 80000

Last Modified On: 3/9/2017 10:19:58 Last Modified By: Reeder, Sue

Phone

Local Phone Mobile Phone Mobile Carrier (enables text messaging)

(435) 797-0000 (435) 797-1000

Email

#1: www.callme@yahoo.com Edit Bad Email Address

#2: jsu.edu Bad Email Address

Opt out of email appointment reminders

Opt out of email notifications (e.g. Secure Message Notifications)

Note: Email reminders and notifications are sent only to Email Address #1. Marking Email #1 as a bad email address will effectively disable web secure messages and other OpenCommunicator functionality.

Preferred Communication Method: Secure Message

Client Modification History | Compliance... | Edit Family...

Location: Livshite Building | Test, Patient 25 | User: A00575675 | Connected to server: UtahSHODEProduction | 10:29 AM 3/9/2017

5

EMERGENCY CONTACT TAB

- ▶ Enter Full Name
- ▶ Enter Contact Relationship

- ▶ Please Note: Use USPS guidelines for entering an address. **ZERO PUNCTUATION** should be used (except after city)

Example:
PO Box 123
Logan, UT 84322

- ▶ If you have both an address and PO Box, enter PO Box first with address underneath

Example:
PO Box 101
1259 S 100 E
Any City, UT 80000

- ▶ State should be caps lock

Example:
UT

The screenshot shows the 'OpenRegistration v12.10 - Edit Client Registration' window. The 'Emergency Contact' tab is active, showing two contact entries. Contact #1 is John Smith, Father, with telephone 4357972222 and mobile 4355551212. Contact #2 is Sally Smith, Mother, with the same telephone and mobile numbers. The address for both is PO Box 101, 1259 S 100 E, Any City, UT 80000. The email for both is calme@yahoo.com. The form also shows a 'Not Eligible' status on the right side.

- ▶ Phone Number: Only enter the numbers. No special characters should be input by the user. Formatting will occur by the computer later.
- ▶ Do not put a 1 in front of a phone number

6

PARENT/GUARDIAN TAB

Enter up to 2 parents/
guardians for each client.

OpenRegistration v12.10 - Edit Person

Title	**Last	**First	Middle	Suffix
	Dad	Favorite		
Maiden Name	DOB	Sex		
	01/01/1900	Male		

Address

123 Happiness is all around!

City: Logan State: UT Zip Code: 84321 Country:

Preferred Phone: 801-123-4567 Preferred Email: test@gmail.com

OK Cancel

OpenRegistration v12.10 - Edit Patient Registration

Client: Test, Patient 25 (Billy - N)

Registration

DOB: 1/1/1900 (14 mos)
Sex: Male
Race: Unknown
SSN: 555-12-3333
Marital: Single
First Known: 3/9/2017
Preferred Name: Billy
Patient Type: Community Member
Internal ID: 1953

Alerts

Agreement to Treatment --unspecified
Privacy Notice --unspecified

Address/Tel

Local Addr: PO Box 101, Any
Local Tel: (435) 797-0000

Perm Addr: PO Box 101, Any
Mobile: (435) 797-1000
Mobile Carrier: Unknown (Appt R)

Pref Comm Method: Secure Message

Academic

Parent/Guardian #1

Dad, Favorite

Relationship to Patient: Father

Favorite Dad

123 Happiness is all around!
Logan, UT 84321

Date of Birth: 1/1/1900
Sex: M
Phone: 801-123-4567
Email: test@gmail.com

Parent/Guardian #2

Relationship to Patient: Please make a selection.

OK Cancel

Summary

Not Eligible

Print... Client Modification History Compliance... Edit Family...

Location: Livvwhite Building Test, Patient 25 User: A00575675 Connected to server: UtahSLHCD@Production

Search the web and Windows

10:34 AM 3/9/2017

7

GUARANTOR TAB

Guarantor: (responsible party) is the person held accountable for the patient's bill.

