Oracle® Health Patient Administration

User Guide

G10053-01
July 2024

Oracle Health Patient Administration User Guide,

G10053-01

Contents

Preface

This preface contains the following sections:

- Diversity and Inclusion
- Documentation Accessibility

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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Patient Search

Use this workflow when you need to search for a patient in Oracle Health Patient Administration.

- Search for Person
- Create New Patient
  If the patient is not located and you need to add them, select Create New Patient and see Schedule an Appointment for a New Patient in Oracle Health Patient Administration.
- Review Patient Profile
  If the patient is located and the patient profile opens, continue with your workflow. The patient profile is displayed for patients with an MRN.
- Edit Person Demographics and Convert to Patient
  You can edit patient details or convert a person to a patient at any time.

Search for Person

1. Select View Patients to locate a person in the system.
2. In the Search by Name field, enter the patient's name. For additional filters, click in the Search for Name field and more filters are displayed: Date of Birth, Phone Number, SSN, and MRN.
3. After you enter your search criteria, press ENTER to perform the search.

> **Note:**
>
> Historical names are included in the search results.

4. A message is displayed if no results are found. Update the search criteria if needed. If the patient is found, select the patient.

Create New Patient

If the patient is not located and you need to add them, select Create New Patient and see Schedule an Appointment for a New Patient in Oracle Health Patient Administration.

Review Patient Profile

If the patient is located and the patient profile opens, continue with your workflow. The patient profile is displayed for patients with an MRN.

Edit Person Demographics and Convert to Patient

You can edit patient details or convert a person to a patient at any time.

To edit patient details or convert a person to a patient (or both):

1. After searching for a person from the Home page, select the name of the person with the profile you want to edit or convert to a patient. If the person exists as a patient, the Patient Profile page opens. If the person already exists as a patient, the Edit Person Demographics page opens.
2. Do one of the following:
   - If you need to edit the patient details, edit the appropriate fields and select Save.
   - If you need to convert the person to a patient, select **Convert to Patient**. You see prompts to collect patient information, financial responsibility information, and to schedule an appointment. Enter details in the appropriate fields and select **Save**.

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Appointment Schedule - New Patient

Use this workflow to add a patient and schedule them in Oracle Health Patient Administration. Following this workflow generates a unique medical record number (MRN), which is then used to capture financial responsibility, and schedule the patient.

- Create New Patient
  Complete the following steps to add a new patient and generate a medical record number (MRN) in the system. This step must be completed before you can schedule or fully register a patient.
- Collect Patient Information
  Complete the following steps to collect patient information:
- Review Financial Responsibility
- Schedule Appointment
  The Appointment Scheduling screen is displayed. For information regarding scheduling an appointment, see Schedule an Appointment in Oracle Health Patient Administration.
- Send Appointment Notifications
  If the patient has provided an email address, they will receive an email notification when an appointment is scheduled. If they have only a phone number listed and they have granted permission to send SMS text messages, the patient receives an SMS text notification about the appointment.
- Review Relationships

Create New Patient

Complete the following steps to add a new patient and generate a medical record number (MRN) in the system. This step must be completed before you can schedule or fully register a patient.

1. Search for patient and, if not located, select **Create New Patient**.
2. If the patient is located and patient does not have an MRN, select **Convert Patient**. For information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Collect Patient Information

Complete the following steps to collect patient information:

1. After selecting **Create New Patient** or **Convert Patient**, the patient information is displayed. Select **Full Registration** or **Quick Registration**.
2. Select a facility and enter a date of birth. Note that the Facility value is used for MRN generation and eligibility.
3. If performing a full registration, you can add a patient photo and identification. Add patient photo here and Add identification here are displayed if the patient is older than the patient self-determination age or if the patient is an emancipated minor.

- To add a patient photo, select **Add patient photo here**. The Patient Photo Upload dialog box is displayed. Capture or upload the photo and select **Save**.
- To add patient identification, select **Add identification here**. The Select the Front of the Identity Card dialog box is displayed. Access the file, select it, and select **Open**. The front of the identity card is displayed. If you do not want to load the back of the identity card, select **Finish**. If you want to load the back of the identity card, select **Load Reverse**. The Select the Back of the Identity Card dialog box is displayed. Access the file, select it, and select **Open**. The back of the identity card is displayed. Select **Finish**. During this process, key data elements are recognized using OCR to eliminate manual entry (for example, First Name, Last Name, Address, and so on).

4. Enter and update patient information, including first name, last name, and date of birth. Contact information is displayed if the patient is older than the patient self-determination age or if the patient is an emancipated minor.Is the patient emancipated and Emancipated Date prompts are displayed if the patient is younger than the patient self-determination age.
5. As you create a patient, the system performs a check to ensure that the patient record you are creating does not already exist. This duplicate check searches select combinations of the following values that currently exist in the system: First name, Last name, Date of birth, Social Security number, Phone number.
6. If a potential duplicate is found, the information is displayed to you. Verify if the potential duplicate person is different from the person you want to create. If you want to continue creating a new person, select **Continue Creating New Profile**. If you want to select the existing person, select Access Profile.
7. Enter and update additional patient details.
8. If a proxy needs to be added, select the **plus sign (+)** to add a proxy. A proxy is required if the patient has not reached the patient self-determination age. If the patient is an emancipated minor, the proxy becomes optional.
    a. Search for the existing person.
    b. If the person is found, select the person and complete information in Add Proxy, including relationship to patient. Select **Add**. Proxy demographics must be updated separately.
    c. If the person is not found, select **Add new person**. The Add Proxy dialog is displayed. Complete required prompts and select Add. If you are adding a proxy by selecting **Add New Person**, the proxy is added to the database as a person.
9. To send the patient a text or email to complete their registration information, select a registration link destination.

    > **Note:**
    >
    > The phone number is displayed here for the patient if you select **OK to send SMS text messages** for the phone number. If the patient has a proxy, this information is also displayed.

10. After the patient information is populated, select **Next**. The MRN is generated and assigned to the patient. If a registration link destination is selected, a text or email is sent to the patient or proxy to complete the self-registration.

Review Financial Responsibility

The Financial Responsibility screen is displayed. Review, update as needed, and select **Next**. For information regarding updating financial responsibility, see Financial Responsibility at the Encounter Level in Oracle Health Patient Administration.

Schedule Appointment

The Appointment Scheduling screen is displayed. For information regarding scheduling an appointment, see Schedule an Appointment in Oracle Health Patient Administration.

Send Appointment Notifications

If the patient has provided an email address, they will receive an email notification when an appointment is scheduled. If they have only a phone number listed and they have granted permission to send SMS text messages, the patient receives an SMS text notification about the appointment.

