

# UC 5 Steps to Intake

Pocket Guide

# SRS Urgent Care

## *5 Steps to Intake*

**Step 1: Tracking Board**

**MD assigned, RN & Room**

**Step 2: Charges**

**Provider & UC Info**

**Step 3: 2 Pt IDs**

**Pt in Room / Triage**

**Step 4: Pharmacy, Nursing Note, Smoking  
Status & Immunization Hx**

**Step 5: "READY" Pt in Tracking Board**

**(RNs: Initiate SPs)**

# Step 1: Tracking Board

## Assign RN and Room

Chart  
Tracking Board  
Call Process  
Tasks  
Task Admin  
Patient Lists  
User Options  
References  
Lexicomp  
Sites  
Reports  
  
User Support  
PTB Reports  
UC Admin Report

Site: **Sharp Rees Stealy - Chula Vista**    Current View: **All**    Date: **Today**    Today    Last Refresh: **8:31:37 AM**

SEQ	Patient Name	G	Age	AC	Reason for Visit	Location	LOS	MD1	MD2	RN	Status	Icons	Comments
7-001	CBTRAIN, ELMO	M	43Y		COUGH	C-1	169.44	CARUL			NDCH	I O I R C	blood pressure 190/60
7-002	CBTRAIN, ANGELINA	F	38Y		HEADACHE						NDCH	I O I R C	please discharge order
7-003	CBTRAIN, ARTHUR	M	41Y		SORE THROAT						WAIT		
7-004	CBTRAIN, MAYA	F	32Y		abd pain						NDCH	I O I R C	
7-005	CBTRAIN, BARNEY	M	57Y		UTI SX						NDCH	I O I R C	Blood pressure 190/60

CBTRAIN, ELMO X

Clear

B263 Draw Front CV\*

B264 Lab Processing CV

C-1

C-2

# Step 2: Charges

## Provider and UC information

**Step 1: Ensure that you have opened the RIGHT chart on the RIGHT patient**

**Step 2: Select Charges from the VTB**

**Step 3: Select "Encounter Form" Tab**

**Step 4: Select Billing AND / OR Performing Provider(s)**

**Step 5: Choose billing area**

**Step 7: Click "Save As Draft" at bottom of screen so the information sticks**

**Step 6: Enter Location**

The screenshot shows a medical software interface with a sidebar on the left containing menu items like 'Charges', 'Chart', 'Trading Board', 'Call Process', 'Tasks', 'Task Admin', 'Patient Lists', 'User Options', 'References', 'Lexicomp', 'Sites', 'Reports', 'User Support', 'PTB Reports', and 'UC Admin Report'. The main area displays the 'Encounter Form' for a patient named 'RGTEST QUERL' on 'MON 31 Jan 2011'. The form includes fields for 'Billing Provider' (BLAKE, GERARD FRANCIS), 'Performing Provider' (MUTH, MARGARET (GINNY)), 'Referring Provider', 'Division', 'Billing Area' (CHULA VISTA URGENT CAR), and 'Location' (URGENT CARE). At the bottom, there is a 'Special Billing' dropdown, a 'Hold for More Charges' checkbox, and a row of buttons: 'Charge Details...', 'Remove', 'Enc Details...', 'New Task...', 'Print...', and 'Save As Draft'. Red arrows point from text boxes to the 'Charges' menu item, the 'Encounter Form' tab, the 'Billing Provider' and 'Performing Provider' dropdowns, the 'Billing Area' dropdown, the 'Location' dropdown, and the 'Save As Draft' button.

Primary	#	ICD-9	ICD-10	Diagnosis
				No entries in list

# Step 3: Verify 2 patient IDs

Before taking patient to room or triage

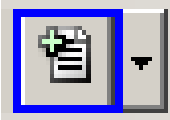
- Ask Patient to state their full name and date of birth
- Compare with patient label

SRSTEST, FERRIS V# 216244037  
MR 04 89 77-09 EHR DOB 01/01/1991 28  
48 UNICORN WAY M FSC: HHN  
SAN DIEGO, CA 92111 C/P: 40.00  
H 123-456-7890 W FSC  
LOC: RB RP: OP: COL  
APPT: 05/13/19 08:00AM TYPE: REG  
DR: ABOLA MD, AMY SUG 57549 DEPT: FP  
PCP: TRUE, WAYNE S OMHCL OME  
OMRN: 2523448 SHC 107-861-928  
ALT INS: CELL 123-456-7890

# Step 4: Nursing Note, Pharmacy, Smoking Status, and Immunization Hx

## 1) Open an Urgent Care Nursing Note

- Click Note Icon



## 2) Select Note type

A screenshot of the 'Note Selector' window in an EHR system. It shows patient information for 'SRSST, Henrydesmony 05-May-1977 (39y) M' and an appointment for '16-Mar-2017'. Under 'Create New', there are radio buttons for 'Note', 'V10 Note', and 'Unstructured'. Below that, there are dropdown menus for 'Specialty' (set to 'Urgent Care') and 'Visit Type' (set to 'UC Nursing Note'). There is also a field for 'Owner' (set to 'TEST, UCRN6') and 'Appt Type' (set to 'Urgent Care Visit (UCV)').

## 3) Complete intake info in Nursing Note



- Go straight down the line and stop at Nursing documentation, then enter immunization history and smoking status

A large screenshot of an EHR interface showing a patient's chart for 'SRSTEST, Luke 04-Apr-1984 (36 years) M'. The interface is annotated with yellow callouts and arrows. Callout #1 points to a blue 'i' icon in the top toolbar. Callout #2 points to a red-bordered list of note types on the left sidebar, with 'Nursing Documentation' and 'UC RN Nursing Docume' highlighted. Callout #3 points to the 'Immunizations' tab in the top right. Callout #4 points to the 'Problem' tab in the top right. The main content area shows a 'Travel Screening' form with sections for 'Reason For Visit', 'Contraception', 'Allergies', 'Current Meds', 'Med/Allergy History', and 'Vitals'. The 'Nursing Documentation' section is expanded, showing 'UC RN Travel Screening' and 'Travel Screening' forms. The 'Immunizations' and 'Problem' tabs are also visible in the top right.

# Step 5: "Ready" Patient in Tracking Board

RN's can initiate Standardized Procedures

7-001	RGTEST, EBONNIE	F	50Y		OCC MED RT LEG IN...		174:...				WAIT	
8-001	SRSTEST, MICHAEL	M	36Y		COVID-19	C-HM	199:...	KISJE		UCRN1	REDY	