

## Data Entry Instructions 2025

**Thank you for volunteering!** The data entry process is divided into 2 sections – patient registration which happens at the start of the patient’s visit, and patient exit which happens at the end. While a patient is line waiting to come into the clinic, they will be given a clipboard, pen and two forms – a patient registration form and a patient questionnaire to complete prior to entry.

### Patient Registration Data Entry

**NOTE: Returning Patients with Blue Copies of their Patient Record need NOT stop at Patient Registration Data Entry, they should be taken by a Patient Ambassador directly to Medical Triage Waiting**

1. Collect clipboard from patient, remove the questionnaire from the clipboard and make sure the record # on the questionnaire matches the pre-printed record # on the patient record (change/fill in number on questionnaire as needed). Both are located in the upper right corner, then set the survey aside.
2. Start a new patient record and enter the demographic information from the patient registration form. You will only be entering the circled fields from the sample patient registration form.
  - a. Click New Patient
  - b. Enter the following fields from the patient registration form:
    - i. Patient # (enter all 4 digits)
    - ii. Last name
    - iii. First name
    - iv. Gender from dropdown
    - v. Zip code (if the city and state doesn’t populate you entered a non-existent zip code)
    - vi. Date of Birth (mmddyy – if the age doesn’t populate you entered an invalid date)
    - vii. Ethnicity from dropdown
    - viii. Veteran from dropdown
3. Click Save
4. Return clipboard to patient and put the questionnaire into the purple questionnaire bin for data entry later.
5. As time permits, enter questionnaires into patient record.
  - a. Click **Search Patient**
  - b. Enter the Patient Record # or last name, it will start populating the results
  - c. When the search results come up, click on the patient name
6. Click on the drop down arrow next to the patient’s name and select **Patient Information**.
  - a. Enter the following data:
    - i. Dental ER visit from dropdown
    - ii. How many times (if applicable) from dropdown
    - iii. How did you hear about the event from dropdown
7. Click Save

8. Click on the dropdown arrow next to the patient's name and select **Medical History**, scroll down to **Dental Concern**.
  
9. If the Patient questionnaire indicated they were in pain when coming here, click Pain
  - a. Then scroll down to Pain Details and indicate how long they were in pain.
  - b. Enter Patient's Insurance Response.
  - c. Enter the length of time since they saw a dentist.
  
10. **Click Save**
  
11. Click on the dropdown arrow next to the patient's name and select **Exit Survey**
  - a. Enter the patient's responses to questions 1 – 7.
  
12. **Click Save**

**Patient Registration Data Entry Stop Here**

## Patient Exit Data Entry

1. Click **Search Patient**
  - a. Enter the Patient Record # or last name, it will start populating the results
  - b. When the search results come up, click on the patient name
2. Click the dropdown next to the patient name from the menu bar, select the **Premedication**
3. Click on any premedication given as indicated on the patient record.
4. **Click Save**
5. Click the dropdown next to the patient name from the menu bar, select **Treatment**
6. Enter the number of procedures with each corresponding Treatment code indicated on the patient record.
7. If a dentist records the tooth number(s) instead of the number of procedures, count the number of teeth and enter the total.
8. If there are x-rays stapled to the form, make sure they are indicated on the form and have been entered in the computer record. If you are unsure what type of x-ray it is, check with the lead.
9. **Click Save**
10. Click the dropdown next to the patient name from the menu bar, select **Prescriptions**
11. Click on any medications that the patient received at the onsite pharmacy
12. **Click Save**
13. Put the form in the box for filing.

Patient Exit Data Entry Stop Here

## Filing

All completed forms are property of the WDA Mission of Mercy and should be filed alphabetically for permanent storage of records.

1. Once data entry is completed, all forms are filed alphabetically based on last name.
2. If a name is hyphenated, the form is filed based on the first of the last names listed.
3. If there are two last names but the named is not hyphenated, it is filed based on the first of the last names listed.
4. If there are multiple records with the same last name, then they should be filed within the last name by first name ( i.e. there are 5 patients with the last name Smith – all the Smith's are kept together but Adam Smith would come before Bob Smith, then Daphne Smith would follow, then Sam Smith and lastly Tiger Smith).
5. People with the same name who are Jr. and Sr. should have Jr. filed before Sr. Likewise someone who is the II comes before III.
6. It is very important at the end of Friday that all forms be alphabetized so we can quickly find one if a patient returns on Saturday morning without one.
7. If a patient returns to the clinic wanting more work done and needs a copy of their record, a Patient Registration volunteer will come to get the record. They should take it to exit to make a blue copy and return the original to data entry where it should get re-filed. It should never go with the patient.