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Peoples' Health Support Group

Front Office User Stories

Version 1.0

12 September 2011

Covers

a. Registration Desk
b. File Readiness Desk
c. Screener Desk

Document Details

Document Number	**FrontOffice-V1/12Sept2011**
Document Description	This document provides the user story for Registration process at JSS, Bilaspur
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Reference Document	The document draws upon the Registration Flow diagram provided and details out the AS IS and TO Be Processes. **JSS EMR New Patient workflow.pdf** – Sept 2011, on Google Docs
Activities covered	New Patient Registration, Returning Patient Registration
Number of Pages	

Document History

Version & Date	**List of Changes**
Ver 1.0 – Sept 12, 2011	Base Document for Review.

Table of Contents

Front Office Activities are split into three logical desks, viz., Registration, File Preparation and Screener Desks. The activities presently carried out are in AS IS Process and the proposed is in TO BE process. It is the considered opinion of users to leave out the Token Issue system out of the present scope. Therefore this document addresses the user stories of only three desks as mentioned in the workflow document and PDF charts.

1. Registration Desk Activities (New Patients)

Note:

1. **Personnel** – Registration Desk /Registration Attendant(s)
2. **Preparation** – Before Operations start for the day
    a. Check for stock of Registration Card of all colors
    b. Keep plastic covers for the Registration Card
3. **Start Time** - Work Begins at 9AM in the morning when patients starts
4. **All interaction with the system are provided in this color**

Registration Desk Activities

AS IS PROCESS	TO BE PROCESS
	Registration Desk Attendant Sign-on to the system
	Beginning of Day Operation – Initialize Token numbers **Click on Registration Screen**
Call out the token Number and Name	The next Token Number to be called is Pulled up on screen with Token Number and Patient Name.
Attendant 1 - Enters Patient details into Registration Card	Attendant 1 – Calls out the Patient Name and Token Number
Enter Details in Ledger for TB patients, diabetes, rheumatic heart disease HIV and cancer patients	Checks if the patient already has a registration card, then • Attendant directs the patient to the File Readiness Desk For all Patients to be registered, Attendant **clicks** on the New Registration button **Enters Patient Demographic Details** on the New Patient Registration Form along with Chief Compliant and Any specific mention of patients with Diseases in the Registry
	Confirms from the Patient on details by Reading out from the screen
	Saves the Record **The details for printing Patient Registration Card**

	are displayed on the screen.
Attendant 2 - Enter Patient Details into the Patient File	Not Required in the TO BE Process
Attendant 3 – Enters Patient Details into Computer	Not Required in the TO BE Process
Enter Details in a Ledger with the patient serial number	Not Required in the TO BE Process A report will provide these details
	Pulls out the Registration Card of the right color and **feeds into the Printer** The following is the Color Code • Men – WHITE - No Sticker Needed • Women - YELLOW sticker • Child – BLUE Colored Sticker • Sub Center Referral - PINK Attendant **clicks on Print** Button and card with Registration Details are printed
Collects the fee (Rs. 10 for adults, Rs 5 for Child)	Same as in AS IS Process
Sends Patient to Weight Record desk / Vital Record desk	Same as in AS IS Process

Impact of the New Registration Process

a. The ledger for entering the patient is done away with
b. Ledger for specific Diseases is done away with
c. Only New Registrations are queued up for processing. The returning patients are directed to another desk for fetching files
d. Position one computer and One Printer for each Registration Attendant Desk (minimum two required)
e. Networking may be required for the computers
f. Registration Card to be preprinted and formatted as per the existing card. Printer should be able to take the registration card that is thicker than paper.
g. Role of the Registration Desk is limited to
    i. Recording Patient Demographic Details
    ii. Query on Patients Demographics
    iii. Printing Registration Card
    iv. Collecting Registration Amount

Registration System Services

1. Token Number Increment
2. Population of New Patient Object
3. Registration Number Generation Service (Increments the Max Registration number by 1).
4. Patent Details Query Service
5. Re Printing Service

Data Elements – New Registration

1. Date Time
2. Token Number for the day
3. Patient Demographic Details (Patient demographics Object)
    a. Patient Name (first),
    b. Patient Last Name /Surname
    c. CasteName (Master Data)
    d. Fathers/Husband Name
    e. Age/ Date of Birth
    f. Sex
    g. Education (drop down),
    h. Family Card no
    i. District (Master data),
    j. Tehsil
    k. Gram Panch
    l. Village (Master data)
    m. Occupation (Master data),
    n. Class (Master Data),
4. Referral Text entry
    a. Referred by Doctor / Sub Center
5. Free Text Entry
    a. Neighborhood (free text),
6. Specific Patient Registry Type (TB, Diabetes, Rheumatic Heart Disease HIV and Cancer)
7. Patient This.Visit details
    a. Chief Complaint (Free Text)
    b. Remarks (blank)
    c. Person accompanying with
        i. Name
        ii. Contact Number
        iii. Relationship to Patient
8. Cash Collection Amount (master data)
9. Registration Attendant details

