



Adding a New Patient Quick Reference Guide

Document version 1

A **New Patient** is completed for a patient not previously entered into the Casamba system.



The user must have the following three user permissions to be able to add a new patient to Medical Records:

- **'Patient List- Manual Add'** POC Permission
- **'Referral- View'** POC Permission
- **'Referral Entry'** POC Permission

1. Search for the patient's name to make sure they do not already have a past admission.



When searching for a patient, it's recommended to capitalize the first letter of the first and last name, so if a new patient is entered from this entry, the first letter of the first and last name will be capitalized in the Referral.

The screenshot shows a search form with the following fields and controls:

- Last Name:** Text input field containing "Smith".
- First Name:** Text input field containing "Gladys".
- SSN:** Text input field containing "#####".
- MRN:** Text input field.
- Date of Birth:** Text input field with a calendar icon.
- Search:** A blue button with the text "Search" and a refresh icon.

Red boxes highlight the "Last Name" and "First Name" fields, and the "Search" button.



- 2. If the patient the user is searching for does not have a past admission, then select the New Patient button to create a new patient.

Last Name Jones-Smith **First Name** Julie **SSN** #####

MRN **Date of Birth** **Search**

Patients (0) **+**

No Admissions found.

- 3. On the **Verify New Patient** screen, review the list of patients already in the system first to be sure this patient does not have a prior admission. In this list, the user will receive results for all patients (regardless of the user’s site access) so the user is aware that the patient is known to the agency, but in a site the user may not have access to.

Cancel **Verify New Patient**

Site *
Select a site

Last Name
Smith

The following patients are already in the system

Name	Age	DOB	Gender
Smith Jr, Freeman	90Y	09/29/1930 (Died)	M
Smith Jr, Henry W	95Y	12/21/1925 (Died)	M
Smith Pinson, Walter A	97Y	01/08/1924 (Died)	M
Smith, Amy O	100Y	11/01/1920 (Died)	F
Smith, Anna Lee	94Y	06/07/1926 (Died)	F
Smith, Anne			

Is this a new patient?

Yes Use Selection

- Once the user has verified that the patient is not already admitted to a different site, enter the site the patient is being admitted to using the **Site** list. The user can only add the patient to a site to which they have access.

Verify New Patient

Cancel

Site *

Select a site

- Select a site
- Site 1
- Site 2
- Site 3
- Site 4

The following patients are already in the system

	Age	DOB	Gender

- Click **Yes** to the question “Is this a new patient”?

Verify New Patient

Cancel

Site

Home Health

Last Name

smith

The following patients are already in the system

Name	Age	DOB	Gender
Smith, Donald L	93Y	05/25/1926 (Died)	M
Smith, Donald R	71Y	10/31/1948	M
Smith, Donna	89Y	08/19/1930	F
Smith, Donna L	77Y	08/03/1942	F
Smith, Donna M	93Y	11/12/1926 (Died)	F
Smith, Dorothy H	96Y	08/17/1923 (Died)	F

Is this a new patient?

Yes Use Selection

- Enter available information to create the new patient record. The two required fields in this screen are the **Site** and the patient's **Last Name**.

- Select **Save New Admission** in the top right once complete.

- A **Confirm** box will display asking the user to confirm that the new patient record should be created. The box will display:

- Patient Name
- Admission Type
- Site

- Select **No** to return to the previous screen or **Yes** to move on to the more detailed Referral screens to continue entering the new patient. Please see the "Edit Referral" section of the *HomeOffice Web Referral/Intake Training Manual* for more information on each Referral screen.

Done		Smith, Gladys (Unknown)	
Demographics	Patient Smith, Gladys DOB Age Referral Date 01/25/21 Last Referral Info 01/25/2021 SOC 01/25/21 Previous Admission No		Demographics
Preferences	Patient Details		<ul style="list-style-type: none"> Patient (Name, DOB and Gender) Patient MRN Patient Address Patient Phone
Referral/Hos	SSN MRN		Contact
Diagnoses	PCP Address Phone		<ul style="list-style-type: none"> Contact Name and Phone
Contacts	Highlighted Attribute	Value	Comments
Physicians	Patient Address		Referral
Orders	Phone		<ul style="list-style-type: none"> Referral Orders Referral DX Admitting MD Referral Meds Referral Allergies
Medications	Directions		
Insurance	Marital Status Race Pets		
F2F	Contacts		
Attributes	Referral MDs		
Overview/Sign	No information recorded.		
	Referral Diagnoses		
	Referral Surgical Procedures		