Health PEI   Santé Î.-P.-É.

Save and Validate Process

General Overview

Current and accurate patient demographic information, such as name, date of birth, sex, address and insurance details are essential for quality healthcare and to maintaining accurate panel data.

Each patient encounter is an opportunity to confirm patient information, including the name of the provider and contact information.

Frequently Asked Questions

1. **What is the Save and Validate process?**
   The Medical Office Assistant (MOA) plays a crucial role in maintaining up-to-date patient demographic information. This is not a new administrative responsibility.

   In the Provincial EMR, the MOA can access the "Update Patient Info" on the appointment card from the schedule. The VALID process is as follows:

   V - Verify identity – Personal Health Number (PHN), DOB, Name and Health Card status
   A – Address "What is your address?"
   L – Last phone number on file – "What is your phone number?"
   I – Identify Primary Practitioner and Primary Location fields are correct on Provincial EMR
   D – Date Stamp – Click "Save and Validate" to confirm patient information is accurate.

   To reduce the risk of errors it is best to have the person state their contact information.

2. **Why is verifying identity important?**
   Client identification (at least two-person specific identifiers) is an Accreditation Required Organizational Practice (ROP) that can avoid harmful incidents such as privacy breaches, allergic reactions, medication errors, lab specimen errors, and wrong person-procedures.

   Ensuring PHN and Health Card status are up-to date are important for billing and for accurate provider panel counts.

3. **Why is address important?**
   To ensure mail such as letters are received by the correct person.

4. **Why is phone number important?**
   To ensure the patient can be contacted in a timely manner, especially in the event of a critical result. A critical result is a medical emergency.

5. **Why is checking Primary Practitioner and Primary Location fields important?**
   The Primary Practitioner and Primary Location fields are essential for panel counts. These fields can be changed by another Provincial EMR user.

6. **How often should the Save and Validate be completed?**
   Best practice is to make this a routine part of the check-in process. Routine procedures are designed to ensure consistent, reliable and effective outcomes. Flexible periodic processes can result in inconsistent outcomes.

7. **What if someone was just in the week before?**
   If the Save and Validate date stamp is within the previous week and the MOA is confident there has been no changes, they can ask "any changes in your address or phone number since last week?".

   Save and Validate is broader than address and phone number. There have been issues with the primary practitioner and primary location fields being changed by other Provincial EMR users which impacts panel counts. By clicking the "Save and Validate" button they are also confirming they have checked Medicare eligibility status and completed the two-person identifier.

8. **Why can I not just use the Hover feature?**
   Although the hover feature over the patient's name does show patient information and contact information, the MOA cannot update patient information in the hover feature. In addition, there is no process to date stamp that verification of the information has been consistently reviewed and updated.

   The hover feature will show pharmacy details; however, any changes need to be updated in the patient chart.

9. **Does the Save and Validate process include unaffiliated patients?**
   Yes.

10. **How long does the Save and Validate process take?**
    The Save and Validate process takes 15 to 30 seconds depending on if the MOA needs to update and information?

11. **Does this apply to private Medical Office Assistants?**
    Yes, Save and Validate is an established Health PEI process that applies to all public and private MOAs in primary care.

12. **Is the Save and Validate process being monitored?**
    Yes. A weekly Save and Validate Rate is calculated every Tuesday at the end of day and shared with Admin Supervisors and Clinic Coordinators to track progress and to identify sites that may need some support. Training is available. You can reach out to your admin supervisor.