

Transferring Patients at Kidney Care Clinics

Classic View > Patients > Demographics

When a patient transfers from another centre, the receiving centre needs to register the patient and update patient information. Below are two scenarios designed to help you complete the transfers in PROMIS successfully and avoid making data entry errors.

- **Scenario 1** – Registering a patient you have access to
- **Scenario 2** – Registering a patient you don't have access to

For both scenarios, you're going to open the *Patient Demographics* followed by the *CKD Registration* screen.

To help you further, common data entry error advisories appear inline in the scenarios.

Scenario 1

"I want to register a patient from another centre to my centre and I already have access to the patient in PROMIS."

In this scenario, you will close the previous primary centre, make your centre the primary centre, and then ensure all current information is accurate for your centre.

If the patient is already assigned to your centre, follow these steps to complete the registration:

1. In PROMIS Classic View, from the *Patients* menu, choose **Demographics**.

The *Patient Demographics* screen appears.

Note: Do not open a new PRA program. Keep the original program open.

2. To ensure centre history information is correct, click the *Centres* tab and complete the following:

Program	Centre Type	Management Centre	Chart id	Start Date	End Date
PR	Clinic	ARH FOOT CARE		28-JAN-2014	
PR	Temporary	ROYAL COLUMBIAN HOSPITAL		08-OCT-2015	
PR	Renal-Primary	ABBOTSFORD RGNL. HOSP. & C.C.		04-SEP-2008	
PR	Renal-Primary	SURREY MEMORIAL HOSPITAL		24-MAY-2007	03-SEP-2008
PR	Renal-Primary	ROYAL COLUMBIAN HOSPITAL		24-MAY-2000	27-JUN-2005

- ⑦ Ensure the transferring centres are all closed.
- ⑦ Do not change the current centre type; instead, create a new centre and end the current centre.
- ⑦ Ensure your centre as *Renal-Primary* instead of *Temporary*.

- a) To close your temporary centre, enter an **End Date**.
 - b) To add your centre, insert a new line and complete all applicable fields, ensuring under **Centre Type** you choose *Renal-Primary*.
 - c) To close the transferring Renal-Primary centre, enter an **End Date**.
3. Click the *Physician* tab and change **Primary Nephrologist** to the patient's nephrologist at your centre.

Ensure you complete this step to avoid the common error of not updating the primary nephrologist.

Patient Demographics ...

General 1 | General 2 | Programs | Centres | **Physicians** | Contacts | Team Members | ABO

PHN: [] Name: ADEMO00034, JANE

Primary	MSP	Name	Speciality	Phone	Relation to Patient
Nephrologist	29563	SCHWARTZ, DANIEL	Nephrology	(604) 516-7774	Nephrologist MD
Primary Heart Physician	[]	[]	[]	[]	[]

Transplant Program: [] Start Date: [] End Date: []

Referring Physician	MSP	Name	Speciality	Phone
Pre-Tx Specialist	[]	[]	[]	[]
Primary Cen. Specialist	[]	[]	[]	[]
Post-Tx Specialist	[]	[]	[]	[]

Other Physician(s)

MSP	Name	Speciality	Phone	Relation to Patient
23991	STARKO, ROBERT	Nephrology	(604) 525-9666	Nephrologist - Other
26934	DANESCU, VIRGIL	Unknown	(604) 859-6774	Family Physician/Primary Care Pro
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]

Save Exit

- Click the *Team Members* tab and remove clinicians who are no longer applicable and, if applicable, replacing them with clinicians from your centre.

Patient Demographics ...

General 1 | General 2 | Programs | Centres | Physicians | Contacts | **Team Members** | ABO

PHN: [] Name: ADEMO00034, JANE

Team Members

Team Member name	Role	Phone
WALKER, GAIL	NURSE	6048514700
NEWELL, JANICE	DIETITIAN	6045496310
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]

Save Exit

- Click **Save** and **Exit**.

