

This guide will help you know how to look-up a student, register a new patient and add insurance.

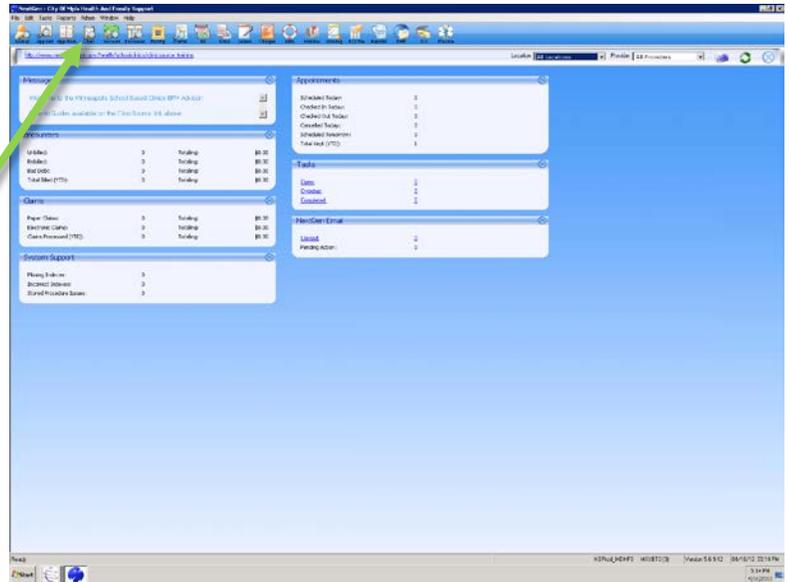
Hint: It may be helpful to also log into Discovery to verify a student's information in order to find him/her in NextGen.

I. Looking-up a Student

To avoid multiple charts, it is very important to do a thorough search for a student in the EPM before adding a new patient.

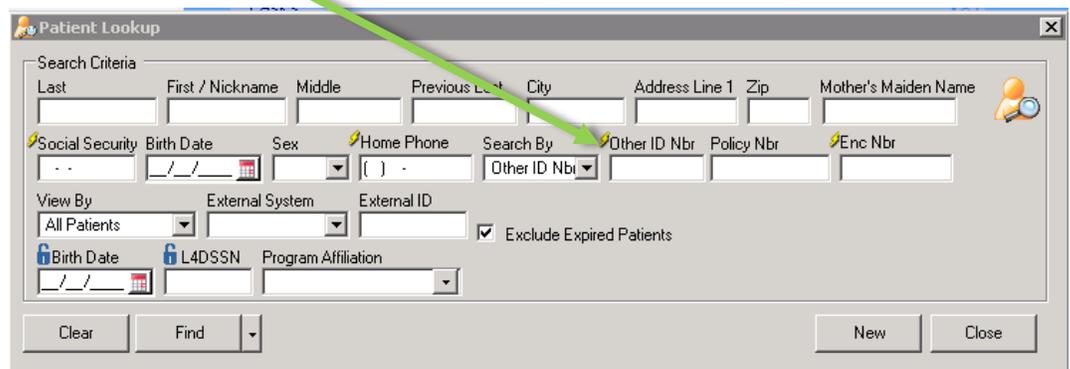
A. In the EPM click on *Chart*

Note: When looking-up a student (whether or not they have been to the SBC before), do not use *People Lookup*.



B. Lookup Student

1. First try looking up the student's ID number. In NextGen this field is called *Other ID Number*. Type the ID number in this field and click *Find*.



If you find the student, congrats! You're done with this How-to-Guide.

- If you don't find the student, click *Clear* and enter the last 4 digits of the SSN in the *L4DSSN* field. Click *Find*.

The screenshot shows the 'Patient Lookup' window. The 'View By' dropdown is set to 'All Patients'. The 'L4DSSN' field is highlighted with a green arrow. The 'Find' button is visible at the bottom.

If you find the student, congrats! You're done with this How-to-Guide.

- If you don't find the student, click *Clear* and search by the student's name. Click *Find*.

Note: Searching by the student's name is the least effective way of finding a student. Only search by name if the previous 3 ways didn't work.