Review Relationships

Optional: Review and update patient relationships as needed. For information regarding updating relationships, see Update Relationships in Oracle Health Patient Administration.

3 Appointment Schedule

You can schedule appointments for new and existing patients in Oracle Health Patient Administration. The system helps to make the process more efficient by filtering the search criteria to display only valid combinations as you make your selections.Appointments are for primary care clinics and must be resource list driven, without orders. Recurring appointments are not supported at this time.

Oracle Health Patient Administration currently does not support displaying and gathering responses to scheduling questionnaires that may have been configured in the form of accept formats against appointment types in the previous Millennium Platform. When you schedule appointments, ensure that you have a process in place for obtaining relevant information, especially if the data to be collected relates to patient safety.

- Search for Patient
  Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.
- Review Patient Information
- Appointment Scheduling
  Complete the following steps to schedule an appointment:
- Review Relationships

Search for Patient

Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Review Patient Information

Review the patient's information and update as needed. For information regarding updating patient information, see Edit Patient Information in Oracle Health Patient Administration.

Appointment Scheduling

Complete the following steps to schedule an appointment:

1. Select a type of appointment. You can select a specialty to further filter the appointment types that are displayed.
2. You can optionally select a provider and location. Enter a reason for the appointment, any appointment comments, and select a start date.

> **Note:**
>
> - The system helps to make the process more efficient by filtering the search criteria to display only valid combinations as you make your selections.
> - A star next to the Specialty, Provider, or Location prompts indicates a previous relationship based on the last 36 months history.

3. Will the appointment time be selected through the availability search (continue to the next step) or the calendar (skip to Step 5)?
4. To select an appointment time using the availability search, select an available time and select **Schedule Appointment**. Continue to Step 7.
5. Select **View Calendar**. The Calendar View is displayed. If not previously selected, enter a provider or providers and select a date.
6. Select **Schedule** or select a time on the calendar.
7. When you select **Schedule**, Schedule Appointment is displayed. Select a provider, location, start time, reason for appointment, and any appointment comments, and select **Schedule**.
8. When you select a time on the calendar, Schedule Appointment is displayed with the resource and start and end times. Select a location, enter a reason for the appointment, and any appointment comments, and select **Schedule**. Note that if a slot is not valid or if the patient has another appointment at the selected time, a message is displayed prompting you to select a different slot. Also, if you select a slot occupied with another appointment, a message is displayed that selecting the slot will result in an overbooking. You can continue, or select **Cancel** to locate a different time.
9. The appointment is now scheduled, and the system creates an encounter or associates an existing encounter with the appointment using encounter match logic.
   - When an encounter is created, the following values are added to the encounter: Appointment Date/Time, Location, Insurance, Guarantor. Additionally, the Scheduled Provider value is added to the Attending Physician prompt.
   - The encounter type is determined by the related encounter on the appointment type. If a related encounter is not associated with the appointment type, the system defaults Outpatient as the encounter type.The appointment is now scheduled, and the system creates an encounter or associates an existing encounter with the appointment using encounter match logic.
10. In the Appointment Summary, review the appointment details and select **Done**.

> **Note:**
>
> If the patient has provided an email address, they receive an email notification when an appointment is scheduled. If they have only a phone number listed and they have granted permission to send SMS text messages, the patient receives an SMS text notification about the appointment.

Review Relationships

Optional: Review and update patient relationships as needed. For information regarding updating relationships, see Update Relationships in Oracle Health Patient Administration.

4 Block Management

Use this workflow when you want to add a block to a resource schedule. You can add a block from Resource Schedule in Oracle Health Patient Administration System.

- Add Block to Resource Schedule
- Modify a Block on a Resource Schedule
- Remove a Block From a Resource Schedule

Add Block to Resource Schedule

> **Note:**
>
> Blocks added in Patient Administration System are not visible in Scheduling Appointment Book (SchApptBook.exe) and are not recognized when you schedule an appointment using this product. If a site continues to maintain shared calendars across the executables (for example, a physician who has perioperative scheduling and physician practice scheduling), Oracle Cerner recommends that you use block slots as part of a resource's default schedule so that time is appropriately accounted for in all scheduling systems. Resource default schedules can be managed as part of a resource's regularly applied default schedule or ad hoc in Revenue Cycle. See Ad Hoc Resource Schedule Change Workflow in Revenue Cycle Scheduling for more information.

Complete the following steps to add a block:

1. Select **Add New Block**. The Create Resource Block dialog box opens.
2. Complete the block information, including resources, block reason, recurrence, date, and time.
3. Select **Add**.
4. If the block results in a conflict, a Resource Conflict message is displayed. To continue, select **Add**. If you no longer want to add the block, select **Cancel**.
5. The block is added to the resource schedule.
6. If the block results in a conflict, a Block Conflict message is displayed on the appointment that causes the conflict.
7. Locate any conflicting appointments and reschedule them. For information regarding the reschedule workflow, see Reschedule an Appointment in Oracle Health Patient Administration.
8. Once the appointment is rescheduled, the block conflict is resolved on the resource schedule. Repeat for any additional conflicts.

> **Note:**
>
> A block conflict may generate a reschedule request, depending on your configuration in Millennium Platform. If a request is generated, it must be managed in Millennium Platform. See Understand Completing Appointment Requests in Revenue Cycle Workflow for more information.

Modify a Block on a Resource Schedule

> **Note:**
>
> Blocks added in Patient Administration System are not visible in Scheduling Appointment Book (SchApptBook.exe) and are not recognized when you schedule an appointment using this product. If a site continues to maintain shared calendars across the executables (for example, a physician who has perioperative scheduling and physician practice scheduling), Oracle Cerner recommends that you use block slots as part of a resource's default schedule so that time is appropriately accounted for in all scheduling systems. Resource default schedules can be managed as part of a resource's regularly applied default schedule or ad hoc in Revenue Cycle. See Ad Hoc Resource Schedule Change Workflow in Revenue Cycle Scheduling for more information.

1. Locate the block that you want to edit. From the Block Actions menu, select **Edit Block**. The Edit Block dialog box is displayed.
    - If you are editing a recurring series, select whether you are editing this block or all blocks in the series.
2. Update the block information and select **Save**.
3. If the block results in a conflict, a Resource Conflict message is displayed. To continue, select **Save**. If you no longer want to edit the block, select **Close**.
4. The block is updated on the resource schedule.
5. If the block results in a conflict, a Block Conflict message is displayed on the appointment that causes a conflict.
6. Locate conflicting appointments and reschedule them. For information regarding the reschedule workflow, see Reschedule an Appointment in Oracle Health Patient Administration.
7. Once the appointment is rescheduled, the block conflict is resolved on the resource schedule. Repeat for any additional conflicts

> **Note:**
>
> A block conflict may generate a reschedule request, depending on your configuration in Millennium Platform. If a request is generated, it must be managed in Millennium Platform. See Understand Completing Appointment Requests in Revenue Cycle Workflow for more information.