The *Patient Demographics* screen closes.

The following steps describe how you check what information exists in the *CKD Registration* screen and possibly make changes.

- From the *Treatment* menu, choose **CKD** and then **Status**.

The *Chronic Kidney Disease Registration* screen appears.

The screenshot shows the 'Chronic Kidney Disease Registration' window. At the top, there's a 'Patient' section with 'PHN' and 'Name' (ADEMO00034, JANE) fields. To the right is a 'Select Mode/List' dropdown set to 'Work List'. Below this is the 'CKD Registration' section. It includes a 'CKD Registration Date' field (24-MAY-2007). Under 'Indicators of Chronicity', there are checkboxes for 'Small Kidneys', 'Biopsy Proven', and 'Renal Function Decline' (checked). The 'Follow-up Location' section has radio buttons for 'Physician's office', 'Renal Clinic', 'Both' (selected), and 'N/A'. The 'Referral to nephrologist' section contains 'Referring Phys.' (STARKO,ROBERT), 'Date' (18-APR-2000), 'Serum Cr' (150 umol/L), 'Calculated CrCl' (mL/min), and 'Measured CrCl' (mL/sec at 1.73m²). The 'CKD End' section has 'CKD Ended?' with 'Yes' and 'No' (selected) radio buttons, an 'End Date' field, and a 'Reason to end CKD' dropdown. A 'Comments' text area is at the bottom left. 'Save' and 'Exit' buttons are at the bottom right.


- Review the information on the *CKD Registration* screen.

Remember to check that the *Follow-up Location* is the current type for your clinic.

- If all the information still applies after this transfer, click **Exit**. You're done.

9. If any of the information on the *CKD Registration* screen is different as a result of this transfer, complete the following:

These steps avoid the common error of not ending the first CKD registration before opening a new one.

- a) In *CKD Ended*, choose **Yes**.
- b) Enter an **End Date**.
- c) In *Reason to end CKD*, choose **Transferred to Diff. FU** (different follow-up).
- d) Click **Save**.
- e) On the main toolbar, click Insert New Record .
- f) A new blank CKD registration record appears.
- g) Complete the *CKD Registration* screen for the patient's current information.
- h) Click **Save** and **Exit**.

Instead of overwriting the previous CKD registration information, create a new record for the new information.

The previous record is ended and a new record is inserted with the updated information.

Chronic Kidney Disease Registration

Patient: PHN [] Name ADEMO00034, JANE [v]

Select Mode/List: Work List [v]

CKD Registration: CKD Registration Date 08-OCT-2015 [v]

Indicators of Chronicity: Small Kidneys Biopsy Proven Renal Function Decline

Follow-up Location: Physician's office Renal Clinic Both N/A

Referral to nephrologist: Referring Phys. STARKO,ROBERT [v] Date 18-APR-2000 [v] Serum Cr 150 umol/L Calculated CrCl [] mL/min Measured CrCl [] mL/sec at 1.73m²

CKD End: CKD Ended? Yes No End Date: [] [v] Reason to end CKD: []

Comments [] [v]

Save Exit

Scenario 2

“I want to register a patient from another centre to my centre. The patient is new to my centre, so I don’t have access to this patient.”

In this scenario, you need to gain access to the patient first. This means you must register the patient at your centre and ensure patient information is up to date. To do that, you start in the *Assign Patients* screen.

If the patient is new to your centre, complete the registration following these steps:

1. In PROMIS Classic View, from the *Patients* menu, choose **Assign**.

The *Assign Patients* screen appears.

Assign Patients

Assign a Patient from another Management Centre to one of your own Centres.

