

Accepting Pre-registration Edits in AMBULATORY Module

Audience: Registration Clerks

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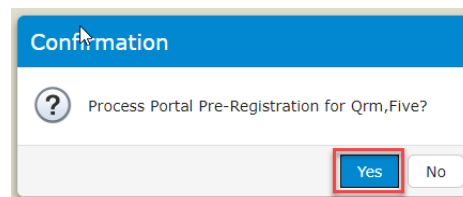
Overview

When a portal user has completed a “pre-registration” via the portal and the information has not yet been accepted into Expanse, the Registration Clerk will need to accept the edits during the registration process.

To **accept pre-registration edits** done in the portal:

If the patient has done the pre-registration via the portal a pop-up box will appear asking you to “Process Portal Pre-Registration for (patient name)”

- Click **Yes** to process the pre-registration



- View changes in each tab. Un-check any edits that you do not want to accept*.

A screenshot of the "Health Portal Edits" interface. The interface shows a patient record for "Qrm, Five" with a date of birth of "05/05/1992". The "Demographics" tab is active, showing fields for "Preferred First Name", "Address", and "Postal". The "Submitted by Patient" section shows checkboxes for "Select All", "Five", "100 Sunshine Lane", and "L3V 4J7". A red box highlights the "Five" checkbox, which is labeled "Un-checked" with a red callout. A red arrow points to the "Check each tab" button at the bottom left. The "Insurance" section shows "Ontario Health Insmc Plan" with a note: "Insurance is valid, but a card was not submitted." Buttons for "Cancel", "Save", and "Process Later" are visible at the top right.

- Click **Save** to accept the changes in Expanse

*NOTE:

- If Preferred First Name is the same as the first name on the patient’s MPI/Health Card, un-check the edit to avoid consuming it. Accepting a Preferred First Name that is the same as the first name on the MPI/Health Card will create a duplicate name in Expanse – which then must be deleted to proceed with the registration.
- If patients have updated their Contacts verify that they haven’t put themselves as the Primary Contact. If they have, un-check those fields before Saving.
- If the patient has updated their Pronouns, un-check before Saving.