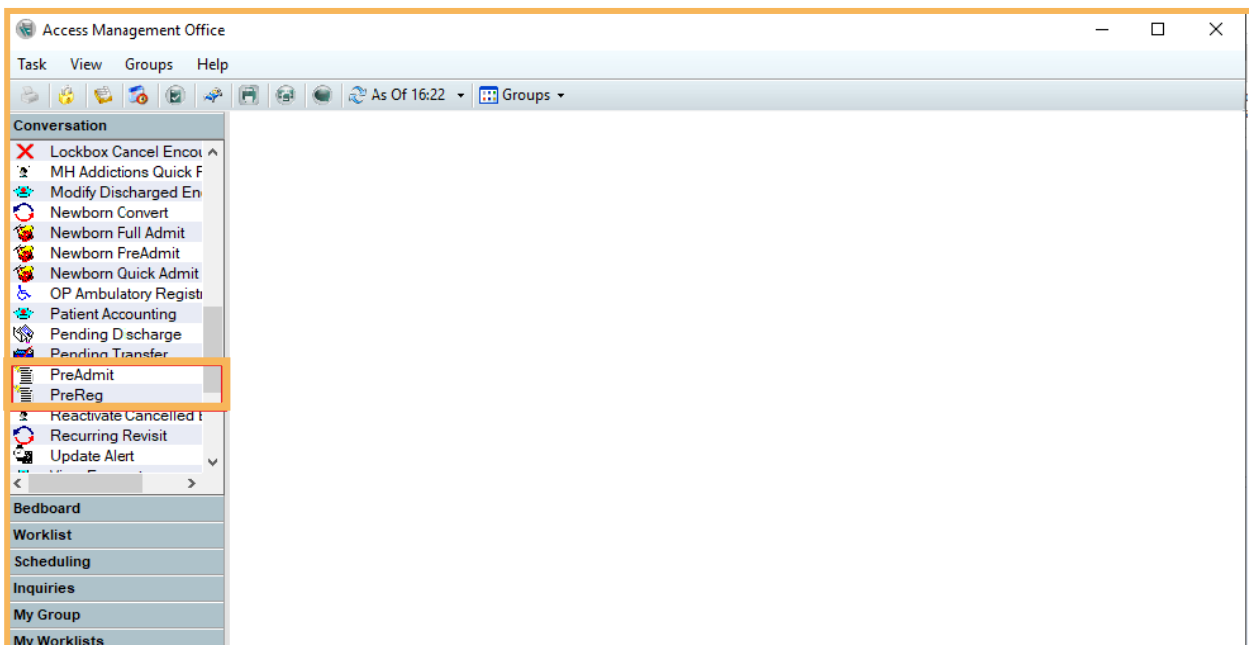## REGISTRATION CLERKS

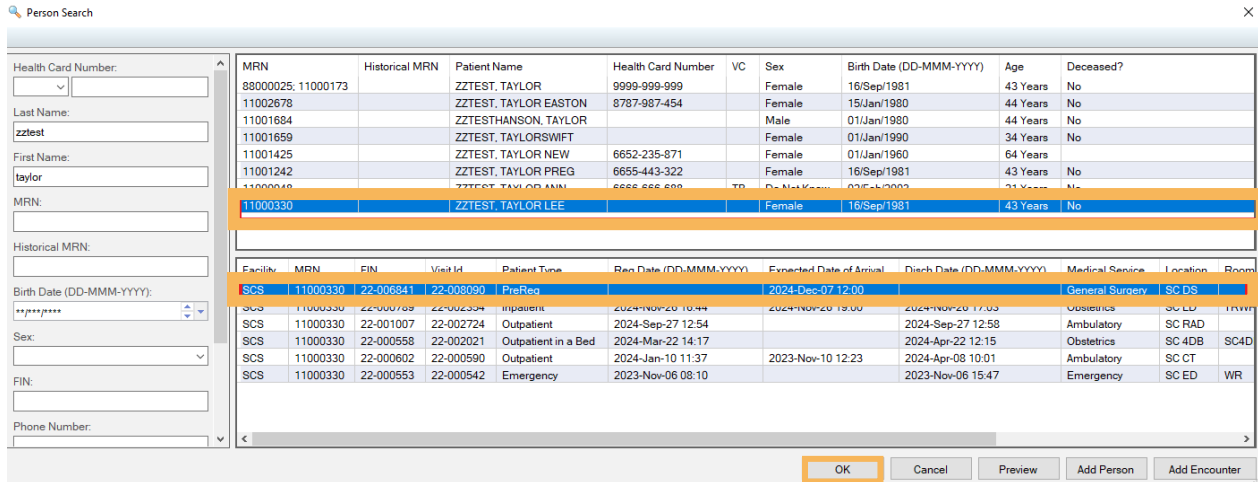This tip sheet provides the steps to verify information in the day surgery/pre-admit encounter

1. To open the scheduled day of surgery encounter, use the **PreReg** (for day surgery) or **PreAdmit** (for inpatient) conversation in Access Management Office.