Remove a Block From a Resource Schedule

> **Note:**
>
> Blocks added in Patient Administration System are not visible in Scheduling Appointment Book (SchApptBook.exe) and are not recognized when you schedule an appointment using this product. If a site continues to maintain shared calendars across the executables (for example, a physician who has perioperative scheduling and physician practice scheduling), Oracle Cerner recommends that you use block slots as part of a resource's default schedule so that time is appropriately accounted for in all scheduling systems. Resource default schedules can be managed as part of a resource's regularly applied default schedule or ad hoc in Revenue Cycle. See Ad Hoc Resource Schedule Change Workflow in Revenue Cycle Scheduling for more information.

Complete the following steps to remove a block:

1. Locate the block that you want to remove. From the Block Actions menu, select **Remove Block**. The Remove Block dialog box is displayed.
2. Is the block that you want to remove a single block or recurring block?
   - If a single block, select **Delete Block**.
   - If a recurring block, select whether you are deleting this block or all occurrences, then select **Delete Block**.
3. The block is removed from the resource schedule. If the block was previously causing a block conflict, the conflict is removed when the block is removed.

> **Note:**
>
> If a reschedule request was generated in Millennium Platform when the block conflict was created, the request is completed when the block conflict is removed.

5

Appointment Edits

Use this workflow when you need to modify the reason for an appointment or comments on an appointment.

- Edit an Appointment
  Complete the following steps to edit an appointment:

Edit an Appointment

Complete the following steps to edit an appointment:

1. Locate the appointment in which the reason for the appointment or appointment comments requires an edit. You can perform this action in the appointments section or the resource schedule.

   > **Note:**
   >
   > Appointments can be located in the appointments section of the patient profile or by selecting the **edit** button.

2. On the appropriate appointment, select the Appointment Actions menu and select Edit Appointment.
3. In the Edit Appointment dialog box, update the reason for appointment and appointment comments as needed and select Save. The appointment is updated.

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Patient Edits

Use this workflow when you need to edit patient information using Oracle Health Patient Administration. This workflow enables you to make updates to demographic information for a patient.

- Search for Patient
  Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.
- Update Patient Information
  Complete the following steps to update patient information:

Search for Patient

Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Update Patient Information

Complete the following steps to update patient information:

1. Select the edit button in the Patient Information section.
2. Update information as needed.

   > **Note:**
   >
   > Proxy demographics must be updated separately.

3. Select **Save**to save the updates. The patient's information is now updated in the system.

   > **Note:**
   >
   > After a patient name or address is updated, new buttons (Name History and Address History) are displayed that you can select to view the patient's historical information:

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Person Edits

Use this workflow when you need to edit person information using Oracle Health Patient Administration. This workflow enables you to make updates to demographic information for a person who does not have a medical record number (MRN).

- Search for Person
  Search for and select the person. If they do not have an MRN, the Person Information screen opens. For information regarding patient search, see Search for Patient in Oracle Health Patient Administration.
- Update Person Information
  Complete the following steps to update person information:

Search for Person

Search for and select the person. If they do not have an MRN, the Person Information screen opens. For information regarding patient search, see Search for Patient in Oracle Health Patient Administration.

Update Person Information

Complete the following steps to update person information:

1. In the Person Information screen, update information as needed.
2. Select Save to save the updates. The person's information is now updated in the system.

8
Appointment Check In

Use the Check In Appointment workflow in Oracle Health Patient Administration to account for patients arriving for scheduled appointments at healthcare facilities where patient information, financial, and encounter information is to be verified before being seen.

- Check In Patient
  Complete the following steps to begin the check-in process:
- Review Patient Information
- Review Financial Responsibility
- Check Eligibility
  For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.
- Review Encounter Details
  The Encounter Details screen is displayed. Review the encounter information, including encounter type, and update as needed. Select **Next**. Note that if the encounter is being managed outside the facility, select a Place of Service facility and Place of Service Code value.
- Complete Patient Forms
  Complete the following steps to complete outstanding patient forms:
- Update Status to In Room
  Complete the following steps to update the appointment status to In Room:

Check In Patient

Complete the following steps to begin the check-in process:

1. In Patient Tracker, locate the appointment you want to check in. You can filter by location, patient name or date of birth, resource or provider, or phase.
2. Select the appointment and select **Check In Patient** or **Send Self Check-In**.
   - If you select **Send Self Check-In**, the patient will receive an email or text by which they can complete their check in. The patient selects a link, enters their name and date of birth to authenticate, and completes the check in. At this time, you can proceed to check in the patient.

     > **Note:**
     >
     > If the patient provided an email address, they receive an email notification when you select **Send Self Check In**. If they have only a phone number listed and they have granted permission to send SMS text messages, the patient receives an SMS text notification to complete check in.

   - If you select **Check In Patient**, Patient Details opens.

- If the check in cannot be completed at this time, select **Cancel** on the Patient Details screen. This updates the appointment state to Arrived. When you are ready to complete check in, select the appointment and select **Complete Check In**. Patient Details opens.

Review Patient Information

Review the patient's information and update as needed. For information regarding updating patient information, see Edit Patient Information in Oracle Health Patient Administration.

Review Financial Responsibility

The Financial Responsibility screen is displayed. Review, update as needed, and select **Next**. For information regarding updating financial responsibility, see Financial Responsibility at the Encounter Level in Oracle Health Patient Administration.

Check Eligibility

For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.

Review Encounter Details

The Encounter Details screen is displayed. Review the encounter information, including encounter type, and update as needed. Select **Next**. Note that if the encounter is being managed outside the facility, select a Place of Service facility and Place of Service Code value.

Complete Patient Forms

Complete the following steps to complete outstanding patient forms:

In the Patient Forms screen, select whether to print the forms or text them to the patient to complete.

1. If texting the forms, select **Send All Via Text**. Forms will be sent to the patient through text message.
2. If printing the forms, select **Print All Forms**. The documents are displayed.
   - Select **Print** and follow the onscreen instructions to print the forms.
   - Present the forms to the patient to complete.
   - Scan the forms when completed and select **+Upload**. Upload Documents is displayed.
   - Select **Form**, navigate to the file and select **Upload**. Repeat for each form.
3. Select **Finish** to complete the check-in process. The appointment state is updated to Checked In.

Update Status to In Room

Complete the following steps to update the appointment status to In Room:

1. To move the patient to a room, select the appointment and select **Move to In Room**.
2. The appointment status is updated to In Room.