UX / Activities to be Performed for New Registration

1. Call out the Token Number
2. Verify the Token Number and Take Name
3. Enter Demographics Details
4. Enter Free Text Details such as Chief Complaints, Remarks
5. Enter Registry Type
6. Save the Form
7. Wait for the Prompt “Print Registration Card”
8. Print Registration Card

9. Collect Registration Amount
10. Send patient to File Readiness Desk

New Registration Forms with data elements

All mandatory elements are shown in Red. There could be changes to these during the pilot / PoC as and when scheduled

1. Patient Call out Screen and Registration
    a. Provides the Next Token in the queue.
    b. Patient Demographics Entry (Patient demographics Object)
        i. Patient Name (first),
        ii. Patient Last Name /Surname
        iii. CasteName (Master Data)
        iv. Fathers/Husband Name
        v. Age/ Date of Birth (validation for DDMMYY)
        vi. Sex (Radio Button M/F/O)
        vii. Contact Phone Number
        viii. Education (Master Data),
        ix. Family Card no (validation)
        x. District (Drop Down from the list),
        xi. Tehsil (Drop Down from the list),
        xii. Gram Panchayat (Drop Down from the list),
        xiii. Village ((Drop Down from the list),
        xiv. Occupation (Drop Down from the list)
        xv. Class (Drop Down from the list)
        xvi. Enter Referrals
            1. Referred by Self/Doctor / Sub Center (radio Button)
            2. If Sub center then Drop Down activated from Master List of Sub Centers
            3. If Other Doctor (Referral of other doctor Entered). Needed in cases of Medico Legal Cases
            4. Self (do nothing)
        xvii. Enter Free Text
            1. Neighborhood (free text),
            2. Chief Complaint (Free Text)
            3. Remarks (blank)
        xviii. Enter Specific Patient Registry Type
            1. Drop Down of Master list of Registry patients (TB, Diabetes, Rheumatic Heart Disease HIV and Cancer)
        xix. Enter Visit Details
            1. Accompanying persons details
                a. Name of the Person Who is accompanying
                b. Relationship

c. Contact Number

xx. On Clicking Save – Save the record

1. Allocate the Registration Number (Next Number)
2. Go to Printing Registration Card Screen

2. Print Registration Card Screen
   a. Provide the details of Registration Card (non editable)
      i. Patient Registration Number
      ii. Patient Name (first),
      iii. Patient Last Name /Surname
      iv. Fathers/Husband Name
      v. Age/ Date of Birth (validation for DDMMYY)
      vi. Sex (Radio Button M/F/O)
      vii. Phone Number
      viii. Family Card no (validation)
      ix. District (Drop Down from the list),
      x. Tehsil (Drop Down from the list),
      xi. Gram Panchayat (Drop Down from the list),
      xii. Village ((Drop Down from the list),
      xiii. Date and Time of Registration
   b. "Print Registration Card" and Cancel Button
      i. Registration Fee Collection (Drop Down for Amounts Rs 10 Rs 5 parameterized)
      ii. On Click of Print Registration card
      iii. Cash Collected is updated into the System with amount
      iv. On Successful printing of the Card
         1. Go to New Patient Registration
         2. If Printing not successful, Reprint Button
3. Patient Query Screen
   a. Enter any of the four Patient related information
      i. Patient Name
      ii. Patient Surname
      iii. Thesil
      iv. Age / Date of Birth
      v. Gram Panchyat
      vi. Village
      vii. Contact phone Number
   b. Query and Cancel buttons
4. Patient Query Response screen1
   a. List of all matching records with Pagination
   b. Select the right patient
5. Patient Demographics Query Output Screen
   a. Patient Demographic Details
   b. Edit and Cancel buttons

        c. On Edit go to Patient Demographics Edit Screen
6. Patient Demographics Edit Screen
    a. Editable Fields
        i. Tehsil
        ii. Gram Panchayat
        iii. Contact Telephone Number
        iv. ..
    b. Non editable fields
        i. Name, Surname, fathers Name

2. File Readiness Activities at Front office

Note:

1. **Personnel** – File Retrieval Desk /Medical Record Department (MRD) Attendant, Vitals Checks Nurse if vitals are involved, If it is just weight, then additional nurse is not needed
2. **Preparation** – Before Operations start for the day
    a. Allocation of all files in respective bins
3. **Start Time** - Work Begins at 9AM in the morning when patients activity starts
4. **All interaction with the system are provided in this color**

