

## EMR is now integrated with Client Registry!

### What this means:

- Changes made in CHR to a Patient’s address, name, contact information will update other Health Systems (such as CIS).
- When Patient updates, such as name, address, Medicare eligibility, date of death etc., are made in other systems this will now flow into CHR and update the patient information immediately.
- Please refer to the complete list of information that is now shared with Client Registry on page 22.

### Quick Tips:

- **Search CHR for Patient first > then Search Client Registry**
- **When creating new patient record, retrieve Patient demographic information from Client Registry and be sure to enter the Location.**
- **Update/add addresses from “Patient Data” – use search feature to ensure the address is formatted properly and select type of Mailing so information is updated in Client Registry.**
- **Phone Format needs to be 10 digits**

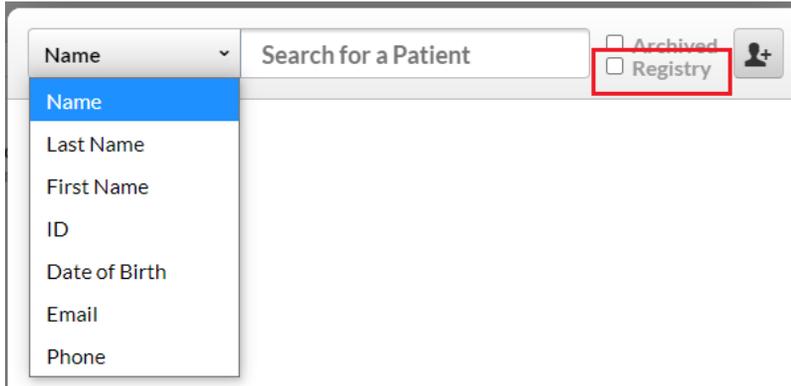
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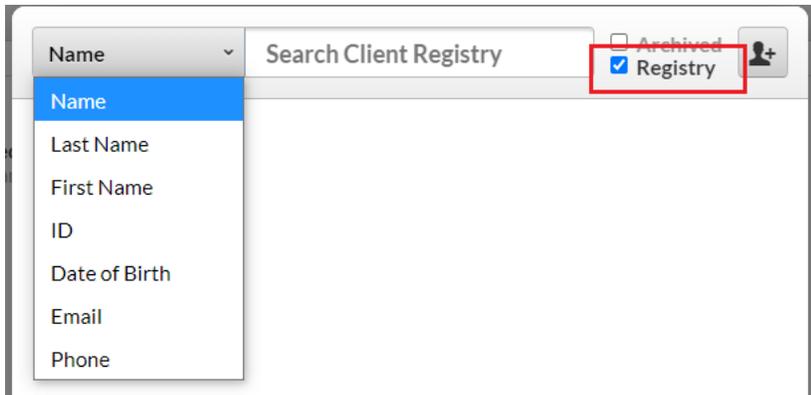
## Searching for a Patient in CHR

You can use several parameters to search for Patients in the CHR. If you are unable to find the Patient from searching in the CHR, you can choose to search Client Registry by checking off the Registry selection.

Search CHR – Registry checkbox is not selected



Searching Client Registry – Registry checkbox is selected



You can also search for the Patient when scheduling an appointment

or

from a Provider Inbox when reviewing documents or results.

When viewing a Provider's inbox, if the Patient is not found in CHR you will get the message below. Click on the search icon (magnify glass), you can search CHR or the Client Registry.