> **Note:**
>
> You cannot change the type of appointment or specialty when using this workflow.

9 Financial Responsibility at the Encounter Level

Use this workflow to manage financial responsibility at the encounter level in Oracle Health Patient Administration. This workflow enables you to make updates to guarantor and insurance information on an encounter when scheduling or rescheduling an appointment, booking an appointment again, or managing an encounter on an appointment, including arrivals.

- Update Guarantor
  To update a guarantor for a patient, select the edit icon in the Financial Responsibility section. If the patient is older than the patient self-determination age or if the patient is an emancipated minor, the patient will be added as a guarantor by the system.
- Add a Guarantor
  Complete the following steps to add a guarantor:
- Edit Guarantor
  Complete the followings steps to edit a guarantor:
- Remove Guarantor Added in Error
  Complete the following steps to remove a guarantor added in error.
- Allocate Guarantor
  Select the guarantor to allocate to the encounter.
- Update Insurance
  To update insurance for a patient, select the edit icon in the Financial Responsibility section. A toggle button is available to filter insurances displayed. The person level displays active or all insurances and the encounter level displays allocated or all insurances.
- Add Insurance by Payer and Health Plan
  Complete the following steps to add insurance by payer and health plan:
- Add Insurance by Related Party's Health Plan
  Complete the following steps to add insurance by the related party's health plan:
- Edit Insurance
  Complete the following steps to edit insurance:
- Allocate Insurance
  Complete the following steps to allocate insurance with the encounter:
- Complete MSPQ
  If Medicare has been allocated to the encounter, an MSPQ link is displayed. Complete the following steps to complete the MSPQ:
- Sequence Insurance
  Complete the following steps to sequence insurance:
- Check Eligibility
  For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.

Update Guarantor

To update a guarantor for a patient, select the edit icon in the Financial Responsibility section. If the patient is older than the patient self-determination age or if the patient is an emancipated minor, the patient will be added as a guarantor by the system.

Add a Guarantor

Complete the following steps to add a guarantor:

1. Select the **plus sign (+)** to add a guarantor. The Search for Person dialog box is displayed.
2. Search for an existing person.
   a. If person is found, select person and complete the information in Maintain Person Guarantor.
   b. Verify that the guarantor information, including the address, is complete. If the guarantor information is not complete, it must be updated using the Edit Person or Edit Patient workflows. See Edit Person Information in Oracle Health Patient Administration or Edit Patient Information in Oracle Health Patient Administration for details.
   c. Select **Add**.
   d. If the person is not found, select **Add New Person**. Maintain Person Guarantor is displayed. Complete the information, including address, and select **Add**. The patient's relationship to the guarantor is added.

Edit Guarantor

Complete the followings steps to edit a guarantor:

1. Select the existing guarantor. Maintain Person Guarantor is displayed.
2. Update information as appropriate and select Save. The patient's relationship to the guarantor is updated.

> **Note:**
>
> Guarantor demographics must be updated separately. Additionally, if the guarantor relationship was previously active, but is no longer valid, update the end date.

Remove Guarantor Added in Error

Complete the following steps to remove a guarantor added in error.

1. If relationship to guarantor is Self, select the existing guarantor. Maintain Person Guarantor is displayed.
2. Update the end date and select **Save**. The patient's relationship to the guarantor is updated.
3. If relationship to guarantor is not Self, select the existing guarantor. Maintain Person Guarantor is displayed.

4. Select **Delete**. The patient's relationship to the guarantor is removed.

Allocate Guarantor

Select the guarantor to allocate to the encounter.

Update Insurance

To update insurance for a patient, select the edit icon in the Financial Responsibility section. A toggle button is available to filter insurances displayed. The person level displays active or all insurances and the encounter level displays allocated or all insurances.

Add Insurance by Payer and Health Plan

Complete the following steps to add insurance by payer and health plan:

1. Select **Add Insurance**.
2. Select **Payer and Health Plan**.
3. In Patient Insurance Plan, if the insurance card is available, select **+ Add Insurance Card**. The Front of Insurance Card dialog box is displayed.
4. Access and select the file, and select **Open**. Front of Insurance Card is displayed.
5. Select **Next**. Back of Insurance Card is displayed.
6. Access and select the file, and select **Open**. Back of Insurance Card is displayed.
7. Select **Done**.
8. Update any additional values as needed and select **Add**. Search for Subscriber is displayed.
9. If the patient is the subscriber, select the **next (>)** button to select the patient. Then skip to Step 11.
10. If someone else is the subscriber, search for and select the person. Patient Insurance Plan is displayed. Note that subscriber demographics must be updated separately. If the person is not found, complete the following steps:
    a. Select **Add New Subscriber**. Maintain Person Subscriber is displayed.
    b. Enter all required values and select **Next**. Patient Insurance Plan is displayed.
11. Complete all information as needed and select **Add**. Insurance Plans is displayed with the insurance and subscriber information.
12. Select **Done**.

Add Insurance by Related Party's Health Plan

Complete the following steps to add insurance by the related party's health plan:

1. Select **Add Insurance**.
2. Select **Related Party's Health Plan**.
3. In the Add Insurance workflow, if the related party insurance is not displayed, select **Cancel** and add insurance using the Payer and Health Plan method.

4. If the related party insurance is displayed, the **next (>)** button to select the appropriate person and insurance. Patient Insurance Plan is displayed. Note that subscriber demographics must be updated separately.
5. Complete all information as needed and select **Add**. Insurance Plans is displayed with the insurance and subscriber information.
6. Select **Done**.

Edit Insurance

Complete the following steps to edit insurance:

1. Select the existing insurance and select the edit icon. Patient Insurance Plan is displayed.
2. Update information as needed and select Save. Note that subscriber demographics must be updated separately.

Allocate Insurance

Complete the following steps to allocate insurance with the encounter:

1. Select Allocate next to the insurance you want to allocate.
2. Insurance Allocation is displayed. Select Allocate and select Save. The allocation status is updated.

Complete MSPQ

If Medicare has been allocated to the encounter, an MSPQ link is displayed. Complete the following steps to complete the MSPQ:

1. Select the **MSPQ** link to begin.
2. Enter all required values. A message is displayed upon completion if Medicare is primary.

Sequence Insurance

Complete the following steps to sequence insurance:

1. Select **Sequence Insurances**. Sequence Insurances is displayed.
2. Move insurances to the appropriate priority by selecting them and using the move buttons.
3. Select **Save**.

Check Eligibility

For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.

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Financial Responsibility at the Patient Level

Use this workflow to manage financial responsibility at the person level in Oracle Health Patient Administration. This workflow enables you to make updates to guarantor and insurance information for a patient.

