

## Adding a Research Patient

Follow the steps below to mark a patient as a research patient.

1. Patient has been identified as a research patient. Search for patient name in search box and click "enter" on keyboard.

😻 Revenue Cycle - Patient Track	ting
File View Task Help	
Search by Name 💽 🔍	🦈 🗇 Appointments  🧐 Re
🔉 🚨 Patient Tracking 🖄	🕹 Kiosk Dashboard

## 2. Find patient, and click "Select"

		MRN	CMRN	Date of	Birth	Sex	Age
AMBMUNSON, CHAR		A04000037; MD10507	48 4000061; 1549345	10/20/1	994	Female	23
AMBMUNSO	N, CHERRY A	MD1050740; A040000	25 1549337; 4000049	09/04/1	.985	Female	32
•		III					•
F							
EDCOUDTOF	Eacility		Encounter Type		Date	of Servic	
A0054000136	Facility Teen Health	Corner - Forest Area	Encounter Type Phone Message Non-	Billable	Date	of Servic	e 🔺
A0054000136 A0054000561	Facility Teen Health Cadillac OB	n Corner - Forest Area	Encounter Type Phone Message Non- Clinic	Billable	Date 03/16	of Servic	e 🔺
A0054000136 A0054000561 A0054000566	Facility Teen Health Cadillac OB Cadillac OB	n Corner - Forest Area 6 GYN 9 GYN	Encounter Type Phone Message Non- Clinic Clinic	Billable	Date 03/16 03/16	of Servic 5/2018 12 5/2018 12	e 🔺
A0054000136 A0054000561 A0054000566 A0054000528	Facility Teen Health Cadillac OB Cadillac OB Cadillac OB	n Corner - Forest Area 9 GYN 9 GYN 9 GYN	Encounter Type Phone Message Non- Clinic Office Visit	Billable	Date 03/16 03/16	of Servic 5/2018 12 5/2018 12 5/2018 12	
A0054000136 A0054000561 A0054000566 A0054000528 A0054000546	Facility Teen Health Cadillac OB Cadillac OB Cadillac OB Cadillac OB	n Corner - Forest Area 9 GYN 9 GYN 9 GYN 9 GYN	Encounter Type Phone Message Non- Clinic Clinic Office Visit Office Visit	Billable	Date 03/16 03/16 03/16	of Servic 5/2018 12 5/2018 12 5/2018 12 5/2018 12	
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A0054000136 A0054000561 A0054000566 A0054000528 A0054000546 A0054000551 A0054000376	Facility Teen Health Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac Print	a Corner - Forest Area 9 GYN 9 GYN 9 GYN 9 GYN 9 GYN 9 GYN mary Care	Encounter Type Phone Message Non- Clinic Clinic Office Visit Office Visit Clinic Clinic	Billable	Date 03/16 03/16 03/16 03/16 03/16 03/16	of Servic 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 8:0	e 🔺
A0054000136 A0054000561 A0054000566 A0054000528 A0054000551 A0054000376 A0054000375	Facility Teen Health Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac Prin Grayling CH	a Corner - Forest Area 9 GYN 9 GYN 9 GYN 9 GYN 9 GYN 9 GYN mary Care 4C Primary Care	Encounter Type Phone Message Non- Clinic Clinic Office Visit Office Visit Clinic Clinic Clinic	Billable	Date 03/16 03/16 03/16 03/16 03/08 03/08	of Servic 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 8:( 7/2018 3:2	e 🔺
A0054000136 A0054000561 A0054000566 A0054000528 A0054000551 A0054000376 A0054000375 A0054000374	Facility Teen Health Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac Pril Grayling CH Grayling CH	a Corner - Forest Area GYN GYN GYN GYN GYN GYN Mary Care G Primary Care G Primary Care	Encounter Type Phone Message Non- Clinic Clinic Office Visit Office Visit Clinic Clinic Clinic Clinic	Billable	Date 03/16 03/16 03/16 03/16 03/16 03/07 03/07	of Servic 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 3: 7/2018 3: 7/2018 1:	e 🔺
A0054000136 A0054000561 A0054000566 A0054000528 A0054000551 A0054000376 A0054000375 A0054000374 A0054000373	Facility Teen Health Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac OB Cadillac Prii Grayling CH Grayling CH Teen Health	a Corner - Forest Area GYN GYN GYN GYN GYN GYN Mary Care G Primary Care G Primary Care C Primary Care C Primary Care	Encounter Type Phone Message Non- Clinic Clinic Office Visit Office Visit Clinic Clinic Clinic Clinic Behavioral Health	Billable	Date 03/16 03/16 03/16 03/16 03/08 03/07 03/07 03/07	of Servic 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 12 5/2018 8: 7/2018 3: 7/2018 1: 7/2018 11	e ▲ 61 = 61 61 61 61 61 61 61 61 61 61 61 61 61

