6 Finding Patient Information

6.1 Patient Lookup Overview

Patient Lookup is the first screen displayed when you log in. IntelliSpace PACS allows you to uniquely identify a person and track their care as they enter an organization and become a patient. You use the **Exam Lookup** to find and manage exams (see 'Exam Lookup Overview' (see page 103) and the **Exception Lookup** (see 'Exceptions Lookup Overview' (see page 169) to find and manage exceptions. You can view and search for exceptions in the **Patient Lookup** (see 'Viewing Exceptions in the Patient Lookup' (see page 79).

Select search criteria and click Search

Search for exams with images
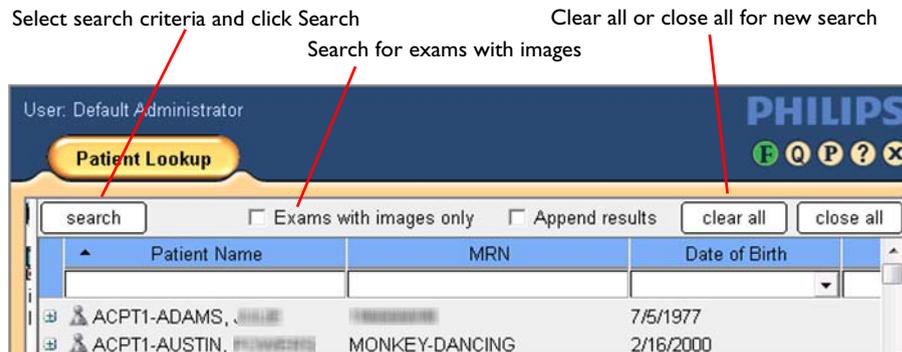
Clear all or close all for new search

Figure 6.1 Patient Lookup

Because healthcare organizations can vary significantly (from single hospitals, to an integrated delivery network consisting of multiple hospitals, imaging centers, or groups of primary care clinics), a person can have multiple patient identifiers. When this occurs, healthcare organizations may implement a Master Patient Index (MPI) system to guarantee the uniqueness of a person with multiple patient identifiers in those organizations. See 'Master Patient Index and Patient Demographics' (see page 75).

IntelliSpace PACS maintains its own database of Organization IDs, Persons, and Patients. Each Person is associated with one or more Patients, and each Patient has an identifier (for example, an MRN and an Organization ID). The way the database of Person and Patient records gets created depends on how the IntelliSpace PACS database is set up and populated.

⚠ **WARNING**   *When running a query using a patient's MRN, it is possible that the non-numeric characters may be stripped from the MRN, possibly causing a mismatch of patient data between two or more patients. Make sure you validate the MRN against the patient name to ensure the returned patient data matches the patient you are looking for.*

You can quickly find patients (with or without associated exams) based on a combination of search criteria. Patients whose records are based solely on exception studies are not displayed. You can search for patients based on any combination of the following. The search criteria in bold below must be displayed at all times:

- **Patient Name**
- **MRN**
- **Date of Birth**
- Social Security Number (see Note below)
- Organization
- Sex

You can set a General User Preference to show and search for exceptions in the Patient List. See 'Setting General Preferences' (see page 332) and 'Viewing Exceptions in the Patient Lookup' (see page 79).

If you do not specify search criteria, IntelliSpace PACS displays the patient information that you can access that is associated with the most recent 200 exams. If additional patients match your criteria, the most recent patients are displayed with a message indicating that additional patients match your criteria. To find these additional patients, narrow your search by adding additional criteria. The System Administrator can set the maximum number of displayed exams up to 1,000, but the supplied value is 200 exams.

When a list of patient names is displayed, you can do the following:

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- View and open exams: See 'Viewing Exam Information' (see page 76)

- Select patients to link or merge: See 'Linking Patient Records from Different Organizations' (see page 97) and 'Merging Patient Records from the Same Organization' (see page 91)

- Right-click to display a menu with actions

- Rearrange and select certain search criteria columns to hide or display: See 'Rearranging Patient Lookup Columns' (see page 81)

- **Shift-click** to select contiguous patient names or **Ctrl-click** to select multiple, non-contiguous patient names

- **Shift-click** to select contiguous exams or **Ctrl-click** to select multiple, non-contiguous exams

N O T E   *You cannot view canceled exams in the Patient Lookup, but you can view these exams in the Exam Lookup, My Filters, System Filters, and Machine Filters. See 'Finding and Managing Exam Information' (see page 103) and 'Filtering Worklists' (see page 149).*

PACS Administrators can set a System Preference to specify which columns are displayed in the Patient Lookup. See 'Setting Patient Columns Preferences' (see page 381). The following columns can be displayed or hidden:

- Organization

- Sex

- SSN (see Note below)

N O T E   *If the BSN (Burger Service Number) feature is enabled on the IntelliSpace PACS server, the SSN field is replaced with the BSN field. The BSN (Burger Service Number) feature is only available for IntelliSpace PACS sites in The Netherlands.*

6.3   Searching for Patients

1. If it isn't already displayed, select **Patient Lookup** from the Folder List (or the Shortcut Bar if you have created a shortcut for this feature).