File Readiness Activities

AS IS PROCESS	TO BE PROCESS
	MRD Desk Attendant Sign-on to the system
	Patient arrives at the File Readiness Desk **Click on Prepare File Screen – Enter Registration number of patient based on Card**
Patient approaches the File Retrieval Counter and give their name and registration number	**Pull up patient Details based on Registration Number** This Patient could be one of two cases below
Returning patients who do not bring their card, MRD Attendant searches for their information on the computer next to the window	
When token number is called Patients deposit their numbered token in a box, Patient File is retrieved. Often an extra piece of paper has to be threaded or stapled to their file to make room for an extension of the patient note.	Case1 Newly Registered Patient • Instructions on the screen for the MRD attendant to prepare new file • **Create new Visit Information for the Patient** • **Enter Weight as the first element for the visit**

	• **Print the Case sheet with Patient details on preprinted stationary** • Place the Sheet in the file (Color Coded file) Case 2 Returning Patient • Instructions on the screen for the MRD attendant to search for the file • Fetch the file from the Shelves • **Create new Visit Information for the Patient** • **Enter Weight as the first element for the visit** • Check if there is a need for adding a new sheet of paper, if so • **Print additional Sheet** • Place in the sheet in the file (there is a scanning activity that is to be done which will be addressed later)
Collect Token and Handover file	Attendant Collects Token and Hands over file to patient
Direct Patient to Screener Desk	Direct Patient to Screener Desk

Impact of the File Readiness Process

a. All patients pass through this counter. Therefore, there is a need of atleast 2 persons at this desk
b. Need for a computer and printer at the Desk at least 2 numbers required (is there space?)
c. The Patient File is Printed here for Newly Registered Patients .
d. For Returning patients, If the file needs an additional sheet, few elements are printed on the additional sheet and then included in the file
e. Regarding Weight is recorded and printed on the additional sheet or on the first page of the newly registered patient.
f. If more than just weight is to be recorded then it helps to separate the activities into a VITALS RECORD DESK that will be before the File Retrieval (Daniel Let me know if this is the case)

Registration System Services

1. Registration Number based Retrevial of Patient Details
2. Update Patient EMR with Weight
3. Patent Details Query Service
4. Printing/Re Printing of File Additional sheet

Data Elements – File Readiness Activities

1. **Date time**
2. **Patient Object**
3. **Patient Registration Number**
4. **Patient Demographics based on Registration Number (Cutting it short)**
5. **Patient Weight / Vitals as the case may be**
6. **MRD Attendant details**

UX / Activities to be Performed for File Readiness Activities

1. Call out the Patient Name / Registration Number/ Token Number
2. Verify the Patient
3. If Returning Patient
    a. Locate file from Shelves Bin
    b. Enter Vitals Information in the system for the patient
    c. Check if additional Paper to be added
        i. If yes, Then Print Paper
        ii. Else, Stamp today's date on the paper
        iii. Create New Visit on System
4. If New Patient
    a. Enter Weight Information in the system for the patient
    b. Print Fresh Case sheet for the patient with information
    c. Create New Visit on System
5. Save the Form
6. Direct Patient to Screener Desk

File Readiness Forms with data elements

1. Opening Screen with Next Patient in Queue
    a. Informs if the patient is a Returning patient or New Registration
    b. Displays Brief Demographics Data such as Patient Name, Surname, Registration Number To facilitate identification of the Patient
    c. Enter Weight of patient weight
    d. For Returning Patients
        i. File Location Confirmation checkbox
        ii. Enter Weight / Vitals as the case may be
        iii. Checkbox for Additional Sheet
        iv. On Click of Additional Sheet
            1. Print Brief Patient Details on Fresh Page
            2. Confirm Printing OK, else reprint
            3. Automatically Create new Visit for the patient
    e. For New Registration Patients
        i. Printing Brief of Patient as in base Case Sheet

1. Patient Name, … demo graphic Details as per existing format

ii. Confirm Printing OK, else reprint

iii. Automatically Create new Visit for the patient

f. New Visit Created for the patient

2. Collect Token and Handover file

3. Screener Desk Activities

Note:

1. **Personnel** – Senior Nurse
2. **Preparation** – Before Operations start for the day, enter the doctors in attendance and their name for each OPD room
3. **Start Time** - Work Begins at 9AM in the morning when patients activity starts
4. **All interaction with the system are provided in this color**

