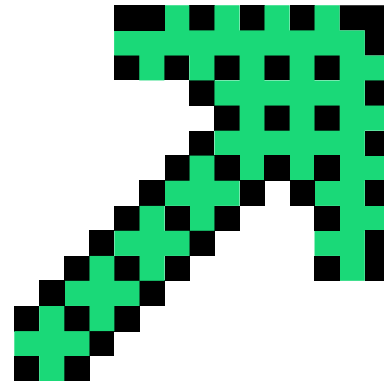


PNC

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 displays the OpenRegistration v12.10 application window. The title bar shows the application name and standard window controls. The menu bar includes File, Client, Tools, View, and Help. The client search bar at the top contains the text 'Test, Patient 25 (Billy) - Client #: N0019400'. The main content area is divided into several sections: a left sidebar with navigation options (Registration, Eligibility, Insurance, Client Photo, Misc, Admin Alerts, Admin Notes, Ins. Cards, Ins. Account, Scanned Docs, Eligibility Setup, Insurance Setup), a central client profile for 'Test, Patient 25 (Billy) - N0019400 - M', and an 'Eligibility Summary' section on the right. The client profile includes tabs for Registration, Emergency Contact, Alerts, Address/Tel, Academic, and Registration Comment. The 'Registration' tab is active, showing details such as DOB (1/1/2016), Sex (Male), Race (Unknown), SSN (555-12-3333), Marital (Single), First Known (3/9/2017), Preferred Name (Billy), Patient Type (Community Member), and Internal ID (1953). The 'Emergency Contact' section lists John Smith (Father) and Sally Smith (Mother) with their respective contact information. The 'Alerts' section shows 'Agreement to Treatment' and 'Privacy Notice' as unspecified. The 'Address/Tel' section provides local and permanent addresses and contact numbers. The 'Eligibility Summary' section indicates the client's status as 'Not Eligible'. A 'New Client' button is highlighted in the bottom left corner of the sidebar. The status bar at the bottom shows the user is logged in as 'User: A00575675' and the system is connected to the server 'UtahSLHCDP/Production'. The system clock shows 10:40 AM on 3/9/2017.