2. Enter the desired search criteria. (Note that you cannot use **Sex** as a search criteria.)

3. If you only want to find patients with exams that have images, select the **Exams with images only** check box.

4. Press **Enter** or click **Search**. A list of patients who match your search criteria is displayed. If no patients match, IntelliSpace PACS displays a message in the Control Strip.

NOTE   *If you do a new search, the old results are removed unless you select the Append results check box or you expanded a patient's record to display that patient's exam list. See 'Appending Patients to an Existing List' (see page 81).*

6.5   **Viewing Exam Information**

You can view a summary of a patient's exams in a list of patients. The following information displays for each exam, starting with the most recent:

- Modality type

- Exam description

- Accession # (maximum length is 20 characters)

- Date and time of order/exam (if no studies have been received) or of studies if they have been received

- Organization (ORG) in which the exam was created

One of the following icons display next to the exams. If there is no icon, no images are available for the exam.

Icon	Description
	Image(s) available
	Exam is scheduled
	Report is available for exam
No icon	No images are available

1. Search for and display a patient or list of patients.

2. Click the plus (**+**) sign to the left of a patient's name. If the patient has associated exams, they display below the name, with the most recent exam displayed first.

3. Double-click on an exam to open it, or right-click to display a menu with various actions, including **Create Exam** and **View Exam Notes**. To open an exam without locking it, press and hold the **Alt** key while double-clicking on the exam.

4. Click the minus (**-**) sign to close the list of exams. You can also click **Close All** to close all displayed exams in a list of patients.

6.5.1 Searching for Patients by Name

You can search for patients by entering their last and first name or by using a wildcard search. For example, to find patient Doe, John you can search for the full name (Doe, John), full last name and partial first name (Doe, J) or partial last name (D). There is also a wildcard search option that allows you to search on a partial last name and "%" and partial or full first name (for example "D%, Joh").

1. If it isn't already displayed, select **Patient Lookup** from the Folder List (or the Shortcut Bar if you have created a shortcut for this feature).

2. Enter all or part of the patient's last name followed (optionally) by a wildcard character (%), a comma (,) and all or part of the first name (for example, "Sm%, J" will match "Smith, Joyce" and "Smithy, Jim").

3. Click **Search** or press **Enter**. Patients who match the name search criteria are displayed.

6.5.2   Searching for Patients by Identifier

If two or more healthcare organizations want to integrate their systems, they can use an MPI patient identifier to enforce the uniqueness between organization identifiers, and to link patients across organizations. IntelliSpace PACS supports customers who currently use MPIs as well as those who don't use MPI now, but plan to. The ability to search for patients by MRN or MPI number lets you use IntelliSpace PACS to link patients with different MRNs together under one MPI.

⚠ **WARNING**   *When running a query using a patient's MRN, it is possible that the non-numeric characters may be stripped from the MRN, possibly causing a mismatch of patient data between two or more patients. Make sure you validate the MRN against the patient name to ensure the returned patient data matches the patient you are looking for.*

1. If it isn't already displayed, select **Patient Lookup** from the Folder List (or the Shortcut Bar if you have created a shortcut for this feature).

2. Enter all or part of the name or number of the patient identifier (usually known as a Medical Record Number (MRN) but sometimes known as a department ID). You do not need to enter leading zeros or the rightmost characters for MRN numbers. You can also enter a Person Identifier (Master Patient Index or MPI) that identifies a person across multiple healthcare organizations, each of which may know this person as a patient.

3. Click **Search** or press **Enter**. Patients who match the identifier search criteria are displayed.

6.5.3   Searching for Patients by Other Criteria

1. If it isn't already displayed, select **Patient Lookup** from the Folder List (or the Shortcut Bar if you have created a shortcut for this feature).

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2. Enter the patient's **Date of Birth**, **Social Security Number**, select an **Organization**, or select the **Exams with images only** check box.

    - **Date of Birth**: Enter the date or click the button in the field to select the date from a calendar control. Use **Ctrl-X** or the **Backspace** key to clear the date field.

    - **Social Security Number**: Enter the exact Social Security Number (SSN). The SSN cannot be more than 50 characters.

    - **Organization**: Select the name(s) of the organization(s). If you search for patients in a specific organization, the patients in that organization are displayed, as well as all exams for patient records that are linked to the organization (when the patient record is expanded by clicking on the plus icon). If you don't specify an organization, linked patients are displayed as separate list items in their respective organizations. Each list of patients displays all exams from all linked patient records showing under it.

