

# User Guide

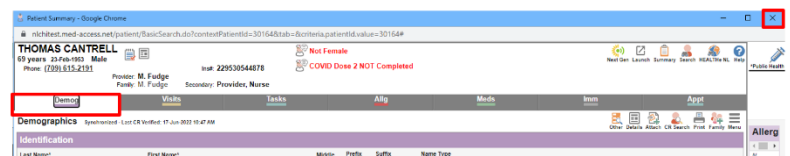
## Med Access: Registering Patients

### Register a Patient with an Existing EMR Chart

If a patient name or 'Restricted' is seen in the 'Patient' column of the daysheet, this means the patient **has** an existing EMR chart. You are able to import the EMR chart and register the patient, as follows:

1. Click on the **patient's name** or the word **Restricted** in the 'Patient' column of the daysheet. Please note that if the 'Client Registry' window appears, click the **Accept Selected PCR Data** button to continue. For Restricted charts, you will need to un-restrict to view the patient chart. See "[Unrestricting Patients](#)" documentation.
2. Click the **Demog** tab to display the patient's demographic information.
3. Click the **x** in the top right corner to close the patient chart. Finalize the registration, as detailed below in the 'Finalize Registration and Log Out' section.

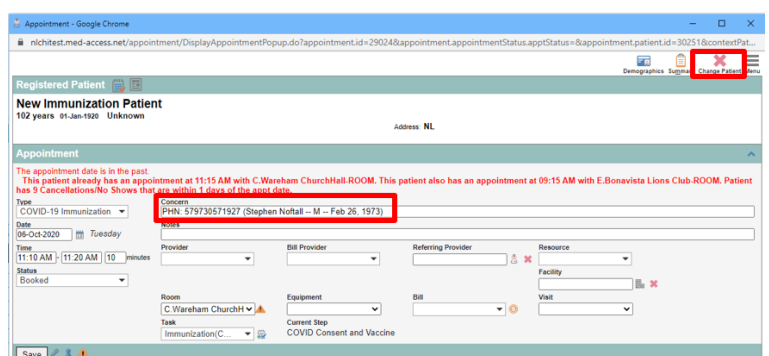
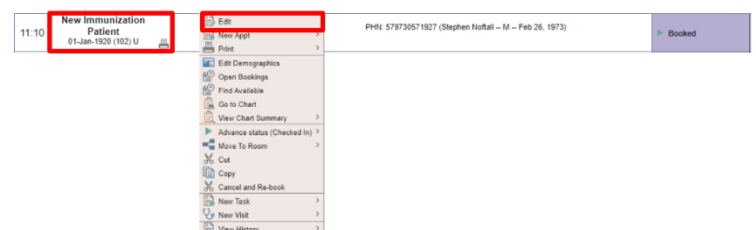
Time	Patient	Primary # Chart #	Type	Concern Resource	Appt Status
03:45					
03:50	THOMAS CANTRELL 23-Feb-1953 (69) M	229530544878	COVID-19 Immunization		Booked
04:00	Restricted				



### Register a Patient with no Existing EMR Chart

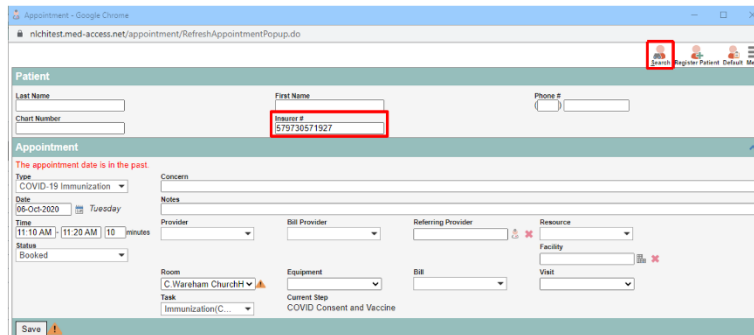
If 'New Immunization Patient' is seen in the 'Patient' column of the daysheet, this means the patient **does not** have an existing EMR chart. You will need to search, add and register the new patient to EMR, as follows:

- 1) Right click on New Immunization Patient in the 'Patient' column of the daysheet and select Edit from the drop-down list.
- 2) Note that the patient's name, MCP, gender and DOB will appear in the 'Concern' field. Note the patient's MCP number from the concern field.
- 3) Click the **Change Patient** icon in the top right corner of the screen. This will open the 'Appointment' window.
- 4) Search for the patient in the local EMR, as follows:



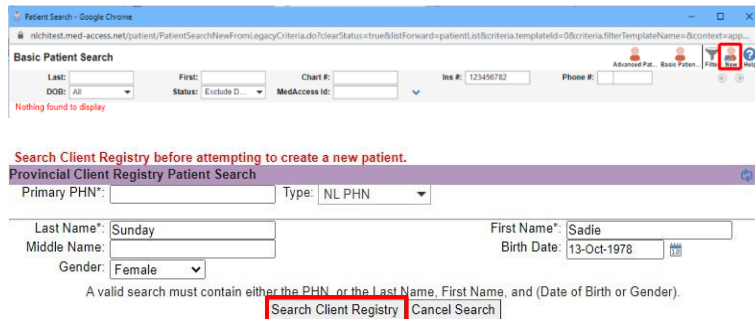
- a) Enter the patient's MCP number in the 'Insurer #' and click the **Search** button in the top right corner.
- b) If results are found, select the patient's name, click the **Accept Selected PCR Data** button, and proceed to finalize registration.

If results are not found, try searching by first and last name before searching within Client Registry.



- 5) Search for the patient in the Client Registry, as follows:

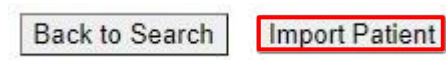
- a) Click the **New** icon in the top right corner of the 'Patient Search' window.
- b) Enter the patient's MCP or 3 demographics (i.e., first name, last name, date of birth or gender) and click the **Search Client Registry** button.



- c) If the patient is found in Client Registry, select the patient's name and click the **Import Patient** button to create the patient chart in the local EMR. Click save on the appointment window to return to the daysheet and finalize registration.

**Or**

If the patient is not found, you will see 'EHR Warn: no candidates found'. To create a new patient chart.

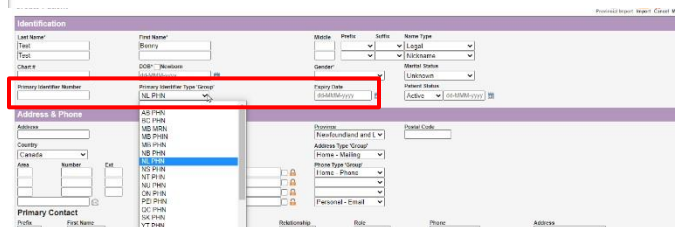


- 6) If the patient is not found in the local EMR or Client Registry you will need to create a new patient chart, as follows:

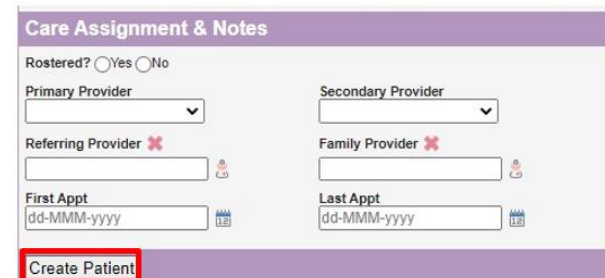
- a) Click the **Create New Patient** button.



- b) Proceed to enter the patient's demographic information in the 'Create Patient' window. Please note that the 'Primary Identifier Number', 'Primary Identifier Type Group' and 'Expiry Date' fields will need to be completed.



- c) When complete, click the **Create Patient** button. Click the x in the top right corner to exit the 'Patient Summary' window.



- d) Click save on the appointment window to return to the daysheet and finalize registration.

## Finalize the Registration and Log Out

Identify the patient's name on the daysheet and click on the green arrow in the 'Appt Status' column to advance the appointment status from 'Booked' to 'Checked In.'