If you find the student, congrats! You're done with this How-to-Guide.

- If you don't find the student, add the student's birth date. Click *Find*.

The screenshot shows the 'Patient Lookup' window. The 'Birth Date' field is highlighted with a green arrow. The 'Find' button is visible at the bottom.

C. No Results

If after performing the 4 searches above you still don't find the student, then (and only then) register the student by clicking *New*.

Note: If you are entering a patient from a Clinic Registration & Consent form without an address, you may enter the patient under the *People Lookup* screen (the address is not required on this screen).

The screenshot shows the 'Patient Lookup' window. A green arrow points from the left side of the window to the 'New' button at the bottom right.

II. Registering a Student

Follow all of the following steps to properly register a patient.

A. Demographics Tab

1. Enter as much information as you can. The red fields are required information. Simply enter the information in each field and the hit *Tab*.
2. **DO NOT USE PUNCTUATION IN ANY FIELD ON THIS SCREEN**
 - a. Hyphenated names: use a space. *Example: Tkadlec Nelson for Tkadlec-Nelson.*
 - b. Don't use an apostrophe. *Example: OBrien for O'Brien*
 - c. Spell out Avenue, Street, Lane, etc.

Hint: After typing the street address, hit *Tab*. You will automatically be taken to the *Zip* field. Once you enter the *Zip*, hit *Tab* again. The *City*, *State* and *County* fields will auto-populate.

Note: If you know the patient's current clinic/doctor, you can enter it here.

The screenshot shows the 'Add Patient Information' window with the 'Demographics' tab selected. Fields include: Last, First, Middle, Previous Last, Nickname; Social Security, Birth Date, Age, Sex; Street, Billing Address, Street, Secondary Address; City, State, Zip; Country, County, Community Cd; Race, Language, Religion, Church, Ethnicity, Contact Preference; Marital Status, Student Status, Veteran, Expired Date, Int'l Hm Phn, Int'l Wk Phn, Int'l Zip; Primary Care Provider, Primary Dental Provider; Telephone Number / E-Mail, Comment; and Generate System Alert. A 'Generate System Alert' checkbox is present. At the bottom are 'Insurance', 'Account', 'Chart', 'OK', and 'Cancel' buttons. A list of phone numbers (Home, Day, Alternate, Secondary Hm, E-Mail, Cell) is shown with double blue arrows for reordering.

3. When entering phone number(s), promote the preferred number to the top by clicking on the double blue arrows.

B. Ext Tab

Next click on the *Ext* Tab.

1. Enter the Student's ID Number in the *Other ID Number* field. **This is the most important information you should enter while registering a patient.**

The screenshot shows a software window titled "Add Patient Information". At the top, there are input fields for "Last", "First", "Middle", "Previous Last", and "Nickname". Below these are fields for "Social Security", "Birth Date", "Age", and "Sex". A tabbed interface is visible with tabs for "Demographics", "Status", "Client Defined", "Provider", "Privacy", "Employer", "Relations", and "Ext". The "Ext" tab is currently selected. Below the tabs is a table with columns: "External ID", "External System", "Creator", and "Create Date". At the bottom of the window, there is an "Other ID Number" input field, which is highlighted by a green arrow. At the very bottom, there are buttons for "Insurance", "Account", "Chart", "OK", and "Cancel".

C. Status Tab

Next click on the *Status* Tab.

1. If you are registering a student, but not booking an appointment, choose *Registered* in the *Patient Status Field*.
2. If you are registering a student and booking an appointment, choose *Active* in the *Patient Status Field*.
3. The *Patient Status Change Reason* field is only used when archiving a chart. You do not need to choose anything in this field at this time.

D. Client Defined Tab

Next click on the *Client Defined* Tab.

1. Choose the proper option for the *Clinic Consent* field.
2. If the patient has a signed minor or mental health consent, also choose the proper options in those fields.

The screenshot shows the 'Add Patient Information' window with the 'Client Defined' tab selected. The 'Clinic Consent' dropdown menu is highlighted with a green arrow. Other fields visible include 'Patient Born in the USA?', 'Existing Paper Chart?', 'Current School', 'Family Planning Waiver', and 'Program Affiliation'.

