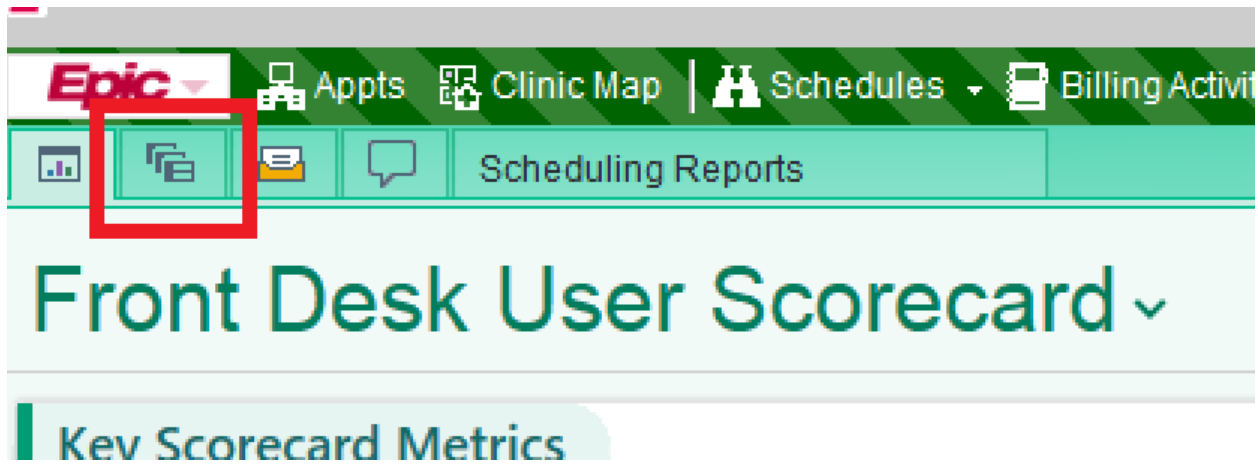
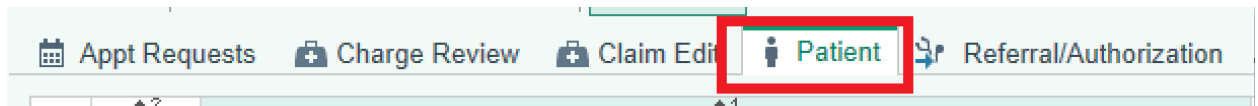


Appointment Conversion Pre-Registration

1. Open up PRD Hyperspace
2. Go to workqueue tab



3. Choose Patient workqueue type.

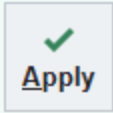


4. Search for location pre-reg workqueue

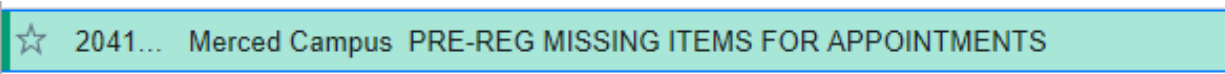


Name Contains or ID

Merced



5. Select the Pre-Reg Missing Items for Appointments workqueue for the location.



6. Select a patient.

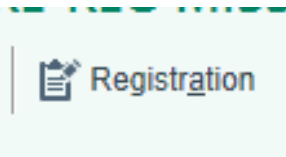
92	202443	AMBULATORY, STANLEY	01/07/2021 Office Visit
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7. Check what errors are on the patient's registration.

Errors

- Patient AMBULATORY, STANLEY has not been verified. Please verify this patient. [CER 100072]
- A visit account is not created for this scheduled appointment. [CER 100173]
- The patient's housing status is blank. [CER 100412]
- This patient has not indicated that their agricultural worker status for this visit date. Please ask them again, as the answer may have changed. [CER 100415]
- The patient needs family size and income added to a financial assistance case. Navigate to Financial Assistance to complete before closing registration. [CER 717536]
- Referring provider is generic; enter a name, phone number, and specialty. [CER 149872]
- The 'Accident related?' field is blank. Please input this information. [CER 100868]

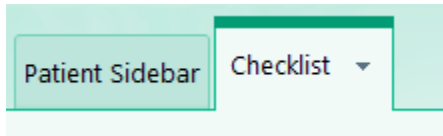
8. Open the patient's registration by double clicking the patient or clicking registration at the top of the workqueue.