Theophylline, Tobra Post, Valproic Acid, Vanco Post, and Gent Post

**Warning:** This patient does not exist in your database. The lab result will not be attached until this patient is registered. [Register Now](#)

**Mr. EMR 10 Zztest**  
HPEI 30812317 / Male / Dec 10, 1993 / Phone: (999)999-9990

Reported By: HNAM  
Accession Number: 000002021246000015

**Theophylline**  
General Lab | IN PROGRESS | 000002021246000015-Theophylline Level-1 | Collected On: Sep 03, 2021 12:28PM

| ORDER PHYSICIAN   | REPORTED TO   |
|-------------------|---|
| Cpoe Surgeon Test | Shannon C Curtis<br>Cpoe Anesthetist Test<br>Cpoe Nurse Practitioner Test<br>Cpoe Physician Test<br>Kory G Jollymore<br>Maeghan K Keddy |

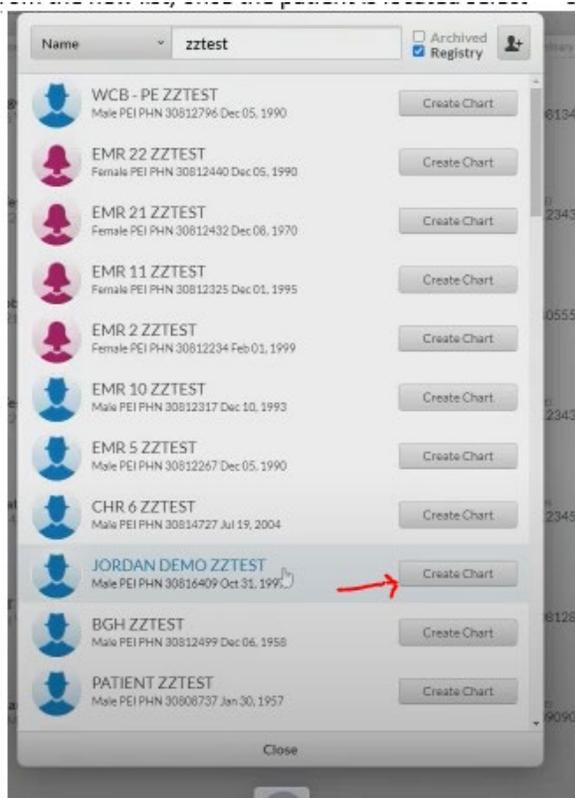
| REQUESTED ON | REPORTED ON          |
|--------------|----------------------|
| Unknown      | Sep 03, 2021 12:50PM |

Register Now should never be used for a Prince Edward Island resident.

Name   Registry

## Adding a new Patient CHR

After searching, a list of matching Patients is displayed, you can choose to Create Chart.



The Patient demographic screen is presented.

Verify and enter the information on the “General” tab when you create the Chart.

Primary location will default to the **location** the user is at when the Chart is created.

- If the Patient’s Primary Practitioner is using the CHR, the Primary Location should reflect that.
- If the Primary Practitioner is not using the CHR, the default can be left as is.

Note: It is very important this location is accurate and represents the Primary Practitioner (General Practitioner and their location).

The screenshot shows a 'New Patient' form with the following data entered:

| Field                 | Value                         |
|-----------------------|-------------------------------|
| TITLE                 | Mr.                           |
| FIRST NAME            | PYXIS KCMH1                   |
| MIDDLE                |                               |
| LAST NAME             | ZZ TEST                       |
| PREFERRED NAME        |                               |
| DATE OF BIRTH         | 12/02/1942                    |
| SEX                   | Male                          |
| GENDER IDENTITY       | Choose one...                 |
| PREFIX                | Choose one...                 |
| EMAIL ADDRESS         |                               |
| NOTIFICATION          | None                          |
| CELL PHONE            |                               |
| HOME PHONE            | (902)444-4444                 |
| OFFICE PHONE          |                               |
| OFFICE PHONE EXT      |                               |
| PRIMARY PRACTITIONER  |                               |
| PRIMARY LOCATION      | Boardwalk Professional Clinic |
| FAMILY DOCTOR         |                               |
| REFERING PRACTITIONER |                               |
| IDENTIFICATIONS       | PE 30810121 (PRIMARY)         |

Note: Medicare eligibility, secondary address and date of death will populate in the CHR after selecting Save (if available from CR)