2. Search for the Patient using the health card number if available, or First and Last name/DOB if health card is not available.
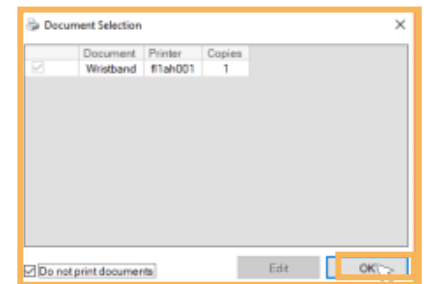

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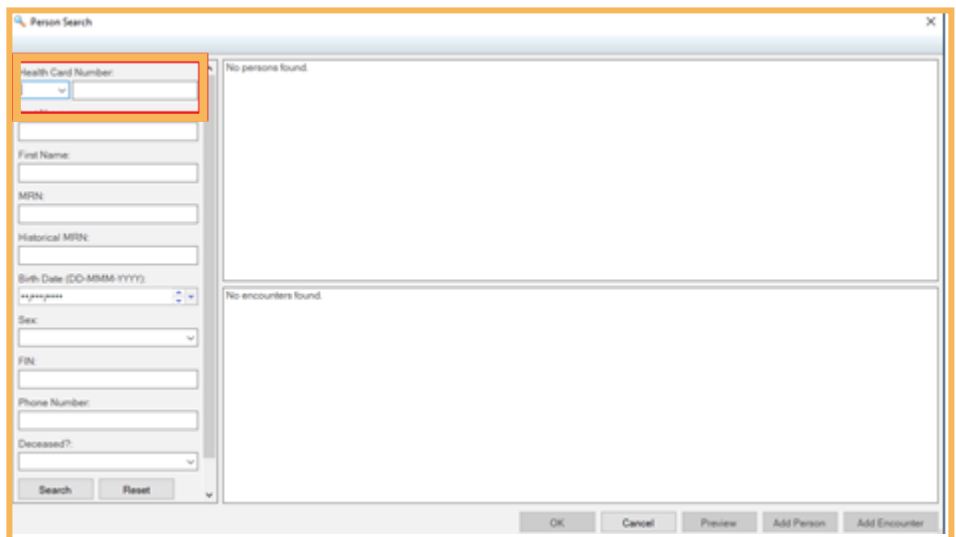
3. In the top pane, select the correct patient, in the bottom pane select the scheduled day of surgery encounter and click **OK**.

4. Confirm demographics with patient and complete all required fields. Fill in additional insurance information if applicable and obtain requested accommodation. Click **OK**.

5. Ensure "Do not print documents" is unselected, select appropriate document(s) from list and click **OK**.

6. Log into Mobile eSignature iOS on the tablet.

7. In the upper left tap "**search**".

8. Fill in FIN for day of surgery and tap "**search**".

9. Tap on correct patient

10. Follow the rest of the ESig workflow and print a copy for the patient.
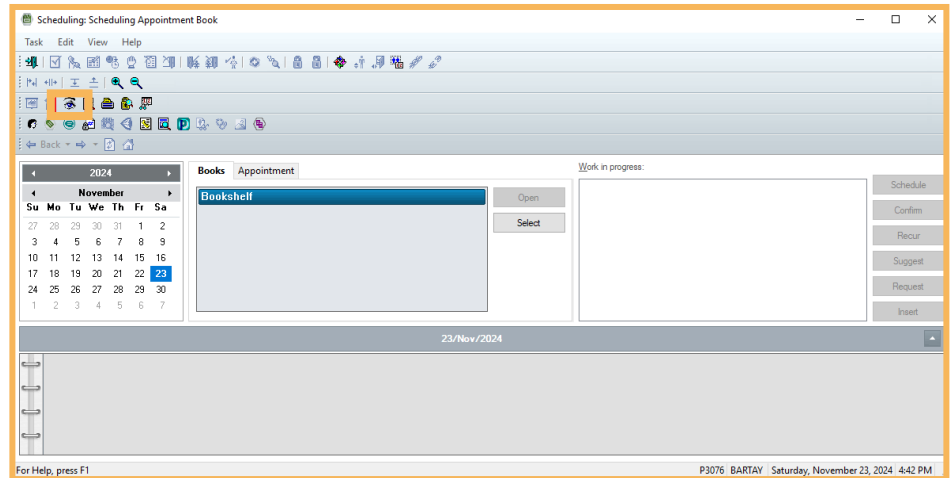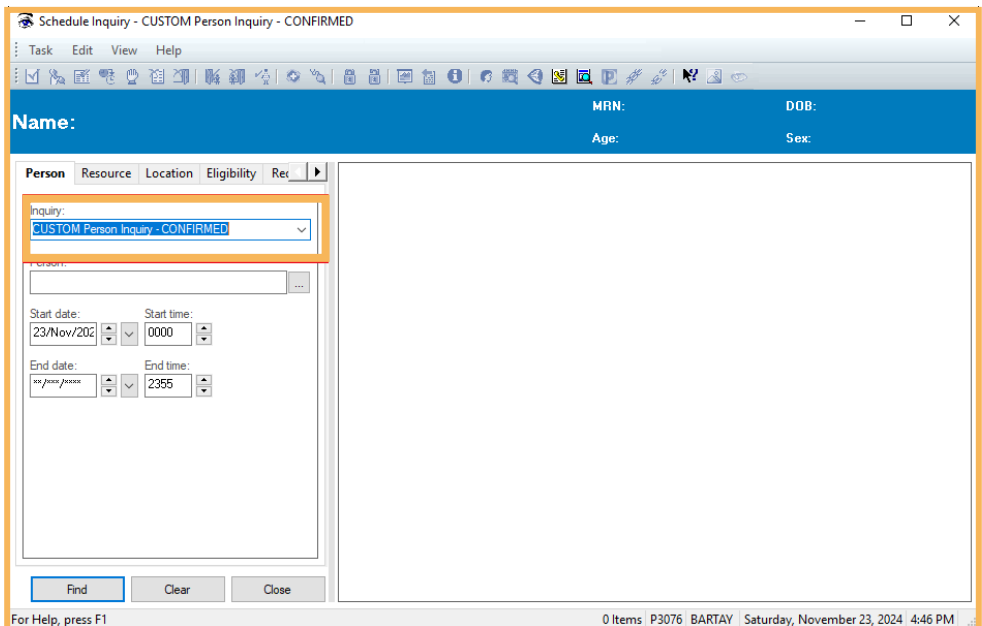
Registering the Pre-op Appointment for today