- Search for Patient
  Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.
- Update Guarantor
  To update a guarantor for a patient, select the edit icon in the Financial Responsibility section. If the patient is older than the patient self-determination age or if the patient is an emancipated minor, the patient will be added as a guarantor by the system.
- Add a Guarantor
  Complete the following steps to add a guarantor:
- Edit Guarantor
  Complete the followings steps to edit a guarantor:
- Remove Guarantor Added in Error
  Complete the following steps to remove a guarantor added in error.
- Update Insurance
  To update insurance for a patient, select the edit icon in the Financial Responsibility section. A toggle button is available to filter insurances displayed. The person level displays active or all insurances and the encounter level displays allocated or all insurances.
- Add Insurance by Payer and Health Plan
  Complete the following steps to add insurance by payer and health plan:
- Add Insurance by Related Party's Health Plan
  Complete the following steps to add insurance by the related party's health plan:
- Edit Insurance
  Complete the following steps to edit insurance:
- Check Eligibility
  For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.

Search for Patient

Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Update Guarantor

To update a guarantor for a patient, select the edit icon in the Financial Responsibility section. If the patient is older than the patient self-determination age or if the patient is an emancipated minor, the patient will be added as a guarantor by the system.

Add a Guarantor

Complete the following steps to add a guarantor:

1. Select the **plus sign (+)** to add a guarantor. The Search for Person dialog box is displayed.
2. Search for an existing person.
    a. If person is found, select person and complete the information in Maintain Person Guarantor.
    b. Verify that the guarantor information, including the address, is complete. If the guarantor information is not complete, it must be updated using the Edit Person or Edit Patient workflows. See Edit Person Information in Oracle Health Patient Administration or Edit Patient Information in Oracle Health Patient Administration for details.
    c. Select **Add**.
    d. If the person is not found, select **Add New Person**. Maintain Person Guarantor is displayed. Complete the information, including address, and select **Add**. The patient's relationship to the guarantor is added.

Edit Guarantor

Complete the followings steps to edit a guarantor:

1. Select the existing guarantor. Maintain Person Guarantor is displayed.
2. Update information as appropriate and select Save. The patient's relationship to the guarantor is updated.

> **Note:**
>
> Guarantor demographics must be updated separately. Additionally, if the guarantor relationship was previously active, but is no longer valid, update the end date.

Remove Guarantor Added in Error

Complete the following steps to remove a guarantor added in error.

1. If relationship to guarantor is Self, select the existing guarantor. Maintain Person Guarantor is displayed.
2. Update the end date and select **Save**. The patient's relationship to the guarantor is updated.
3. If relationship to guarantor is not Self, select the existing guarantor. Maintain Person Guarantor is displayed.
4. Select **Delete**. The patient's relationship to the guarantor is removed.

Update Insurance

To update insurance for a patient, select the edit icon in the Financial Responsibility section. A toggle button is available to filter insurances displayed. The person level displays active or all insurances and the encounter level displays allocated or all insurances.

Add Insurance by Payer and Health Plan

Complete the following steps to add insurance by payer and health plan:

1. Select **Add Insurance**.
2. Select **Payer and Health Plan**.
3. In Patient Insurance Plan, if the insurance card is available, select **+ Add Insurance Card**. The Front of Insurance Card dialog box is displayed.
4. Access and select the file, and select **Open**. Front of Insurance Card is displayed.
5. Select **Next**. Back of Insurance Card is displayed.
6. Access and select the file, and select **Open**. Back of Insurance Card is displayed.
7. Select **Done**.
8. Update any additional values as needed and select **Add**. Search for Subscriber is displayed.
9. If the patient is the subscriber, select the **next (>)** button to select the patient. Then skip to Step 11.
10. If someone else is the subscriber, search for and select the person. Patient Insurance Plan is displayed. Note that subscriber demographics must be updated separately. If the person is not found, complete the following steps:
    a. Select **Add New Subscriber**. Maintain Person Subscriber is displayed.
    b. Enter all required values and select **Next**. Patient Insurance Plan is displayed.
11. Complete all information as needed and select **Add**. Insurance Plans is displayed with the insurance and subscriber information.
12. Select **Done**.

Add Insurance by Related Party's Health Plan

Complete the following steps to add insurance by the related party's health plan:

1. Select **Add Insurance**.
2. Select **Related Party's Health Plan**.
3. In the Add Insurance workflow, if the related party insurance is not displayed, select **Cancel** and add insurance using the Payer and Health Plan method.
4. If the related party insurance is displayed, the **next (>)** button to select the appropriate person and insurance. Patient Insurance Plan is displayed. Note that subscriber demographics must be updated separately.
5. Complete all information as needed and select **Add**. Insurance Plans is displayed with the insurance and subscriber information.

6. Select **Done**.

Edit Insurance

Complete the following steps to edit insurance:

1. Select the existing insurance and select the edit icon. Patient Insurance Plan is displayed.
2. Update information as needed and select Save. Note that subscriber demographics must be updated separately.

Check Eligibility

For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.

11 Eligibility Management

Use this workflow to manage eligibility in Oracle Health Patient Administration. This workflow enables you to view additional eligibility information sent from the payer once eligibility has been submitted. Eligibility can be submitted manually or through a Millennium Platform Operations job. The Eligibility workflow displays information from the payer and enables you to review patient insurances before the associated visit occurs to ensure that the health plans are active. Reviewing insurances in advance also allows you to collect necessary payments sooner. This workflow also enables you to verify that the correct health plans are associated with the correct claims and that health care facilities receive the correct payments.

- Submit Eligibility Response
  Complete the following steps to submit an eligibility response:
- View Coverage Status
  Complete the following steps to view coverage status information:
- View Patient/Subscriber Information
  Complete the following steps to view patient or subscriber information:
- View and Update Discrepancies
  In the Common Financial Clearance interface, if any differences exist between the information submitted in the request and the information the payer has on file, a discrepancy alert is displayed. Information contained in Oracle Health Patient Administration is displayed in the Current row,while the response from the payer is displayed in the Response row.
- Review Messages and Alerts
  Complete the following steps to review messages and alerts:
- Review Support Information
  Complete the following steps to review the support information:
- Select and View Benefit Information
  Complete the following steps to select and view benefit information:

Submit Eligibility Response

Complete the following steps to submit an eligibility response:

1. Access the Insurance section in Financial Responsibility or Manage Encounter.
2. Select the checkbox next to the appropriate insurance and select Check Eligibility.

   > **Note:**
   >
   > The Check Eligibility button is not available if the facility or payer are not configured for eligibility, if an eligibility request is already in progress, or if the person does not have access to the facility. Details on the most recent eligibility check can be located under Eligibility Details.

