

Registering a New Patient

1. Search for a patient using 3 patient identifiers.
2. If no results are found, begin patient registration by clicking the  button.
3. Enter as much information on the **Patient** tab as possible.

Note: All yellow fields with a red asterisk are **required** fields.

- a. Selected Facility:
 - Facility: verify correct facility has populated.
 - Primary Care Physician – must be the patient’s true PCP.
 - No PCP Reason – select a reason to bypass the required Primary Care Physician field, if appropriate.
 - SSN – enter patient’s Social Security number.
 - No SSN – select a reason to bypass the required SSN field, if appropriate.
- b. Legal Name:
 - Enter the patient’s Last Name, First Name, and Middle Name exactly as written on their driver’s license or passport.
 - The suffix field should only include a true suffix, i.e., Jr., Sr., III, etc.
 - Preferred First Name is what the patient likes to be called.
- c. Demographics:
 - Sex – must be the patient’s sex assigned at birth.
 - DOB
 - Preferred Language
 - Races/Ethnicities – use the green pencil to modify the patient’s self-reported races and ethnicities.
- d. Home (Mailing) Address:
 - Enter the patient’s mailing address.
 - Click the envelope to validate the address through USPS.

Note: After registration has been completed, there is a place to enter a physical or secondary address, if necessary.

The screenshot shows the 'Add Patient' form with the following sections highlighted by red boxes and letters:

- 3**: Points to the 'Add Patient' button at the top left.
- a**: Points to the 'Selected Facility' section, including fields for Facility (MHC Munson Family Practice Center), Primary Care Physician, No PCP Reason, SSN, and No SSN.
- b**: Points to the 'Legal Name' section, including fields for Last Name (PRACTICE), First Name (BRETT), Middle Name, Suffix, and Preferred First Name.
- c**: Points to the 'Demographics' section, including fields for Sex, DOB (08/10/1949), Preferred Language (English), Races, and Ethnicities.
- d**: Points to the 'Home (Mailing) Address' section, including fields for Address Line 1, Address Line 2, Country (US), Zip Code, City, and State.

- e. Contact Information:
 - Select the patient’s Preferred Phone Type
 - Note:** The phone type selected will then become a **required** field.
 - Enter all available contact information for the patient.
- f. Healthe Life Portal:
 - Enter the Patient E-Mail Address
 - Select an Access Offered
 - No: should rarely be selected, patients should always be offered access to their Portal
 - Patient Declined
 - Yes
 - If Yes, additional fields will become available:
 - Send Invite by selecting **Send**
 - Challenge Question will default to **Your postal code**
 - Challenge Answer will default to the patient’s five-digit zip code
- g. Patient Comments:
 - Enter any pertinent registration comments in textbox.

The screenshot shows a registration form with three main sections highlighted by red boxes and callouts:

- Section e:** Contact Information fields including Preferred Phone Type, Home Phone, Mobile Phone, Work Phone, Work Extension, and Alternate Phone Number.
- Section f:** Healthe Life Portal fields including Patient E-Mail Address, Access Offered, Send Invite, Challenge Question, Challenge Answer, Invite Status, Online Identity Link Status, and Error Reason.
- Section g:** Patient Comments section with a text area for Patient Comment.

4. Select the **Guarantor** tab.
 - a. Click the button to add the person responsible for payment on the patient’s account.
 - b. Select **Self** to choose the patient as the guarantor.
 1. Click **OK**.

The screenshot shows the 'Guarantor' dialog box with the following details:

- Section:** Patient Relationship to Guarantor
- Options:**
 - Self (highlighted with a red box and callout 'b')
 - Current
 - Search
- Type:** SELF

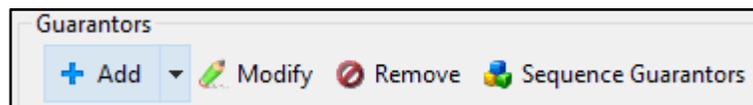
- c. Select **Search** to choose a person as the guarantor that is **not** the patient.
 1. Type the person's name in the **Search for Related Person** box and press enter on the keyboard or click on the magnifying glass to open the Person Search window.
 - Choose the correct person from the list and click **Select**.
 - If no person is found, click the button to add a new guarantor.
 2. Select the **Type** of relationship from the **required** field drop-down.

NOTE: The Type of relationship is who the patient is to the related person (Example: If the patient is a child and the guarantor is the parent, the Type would be Child).

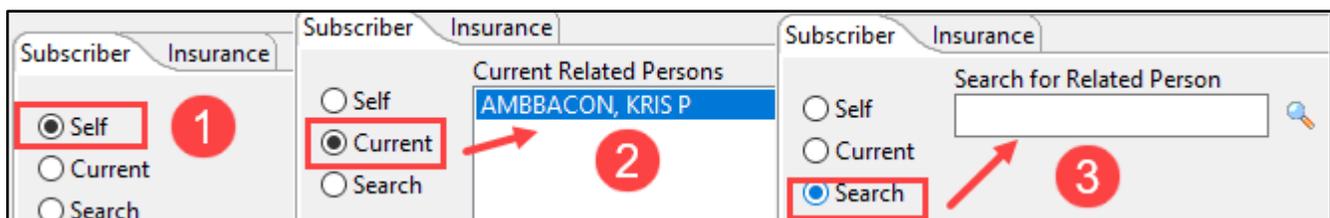
3. Click **OK**.