Search by:

PHN

Name

Last Name: First Name: Birth Date:

Find Patient

Patient Confirmation:

PHN: Last Name: First Name: Middle Name:

Birth Date: Sex: Also Known As: Home Phone:

Open Primary Centres

Centre Type	Program	Primary Centre	Deactivation Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Assign this Patient to a Centre:

Centre Type: Program: Management Centre:

Start Date: Chart ID:

Assign Patient

Re-Enter **Exit**

2. Search for the patient by entering either the patient’s PHN or Name (Last Name, First Name, and Birth Date required).

3. When the correct patient is found, complete the *Assign this Patient to a Centre* section to add the patient to your centre:

- a) For **Centre Type**, choose *Temporary*.

Although the patient is moving to your centre *permanently*, you are going to assign the patient to your centre as *temporary*. The reason for this is that only one primary centre can be open at a time. Once you assign the patient, you will change your centre to primary in the *Demographics* screen.

- b) For **Program**, choose the current renal program where the patient is registered.

To choose a program, refer to the *Open Primary Centres* section (above) where patient is currently registered.

- c) Choose your **Management Centre**.
- d) Add the **Start Date**.
- e) If applies to your centre, add a **Chart ID** number.
- f) Click **Assign Patient**.
A confirmation message appears.
- g) Click **Yes**.

The patient is assigned and a new line in *Patient Demographics* is added. You can now open *Patient Demographics* and close the previous centre and make your centre the primary one for this patient.

4. From the *Patients* menu, choose **Demographics**.
The *Demographics* screen appears.
5. On the *Centres* tab, search for the line with the following:
- Previous *Management Centre*
 - *Centre Type* is **Renal-Primary**
 - No *End Date*

PHN Name ADEMO00034, JANE

Management Centre

Program	Centre Type	Management Centre	Chart id	Start Date	End Date
PR	Clinic	ARH FOOT CARE		28-JAN-2014	
PR	Temporary	ROYAL COLUMBIAN HOSPITAL		08-OCT-2015	
PR	Renal-Primary	ABBOTSFORD RGNL. HOSP. & C.C.		04-SEP-2008	
PR	Renal-Primary	SURREY MEMORIAL HOSPITAL		24-MAY-2007	03-SEP-2008
PR	Renal-Primary	ROYAL COLUMBIAN HOSPITAL		24-MAY-2000	27-JUN-2005

Save Exit

- ① Ensure the transferring centres are all closed.
- ① Do not change the current centre type; instead, create a new centre and end the current centre.

6. Enter an **End Date**.

Now you can make your centre the primary one.

7. Search for the line with your centre you added in the *Assign Patients* screen.

- ① Ensure your centre as *Renal-Primary* instead of *Temporary*.

8. Change *Centre Type* from *Temporary* to **Renal-Primary**.

9. Click **Save**.

Your centre is now the primary centre for this patient.

10. Click the *Physician* tab and change **Primary Nephrologist** to the patient's nephrologist at your centre.

ⓘ Ensure you complete this step to avoid common error of not updating the primary nephrologist.

The screenshot shows the 'Patient Demographics' window with the 'Physicians' tab selected. The patient's name is 'ADEMO00034, JANE'. The 'Primary Nephrologist' is currently set to Daniel Schwartz (MSP 29563). Below this, there are fields for 'Transplant Program', 'Start Date', and 'End Date'. There are also sections for 'Referring Physician', 'Pre-Tx Specialist', 'Primary Cen. Specialist', and 'Post-Tx Specialist'. At the bottom, there is a table for 'Other Physician(s)' with two entries: Robert Starko (MSP 23991, Nephrology) and Virgil Danescu (MSP 26934, Unknown). The 'Save' and 'Exit' buttons are at the bottom right.

MSP	Name	Speciality	Phone	Relation to Patient
29563	SCHWARTZ, DANIEL	Nephrology	(604) 516-7774	Nephrologist MD

MSP	Name	Speciality	Phone	Relation to Patient
23991	STARKO, ROBERT	Nephrology	(604) 525-9666	Nephrologist - Other
26934	DANESCU, VIRGIL	Unknown	(604) 859-6774	Family Physician/Primary Care Pro

- Click the *Team Members* tab and remove clinicians who are no longer applicable and, if applicable, replacing them with clinicians from your centre.