## Viewing Medicare Eligibility

Select the setting icon beside the arrow

The image shows a software interface for a 'New Patient' form. The form is partially obscured by a modal window titled 'Edit Identification'. The modal contains the following fields:

- EDIT IDENTIFICATION TYPE: PE
- IDENTIFICATION VALUE: 30810121
- PLAN START DATE: dd/mm/yyyy
- PLAN END DATE: dd/mm/yyyy

At the bottom of the modal are 'Cancel' and 'Okay' buttons. Below the modal, in the 'IDENTIFICATIONS' section, there is a row with the following data:

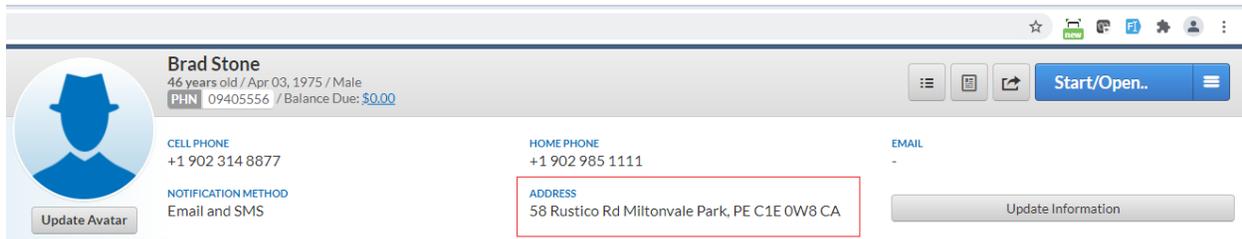
| TYPE | VALUE    | STATUS  | ACTION |
|------|----------|---------|--------|
| PE   | 30810121 | PRIMARY | ⚙️     |

A red arrow points to the gear icon (⚙️) next to the 'PRIMARY' status label. Below the 'IDENTIFICATIONS' section is a link that says '+ Add New Identification'. At the bottom of the form are 'Close' and 'Save' buttons.

## How to update information in CHR

The following details outline how to update Patient Demographic in the CHR to ensure data integrity across all Health systems.

The following describes the Patient Demographic areas within the CHR.



The screenshot shows a patient profile for Brad Stone. The profile includes a blue silhouette avatar, a name 'Brad Stone', and demographic information: '46 years old / Apr 03, 1975 / Male'. A PHN (09405556) and a balance due (\$0.00) are also listed. The profile is divided into sections for contact information: 'CELL PHONE' (+1 902 314 8877), 'HOME PHONE' (+1 902 985 1111), and 'EMAIL' (-). A red box highlights the 'ADDRESS' field, which contains '58 Rustico Rd Miltonvale Park, PE C1E 0W8 CA'. There are buttons for 'Update Avatar', 'Update Information', and 'Start/Open..'. The top of the page features a navigation bar with various icons and a search bar.

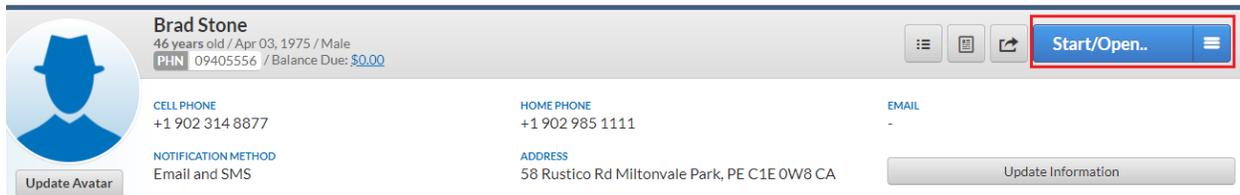
The address that is displayed at the top of the screen is the most recent address that was updated either by a CHR user or from a Client Registry update.

