

Detailed instructions on **reassigning HRM reports received under the TBD Patient:**

1. Open the Report XML Data. (See the red marker below)

Received Date	Author Name	Sending Facility
11/17/2023 19:47:10		4180
11/17/2023 18:47:07		4107
11/17/2023 18:47:04		4180
11/17/2023 17:47:02		4064
11/17/2023 17:46:57		4180
11/17/2023 16:47:00		4180
11/16/2023 18:33:46		4180

2. You will then confirm that the **patient's name matches completely**. In the example above, note that the patient's name is spelled differently. You would then follow the steps below if the patient's name does not match.

- I. IF THERE ARE ANY DIFFERENCES: Then copy the OHIP number if present or the last name if no OHIP number is available. You will likely see instances where the name or other data doesn't match perfectly, OR where the patient is listed as TBD_Patient Practice4 (as seen in the below example).
- II. Paste the copied information into the "Re-assign to" field. *Note: When pasting the OHIP number, please remove the last digit to ensure proper patient population.*

Received Date	Author Name
11/16/2023 14:32:20	
11/16/2023 14:32:14	
11/16/2023 14:32:13	Coyne Jade
11/16/2023 14:32:12	

3. Select the appropriate patient. If there is no patient in the system who matches this data, then check the "patient search (active and inactive)" and confirm the patient doesn't exist in Cerebrum. If they do not, then add the patient with the patient demographics listed in the report, once added, then use that information to search and attach the report.

Looking for the correct report.

While adding the report to the “loose report” field does add the report to the correct patient, now that you are all paying attention, it would be **more helpful** to attach the report to any pending reports the patient’s file is waiting on.

The screenshot displays a medical reporting interface. On the left, patient information is shown: Patient M [redacted] NDO, Re-assign to [input field], Author Name, Sending Facility 4180, Test Date 11/17/2023, Doctor RINNE, Claus, and Description CD:2557679691*Arrhythmia Clinic Note (highlighted with a red box). Below this is the 'Assign To' section with 'Requisition / Loose Report' and a table of reports. The table has columns for 'Requisition / Loose Report' and 'Date'. The first entry is 'Consultation Request (SMGH Arrhythmia Clinic, SMGH Arrhythmia Clinic)' dated 03/15/2023, highlighted with a red box. Other entries include 'Blood&Urine' dated 10/05/2022 and 'Blood&Urine' dated 06/29/2021. On the right, a table shows 'Received Date', 'Author Name', and 'Sending Facility' for multiple reports, with the last row (11/17/2023 09:42:50) highlighted. Below the table are radio buttons for 'Report View' and 'Report XML Data' (highlighted with a red box). At the bottom right, a 'Tag' table shows patient details like 'Patient's First Name', 'Patient's Last Name', 'Patient's DOB', 'Patient's Gender', 'Patient's Health Card Number', and 'Patient's Health Card'.

In the example above, you can see that the report is from the Arrhythmia clinic (in the description field) and you’ll note that in the Requisition/Loose Report field, you can see that a Arrhythmia clinic consultation was requested. Therefore, it would be most helpful to attach this report to that report (vs loose report).

If there are no such requests, or you are unsure, then please assign to “Loose report” so the patient’s file at least has the copy of the report sent.

Important NOTE: It is **crucial not to deactivate or rename a TBD Patient**, as it is mandatory for assigning reports when no patient match is found in Cerebrum. Reports received under TBD Patient must be reassigned to real patients.