This dialog box contains the following fields:

- Name:** Title, **Last, **First, Middle, Suffix. Example: Dad, Favorite.
- Maiden Name:** Text field.
- DOB:** 01/01/1900
- Sex:** Male
- Address:** 123 Happiness is all around!
- City:** Logan, **State:** UT, **Zip Code:** 84321, **Country:** [Empty]
- Preferred Phone:** 801-123-4567
- Preferred Email:** test@gmail.com

The main window shows patient information for 'Test, Patient 25 (Billy) - N'. The 'Guarantor' tab is active, displaying:

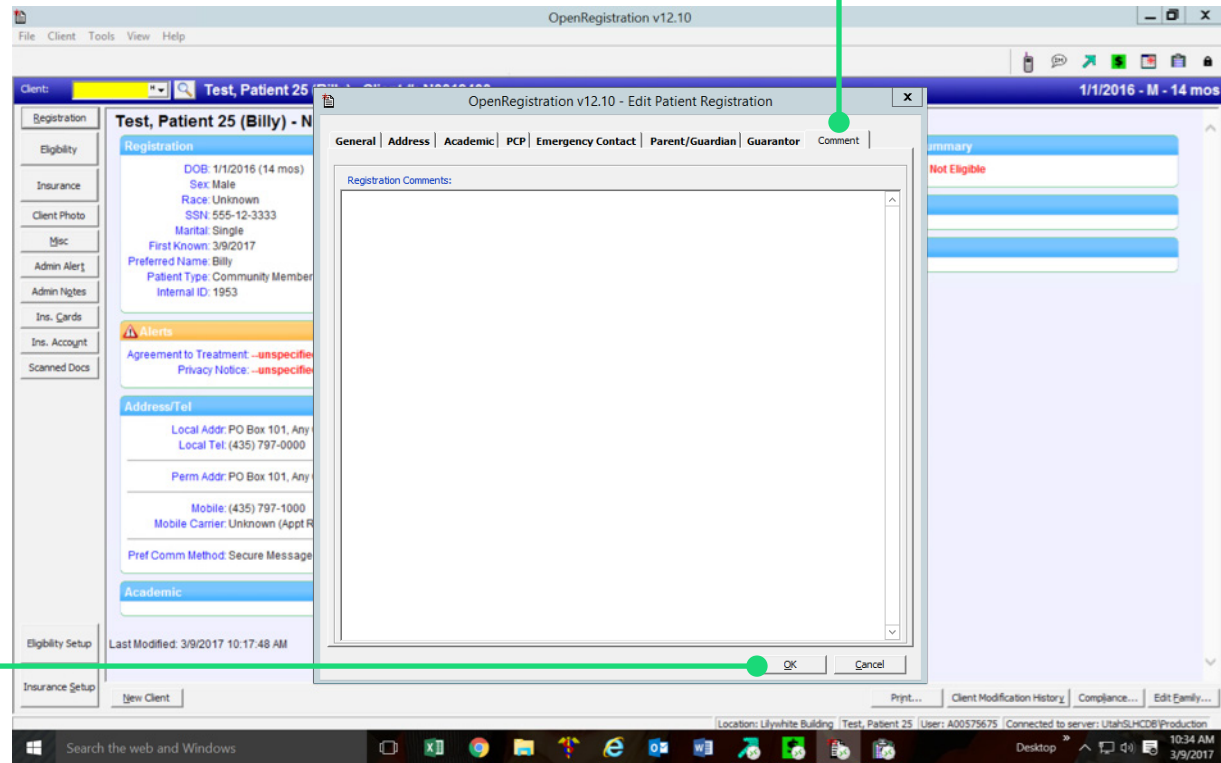
- Guarantor:** Test, Patient 2
- Relationship to Patient:** [Dropdown menu]
- Patient 2 Test:** 123 Fake Street, Any City, UT 84321
- Date of Birth:** 1/1/1901
- Sex:** M
- Phone:** 888-222-1111
- Email:** gmail.com

Other tabs visible include Registration, Address, Academic, PCP, Emergency Contact, Parent/Guardian, and Comment. The status bar at the bottom shows 'Location: Livwhite Building', 'Test, Patient 25', 'User: A00575675', and 'Connected to server: UtahSLHCDP/Production'.

8

COMMENT TAB

Comment Tab: Can add any information related to registration, will show on front page under “registration comment”



When each of the steps have been completed, hit OK

REGISTRATION IS NOW COMPLETE