

SWIM – Access to Care

Register Patients

Quick Reference Guide

Daily Activity Workflow

| 1. Review List Settings | <ul style="list-style-type: none"> Select the correct Care Venue from the dropdown list Confirm Show Me is set to Uncleared Cases Confirm the list is sorting in ascending order (earliest preceded by later dates) | <table border="1"> <tr> <th>Procedure Date</th> </tr> <tr> <td>10/31/2023</td> </tr> <tr> <td>11/06/2023</td> </tr> </table> | Procedure Date | 10/31/2023 | 11/06/2023 |
|---|---|--|----------------|------------|------------|
| Procedure Date | | | | | |
| 10/31/2023 | | | | | |
| 11/06/2023 | | | | | |
| 2. Action list in priority order | | | | | |
| 3. Review and Send Messages | <p>Flashing envelope indicates that you have unread messages.</p> <p>Note: Messages relate to cases at ALL care venues that you have access to. It is not filtered by the care venue that is filtering your list of patients to register</p> | | | | |

Priority Order

- Sort List by Date and focus work on the soonest procedure date: these are the cases that OR Slating and PAC will be working on first.
- Then focus on ones without a surgery date or to be cancelled.

Note: EPR Admit date = Visit Date

| | | |
|--------------------------|------------|---|
| Blue: New Case | ATC | <ul style="list-style-type: none"> Open case record to view patient demographics and case details |
| | EPR | <ul style="list-style-type: none"> Find patient (use 3 patient identifiers per current best practice (e.g., Name, DOB, PHIN)) Create pre-registration using information in ATC Case Details Save the visit |
| | ATC | <ul style="list-style-type: none"> Add visit number & MRN into Manage Visit Numbers details section. Click Assign after each entry <div style="border: 1px solid green; padding: 5px;"> <p>Visit Number: enter or copy/paste numeric sequence from the EPR</p> <p>MRN: enter "MRN + 'space'" and enter copy/paste MRN numeric sequence</p> </div> |

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| Priority Order | | |
|---|-----|---|
| | | <ul style="list-style-type: none"> Click Save - watch for the Alert to confirm you have saved the record <div style="border: 1px solid green; padding: 5px; margin: 10px 0;">  WARNING: the visit number and MRN will not automatically save. Failure to click save will result in blank field values. The visit number is a requirement to complete the case booking in SIMS. </div> <ul style="list-style-type: none"> Clear the record <ul style="list-style-type: none"> Clear & Next opens the next case Clear returns you to the case list view |
| Gray: Case details have been updated | ATC | <ul style="list-style-type: none"> Open the case record Review changes; changes are highlighted in red |
| | EPR | <ul style="list-style-type: none"> Using the Visit number and MRN entered in Manage Visit Numbers section, in EPR find and update pre-registered visit with changes Save the visit |
| | ATC | <ul style="list-style-type: none"> Clear the record |
| Yellow: Case delayed and will be rebooked | ATC | <ul style="list-style-type: none"> Open the case record Review changes; changes are highlighted in red. The Visit Date will be blank |
| | EPR | <ul style="list-style-type: none"> Using the Visit number and MRN entered in Manage Visit Numbers section, in EPR find and update pre-registered visit with changes Change Admit date: to the date of Dec 31, 2099. <i>This is the default date used to indicate that a patient has been “put back on the waitlist” and will be rescheduled for surgery at a later date</i> <div style="border: 1px solid green; padding: 5px; margin: 10px 0;">  The pre-reg visit is not cancelled in the EPR. </div> <ul style="list-style-type: none"> Save the visit |
| | ATC | <ul style="list-style-type: none"> Clear the record |

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| <u>EPR Visit Used (Patient arrived day of surgery but surgery did not occur)</u> | | | | | |
|---|---|---|-----|-----|---|
| Green: case has been rescheduled | ATC | <ul style="list-style-type: none"> Open the case record Review changes; changes are highlighted in red | | | |
| | EPR | <ul style="list-style-type: none"> Using the MRN entered in Manage Visit Numbers section, in EPR find the visit from the ATC record Review Visit Status | | | |
| | | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #e0f2f1;">PRE</th> <th style="background-color: #e0f2f1;">DSC</th> </tr> </thead> <tbody> <tr> <td style="background-color: #e0f2f1;"> <ul style="list-style-type: none"> if PRE, the visit has not been used, update the existing visit with the new surgery date </td> <td style="background-color: #e0f2f1;"> <ul style="list-style-type: none"> if DSC, the visit has been used, create a new visit <ul style="list-style-type: none"> Create new Pre-Registration using information in ATC Case Details Save the visit </td> </tr> </tbody> </table> | PRE | DSC | <ul style="list-style-type: none"> if PRE, the visit has not been used, update the existing visit with the new surgery date |
| | PRE | DSC | | | |
| <ul style="list-style-type: none"> if PRE, the visit has not been used, update the existing visit with the new surgery date | <ul style="list-style-type: none"> if DSC, the visit has been used, create a new visit <ul style="list-style-type: none"> Create new Pre-Registration using information in ATC Case Details Save the visit | | | | |
| ATC | <ul style="list-style-type: none"> Save and Clear the record | | | | |
| Red: Cancelled surgery | ATC | <ul style="list-style-type: none"> Open the case record | | | |
| | EPR | <ul style="list-style-type: none"> Using the Visit number and MRN entered in Manage Visit Numbers section, in EPR find and cancel pre-registered visit <p><i>Note: Cancelled in ATC means patient will not be rescheduled for surgery</i></p> | | | |
| | ATC | <ul style="list-style-type: none"> Clear the record | | | |