



HOW TO CREATE A PATIENT

Create a Patient:

Select +New Patient

A horizontal search bar with a white background and a purple border. It contains a search input field with the text "Search Patients", a "go" button, and a "+ New Patient" button. The "+ New Patient" button is highlighted with a red rectangular border.

Fill in the items below

Items in red are mandatory

MRN

First Name

Last Name

DOB

Click "Create"

A screenshot of the "New Patient" form in the CardiacCare system. The form is titled "New Patient" and contains several input fields. The fields for MRN, First Name, Last Name, and DOB are marked with a red asterisk, indicating they are mandatory. A blue speech bubble points to the "Test Patient" checkbox, which is also highlighted with a red border. The "Create" button is located at the bottom right of the form. The top of the page shows the CardiacCare logo, search bar, and user information.

Be sure to check "Test Patient" to create a test patient.

Create an Episode:

Find or create the patient (if you create a patient, the application will automatically default to adding an Episode after you select [Create](#)).

Add Episode

Inpatient Outpatient

Arrival Date

Admission Date

Procedure Date

Discharge Date

Account Number

Facility

Registry Registry is enabled when Procedure Date is provided

Follow-Up

Episode #

For an existing patient, select the desired patient, and with the patient's name highlighted, you can Add an Episode.

Builders, Bob

- 10/25/2020 (Episode)
 - 10/31/2020 (Visit)
 - ACC/NCDR CathPCI v5.0
 - ACC/NCDR Chest Pain MI v3
- 10/02/2020 (Episode)
- 10/14/2020 (Visit)
 - ACC/NCDR CathPCI v5.0
- 09/13/2020 (Episode)
- 09/30/2020 (Visit)
 - St Francis Trinity of NE
- 09/12/2020 (Episode)
- 09/12/2020 (Visit)
 - ACC/NCDR CathPCI v5.0
 - ACC/NCDR Chest Pain MI v3

Patient - Builders, Bob

Data Forms:

[Demographics](#)

[custom questions](#)

Patient Survey Request:

MRN: Cath88888123123

Alternate ID:

First Name: Bob

Middle Name: B

Last Name: Builders

DOB: 09/13/1980

Fill in the **Admission** and **Procedure** dates. It's okay if these dates are the same. However, the Registry drop-down will not allow access unless the **procedure** date is filled out.

Fill in the Discharge date (if known)

Select a Facility

Select Save when done. (This information can always be changed/updated later if needed)

Add Episode

Inpatient Outpatient

Arrival Date

Admission Date

Procedure Date

Discharge Date

Account Number

Facility

*** Registry**

Follow-Up

Episode #

Create a Visit:

Select your desired Episode – then select **Add Visit**.

The screenshot shows a user interface for managing medical episodes. On the left, a list of episodes is displayed under the user 'Builders, Bob'. The episode '10/25/2020 (Episode)' is selected and highlighted with a red box. On the right, the details for this episode are shown, including the date and time '10/25/2020 15:54'. There are three buttons: 'Delete', 'Edit', and 'Add Visit', with 'Add Visit' highlighted by a red box. Below the buttons, there is a section for 'Data Forms' with two entries: 'ACC/NCDR Atrial Fibrillation Effect on Quality-of-life (AFEQT) Questionnaire' and 'Admission-Discharge'.

Add a Visit Date

Add a Facility

Choose the Registry

The other items are optional

Click "Save"

The screenshot shows the 'Add Visit' form. The title 'Add Visit' is at the top left. The form contains several fields: 'Visit Date' (with a red box around the label and the date '09/10/2024'), a time field (with '11:55'), 'Facility' (with a red box around the label and a dropdown menu showing 'Cedaron Heart Health 2'), 'Registry' (with a red box around the label and a dropdown menu), 'Follow-Up' (with an unchecked checkbox), 'Visit Name' (with an empty text input field), and 'Description' (with an empty text area). At the bottom right, there are two buttons: 'Cancel' and 'Save', with 'Save' highlighted by a red box.

Adding a Procedure:

Select your desired Visit – the select Add Procedure

The screenshot shows a software interface with a left-hand navigation pane and a main content area. The left pane lists a user 'Builders, Bob' and several visits. The visit '10/31/2020 (Visit)' is selected and highlighted with a red box. Below it are two procedure options: 'ACC/NCDR CathPCI v5.0' and 'ACC/NCDR Chest Pain MI v3'. The main content area displays the details for the selected visit: 'Visit - 10/31/2020 15:55'. At the top right of this area are three buttons: 'Delete', 'Edit', and 'Add Procedure', with the 'Add Procedure' button highlighted in red. Below the buttons is a 'Visit Description' section containing the following information:

- Visit Date:** 10/31/2020 15:55
- Facility:** Cedaron Heart Health 2
- Follow-Up:** No
- Date Created:** 11/09/2020 17:56
- Created By User:** Sean Rivera

Fill in the Procedure Date

Select a Facility

Choose a Registry

Click "Save"

The screenshot shows the 'Add Procedure' form. The title 'Add Procedure' is at the top. Below the title are four input fields:

- * Procedure Date:** A date-time field with '10/31/2020' and '15:55' entered. The label is highlighted with a red box.
- Facility:** A dropdown menu with 'Cedaron Heart Health 2' selected. The label is highlighted with a red box.
- * Registry:** A dropdown menu with a heart icon on the left and 'ACC/NCDR Chest Pain MI v3' selected. The label is highlighted with a red box.
- Procedure Name:** An empty text input field.

At the bottom right of the form are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red box.