1. Log into **Scheduling Appointment Book**

2. Locate Patient via Appointment Inquiry. Left click on the "**eye in the sky**" icon.

3. Navigate to Person tab and select "**Custom Person Inquiry – Confirmed**". Hit the three ellipses(dots) on the person line to search for patient.
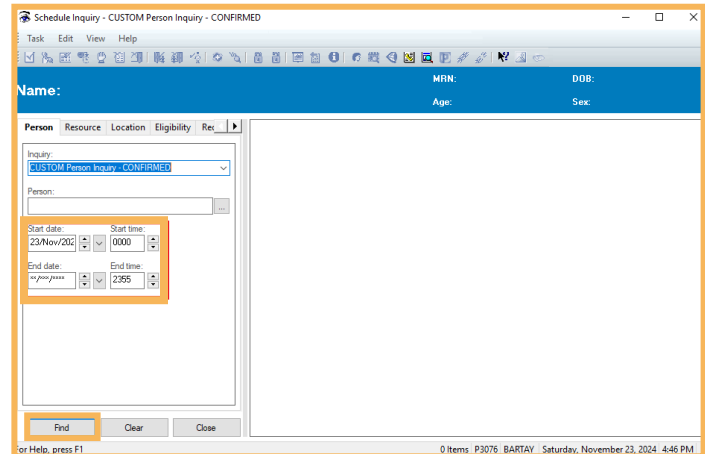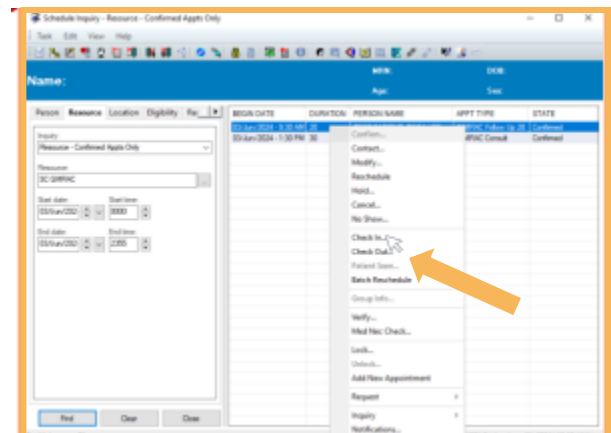
4. Search Patient by health card number

   Confirm the patient, and click **OK**.

5. Select the correct date ranges and start/end times (only enter an end date/time if needed).

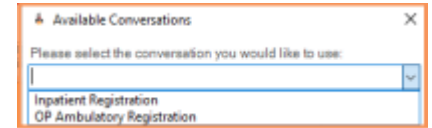6. In your inquiry box, click "**Find**" in the bottom left.

7. Right-click on the Appointment Type that needs to be Checked In. Select "**check in**"

8. Review appointment information and select **OK.**

9. An "**Available Conversations**" box will pop-up. From the drop-down menu, select the "**OP Ambulatory Registration**" conversation and click **OK**.

10. Confirm demographics if patient is present, otherwise fill out to the best of ability and click **OK**.

11. Document Selection box will open at the end of registration. Ensure "**Do not print documents**" is unselected, select appropriate document(s) and printer from list and click **OK**.