9. Open the check list for the appointment (the green arrow on the far-right side).



10. Make sure you have the Checklist selected.



11. In the checklist is a list of warnings and errors that are occurring for the patient's appointment.

Patient Sidebar Checklist

Hide verified items

3 Verifications Remaining

Patient
Ambulatory, Stan... Verify

Elapsed

PCP
Ambulatory, Stan... Verify

Elapsed

Encounter
On 1/7/2021 Verify

New

- ❗ Patient AMBULATORY,STANLEY has not been verified. Please verify this patient. [R-100072]
- ❗ The 'Accident related?' field is blank. Please input this information. [R-100868]
- ⚠ Patient is 65 or older and has no effective Medicare coverage. Add a Medicare coverage if the patient is covered by Medicare. If the patient should not have a Medicare coverage, add a patient type of 'Verified with no Medicare'. [R-100149]
- ⚠ The patient needs family size and income added to a financial assistance case. Navigate to Financial Assistance to complete before closing registration. [R-717536]
- ❗ P/F - AMBULATORY,STANLEY [1447] has not been verified. Please verify this guarantor. [R-100136]

Last changed by CADENCE, FRONT DESK on 2/25/2021 2:20 PM.

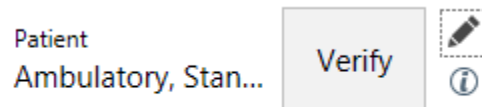
Run all checks and complete registration

12. If you are not able to reach the patient on the phone, **here are some registration errors that we can solve using NextGen (without the patient present).**

- a. Accident related?: Use NextGen appointment notes to see if the patient is coming in for a visit related to an accident.
- b. Patient's demographics are missing: Use NextGen to find the patient's demographics.
 - i. ZIP code, city, state, housing status, migrant workers status, language, etc.
- c. Patient Coverage for the visit: Use NextGen to determine if the patient has a coverage for the visit or not.
 - i. If you need more information on how to add a coverage, check out the [Guarantor-Coverage Support doc.](#)

13. If you are able to call the patient, here are some registration errors that cannot be solved without the patient on the phone.

- a. Verifying any information on the checklist: We want to ask the patient if everything we said about their appointment was correct before clicking any verify buttons



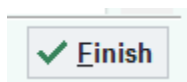
i. Elapsed

- b. Medicare Secondary Payer Questionnaire (MSPQ): The MSPQ includes questions that the patient needs to answer about their visit and their coverages.
- c. Travel Questionnaire: We want to have accurate information from the patients about their recent travel and exposure to COVID-19.

14. Here are the registration errors that cannot be solved until the patient arrives at the clinic for their appointment.

- a. Financial Assistance Case: The patient will need to fill out the Patient Information Worksheet in order for us to document their financial information.
- b. Documents: We cannot fill out documents for the patient.

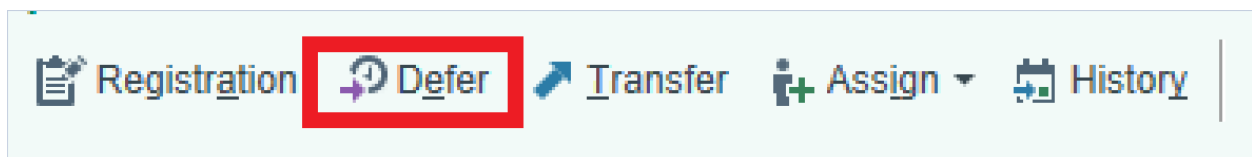
15. After you have completed what you can on the checklist, select Finish.



16. If all the information was filled out, the patient will fall off of the workqueue.

17. If you have filled out all the information possible without contacting the patient, you can defer the appointment by clicking the “defer” activity in the workqueue.

- a. By doing this, the patient will not be visible from the active tab and no one else will try to register or contact the patient again.



18. Choose the reason of “Waiting for Information” and the day and time of 3/29 and 12:00AM.

Defer ✕

Reason

Waiting for Information 🔍

Until Time

3/29/2021 📅 12:00 AM 🕒 1d 7d 14d 30d

19. Add a comment of Pre-Registered during Registration Conversion without patient present.

Comment

🔍 abc | ↶ ↷ | ? ? + | More ▾

Pre-Registered during Registration Conversion without patient present.

20. Click Defer.

🕒 Defer