Documenting on the Correct Patient and Visit

Interior Health

A. Selecting the Correct Patient

Selecting the correct patient is extremely important. Documenting against the wrong patient can lead to privacy breaches and impacts patient care. Here's a quick guide on how to find your patients in Meditech.

1. Header Buttons

Meditech's EMR contains Header Buttons that are the most common approach to locating patients.

My Patients
Penticton Regional Hospital

[My Patients] [Rounds Patients] [My Discharged] [Cover Discharged]

- **My Patients**: Patients for whom you are named as Admitting, Attending, PCP, Family Physician, or Other physician. This will include inpatients, and outpatients who have been assigned to a bed.

- **Round Patients**: ED, inpatients, and outpatients assigned to a bed.

- **My Discharged Patients**: Inpatients discharged in the last week for whom you were listed as a provider at time of registration/admission.

- **Cover Discharged**: The same as the above, but includes patients for other physicians you have covered for.

2. Find Patient by Identifiers

The Find Patient panel (upper right in PCM) can be used to locate patients by identifiers (name, PHN, account number).

Msg/Task
Patient Lists
Next Patient
→ Find Patient

BEST PRACTICE

Search using **Account Number** (e.g. PR0000443/20)

Account Num [   ]

This will correctly identify both the patient **and** the correct visit.

GOOD

Search using PHN—entered in the HC Number field.

HC Num [   ]

You will still need to identify and select the correct patient visit to document against.

LAST RESORT

Search using Patient Name in the format **Last, First**. Confirm the correct patient with identifiers such as DOB, PHN, Facility and Location, Registered/Admitted Date, and Attending Physician. Once selected, you will also need to select the correct patient visit.

3. List Button

Using the [Lists] button at the bottom left shows you all patient lists available.

Patient Lists
My Patients
Rounds Patients
My Discharged Patients
Cover Discharged Patients
My Emergency Patients
Cover Emergency Patients
My Scheduled Outpatients
Cover Scheduled Outpatients
My Hold Queue
Cover Hold Queue
My Recent Consultations
My All Patients
Recent Visit Activity
Personal List
Recently Accessed
Admissions/Discharges By Date
Any Location

Commonly Used Lists:

- **My Emergency Patients:** Patients in ED under your care. When selected, you can choose to see a list of your ED patients, or all ED patients you are covering.

- **My Scheduled Outpatients:** Patients booked for an outpatient visit or follow-up. Examples include Ortho or Respiratory clinic outpatients. This list works for any outpatient booked through Community-Wide Scheduling.

- **Recently Accessed:** A 'shortcut' list to the last 40 patients charts you have accessed in Meditech. Limited to the patients accessed in the past 7 days.

- **Any Location:** This list is useful if you are on call through MOCAP, and are searching for a patient account at another facility.

B. Selecting the Correct Visit

Once you have selected the correct patient, you must document against the correct patient visit. Documenting against the wrong patient visit affects report distribution and clinical care. Here are some pointers on how to identify and document against the correct patient visit.

Visits Table

The visits table is default sorted by most recent registration date.

✔	Reg Date ▲	Type	Loc	Dis Date	Account Num	Provider	Reason for Visit
✔	16/07/19	**ADM ACIN**	PENPRHIP5		PR0000231/20		Longlifitis
✔	11/02/19	DIS CCRO	VERHCC	11/02/19	HJ0000048/19		Vernon Home and Community Care
✔	15/01/19	REG CLI	KELKGHAMSE		KG0000353/19		EMPI Test
✔	01/07/17	DIS RCR	SUMSGHLB	04/07/19	SG0000006/18		TEst auto-discharge

- **Reg Date**: The patient's registered date or admitted date

- **Reg Type**: The type of registration

> **BOLD** indicates an active registration.
>
> **ACIN**: Inpatient   **SDC**: Surgical Daycare
>
> **ED**: Emergency   **RCR**: Recurring Visit

- **Provider**: Admitting or responsible physician

Hint: Use Filters

Looking for an Inpatient visit? Filter The Visit Type. Change the Time Period to filter to recent visits (for example, last 30 days).

Time Period	Visit Type
○ 7 days	○ Inpatient
○ 30 days	○ Outpatient
○ 90 days	● All
○ 12 months	
○ 24 months	
● All	
○ Selected Visits	
○ Time Frame	

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