It could be either the Mailing or Home address. It's very important to know which address is being displayed. Most systems that integrate with Client Registry receive mailing address updates.

To update a Patient's address, you will navigate to the **Patient Data** section.

## Finding the Patient Data section

There are two ways to select the Patient Data. Start/Open menu, then select Patient Data menu option.



Brad Stone  
46 years old / Apr 03, 1975 / Male  
PHN 09405556 / Balance Due: \$0.00

CELL PHONE  
+1 902 314 8877

HOME PHONE  
+1 902 985 1111

EMAIL  
-

NOTIFICATION METHOD  
Email and SMS

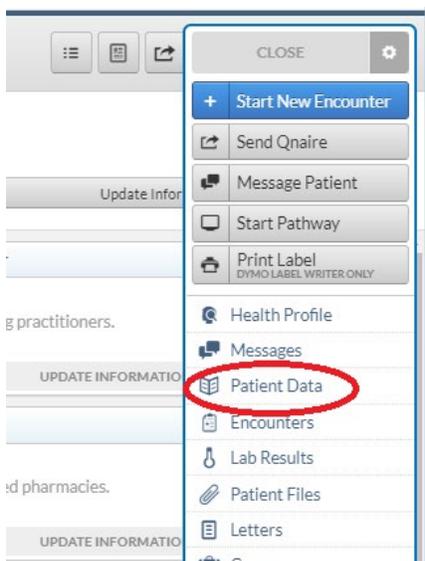
ADDRESS  
58 Rustico Rd Miltonvale Park, PE C1E 0W8 CA

Update Avatar

Update Information

Start/Open..

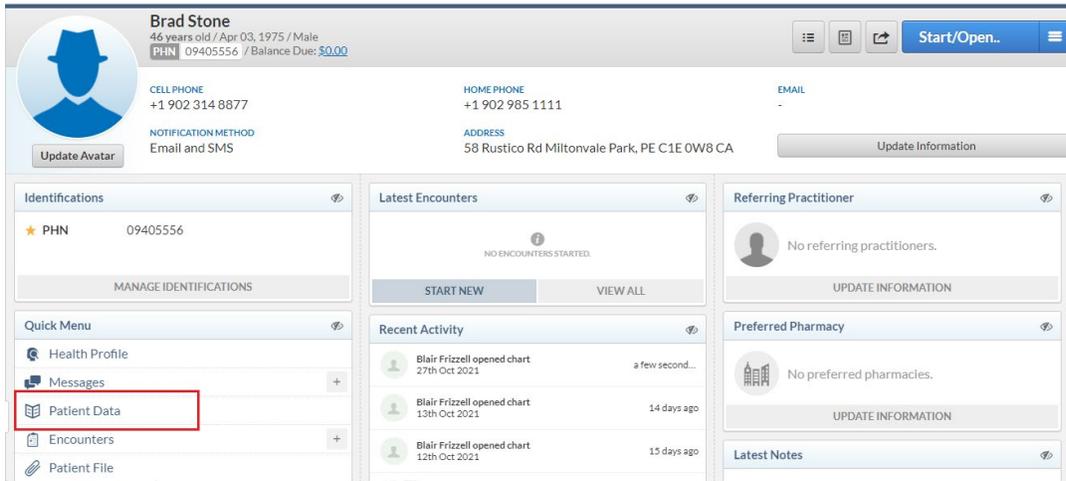
After selecting Start/Open, choose Patient Data



CLOSE

- + Start New Encounter
- Send Qnaire
- Message Patient
- Start Pathway
- Print Label  
DYMO LABEL WRITER ONLY
- Health Profile
- Messages
- Patient Data**
- Encounters
- Lab Results
- Patient Files
- Letters

A second option is from the Patient Dashboard, select Patient Data from Quick Menu.



After selecting Patient Data, the following screen is presented, click on Demographics to expand the section.



The highlighted sections indicate what information Client Registry accepts from CHR.

