IDX Registration Tips

Name:
- Be sure to obtain AKAs, especially on married or divorced females. (Appointment Services: on new registrations; Registration on any patient without a medical record number.) If married female kept her maiden name, retype name in AKA field as LAST, FIRST* (with asterisk).

Address:
- Follow postal abbreviations.
- Do not use any punctuation.
- If entire address does not fit on line one, enter street address on line two and apartment number on line one. (Post office reads from bottom to top.)
- Do not enter a PO Box and street address. If patient wants to use PO Box, note the street address in general comments.

PCP:
- Enter only the first few letters of the physician’s last name so the dictionary can search for you.
- If the physician is not in the dictionary, use format: SMITH MD, JOHN
- If the patient does not have a primary care doctor or cannot give you a first and last name, enter “PCP,NONE”.

DEMOGRAPHICS:
- Complete all fields. Enter “UNK” if unknown
- If patient’s employment status is unemployed or disabled, employer name field should be blank.

AREA CODES/PHONE NUMBERS:
- Enter an area code in any field that contains a phone number.
- If patient does not have a phone number, use format: 999-999-9999
- If patient is unemployed or emergency contact does not have a work phone number, leave these fields blank.

EMERGENCY CONTACT:
- If emergency contact has no phone number, list someone else or enter “NONE,GIVEN” in the emergency contact name field (EMER CONTACT field) and enter 5 or OTH and select OTHER RELATIONSHIP in the Patient Relationship to Emergency Contact field (PTNT REL TO E C field).
- If patient’s information has changed and spouse is listed as emergency contact, be sure to update emergency contact information also.
- If you are given a cell phone or pager number for emergency contact, note in general comments (ie; HOME=CELL# OR WORK=PAGER#)

RESPONSIBLE PERSON:
- Adult patients (“SELF” in relation to responsible person) should always be listed as their own responsible person unless patient has a specific legal guardian or power of attorney.
- If the responsible person lives at the same address as the patient, address information can be left blank; if not, complete address fields.
- Other responsible person fields should be maintained when it is not the patient.

IN GENERAL:
- Less is best when searching in any dictionary field.
- Make general comments when any pertinent information is overridden or corrected. (ie; date of birth, social security number, address.)
- Make general comment whenever you have missing information (ie; patient’s social security number, insurance contract information, responsible person’s social security number, employment details, etc.)
- If necessary, dummy date of birth is 01/01/1900. (Appointment Services only.) Remember general comment.
- Clean up as you go.
- Reference material such as new address form, duplicate account form, FSC list, FSC contract matrix, postal abbreviations, etc. can be found at: http://www.cps.mcw.edu/reference_guides.htm