3. Choose the proper option for the *Patient Born in the USA?* field.
4. Indicate if the patient has an existing paper chart in the *Existing Paper Chart?* field.
5. Enter the patient's current school.
6. If the patient is the process of obtaining or has obtained a Family Planning Waiver, choose the proper option in that field.
7. If the patient is involved in any of the following programs, select it in the *Program Affiliation* field.
 - Life Skills
 - POHI
 - SPAN
 - TAPPP
 - Wellstone School

8. If you have the patient’s insurance information, go ahead and enter the insurance by clicking on the Insurance Button.

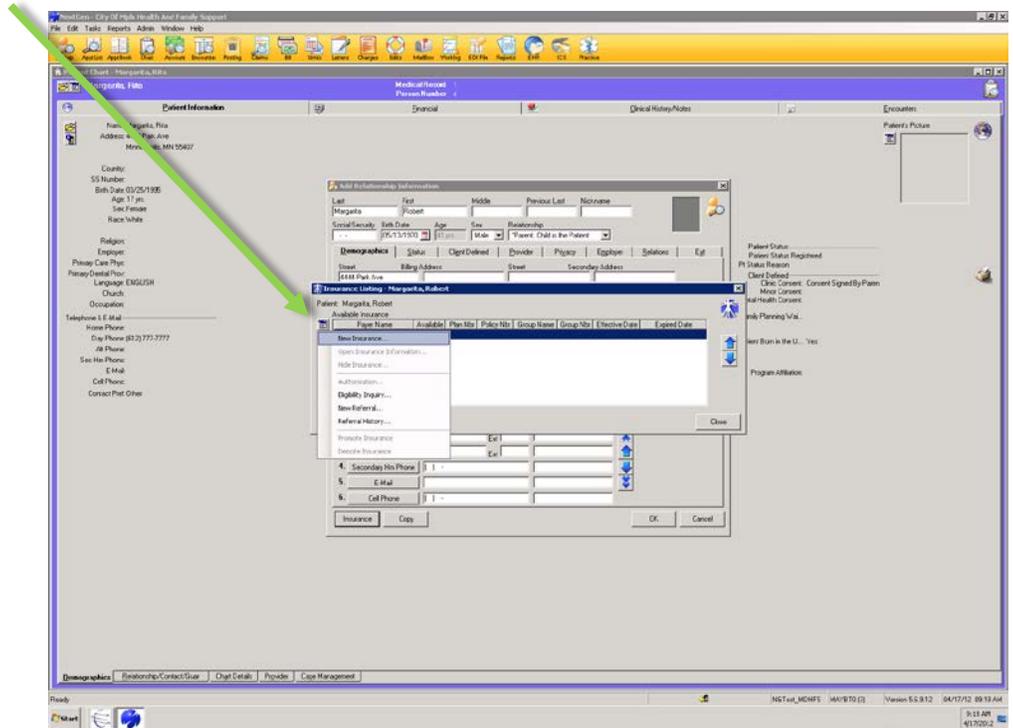
If you don’t know the insurance information, click *OK*. **Congrats! You are done with this How-to Guide.**

Note: **Do not** click on the *Chart* button at this time.