3. Select Check Eligibility or Check Eligibility with Options. If the latter, you can select values for Service Date Range and Service Type, then select Submit.

4. The eligibility check transaction is called and the eligibility status is updated to Pending. Refresh the page to view the status.
5. When the eligibility response is returned, select the Eligibility Details button to open Eligibility Response.

> **Note:**
>
> If a response is not returned, review the insurance information and ensure that all information is accurate and up to date. Resubmit eligibility.

View Coverage Status

Complete the following steps to view coverage status information:

1. In the Eligibility Details dialog box, view the coverage status below the patient name. Select it to view additional details.
   a. Active Coverage or Active Multiple Coverage
   b. Inactive or Noncoverage
   c. Payer Rejection, Payer Cannot Process, or Contact Other Entity
2. If the coverage status is inactive, no coverage, or payer rejection, the Verify Status field is automatically updated to Yes Follow Up. Payers with a verify status of Yes Follow Up are qualified for the Incomplete Verification Work Queue.
   a. If manual follow up is needed because of inactive coverage, contact the payer and update the Verify Status accordingly.
   b. Select Cancel to close Eligibility Response and update the insurance information using information from the patient or payer.
   c. Resubmit insurance for eligibility.
3. If the coverage status is Active Coverage or Multiple Coverages, no further action is necessary.

> **Note:**
>
> The Historical Response alert is only displayed if you enable the Historical Processing option in the associated domain. If this option is disabled, the Historical Response alert is not displayed.

Note:

The Verify Status value for the health plan is automatically updated to **Verified** if the eligibility status is returned as **Active**. If the eligibility status is returned as **Inactive**, **No Coverage**, or **Payer Rejection**, the status is updated to **Yes Follow Up**. The following values are available for the Verify Status field and can be manually selected after eligibility is checked on the health plan:

- **Denied:** Manually updated value if patient's insurance is denied
- **Not Applicable:** Manually updated value used if insurance verification does not apply to the specific health plan
- **Pending:** Manually set value if patient's insurance information is pending
- **Required:** Default value for the Verify Status field
- **Verified:** Indicates successful eligibility transaction and that patient has eligibility coverage
- **Error:** Manually updated status for insurance if patient's insurance information is in error
- **Yes Follow Up:** If eligibility submissions come back as inactive coverage

View Patient/Subscriber Information

Complete the following steps to view patient or subscriber information:

1. Open the Eligibility Details dialog box.
2. In the Patient/Subscribertab, view the demographic information. Verify that the displayed information is correct.
3. If the information is incorrect, update the health plan information as necessary.
4. View Primary Care Provider and determine if the payer sent the patient's primary care provider (PCP).
5. If the PCP is displayed, verify that the information matches the patient registration.
6. View Third Party Liability and determine if the payer sent the necessary information.
7. View Managed Care and determine if the payer sent the necessary information.

View and Update Discrepancies

In the Common Financial Clearance interface, if any differences exist between the information submitted in the request and the information the payer has on file, a discrepancy alert is displayed. Information contained in Oracle Health Patient Administration is displayed in the Current row,while the response from the payer is displayed in the Response row.

1. To update Oracle Health Patient Administration with the data received from the payer, select **Accept**.
2. To reject the discrepancy, select **Reject** and the information is not updated in Oracle Health Patient Administration.
3. To change the previous action of Accept or Reject, select **Edit**and select **Reset** to override the previous selection.

4. Open the Eligibility Details dialog box. The number of discrepancies is displayed.
5. View Discrepancies and determine if one or more of the following discrepancies exist:
   a. Health Plan
   b. Patient Name
   c. Birth Date
   d. Gender
   e. Member ID
   f. Group Number
   g. Group Name
6. If a discrepancy exists, review the information and select **Accept** or **Reject**. When all discrepancies are resolved, the following message is displayed: All discrepancies resolved.
   a. If you select **Accept**, the information is displayed in the health plan information in Oracle Health Patient Administration.
   b. If you select **Reject**, the information from the payer is not displayed in Oracle Health Patient Administration, but is still displayed on the eligibility response.

Review Messages and Alerts

Complete the following steps to review messages and alerts:

1. Open the Eligibility Details dialog box.
2. Review Messages for any messages and alerts, and take the appropriate action. When all messages or alerts have been resolved, no further action is necessary.

Review Support Information

Complete the following steps to review the support information:

1. In the Eligibility Details dialog box, view Support Information.
2. Select **Inquiry Details**and view the data sent to the payer on the eligibility inquiry.
3. Select **Transaction Reference Details** and view the data related to the transaction for troubleshooting.
4. Select **Close**.

Select and View Benefit Information

Complete the following steps to select and view benefit information:

1. Open the Eligibility Details dialog box and view Benefits.
2. Select **All Benefits** to view all benefit information returned on the eligibility response (if applicable).
3. Select **+ Apply Benefits** to add a benefit to the encounter.

> **Note:**
>
> + Apply Benefits is available in encounter workflows.

4. From the Service list, select the appropriate service.
5. From the Network list, select the appropriate network option.
6. From Benefits, view the following information:
   a. Co-payment
   b. Co-Insurance
   c. Deductible
   d. Out of Pocket
   e. Limitations
   f. Reserve
7. Select **Apply** for benefits information to copy to the benefits organizer.
8. As necessary, repeat Steps 1 through 7 to view additional benefit information. After all benefit information is added, you can view this information in the benefits organizer.
9. Select **Apply** to save your changes and return to Financial Responsibility or Manage Encounter.
10. If applicable, open the encounter in Millennium Platform and enter the co-payment amount into the Financial Responsibility box in the registration conversation.

12

Appointment Cancellation

Use the Cancel Appointment workflow when a patient, provider, or facility requests to cancel an appointment. Any appointment not in a Checked Out state can be canceled.

Cancel Appointment

Complete the following steps to cancel an appointment:

1. Locate the appointment to be canceled. Appointments can be canceled from the Appointments panel, Patient Tracker, or the resource schedule.

   > **Note:**
   >
   > Appointments can be located in the Appointments panel of the patient profile or by selecting the **edit** button.

2. On the appropriate appointment, select the **Appointment Actions** menu and select **Cancel**.The Cancel Appointment dialog box is displayed. Select **Patient Requested** or **Other Reason**.
3. Select a reason from the drop-down list and select **Cancel Appointment**. The appointment is now canceled.

   > **Note:**
   >
   > If the patient has provided an email address, they receive an email notification when an appointment is canceled. If they have only a phone number listed and they have granted permission to send SMS text messages, the patient receives an SMS text notification about the appointment.

   > **Note:**
   >
   > A canceled appointment may generate a reschedule request, depending on your configuration in Millennium Platform. If a request is generated, it must be managed in Millennium Platform. See Understand Completing Appointment Requests in Revenue Cycle Workflow for more information.