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

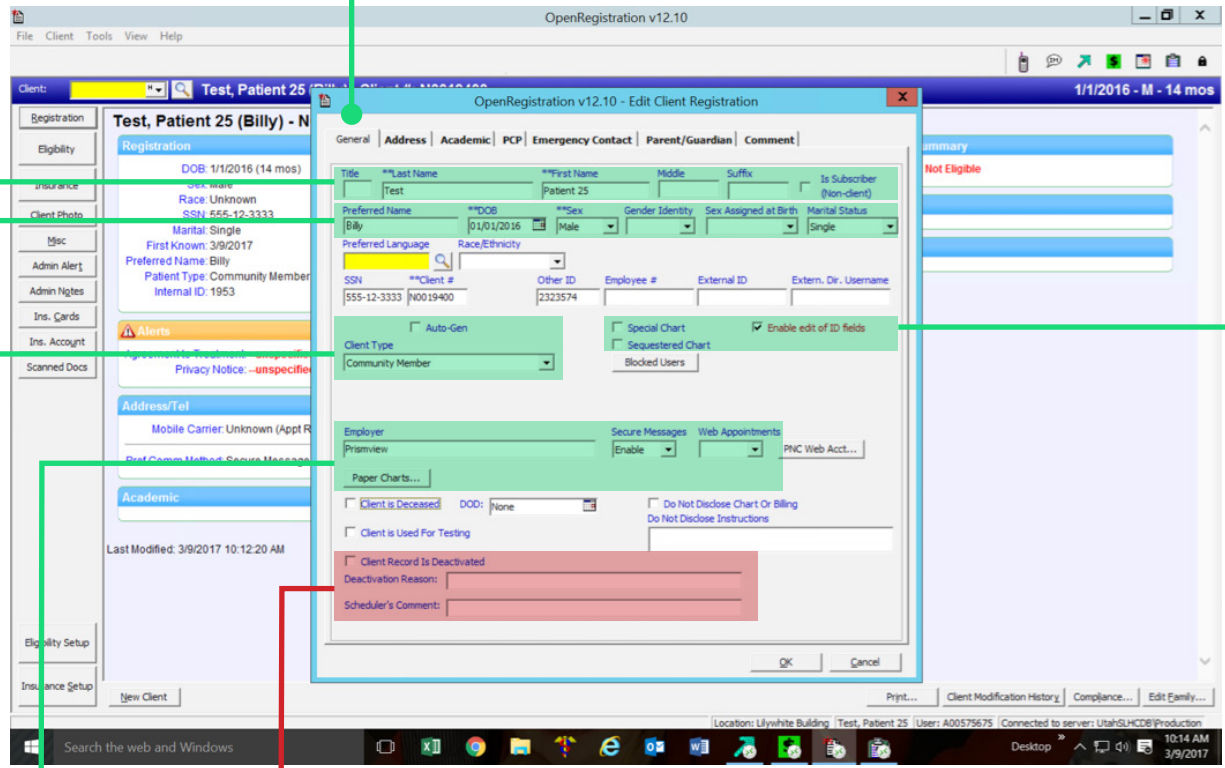
2

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)

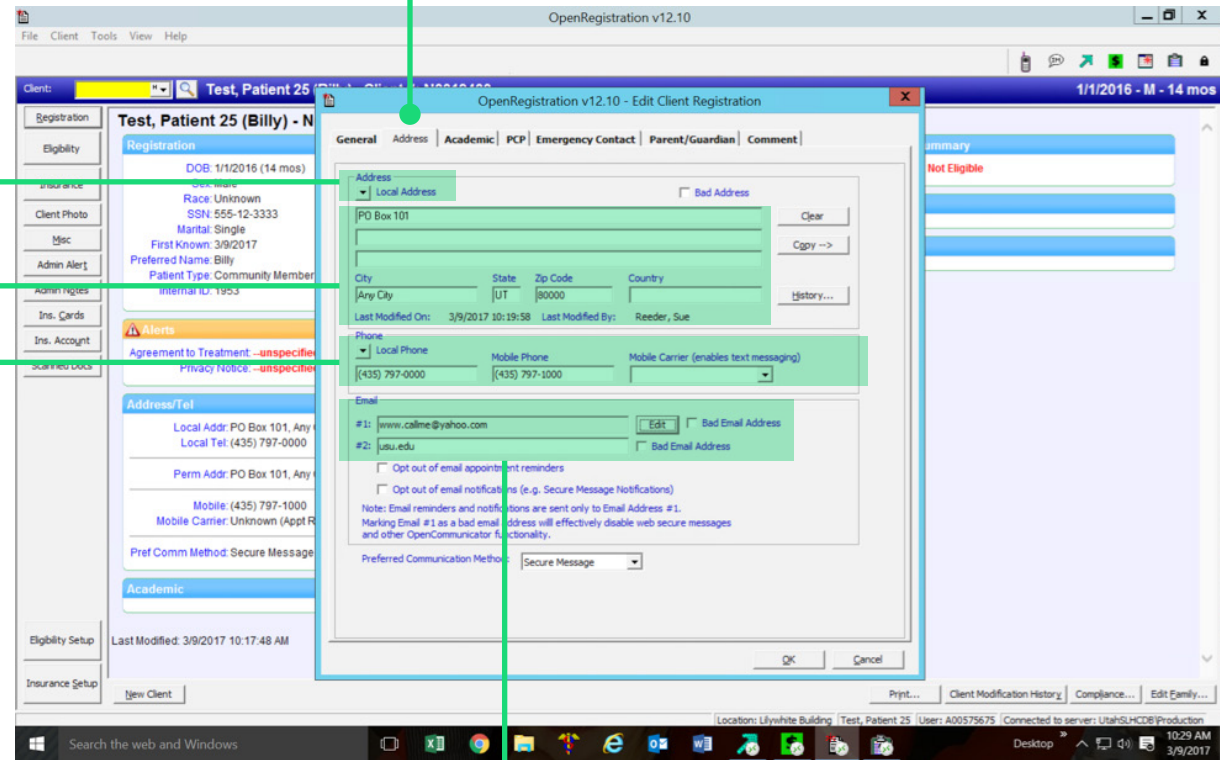
Example:
PO Box 123
Logan, UT 84322

- ▶ 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

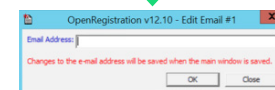
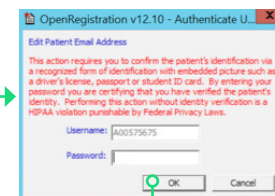
- ▶ State should be caps lock

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'. A secondary window is open over it, showing the 'Academic' and 'PCP' tabs. The 'Academic' tab is currently selected, and the 'PCP' tab is also visible. The form contains various fields for patient information, including DOB, Sex, Race, SSN, Marital Status, First Known, Preferred Name, Patient Type, and Internal ID. The 'Address' section includes fields for Local Address, Bad Address, City, State, Zip Code, and Country. The 'Phone' section includes fields for Local Phone, Mobile Phone, and Mobile Carrier. The 'Email' section includes fields for Email #1 and #2, and checkboxes for 'Bad Email Address' and 'Opt out of email appointment reminders'. The 'Preferred Communication Method' is set to 'Secure Message'. The status bar at the bottom indicates the user is 'A00575675' and is connected to the server 'UtahSLH001Production'.

