SWIM – Access to Care

Create a Case

Quick Reference Guide

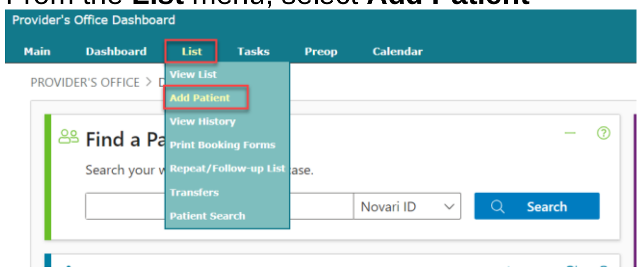
Add a case to the surgical waitlist

Add a Patient

1. Search Client Registry

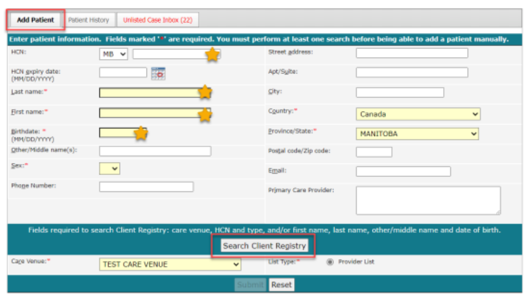
After logging into the application, open the **Provider Office Module**

- From the **List** menu, select **Add Patient**



This will open the **Add Patient** screen

- Enter a minimum of **3** patient identifiers
- Click **Search Client Registry**



> The first search result will look to match **HCN (PHIN)** and if this is not the correct patient click **Find Similar Patients** to expand the search criteria.

2. Review Client Registry Search Results

1. If a record is found in CR, **Patient Match** screen appears indicating patient matches the search criteria entered
2. Select patient record and review additional information to confirm the patient match
   a. If the record is not a match
      i. Select **Find Similar Patients**; this will expand the Client Registry search to include additional demographic information
      ii. Review expanded search results
         - If the record is a match click **Patient Found**
         - If the record is not a match click **Not My Patient**
   b. If the record is a match, click **Patient Found**

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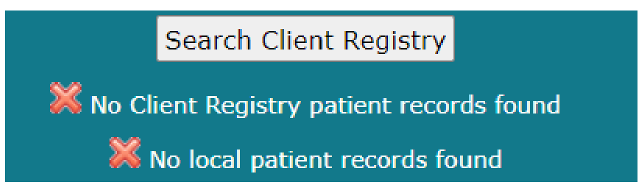
<table>
<tr><th colspan="2">Add a Patient</th></tr>
<tr><td>3. Review results from local ATC database search</td><td>If there is a patient record in the local ATC database:

1. The Patient Match popup will display a message “Please help us keep our records in order.”
2. Review the client records
a. If the patient is a match,
i. Select the patient and click Match Found
- If a record was found in Client Registry, the Patient Match screen will display a comparison of the data between Client Registry and ATC. Review the default values, update if required
- Click Save Patient
ii. On the Add Patient screen, confirm/update the Care Venue
iii. Click Submit

b. If the record is not a match:
i. Click Not My Patient
ii. Enter all mandatory data values
iii. Confirm/update Care Venue
iv. Click Submit</td></tr>
<tr><td>4. Enter a patient
Patient not found in CR or Local records (database)</td><td>

1. Enter all mandatory data values
2. Confirm/update Care Venue
3. Click Submit</td></tr>
<tr><td>5. Add Case details</td><td>• Enter all available case information.
(* indicates a mandatory field)
• Click Submit
Reference: Working with QuickPicks QRG to generate your list of most common procedures</td></tr>
<tr><td>6. View completed case</td><td>From the List menu, select View List</td></tr>
</table>