13

Appointment Reschedule

Use the Reschedule Appointment workflow in Oracle Health Patient Administration when a patient, provider, or facility requests to reschedule an appointment. Any appointment not in a Checked Out state can be rescheduled.

- Initiate Reschedule Process
  Complete the following steps to initiate the rescheduling process:
- Review Financial Responsibility
- Reschedule an Appointment
  Complete the following steps to reschedule an appointment:

Initiate Reschedule Process

Complete the following steps to initiate the rescheduling process:

1. Locate the appointment to be rescheduled. Appointments can be rescheduled from the Appointments section, Patient Tracker, or the resource schedule.

   > **Note:**
   >
   > You can locate appointments in the Appointments section of the patient profile or by selecting the **edit** button.

2. On the appropriate appointment, select the **Appointment Actions** menu and select **Reschedule**. The Reschedule Appointment dialog box opens.
3. Select a reschedule reason type, Patient Requested or Other Reason.
4. Select a reason from the drop-down menu and select **Continue**.

Review Financial Responsibility

The Financial Responsibility screen is displayed. Review, update as needed, and select **Next**. For information regarding updating financial responsibility, see Financial Responsibility at the Encounter Level in Oracle Health Patient Administration.

Reschedule an Appointment

Complete the following steps to reschedule an appointment:

1. The Appointment Scheduling screen is displayed with available appointment times. The original appointment information is displayed under Current Appointment. As needed, update the provider, location, reason for appointment, appointment comments, and start date.
2. Will the appointment time be selected through the availability search (continue to the next step) or the calendar (skip to Step 4)?

3. To select an appointment time using the availability search, select an available time and select **Schedule Appointment**. Continue to Step 5.
4. Select **View Calendar**. The Calendar View is displayed.
5. If not previously selected, enter a provider or providers and select a date.
6. Select **Schedule** or select a time on the calendar.
7. When you select **Schedule**, Schedule Appointment is displayed. Select a provider, location, start time, reason for appointment, and any appointment comments, and select **Schedule**.
8. When you select a time on the calendar, Schedule Appointment is displayed with the resource and start and end times. Select a location, enter a reason for the appointment, and any appointment comments, and select **Schedule**. Note that if a slot is not valid or if the patient has another appointment at the selected time, a message is displayed prompting you to select a different slot. Also, if you select a slot occupied with another appointment, a message is displayed that selecting the slot will result in an overbooking. You can continue, or select **Cancel** to locate a different time.
9. The appointment is rescheduled. The system uses encounter match logic to determine if the encounter will be retained or if a new encounter is created.
10. In the Appointment Summary, review the appointment details and select **Done**.

> **Note:**
>
> If the patient has provided an email address, they receive an email notification when an appointment is rescheduled. If they have only a phone number listed and they have granted permission to send SMS text messages, the patient receives an SMS text notification about the appointment.

14 Relationships

Use this workflow when you need to update a relationship for a patient in Oracle Health Patient Administration. This workflow enables users to add or update a relationship (for example, a primary care provider, a caregiver, an emergency contact, and so on).

- Search for Patient
  Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.
- Add a Clinician
  Complete the following steps to add a clinician:
- Remove Clinician
  Complete the following steps to remove a clinician:
- Add Caregiver
  Complete the following steps to add a caregiver:
- Edit Caregiver
  Complete the following steps to edit a caregiver:
- Remove Caregiver Added in Error
  Complete the following steps to remove a caregiver added in error:

Search for Patient

Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Add a Clinician

Complete the following steps to add a clinician:

1. Select the edit button in the Relationships section.
2. Select the plus (+) button under Clinicians. The Search for Clinician dialog box is displayed.
3. Search for the clinician (limited to providers configured in your domain).
4. Select the clinician. The Maintain Clinician dialog box is displayed.
5. Select the type of clinician and select Add. The relationship is added.

Remove Clinician

Complete the following steps to remove a clinician:

1. Select the edit button in the Relationships section.
2. Select the clinician. The Maintain Clinician dialog box is displayed.
3. Select Delete. A message is displayed: Are you sure you wish to remove this clinician from the care team?

4. Select Delete. The relationship is removed.

Add Caregiver

Complete the following steps to add a caregiver:

1. Select the edit icon in the Relationships section.
2. Select the plus (+) icon under Caregivers. The Search for Person dialog box is displayed.
3. Search for the caregiver. If the person is found, select them, enter required values, and select Save. The relationship is added.
4. If the person is not found, select + Add New Person, enter required values, and select Save. The relationship is added.

> **Note:**
>
> If you are adding an emergency contact by selecting Add New Person, the emergency contact is added to the database as a free-text person.

Edit Caregiver

Complete the following steps to edit a caregiver:

1. Select the edit icon in the Relationships section.
2. Select the caregiver. Maintain Person - Caregiver is displayed.
3. Update the relationship details as needed and select Save. The relationship is updated.

> **Note:**
>
> - Caregiver demographics must be updated separately.
> - If the caregiver relationship was previously active, but is no longer valid, update the end date. The caregiver is displayed as Inactive.

Remove Caregiver Added in Error

Complete the following steps to remove a caregiver added in error:

1. Select the edit icon in the relationships section.
2. Select the caregiver. Maintain Person - Caregiver is displayed.
3. Select Delete. The relationship is removed.

15

Encounter Management

Use this workflow to update encounter details on a scheduled appointment in Oracle Health Patient Administration. This workflow enables users to add or update financial responsibility and additional encounter details.

- Search for Patient
  Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.
- Manage Encounter
  Complete the following steps to manage the encounter:
- Review Financial Responsibility
- Check Eligibility
  For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.
- Update Encounter Main
  Update information as needed and select **Save**. If the encounter is being managed outside the facility, select values for Place of Service Facility and Place of Service Code. Note that after a patient's encounter comments are updated, a new View Comment History button is displayed that you can select to view the patient's historical information.

Search for Patient

Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Manage Encounter

Complete the following steps to manage the encounter:

1. Locate the appointment from Upcoming Appointments or select the **edit button** in the Appointment section to view the appointment dashboard.
2. On the appropriate appointment, select the **Appointment Actions** menu button and select **Manage Encounter**. The Manage Encounter screen is displayed.

Review Financial Responsibility

The Financial Responsibility screen is displayed. Review, update as needed, and select **Next**. For information regarding updating financial responsibility, see Financial Responsibility at the Encounter Level in Oracle Health Patient Administration.

Check Eligibility

For information about checking eligibility, see Manage Financial Clearance Eligibility in Oracle Health Patient Administration. After you have completed this task, select Next.