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 interface also shows a 'Registration' tab with client details like DOB (1/1/2016), SSN (555-12-3333), and preferred name (Billy).

- ▶ 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

Name	**Last	**First	Middle	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maiden Name	DOB	Sex		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Address				
<input type="text"/>				
City	State	Zip Code	Country	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Preferred Phone	Preferred Email			
<input type="text"/>	<input type="text"/>			

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.

OK Cancel

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:

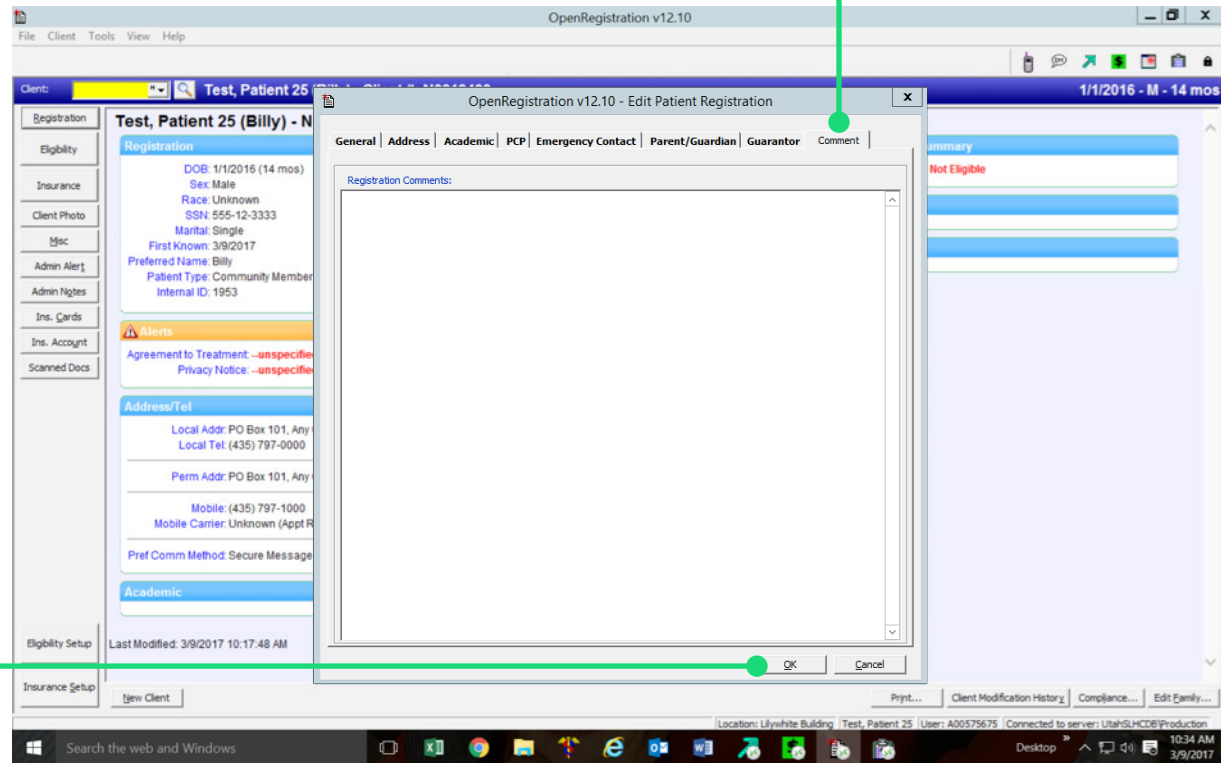
- Guarantor:** Test, Patient 2
- Relationship to Patient:** [Dropdown menu]
- Patient 2 Test:** 123 Fake Street, Any City, UT 84321
- Date of Birth:** 1/1/1901
- Sex:** M
- Phone:** 888-222-1111
- Email:** gmail.com

Other tabs visible include Registration, Address, Academic, PCP, Emergency Contact, Parent/Guardian, and Comment. The status bar at the bottom shows 'Location: 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