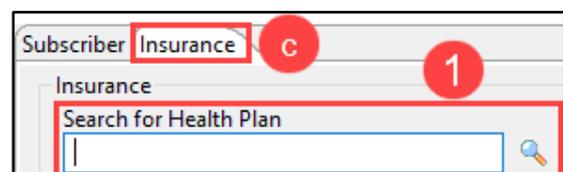
- d. Guarantors can be modified, removed, and sequenced once added.



5. Select the **Insurance** tab.
 - a. Click the button to add an insurance.
 - b. Choose the Subscriber.
 1. Select **Self** to choose the patient as the subscriber.
 2. Select **Current** to choose a Current Related Person (available if a guarantor other than the patient was selected).
 3. Select **Search** to choose a person as the subscriber that is not the patient.



- c. Select the **Insurance** tab.
 1. Search for the patient's insurance by entering the plan name into the **Search for Health Plan** field and hit enter on the keyboard or click the magnifying glass.



- Click the arrow next to the correct Health Plan name to expand the details.
- Verify the Address displayed is correct and click to highlight.
- Click Select.

Health Plan	Insurance Office	Type	Address	Payer	Financial Class	Plan Alias
> Priority Caid HMP				Priority Health	MEDICAID HMO HMP	Health Plan
<input checked="" type="checkbox"/> Priority Health			Business PO Box 232 Grand Rapids MI 49501 (800) 942-4765 <Unspecified Address>	Priority Health	PRIORITY HEALTH	Health Plan
> Priority Health Caid				Priority Health	MEDICAID HMO HMP	Health Plan
> Priority Health HRA				Priority Health	PRIORITY HEALTH	Health Plan
> Priority Health MICHILD				Priority Health	MEDICAID HMO	Health Plan
> Priority Medicare				Priority Health	MEDICARE ADVANTAGE	Health Plan
> YYPriority Caid HMP 1500 Clinic				Priority Health	MEDICAID HMO HMP	Health Plan
> YYPriority Caid HMP Clinic				Priority Health	MEDICAID HMO HMP	Health Plan
> YYPriority Health Caid Clinic				Priority Health	MEDICAID HMO	Health Plan
> YYPriority Health Caid Clinic NPF				Priority Health	MEDICAID HMO	Health Plan

- Fill in all **required** fields in Plan Details.

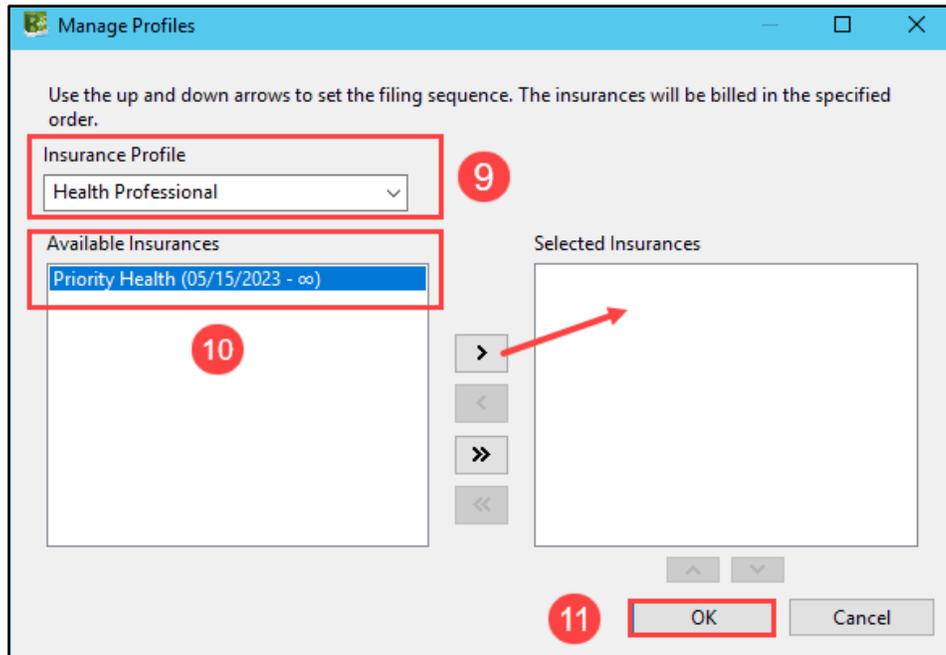
Note: The Begin Date **must** be 1 day prior to the date of registration creation or addition of a new insurance plan.

- Insured Name on Card** is available if the patient's legal name differs from the name on the insurance card.

- Click OK.
- Click on Manage Profiles.

Profile	Seq	Health Plan	Payer	Financial Class
Unassociated		Priority Health	Priority Health	PRIORITY HEALTH

9. Select the Insurance Profile.
10. Click on the correct Available Insurances and click the arrow to add it to the Selected Insurances.
11. Click OK.



12. Click Save.