Update Encounter Main

Update information as needed and select **Save**. If the encounter is being managed outside the facility, select values for Place of Service Facility and Place of Service Code. Note that after a patient's encounter comments are updated, a new View Comment History button is displayed that you can select to view the patient's historical information.

16 Appointment Check Out

Use the Check Out Appointment workflow in Oracle Health Patient Administration to account for patients departing their appointment. Users can mark the appointment as checked out and they can schedule follow-up appointments if needed.

- Check Out a Patient
  Complete the following steps to check out a patient:
- Schedule a Follow Up
  Complete the following steps to schedule a patient for a follow-up appointment:

Check Out a Patient

Complete the following steps to check out a patient:

1. In Patient Tracker, locate the appointment to be checked out. You can filter by location, patient name or date of birth, resource or provider, or phase.
2. Select the appointment and select **Move to Checked Out**. The appointment state is updated to Checked Out.

Schedule a Follow Up

Complete the following steps to schedule a patient for a follow-up appointment:

1. In Patient Tracker, locate the appointment.
2. If follow up is scheduled using Book Again functionality, select **Book Again**. See Book Again in Oracle Health Patient Administration for more information.
3. If scheduling a different appointment for a follow up, select **View Patient Profile**. The patient profile opens. See Scheduling an Appointment in Oracle Health Patient Administration for instructions for the scheduling workflow.

17

Encounter Discharge

Use this workflow to discharge an encounter in Oracle Health Patient Administration. An encounter is ready for discharge once the patient has been treated, and can be performed manually or automatically. Automatic discharge runs at a scheduled time and discharges qualifying encounters with no action required by clinical staff. The manual workflow is necessary to show if a patient has been discharged and is the only alternative to automatic discharge.

- Search for Patient
  Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.
- Discharge Encounter
  Complete the following steps to discharge the encounter:

Search for Patient

Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Discharge Encounter

Complete the following steps to discharge the encounter:

1. Locate the checked out appointment from Upcoming Appointments or select the edit button in the appointment section to view the appointment dashboard.
2. On the appropriate appointment, select the Appointment Actions menu button, and select Manage Encounter. Manage Encounter is displayed.
3. Enter values for Discharge Date/Time and Discharge Disposition, and select Save. The encounter is discharged.

> **Note:**
>
> Future appointments associated with the encounter can be canceled. If the DISENCCANEVT scheduling system preference is set to 1, when the associated encounter is discharged, appointments are canceled automatically with a cancel reason of Auto Discharge.

18

Appointment Book Again

Use this workflow when you need to book a new appointment with the same details as an existing appointment using Oracle Health Patient Administration. This workflow eliminates the need to re-enter information, but includes the option to update if necessary.

Search for Patient

Search for and select the patient to open the patient profile. For information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

> **Note:**
>
> If the patient is already displayed in Patient Tracker, skip to the Book Again section.

Review Patient Information

Review the patient's information and update as needed. For information regarding updating patient information, see Edit Patient Information in Oracle Health Patient Administration.

Book Again

Complete the following steps to book again:

1. Locate the appointment to be booked again in the Appointments section or Patient Tracker. Select the edit icon to view all appointments.
2. On the appropriate checked out appointment, select the **Appointment Actions** menu and select **Book Again**.

Review Financial Responsibility

The Financial Responsibility screen is displayed. Review, update as needed, and select **Next**. For information regarding updating financial responsibility, see Financial Responsibility at the Encounter Level in Oracle Health Patient Administration.

Schedule Appointment

Complete the following steps to locate an appointment time and schedule an appointment:

1. In Appointment Scheduling, available appointment times are displayed, with all information carried forward from the selected appointment. As needed, update provider, location, reason for appointment, appointment comments, and start date.

> **Note:**
>
> You cannot change the type of appointment or specialty when using this workflow.

2. Will the appointment time be selected through the availability search (continue to the next step) or the calendar (skip to Step 4?
3. To select an appointment time using the availability search, select an available time and select **Schedule Appointment.** Continue to Step 5.
4. Select **View Calendar**. The Calendar View is displayed. If not previously selected, enter a provider or providers and select a date.
5. Select **Schedule** or select a time on the calendar.
   a. When you select **Schedule**, Schedule Appointment is displayed. Select a provider, location, start time, reason for appointment, and any appointment comments, and select **Schedule**.
   b. When you select a time on the calendar, Schedule Appointment is displayed with the resource and start and end times. Select a location, enter a reason for the appointment, and any appointment comments, and select **Schedule**. Note that if a slot is not valid or if the patient has another appointment at the selected time, a message is displayed prompting you to select a different slot. Also, if you select a slot occupied with another appointment, a message is displayed that selecting the slot will result in an overbooking. You can continue, or select **Cancel** to locate a different time.
6. The appointment is now scheduled, and the system creates an encounter or associates an existing encounter with the appointment using encounter match logic.

> **Note:**
>
> When an encounter is created, the following values are added to the encounter: Appointment Date/Time, Location, Insurance, Guarantor. Additionally, the Scheduled Provider value is added to the Attending Physician prompt.

> **Note:**
>
> The encounter type is determined by the related encounter on the appointment type. If a related encounter is not associated with the appointment type, the system defaults Outpatient as the encounter type.The appointment is now scheduled, and the system creates an encounter or associates an existing encounter with the appointment using encounter match logic.

7. In the Appointment Summary, review the appointment details and select **Done.**

> **Note:**
>
> If the patient has provided an email address, they receive an email notification when an appointment is scheduled. If they have only a phone number listed and they have granted permission to send SMS text messages, the patient receives an SMS text notification about the appointment.

Review Relationships

Optional: Review and update patient relationships as needed. For information regarding updating relationships, see Update Relationships in Oracle Health Patient Administration.

19 Deceased Patients

Use the External Deceased Patient Process workflow in Oracle Health Patient Administration when you are informed of the death of a patient that has occurred outside of your facility. By documenting that the patient is now deceased and the date of death, any future appointments are canceled.

- Search for Patient
  Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.
- Manage Deceased Patients
  Complete the following steps to document a patient as deceased:

Search for Patient

Search for and select the patient. The patient profile opens. For more information regarding patient search, see Search for Patients in Oracle Health Patient Administration.

Manage Deceased Patients

Complete the following steps to document a patient as deceased:

1. Select the edit button in the Patient Information section.
2. Select the check mark next to Is the patient deceased? The Date of Death field is enabled.
3. Enter a date of death, if known, and select Save.
4. If the patient has future appointments scheduled, a message is displayed asking if you would like to continue. Selecting the deceased option cancels all upcoming appointments for the patient. Select Continue.
5. Any future appointments are canceled and a deceased badge is displayed in the patient profile.