Screener Activities

AS IS PROCESS	TO BE PROCESS
	Scanner Desk Attendant Sign-on to the system
	• **Choose Form "OPD Doctors for the day"** • **Select Each Doctors In Attendance** • **Select Doctor OPD room** • **Save Form** • **Choose Allocate Patient Screen**
Patient approaches the Screener Desk with File	Patient approaches the Screener Desk with File
Screener Decision1 Categorize Patient after quick initial Interaction and checking Patient file Case 1 – Urgent, Emergency and is to be handled at OPD Case 2 – Patient has Surgery Scheduled Case 3 – Patient is for OPD consultation	Same as in AS IS process
Case 1a – Emergency OPD • By pass all queues • Choose Doctor from OPD Sheet • Direct Patient to the OPD Doctor • Update Patient Count for OPD room Case 1b – Emergency IPD	Case 1a – Emergency OPD • By pass all queues • **Enter Patient Registration Number** • **Select Radio Button "OPD Emergency"** • **Choose OPD Room** • **Select Doctor from OPD Room**

• Choose Doctor from IPD • Direct Patient to Nursing Station at Casualty inside hospital	• **Save the form** • Direct Patient to OPD Room Case 1b – Emergency IPD • **Enter Patient Registration Number** • **Select Radio Button "IPD / Casualty"** • **Choose OPD Room** • **Select Doctor from OPD Room** • **Save the form** • Direct Patient to Casualty/IPD Nursing Station
Case 2 - Surgery • Check in OT Dairy • Direct Patient to OT	Case 2 Surgery • **Enter Patient Registration Number** • **Select Radio Button "Surgery"** • **Check if patient listed under surgery for day** • **Select Patient Record and Validate** • **Confirm Surgery Scheduled** • Direct Patient to Nursing Station/OT/Minor OT
Case 3 – OPD Consultation • Study File – Primarily the compliant • Allocate to a OPD Room based on Doctor Availability • Update Sheet for paitnet count to the OPD room	Case 3 – OPD Consultation • **Enter Patient Registration Number** • **Select Radio Button "OPD Emergency"** • **Select Doctor from OPD Room** • **Save the form**

Impact of the Screener Process

1. Screen will have to be provided with a Computer
2. Networking if needed

Screener Services

1. Token Query Service
2. Patent Details Query Service
3. Surgery Schedule Query Service
4. OPD room Query Service (doctor and room)

Data Elements – Screen Activities

1. Date and Time
2. OPD Rooms
3. Doctors
4. Patient Object
5. Surgery Schedule
6. Count of OPD Patients

UX / Activities to be Performed for Screener Activities

1. Beginning of day
    a. Update Doctors in Attendance for the Day
    b. Update Doctors OPD room for the day
2. Choose Allocate Patient Screen
3. Decide on the Patient Type (emergency, Surgery, OPD Consultation)
    a. Case 1 – Emergency /OPD/IPD
        i. Enter Patient Registration Number
        ii. Choose emergency (IPD/OPD)
        iii. Direct to OPD Doctor / IPD Nursing Station/ Casualty
        iv. Save form
        v. Screen Refreshes to Allocate Patient Screen
        vi. IF IPD patient, Advice Patient Attendant to Get Admission in IP if required
    b. Case 2 – Surgery
        i. Enter Patient Number
        ii. Choose Surgery
        iii. Click "Get Surgery" Schedule
        iv. Check Surgery Schedule for the patient
        v. Confirm Patient Presence for Surgery
        vi. Save form
        vii. Screen Refreshes to Allocate Patient Screen
        viii. Direct Patient to OT / Minor OT / Nursing station / IPD Admissions
    c. Case 3 – OPD Consultations
        i. Enter Patient Number
        ii. Choose OPD consultation
        iii. Choose Doctor
        iv. Save Form
        v. Screen Refreshes to Allocate Patient Screen
        vi. Direct Patient to Room number / Waiting area for OPD Consultation

Screener Forms with data elements

1. Call Form - OPD Doctors for the Day
    a. Choose the Doctor from the drop down
    b. Choose the OPD room for the doctor
    c. Click on Add Doctor
    d. Choose the Doctor from the drop down
    e. Choose the OPD room for the doctor
    f. Continue till all doctors are added for the day
    g. Save Form
2. Call Allocate Patient Screen
    a. Patient Distribution list OPD wise
        i. Displays Patient Count OPD Room wise (hyper link the number)

        ii. Click on Count hyperlink
        iii. Call Form List of Patients for OPD room
    b. Fields – Patient Registration Number
    c. Validate Patient Registration Number
    d. Display Patient Object
    e. Doctor for Patient from Dropdown with doctors for the day
    f. Save and Cancel Button Form
3. List of Patients for OPD Room
    a. Displays the Patient Object details in along with allocated OPD Room
4. Patient Query Form as in other cases