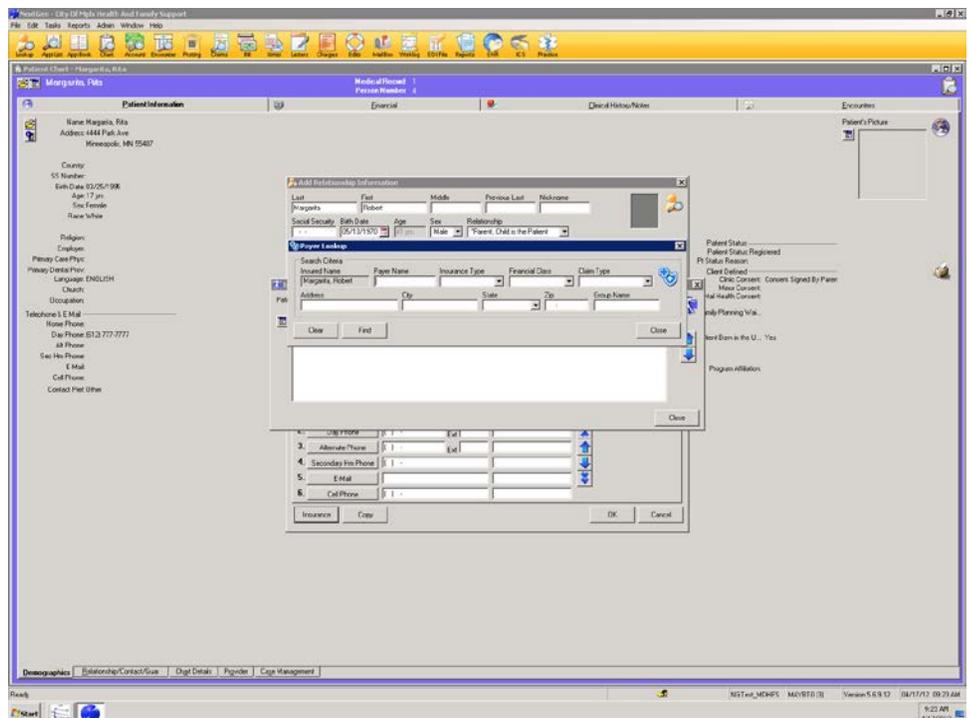
E. Insurance

If you do not know the patient's insurance status, skip this step.

1. Click on the *Norton* button and select *New Insurance*.



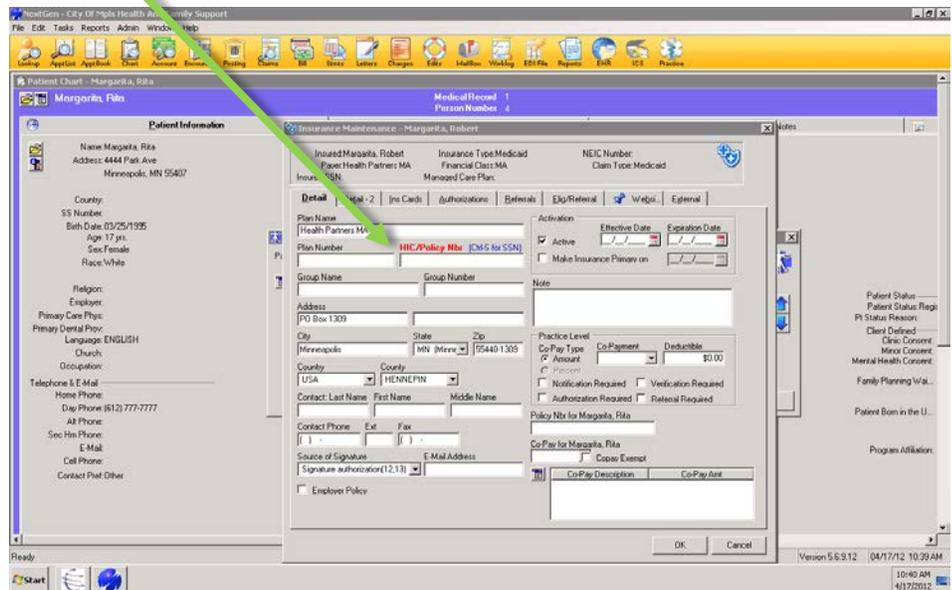
2. To search for the insurance, type the first few letters of one of the insurance payers below in the *Payer Name* field; or for a full list of the insurance payers, simply hit *Enter* in the blank *Payer Name* field.