**Patient Data**

**Demographics**

|                               |  |
|-------------------------------|--|
| Name                          | Brad Stone   |
| Sex & Gender                  | Male / Identity: Male                                  |
| Date of Birth                 | Apr 03, 1975   |
| Contacts                      | Mobile Phone: +1 902 314 8877 / Home Phone: 9029851111 |
| Preferred Notification Method | E-mail, SMS  |
| Family Doctor                 | (Billing: N/A, License: N/A)                           |
| Referring Doctor              | (Billing: N/A, License: N/A)                           |
| Addresses                     | Mailing: 58 Rustico Rd, Miltonvale Park PE, C1E 0W8 CA |
| Additional Contacts           | (N/A; N/A) - Mobile Phone: N/A                         |
| Preferred Pharmacy            | No Entry   |
| Language                      | No Entry   |
| Status                        | No Entry   |

Selecting the label, you will be presented with a screen to enter and delete information.

## Updating addresses in CHR

Click on Addresses to open editable forms to manage a Patient address.

The following example is a Mailing Address. A person can have multiple addresses, all will be displayed here.

| Type               | Mailing            |
|--------------------|--------------------|
| Street Address     | 58 Rustico Rd      |
| Additional Address | Additional Address |
| City               | Miltonvale Park    |
| Province/State     | PE                 |
| Country            | CA                 |
| Postal Code        | C1E 0W8            |

You can edit the existing Mailing Address or add a new address.

Minor edits can be performed directly in the address fields (e.g., adding an apartment number to the Additional Address)

## Adding an Address

When editing a Street Address or adding a new Address, use the Search Address field.

As you begin to type, valid addresses are displayed to select from. The more you type, the more exact the results.

The screenshot shows a search bar with the text "58 Rustico" entered. Below the search bar, a dropdown menu displays several address suggestions:

- 58 Rustico Road Miltonvale Park, PE, Canada
- 58 Rustico Road North Rustico, PE, Canada
- 58 Rustico Quimpo Kaino, Aklan, Philippines
- Rua Capricho Rústico, 58 Jardim Jaragua (Itaim Paulista), São Paulo - State of São Paulo, Brazil
- Rua Rústico Gobbato, 58 São Luiz, Farroupilha - RS, Brazil

Below the suggestions, there are fields for "City", "Province/State", "Country", and "Postal Code". At the bottom, there is a "+ Add Address" button and "Close" and "Save" buttons.

Once you have the address, select the appropriate Type. Mailing Address is the type updated /sent to CR. Reminder: It is important to ensure the mailing address is accurate!

A person should have only one mailing address. Once updates are completed select Save.

The screenshot shows the address form with the "Type" dropdown menu open. The dropdown menu has the following options:

- None
- Home
- Mailing

The "Type" field is currently set to "No Entry". The "Street Address" field is empty. The "Additional Address" field is set to "None". The "City" field is empty. The "Province/State" field is set to "PE". The "Country" field is set to "CA". The "Postal Code" field is set to "C1E 0W8". There are "Updated" buttons next to the "Type" and "Street Address" fields.

A new address can be added by selecting Add Address. Selecting the X in the top right will delete the address from the Patient.

The screenshot shows a mobile application interface for managing patient addresses. At the top, there is a header titled "Addresses" with a search bar and a "PRIMARY" indicator. Below the search bar is a list of address details in a table format. At the bottom of the form, there is a button labeled "+ Add Address" and a footer with "Close" and "Save" buttons.

|                    |                    |
|--------------------|--------------------|
| Type               | Mailing            |
| Street Address     | 58 Rustico Rd      |
| Additional Address | Additional Address |
| City               | Miltonvale Park    |
| Province/State     | PE                 |
| Country            | CA                 |
| Postal Code        | C1E 0W8            |

+ Add Address

Close Save

## To update a Patient's contacts, select Additional Contacts.

There are times a Patient will require multiple addresses. The following describes how to do this and some information about the screen.