    - **Exams with images only**: Select this check box if you only want to find patients with exams that have images.

3. Click **Search** or press **Enter**. Patients who match the search criteria are displayed.

6.6   Viewing Exceptions in the Patient Lookup

1. Verify that the General User Preference **Show Exceptions in Patient List** has been set.

2. If it isn't already displayed, select **Patient Lookup** from the Folder List (or the Shortcut Bar if you have created a shortcut for this feature).

3. Enter the desired search criteria. (Note that you cannot use **Sex** as a search criteria.)

4. Press **Enter** or click **Search**. A list of patients with exams and exceptions who match your search criteria is displayed, with an exclamation mark icon to the left of the patient name. Patients with exams are listed first. Exceptions with the same name as patients are listed after the last patient name. If no patients match, a message displays in the Control Strip.
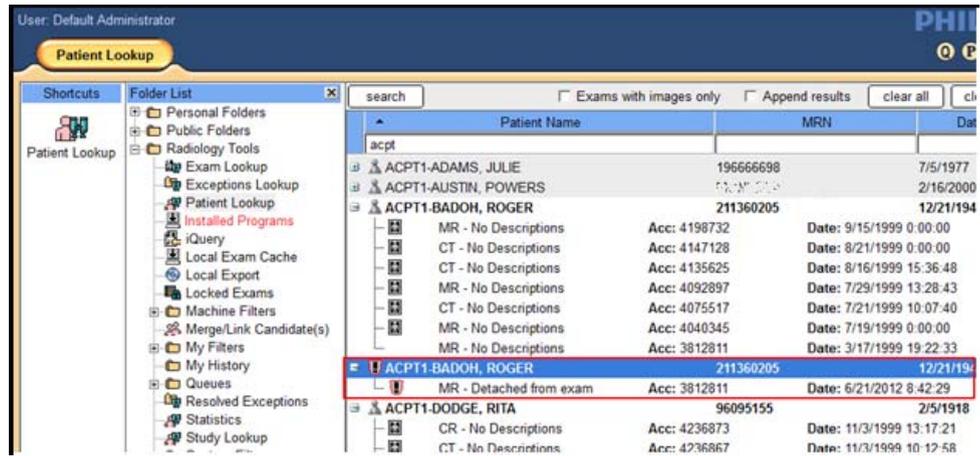
5. Double-click the exception to open it in the Canvas Page.

   Note the following:

   • If you do a new search, the old results are removed unless you select the **Append results** check box or you expanded a patient's record to display that patient's exam list.

   • By design, the top 200 exceptions are displayed.

   • There is no context (right-click) menu for exceptions in the Patient Lookup.

6.7   Clearing a List of Patients

If you have a list of patients displayed, you can clear the patients in the list by starting a new search or by clicking **Clear All**.

• With patients displayed in the **Patient Lookup**, click **Clear All**. All names in the list are removed.

6.8   Closing a List of Patients

If you have exams displayed in the list of patients, you can close the exams individually by clicking the - icon to the left of the patient name. You can also close the exams for all patients in the list at the same time.

With patients and exams displayed in the **Patient Lookup**, click **Close All**. The exams for all patients in the list are closed, so that only the patient names are listed.

6.9   Showing or Hiding Patient Lookup Columns

You can show or hide any **Patient Lookup** columns except **Patient Name**, **MRN**, and **Date of Birth**.

1. Right-click in the column area, above the list of patient names.
2. Select the columns you want to show or hide. Shown columns are checked; hidden columns are unchecked.
3. Repeat steps 1 and 2 as required.

6.10   Rearranging Patient Lookup Columns

You can click and drag **Patient Lookup** columns to rearrange their order, except for **Patient Name** and **MRN**. This allows you to customize the order in which patient information is displayed.

Click and drag a column to the position you want, and release the mouse button.

6.11   Appending Patients to an Existing List

You can use **Append results** to build a list of patients by specifying different search criteria. For example, you can search for two different MRNs, or to find two patients you wish to link or merge.

1. If it isn't already displayed, select **Patient Lookup** from the Folder List (or the Shortcut Bar if you have created a shortcut for this feature).

2. Search for the first set of patients using one set of search criteria.

3. When the list of patients is displayed, select the **Append results** check box and enter the next set of search criteria.

4. Click **Search** or press **Enter**. The new search results are added to the original list.

6.12   Sorting Results

The list is automatically sorted by patient name in alphabetical order.

Click the blue column heading that you want to sort by. An arrow appears in the column heading to display whether the order is ascending (A-Z or 1-9) or descending order (Z-A or 9-1). To reverse the order, click the same column heading again.