Insurance Payers

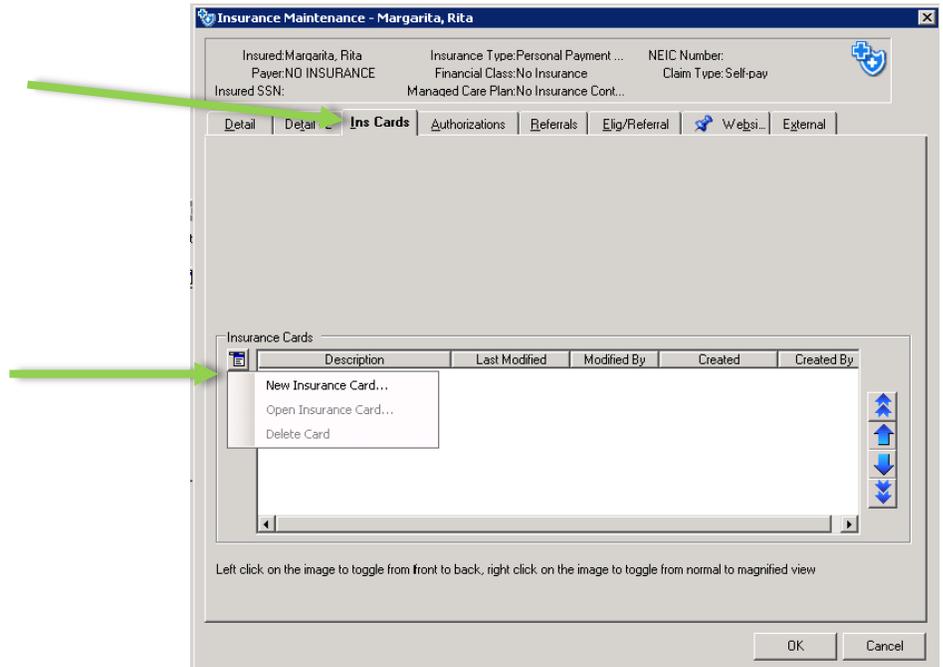
Payer	Explanation
Assured Care MA	
BCBS Commercial	
BCBS MA	
CONFIDENTIAL	when the patient receives confidential services. The biller will later determine if we can bill based on patient's insurance.
Family Planning Waiver	use even if the waiver has not yet been approved
Health Partners Commercial	
Health Partners MA	
Medica Commercial	
Medica MA	
NO INSURANCE	Use if the patient has a different insurance payer than listed here or you know for sure the patient does not have insurance.
NOT ELIGIBLE	for non-billable services such as SSI, pre-diagnostic mental health services or nutrition SPE follow-up.
Preferred One Commercial	
State of Minnesota MA	Medicaid/MA
UCare Minnesota Commercial	
UCare Minnesota MA	

- To select an insurance payer, double-click on its name.
- On the *Insurance Maintenance* screen, enter the policy number in the *HIC/Policy Nbr* field

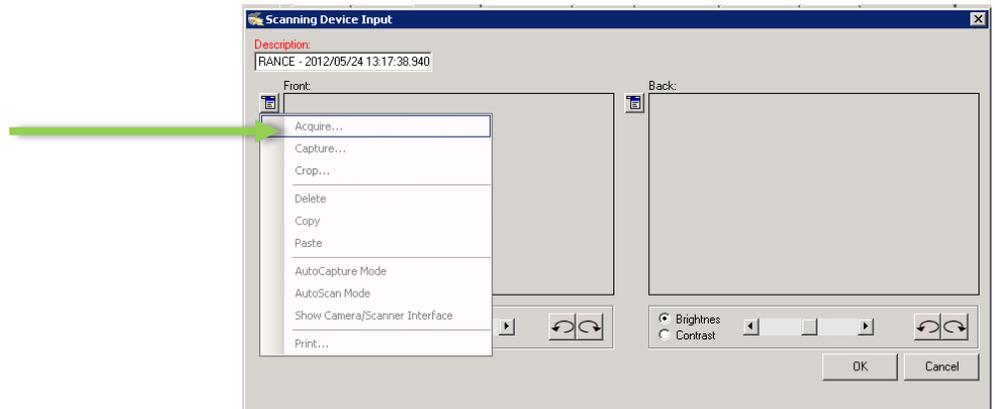


- NO INSURANCE Entry**
If the patient has a different insurance payer than listed above and you selected NO INSURANCE, please enter the insurance payer name in the *Group Name* field. This will be used for reporting purposes.
- If you know the effective and/or expiration dates of the insurance, please enter these, as well, however they are not required.