| Patient Data                    |  | <input type="checkbox"/> Show Last Updated |
|---------------------------------|--|--|
| <b>Demographics</b>             |  | AUTO EXPAND                                |
| • Name                          | Brad Stone   |  |
| • Sex & Gender                  | Male / Identity: Male                                  |  |
| • Date of Birth                 | Apr 03, 1975   |  |
| • Contacts                      | Mobile Phone: +1 902 314 8877 / Home Phone: 9029851111 |  |
| • Preferred Notification Method | E-mail, SMS  |  |
| • Family Doctor                 | (Billing: N/A, License: N/A)                           |  |
| • Referring Doctor              | (Billing: N/A, License: N/A)                           |  |
| • Addresses                     | Mailing: 58 Rustico Rd, Miltonvale Park PE, C1E 0W8 CA |  |
| • <b>Additional Contacts</b>    | (N/A; N/A) - Mobile Phone: N/A                         |  |
| • Preferred Pharmacy            | No Entry   |  |
| • Language                      | No Entry   |  |
| • Status                        | No Entry   |  |

You are then presented with the following screen.

The screenshot shows a window titled "Additional Contacts" with a standard macOS-style title bar (minimize, maximize, close buttons). The form contains the following fields and options:

- First Name:** Text input field with a blue "PRIMARY" button to its right.
- Middle Name:** Text input field.
- Last Name:** Text input field.
- Contact Purpose:** A group of radio button options:
  - Emergency Contact
  - Next of Kin
  - Administrative Staff
  - Care Giver
  - Power of Attorney
  - Insurance
  - Guarantor
  - Substitute Decision Maker
  - Other
- Relationship:** A group of radio button options:
  - Spouse
  - Mother
  - Father
  - Guardian
  - Brother
  - Sister
  - Son
  - Daughter
  - Grandmother
  - Grandfather
  - Friend
  - Partner
  - Relative
  - Other
- Mobile Phone:** Text input field.
- Home Phone:** Text input field.
- Work Phone:** Text input field.
- Work Phone Extension:** Text input field.
- Email:** Text input field.
- Address:** Text input field.
- Notes:** Text input field.

At the bottom of the form, there is a "+ Add Additional Contact" button, a "Close" button, and a blue "Save" button. The bottom of the window shows a partial view of a patient's medical history with labels like "Age", "Lipidsterol", "HDL", "BP", and "SMK".

The first contact added here is displayed on the Update Patient, Address & Extra tab discussed on page 8. It does not have to be an Emergency Contact.

You can add different Contacts for the Patient.

To record phone numbers and an email address for the Patient, navigate to the Contact section.

Patient Data ☐ Show Last Updated

**Demographics** AUTO EXPAND

|                                 |  |     |
|---------------------------------|--|-----|
| • Name                          | Brad Stone   | 🔍 ↻ |
| • Sex & Gender                  | Male / Identity: Male                                  | 🔍 ↻ |
| • Date of Birth                 | Apr 03, 1975   | 🔍 ↻ |
| • <b>Contacts</b>               | Mobile Phone: +1 902 314 8877 / Home Phone: 9029851111 | 🔍 ↻ |
| • Preferred Notification Method | E-mail, SMS  | 🔍 ↻ |
| • Family Doctor                 | (Billing: N/A, License: N/A)                           | 🔍 ↻ |
| • Referring Doctor              | (Billing: N/A, License: N/A)                           | 🔍 ↻ |
| • Addresses                     | Mailing: 58 Rustico Rd, Miltonvale Park PE, C1E 0W8 CA | 🔍 ↻ |
| • Additional Contacts           | (N/A; N/A) - Mobile Phone: N/A                         | 🔍 ↻ |
| • Preferred Pharmacy            | No Entry   | 🔍 ↻ |
| • Language                      | No Entry   | 🔍 ↻ |
| • Status                        | No Entry   | 🔍 ↻ |

The following screen is displayed.

| Contacts               |   |
|------------------------|---|
| • Email                | Email   |
| • Mobile Phone         | +1 902 314 8877                                       |
| • Home Phone           | Home Phone <span style="float: right;">Updated</span> |
| • Work Phone           | Work Phone  |
| • Work Phone Extension | Work Phone Extension                                  |

Close Save

When entering the phone numbers, it's important to include the area code and 7 digits. Currently, no validation is completed on the phone number format, so it's possible to save an incorrect phone number format.

