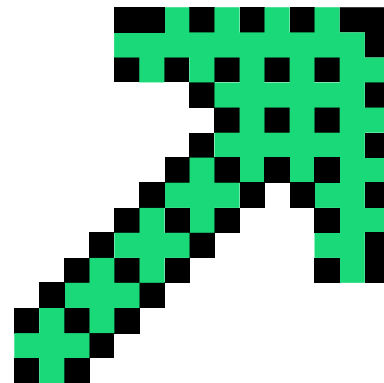


# PNC

## 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

The screenshot shows the OpenRegistration v12.10 application window. The title bar indicates the client is 'Test, Patient 25 (Billy) - Client #: N0019400' and the date is '1/1/2016 - M - 14 mos'. The sidebar on the left contains a 'New Client' button at the bottom, which is highlighted with a green circle. The main content area is divided into several sections: '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' (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; 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), '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', and 'Registration Comment'. There are also 'Alerts' for 'Agreement to Treatment --unspecified--' and 'Privacy Notice --unspecified--'. The bottom of the window shows a Windows taskbar with the date and time '10:40 AM 3/9/2017'.

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, showing fields for 'Local Address', 'Local Tel', 'Perm Addr', 'Mobile', and 'Mobile Carrier'. The 'PCP' tab is also visible, showing fields for 'Local Phone', 'Mobile Phone', and 'Mobile Carrier'. The 'Email' section includes two email addresses and checkboxes for 'Bad Email Address' and 'Opt out of email appointment reminders'. The 'Preferred Communication Method' is set to 'Secure Message'.

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

Local Address: PO Box 101  
City: Any City, State: UT, Zip Code: 80000, Country: [History...]  
Last Modified On: 3/9/2017 10:19:58, Last Modified By: Reeder, Sue

Phone

Local Phone: (435) 797-0000, Mobile Phone: (435) 797-1000, Mobile Carrier: [Dropdown]

Email

#1: www.callme@yahoo.com, #2: jsu.edu  
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: UtahSLH06Production | 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 contacts. Contact #1 is John Smith, relationship 'Father', with phone number 4357972222 and address PO Box 101, 1259 S 100 E, Any City, UT 80000. Contact #2 is Sally Smith, relationship 'Mother', with the same phone number and address. The 'Registration' tab on the left shows client details for 'Test, Patient 25 (Billy) - N', including DOB 1/1/2016, SSN 555-12-3333, and marital status 'Single'.

- ▶ 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	State	Zip Code	Country	
Logan	UT	84321		
Preferred Phone	Preferred Email			
801-123-4567	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

Eligibility Setup Last Modified: 3/9/2017 10:17:48 AM

Insurance Setup

New Client

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.

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

Location: Livvwhite Building Test, Patient 25 User: A00575675 Connected to server: UtahSLHCD@Production 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 the 'Test, Patient 25 (Billy) - N' registration details. The 'Guarantor' tab is active, displaying:

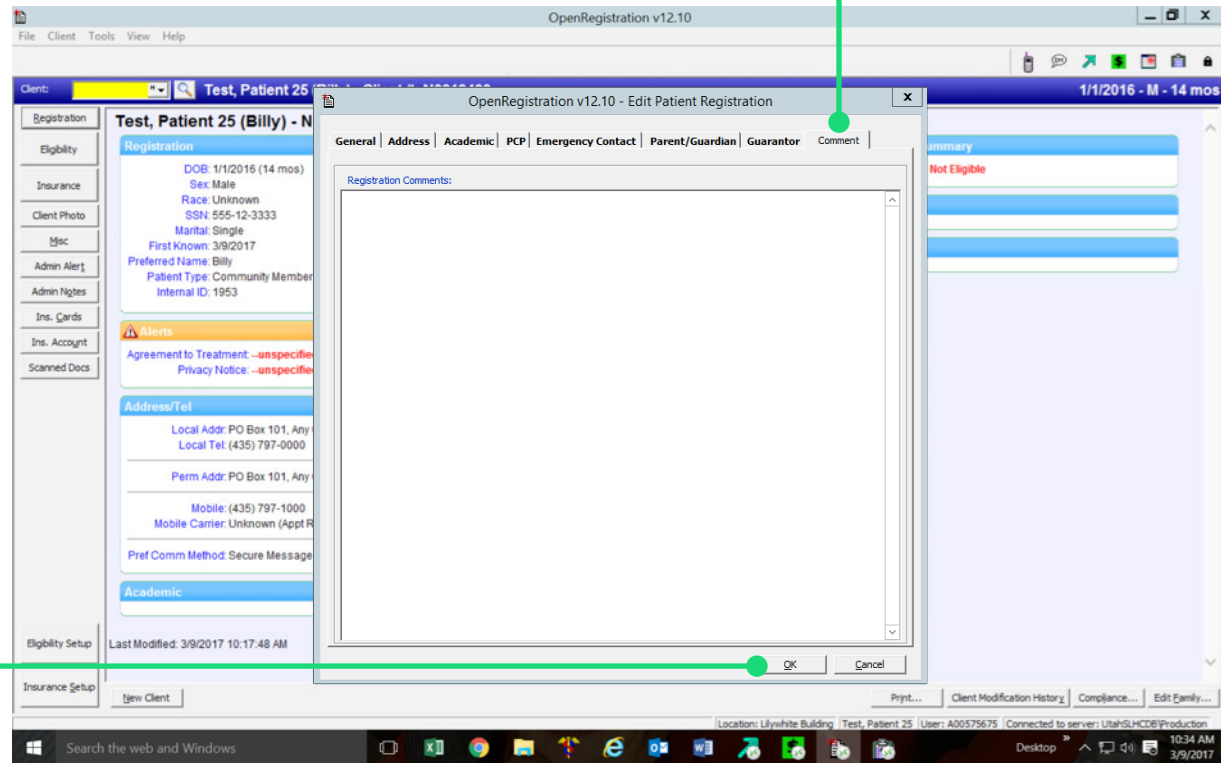
- Guarantor:** Test, Patient 2
- Relationship to Patient:** [Dropdown menu]
- Patient 2 Test:** 123 Fake Street, Any City, UT 84321
- Date of Birth:** 1/1/1901
- Sex:** M
- Phone:** 888-222-1111
- Email:** gmail.com

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