PHN Name

Team Members

Team Member name	Role	Phone
WALKER, GAIL	NURSE	6048514700
NEWELL, JANICE	DIETITIAN	6045496310

- Click **Save** and **Exit**.

The *Patient Demographics* screen closes. You need to check which is done in CKD Registration and possibly make changes.

- From the *Treatment* menu, choose **CKD** and then **Status**.

The *Chronic Kidney Disease Registration* screen appears.

Chronic Kidney Disease Registration

Patient: PHN [] Name ADEMO00034, JANE []

Select Mode/List: Work List []

CKD Registration: CKD Registration Date 24-MAY-2007 []

Indicators of Chronicity: Small Kidneys Biopsy Proven Renal Function Decline

Follow-up Location: Physician's office Renal Clinic Both N/A

Referral to nephrologist: Referring Phys. STARKO,ROBERT [] Date 18-APR-2000 [] Serum Cr 150 umol/L Calculated CrCl [] mL/min Measured CrCl [] mL/sec at 1.73m₂

CKD End: CKD Ended? Yes No End Date: [] Reason to end CKD: []

Comments []

Save Exit

14. Review the information on the CKD Registration screen.

Remember to check that the *Follow-up Location* is the current type for your clinic.

15. If all the information still applies after this transfer, click **Exit**. You're done.

16. If any of the information on the *CKD Registration* screen is different as a result of this transfer, complete the following:

The screenshot shows the 'Chronic Kidney Disease Registration' window. The 'Patient' section includes a PHN field and a Name field containing 'ADEMO00034, JANE'. The 'CKD Registration' section has a 'CKD Registration Date' field set to '24-MAY-2007'. Under 'Indicators of Chronicity', 'Renal Function Decline' is checked. Under 'Follow-up Location', 'Both' is selected. The 'Referral to nephrologist' section shows 'Referring Phys.' as 'STARKO,ROBERT', 'Date' as '18-APR-2000', 'Serum Cr' as '150 umol/L', 'Calculated CrCl' as an empty field, and 'Measured CrCl' as an empty field. The 'CKD End' section has 'CKD Ended?' set to 'Yes', 'End Date' as '08-OCT-2015', and 'Reason to end CKD' set to 'Transferred to Diff. FU'. A 'Comments' field is at the bottom, and 'Save' and 'Exit' buttons are in the bottom right corner.

This avoids the common error of not ending the first CKD registration before opening a new one.

- a) In *CKD Ended*, choose **Yes**.
- b) Enter an **End Date**.
- c) In **Reason to end CKD**, choose *Transferred to Diff. FU* (different follow-up).
- d) Click **Save**.
- e) On the main toolbar, click Insert New Record .
- f) A new blank CKD registration record appears.
- g) Complete the screen for the patient's current information.
- h) Click **Save** and **Exit**.

Instead of overwriting the previous CKD registration information, create a new record for the new information.

The previous record is ended and a new record is inserted with the updated information.

Chronic Kidney Disease Registration

Patient: PHN [] Name [ADEMO00034, JANE]

Select Mode/List: [Work List]

CKD Registration: CKD Registration Date [08-OCT-2015]

Indicators of Chronicity:

- Small Kidneys
- Biopsy Proven
- Renal Function Decline

Follow-up Location:

- Physician's office
- Renal Clinic
- Both
- N/A

Referral to nephrologist:

- Referring Phys. [STARKO,ROBERT]
- Date [18-APR-2000]
- Serum Cr [150] umol/L
- Calculated CrCl [] mL/min
- Measured CrCl [] mL/sec at 1.73m²

CKD End:

- CKD Ended?
 - Yes
 - No
- End Date: []
- Reason to end CKD: []

Comments []

[Save] [Exit]