It's recommended to enter the phone as ### # ## #. Example: 902 555 4321. Phone number formats are sent to Client Registry so it's important to ensure they have 10 digits.

## Viewing Historical Patient Information

Viewing historical information can be done by selecting Show Last Updated. Which will display the date of the last update for each section.

**Patient Data**  Show Last Updated

**Demographics** AUTO EXPAND

|                                 |  |   |
|---------------------------------|--|---|
| • Name                          | Brad Stone   |   |
| • Sex & Gender                  | Male / Identity: Male                                  |   |
| • Date of Birth                 | Apr 03, 1975   |   |
| • Contacts                      | Mobile Phone: +1 902 314 8877 / Home Phone: 9029851111 |   |
| • Preferred Notification Method | E-mail, SMS  |   |
| • Family Doctor                 | (Billing: N/A, License: N/A)                           |   |
| • Referring Doctor              | (Billing: N/A, License: N/A)                           |   |
| • Addresses                     | Mailing: 58 Rustico Rd, Miltonvale Park PE, C1E 0W8 CA |   |
| • Additional Contacts           | (N/A; N/A) - Mobile Phone: N/A                         |   |
| • Preferred Pharmacy            | No Entry   |   |
| • Language                      | No Entry   |   |
| • Status                        | No Entry   |   |

To view the history of each data elements in Patient Data, select the history icon

**Patient Data**  Show Last Updated

**Demographics** AUTO EXPAND

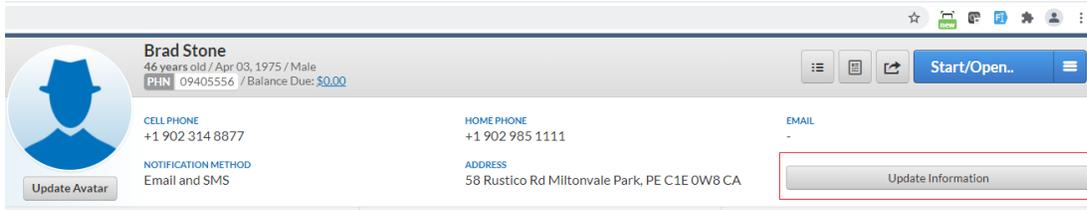
|                |   |   |
|----------------|---|---|
| • Name         | Charlie Frizzell<br>Last Updated: Nov 03, 2021 9:09AM |   |
| • Sex & Gender | Male<br>Last Updated: Nov 02, 2021 2:20PM             |   |

The following details the recent updates

| History        |  |  |  |
|----------------|--|--|--|
|                |  <b>Mr. Blair Frizzell</b><br>Nov 03, 2021 9:09AM |  <b>Dr. Api Import Agent</b><br>Nov 03, 2021 9:05AM |  <b>Mr. Blair Frizzell</b><br>Nov 02, 2021 2:20PM |
| Given Name     | Charlie  | Charlie  | Charlie  |
| Preferred Name | -  | -  | -  |
| Middle Initial | TEST   | TEST   | C  |
| Family Name    | Frizzell   | Test   | Test   |
| Prefix         | -  | -  | -  |
| Suffix         | -  | -  | -  |

## Update Information button

Address information **SHOULD NOT** be updated from this area.



