

## SWITCHING ACCOUNTS

Scenarios that require account switches:

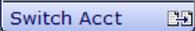
- ❖ Case originally booked as IN but changed to SDC
- ❖ Case booked with a previously used (DEP) or cancelled (CAN) account
- ❖ Case cancelled after patient registered but prior to arrival to the OR, so a new account is required before waitlisting or rescheduling the appointment.
- ❖ Patient unexpectedly admitted to the hospital prior to an elective procedure thus the OR chart needs to be changed to the existing IN PT account.
- ❖ Admitting didn't use the original elective account created by the OR
- ❖ Emergency patient scheduled/documentated on an ER account instead of an IN or SDC account

There are two ways to switch accounts:

1. Scheduler Desktop- best option for editing before the day of surgery on elective cases
2. Billing Maintenance Desktop- best option for editing after case is completed and on emergency cases

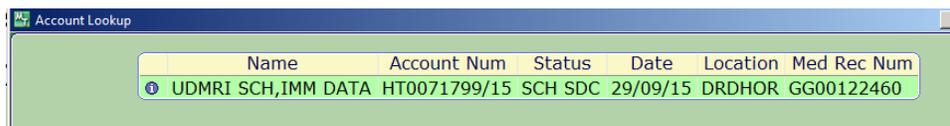
## SWITCHING AN ACCOUNT PRIOR TO DAY OF SURGERY

**Scheduler Desktop:** Go to the correct Room Group/Date, then click on the correct patient on the scheduling grid or a patient on the waitlist

1. Click on the  side button



2. If other accounts exist, an *Account Lookup* screen will appear

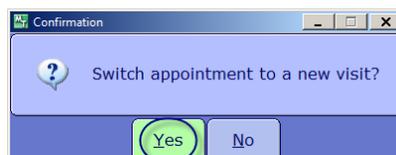


**Switch to a existing account (skip steps 4, 5,6):**

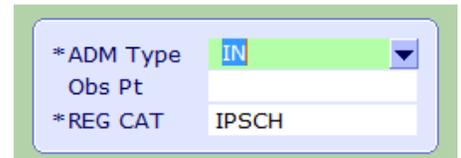
3. If the correct account is there, click on it to change to this account.  
If you are not sure which account, check with admitting. Often the date that displays on the account is related to an event (date of admission or date of discharge).

**Switch to a new SCH status account:**

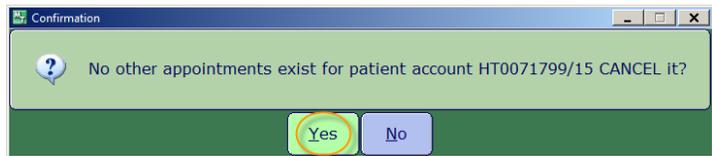
4. If the Account Lookup appears click the **ESC key** or **Cancel button** 
5. A text box will appear asking if you want to switch to a new visit. Click **Yes**.



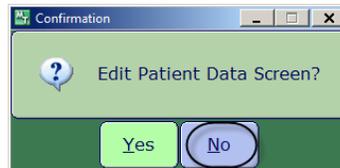
- The **Switch Account Number** window appears. Change the **ADM Type** from IN or SDC. Always leave Obs Pt blank. Add in the **REG CAT** by clicking **F9** for the lookup (SCH status).



- Click **F12** or .
- If the original account was not used for any other hospital visits, a confirmation window will open indicating no other appointments exist for this patient account and to cancel the original account.
- Click **Yes** to cancel the original account.



- A confirmation window for Edit Patient Data Tab Screen. Click **No** unless you are prompted with a required field such as "Reason for Visit"



## SWITCHING AN ACCOUNT ON DAY OF SURGERY, AFTER SURGERY & EMERGENCY CASES

### **Billing Maintenance Desktop (preferred method)**

- Click the side button and change to **ALL CASES**



- Click the  footer button to find the patient and correct case (using any patient search method).

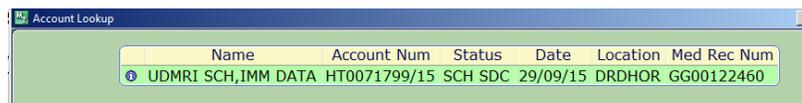
- Click on the correct patient

- Ensure chart is in Unverified status. If it's in Verified, click the footer button for **Unverify** and F12

- Click on the **Switch Acct** side button



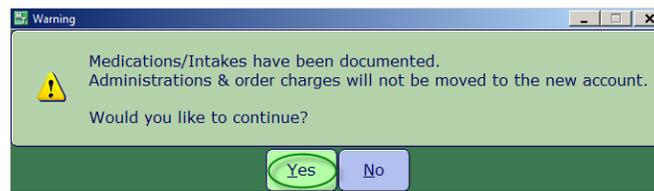
- A Patient Account Lookup screen will appear to show any existing accounts.