3. Navigate to "Encounters" within top toolbar and select icon

📁 Appointments  Registratio	O Encounters	🌌 Patient Account 🛛 🚭 Charge Entry	🤁 🔹	AMBMUNSON, CHERRY A
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## Job Aid

Cerner Ambulatory

4. Navigate to the "Encounters" tab and select appropriate encounter to document on.

C	) Encounters 🛛 🕜 Encounter Details 🎒 Patient Cases								
Ć	3 Encounter: A0054011927, 09/14/2018-09/14/2018								
	<ul> <li>Filters</li> </ul>								
1	Encounter	Facility	Encounter Type	Begin Date	End Date	Resource			
	A0054011927	Cadillac Primary Care	Clinic	09/14/2018	09/14/2018	Cox MD, Douglas			
1	A0054011916	Milltown Clinic	Clinic	09/13/2018	09/13/2018	Hanert DO, Gregg B			
	A0054011913	Milltown Clinic	Clinic	09/12/2018	09/12/2018	Hanert DO, Gregg B			
	A0054009401	Munson Family Practice Center	Clinic	08/23/2018	08/23/2018	Cook DO, Joseph N			
	A0054009374	Cadillac Primary Care	Clinic	08/22/2018	08/22/2018	Crago MD, Lori M			
	A0054008447	Cadillac Primary Care	Clinic	08/16/2018	08/16/2018	Crago MD, Lori M			
	A0054008443	Cadillac Primary Care	Clinic	08/15/2018	08/15/2018	Crago MD, Lori M			

5. Double Click on the encounter you want to document the research information on. "Encounter details" will open. Click on the green pencil to modify.

		A 11 40 3 4
🕐 Encounter 🕜 Encounter Details 🖾 🔧	Patient Cases	🗶 🖬 🛲 🎿 🔻 🖉
A F		

6. The "encounter details" will open, scroll down and you will see the Trial Patient field and the Clinical Trial Number field. Complete the fields. Click Save.

G Encounters	3 🥑 Patient Cases	
Contention Contention (Contention) Contention (Cont	/2018-09/14/2018	
Details Guarantor Insurance		
Referring Physician Referring Physician Clinic	۹ Referring Physician First Name	Referring Phy
Referring Physician Address	Referring Physician City	Referring Phy
Patient Case	•	_
Trial Patient Yes 👻	Clinical Trial Number 123456	

7. Navigate to the "registration" icon.

Appointments	🧭 Registration	O Encounters



Job Aid

**Cerner Ambulatory** 

8. Click on the green pencil in the upper right hand corner to modify the registration.



## 9. Navigate to the "Alerts" tab.

🚨 *Demographics 🛙 🔪 🧐 Transaction History Viewer) 🤪 Guarantor Balance Summary 🎒 Patient Cases
Patient Relationships Guarantor Insurance Legal Forms Alerts
Alerts
Process Marte

10. Click on the green pencil to modify. Select Research patient from the list. Click the over arrow and select OK.

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hronic Care Patient iombative Patient inancial Assistance Declined terpreter Needed avment Arrangements		
Letter ID Required- Documented ID Theft leter to Business Office lesearch Patient ee Patient Comments election Alert-Similar Name		
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11. Navigate to the Relationships Tab and select yes to verify

Patient Relationships Guarantor	Insurance Legal Forms Alerts
Verify Relationships? Yes	Emancipated Minor
Related Persons	

12. Navigate to the insurance tab and verify the insurance.

🖕 *Demographics 🛙 🔪 🕙 Transaction History Viewer 🥔 Guarantor Balance Summary 🎯 Patient Cases								
Patient Relationships Guarantor Insurance Legal Forms Alerts Yenty Person Insurance Yes •								
Add Insurance &	Modify	/ Insurance 🛛 Re	move Insurance  ರ Mai	nage Profiles				
Profile	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin Dat
Health Professiona	1							
	1	Blue cross Of MI	Blue Cross/Blue Shield	Blue Cross/ Blue Shield	AMBMUNSON, CORI	XYZ383928383		09/18/201

13. Click on the floppy disc icon in the upper right hand corner to save.