Brad Stone  
46 years old / Apr 03, 1975 / Male  
PHN 09405556 / Balance Due: \$0.00

CELLPHONE +1 902 314 8877  
HOME PHONE +1 902 985 1111  
EMAIL -

NOTIFICATION METHOD Email and SMS  
ADDRESS 58 Rustico Rd Miltonvale Park, PE C1E 0W8 CA

Update Avatar Start/Open.. Update Information

After selecting “Update Information”, you are presented with the Update Patient screen with several tabs across the top



Brad Stone  
46 years old / Apr 03, 1975 / Male

Update Patient Patient Chart

General Address & Extra Portal Merge Patient Accessibility

TITLE FIRST NAME MIDDLE LAST NAME  
Mr Brad Stone

NOTIFICATION METHOD ADDRESS

These screens allow you to view and enter information. A few details about this screen.

On the **General Tab**, you are presented with the following screen.

You can update information on this tab such as phone numbers or name information which is sent to Client Registry.

Make sure Phone numbers have 10 digits when entering them in the CHR.

**Update Patient** Patient Chart

General Address & Extra Portal Merge Patient Accessibility

TITLE: Mr. FIRST NAME: Charlie MIDDLE: TEST LAST NAME: Smith

PREFERRED NAME: DATE OF BIRTH: 03/03/1980

SEX: Male GENDER IDENTITY: Choose one... PREFIX: Choose one...

EMAIL ADDRESS: NOTIFICATION: None

CELL PHONE: 902 314 2222 HOME PHONE: 902 314 8888

OFFICE PHONE: OFFICE PHONE EXT:

PRIMARY PRACTITIONER: PRIMARY LOCATION: Dr. Newson-Boardwalk Profession

FAMILY DOCTOR: REFERRING PRACTITIONER:

IDENTIFICATIONS: PE 30817092 PRIMARY

+ Add New Identification

Close Save

David Ross updated an unsigned encounter

On the **Address & Extra** tab – the address that is displayed on this screen functions the same as that displayed at the top of the screen – it is the most recent address that was updated. It does not indicate if it a Mailing or Home address.

If a Patient has both a Home and Mailing, the most recent update to that address is displayed. **It's important to navigate to the Patient Data screen to enter/update addresses.**

Reminder: address information should be updated in the Patient Data section

16 years old / Apr 03, 1975 / Male

### Update Patient

[Patient Chart](#)

General | **Address & Extra** | Portal | Merge Patient | Accessibility

Family Doctor Additional Info

Street Address

Additional Address

City

State/Province

Country

ZIP/Postal Code

Email

Home Phone

Office Phone

The Emergency Contact Fields displayed on the **Address & Extra** tab **MAY NOT** be the Patient's Emergency Contact. It is populating with the first Contact that was added to the Patient from the Patient Data field.

**Update Patient** Patient Chart

General **Address & Extra** Portal Merge Patient Accessibility

Family Doctor Additional Info

Street Address

Additional Address

City

State/Province

Country

ZIP/Postal Code

Email

Home Phone

Office Phone

Office Phone Ext

Cell Phone

Emergency Contact First Name

Emergency Contact Last Name

Emergency Contact Number

Emergency Relationship

Insurance Company

Insurance ID

Insurance Group #

Language

Close Save

## Data that is Exchanged with CR

### **The following information is provided from Client Registry to CHR**

- PHN
- First Name
- Middle Name
- Last Name
- Date of Birth
- Sex
- Mailing Address
- Home Address
- Home Phone (will not update after the Chart is created in CHR)
- Cell Phone (will not update after the Chart is created in CHR)
- Business Phone (will not update after the Chart is created in CHR)
- Date of Death
- Medicare Eligibility

### **The following CHR information will update Client Registry**

- First Name
- Middle Name
- Last Name
- Date of Birth
- Mailing Address
- Home Address
- Home Phone
- Cell Phone
- Business Phone

*Note: email address is not part of the Client Registry updates*