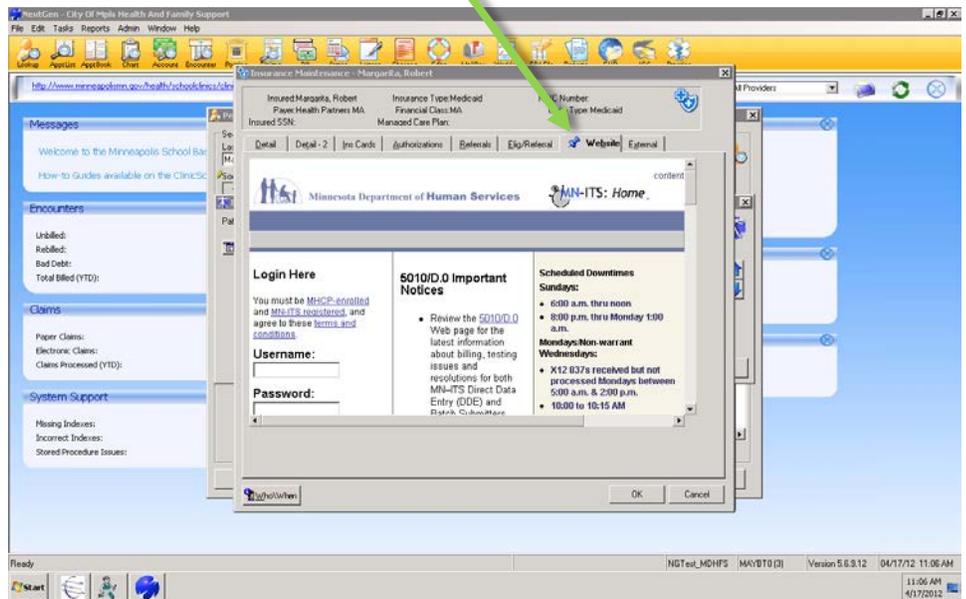
5. If the student has an insurance card with them, click on the *Ins Cards* tab



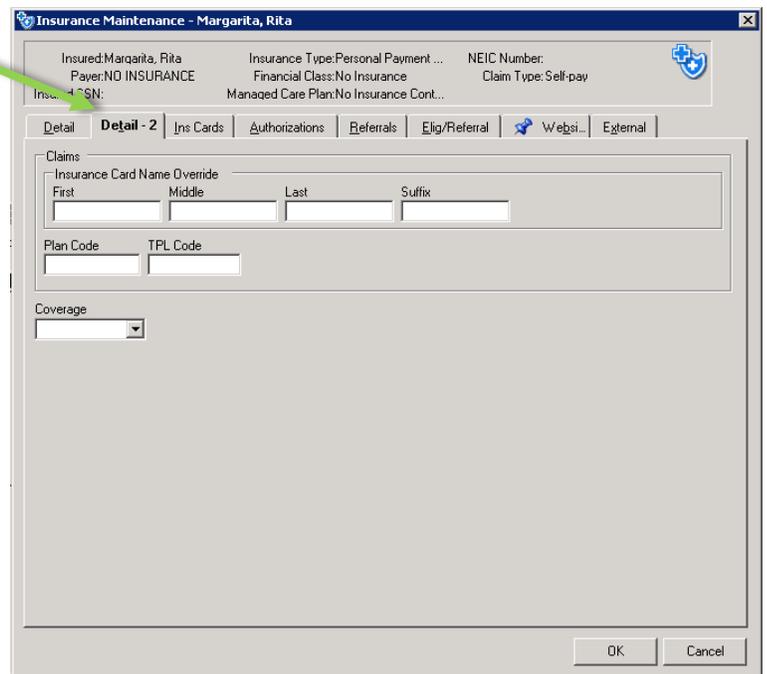
- a. Click on the Norton button and select *New Insurance Card*
- b. Place the card face-down on the far right side of the scanner. You should feel the scanner grab the card
- c. Click on the *Norton* button, click *Acquire* and then the *Scan* button.



6. If you need to access MN-ITS to find out the patient's insurance information, you can do so by clicking on the *Website* tab.



7. If the name on the insurance card or in MN-ITS is different in any way from the chart, click on the *Detail-2* tab and enter the name as it appears on the card or website.



Congrats! You are done with this How-to Guide.