

# Encounter Selection: Patient/Client/Resident

## Site Applicability

This is a joint guideline between Vancouver Coastal Health (VCH), Providence Health Care (PHC), and Provincial Health Services Authority (PHSA). This guideline is only applicable to the agencies and sites which are utilizing the [electronic health record \(EHR\)](#) CST Cerner.

All VCH, PHC, & PHSA sites that use Cerner.

**NOTE: Implementation only at Lions Gate Hospital & Squamish General Hospital to support CST Go Live.**

## Practice Level

This guideline is for all [“Designated Health Care Professionals” \[DHCPs\]](#) working across the Health Organizations (HO – specifically PHC, PHSA and VCH) who interact with patient/client/resident health records in support of patient/client/resident care and/or interventions in CST Cerner.

## Need to Know

The encounter selection process provides the additional assurance that accurate and current documentation of patient/client/resident specific interactions are occurring with every patient/client/resident [encounter](#) within the system. By incorporating this process into regular workflows, the level of risk to patients/clients is greatly decreased in areas such as:

- Harm prevention
- Protection of patient/client/resident and staff safety
- Avoidance of duplication and/or re-entering of documentation from interventions, investigations or procedures

## Guideline

Review the following fields whenever accessing or interacting with a patient/client/resident in CST Cerner to ensure the correct encounter has been selected:

- Encounter Number
- Location (Facility/Building/Room/Unit/Bed)
- Registration Date
- Encounter Type
- Encounter Status

All staff that create or update encounters must also consider the following guidelines:

This material has been prepared solely for use at Providence Health Care (PHC), Provincial Health Services Authority (PHSA) and Vancouver Coastal Health (VCH). PHC, PHSA and VCH accept no responsibility for use of this material by any person or organization not associated with PHC, PHSA and VCH. A printed copy of this document may not reflect the current electronic version.

- Determine correct encounter by verifying the patient/client/resident specific details listed above in combination with the correct service being provided in the care area
- Creation of a new encounter is necessary when:
- No existing active encounter for designated/appropriate care area has been determined
- *No existing pre-encounter* for that specific visit has been determined

## Related Documents

- Patient/client/resident Identification

## References

Accreditation Canada (2016) Required Organizational Practice (ROP): client Identification BC Ministry of Health: Provincial Enterprise Master Patient/client/resident Index Data and Best Practice Guidelines. (V 3.0) (2008-02-08)

## Definitions

**Encounter selection:** A collection of encounter identifiers unique to that visit that can be cross referenced (utilization of all available resources, data elements, documentation and verbal testament) in order to determine the correct encounter. A minimum of two data elements is required for correct encounter identification and such as: Encounter Number, Encounter Type, Service, Encounter Status, Pre-Registration Date, Registration Date, Reason For Visit, Discharge Date, Location (Facility/Building/Room/Unit/bed).

**Patient/client/resident Identification:** The use of all available sources, data elements, documentation and verbal testament to determine an individual's identity. A minimum of two data elements is required for positive patient/client/resident identification and a minimum of three data elements will be used when they are available (e.g., name, date of birth, MRN and/or PHN and/or Encounter Number).

**Designated Health Care Professionals:** refers to both **Regulated Health Care Professionals and Approved Non-regulated Health Care Professionals.**

- Regulated Health Care Professionals:** Professionals (including students) governed by regulatory colleges under the [Health Professions Act](#) e.g. Physicians, Midwives, Pharmacists, Nurses, and Dietitians. For complete list see [BC Ministry of Health Professional Regulation](#).
- Approved Non-regulated Health Care Professionals:** Additional non-regulated professionals (including students) designated through the health organizations approval process (e.g. Medical Imaging Technologists, Cardiology Technologists, Care Aides).

**Electronic Health Record (EHR) CST Cerner:** This is the collective electronic medical records of a patient/client/resident or a population of patients/clients.

**Encounter:** Describes a particular instance when a patient/client/resident is registered within the healthcare system (e.g., hospital, clinic, daycare, homecare, and/or any other department where they receive service). It is a single patient/client/resident interaction such as a patient/client/resident registered as an inpatient/client/resident or a patient/client/resident registered as an outpatient.

**Patient/client/resident:** Refers to patient, client, resident or person in receipt of healthcare services within the health organization

<b>Effective Date:</b>	DRAFT 27 – April - 2018		
<b>Posted Date:</b>	DRAFT 27 – April - 2018		
<b>Last Revised:</b>	DD-MMM-YYYY		
<b>Last Reviewed:</b>	DD-MMM-YYYY		
<b>Approved By:</b> <i>(committee or position)</i>	PHC	PHSA	VCH
			To Support Cerner Go Live
<b>Owners:</b> <i>(optional)</i>	PHC	PHSA	VCH
	Professional Practice	Professional Practice	Professional Practice

This material has been prepared solely for use at Providence Health Care (PHC), Provincial Health Services Authority (PHSA) and Vancouver Coastal Health (VCH). PHC, PHSA and VCH accept no responsibility for use of this material by any person or organization not associated with PHC, PHSA and VCH. A printed copy of this document may not reflect the current electronic version.