Name	Account Num	Status	Date	Location	Med Rec Num
UDMRI SCH, IMM DATA	HT0071799/15	SCH SDC	29/09/15	DRDHOR	GG00122460

7. If the correct account is there, click on it to change to this account.
  - You can't switch a documented chart to a SCH status account
  - If you are unsure which account to use:
    - ✓ View the documented chart to confirm date of surgery
    - ✓ Click the EMR side button and then Other Visits to look for a more appropriate account for this surgery
    - ✓ View EMR Other Reports and see if there is a surgeon dictation that matches the documented case.
    - ✓ If still unsure, check with your admitting department

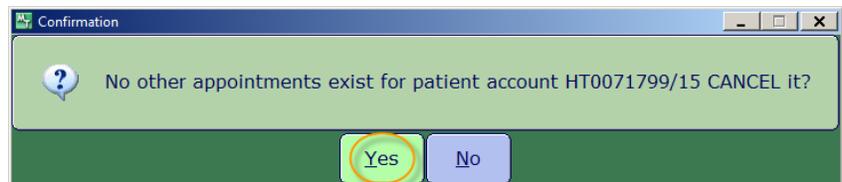
8. If medication(s) or intake(s) has been documented the following pop-up will appear. Click **Yes**



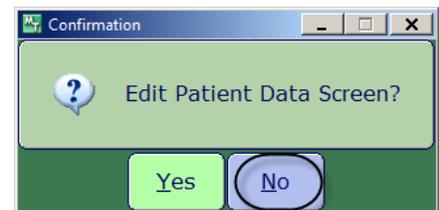
**\*\*Important\*\*** You will need to communicate to the nurse involved in the charting. He/she will need to access this chart and reenter the medication/intake exactly the same. Please refer to the steps listed in [Updating medications/intakes after an Account switch](#).

9. If the original account was not used for any other hospital visits a confirmation window will open indicating no other appointments exist for this patient account and to cancel the original account.

Click **Yes** to cancel the original account.



10. A confirmation window for Edit Patient Data Tab Screen. Click **No** unless your site requires that you fill in the "Reason for Visit" field. This field will not carry over so has to be entered again.



11. Some changes may also prompt a confirmation window asking to Print Admission Forms? Say **No** (unless this is required at your site)



12. Verify the chart via the footer button.

## UPDATING MEDICATIONS/INTAKES AFTER AN ACCOUNT SWITCH

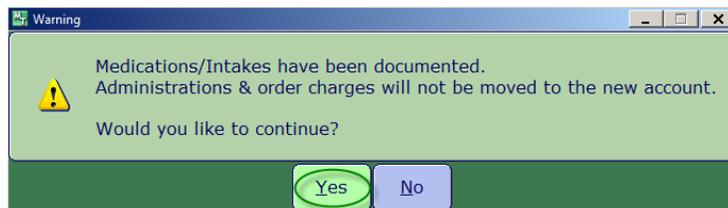
***When medications/intakes have been documented on a chart and the account required a switch, the medications/intakes must be reentered.***

***Why is this required:*** OR medications are linked to Pharmacy (PHA Module) which is linked to a specific account (visit). Nurses entering a medication in the ORM chart creates a completed order in PHA for this patient and this account/visit. When an OR chart is documented on the wrong account/visit (right patient), it requires an account switch to move the documentation to the correct visit. While the ORM module can seamlessly move documentation in the OR chart from the same patient to a different account, the PHA module cannot move medications. The only way to correct this is to have the nurse enter the original medication/intake details again, so it is connected to the new account and delete the original medication entry.

***This is not a reflection of errors with the medication/intake documentation but rather additional steps that are required to ensure the integrity of the content that keeps it linked to the correct account (visit).***

### ***Nursing Desktop***

1. When completing an account switch on a documented case, the following pop up appears



2. Select the patient and view the **Operative**  chart. Take note, a screen shot or print the operative chart to remember:
  - a) the new account number
  - b) date of surgery
  - c) surgeon
  - d) procedure performed
  - e) circulating nurse(s)
3. Notify the circulating nurse(s) regarding the need for a medication/intake to be re-entered
4. Nurse accesses the chart via the **ORM Nurse Desktop**
5. Click the **Add Case** footer button to find the patient and correct case.

6. Click on the correct patient and case
7. Unverify the chart, if required.
8. Based on the information noted/collected earlier (step 2), re-enter all medications/intakes exactly the same  
**TIP:** Suggest leaving the original medication(s)/intake(s) until you can validate/compare the new entry.
9. Validate the information matches and then delete the original medication/intake entries.
10. In the **Notes** section, enter a note to indicate a late entry requirement to re-enter the medication due to an account change process.
11. Verify the chart.

#### NO SHOW STATUS REQUIRING AN ACCOUNT SWITCH

##### *Scheduler Desktop or Patient Screen*

If an OR appointment remains in a SCH status after day of surgery, the Meditech midnight run will assume it was a NO SHOW and change the status from BOOKED to NO SHOW. It won't impact the sites ability to document or capture the stats, but occasionally it does impact your ability to make edits and thus, you need to change the status.

1. Click on the appointment
2. Click "**Change Status**" footer button
3. Pick **ATTENDED** and **Save**
4. If that does not work pick **BOOKED** first, **Save** it, pick **ATTENDED**, **Save** it
5. Complete the switch account process listed in [Switching an Account Prior to Day of Surgery](#).