

Guarantor's Patient Field Formerly Known As Associated Patient



Audience: Front Desk and Registration Staff

The current **Associated Patient** name field has been changed to **Guarantor's Patient** field on the **Guarantor's Demographics** form.

P/F - AARDVARK,RITA		P/F - MOUSE,MARY	
Service area:	HOUSTON METHODIST SERVICE	Service area:	HOUSTON METHODIST SERVICE
Account type:	Personal/Family Active? <input type="checkbox"/>	Account type:	Personal/Family Active? <input type="checkbox"/>
Name:	AARDVARK,RITA	Name:	MOUSE,MARY
Address link?	Yes	Address link?	Yes
Address:	2550 Holly Hall	Address:	123 Main St
City (or ZIP):	HOUSTON	City (or ZIP):	HOUSTON
State:	TX ZIP: 77054	State:	TX ZIP: 77098
County:	HARRIS Country: US	County:	HARRIS Country: US
Account status:	1	Account status:	1
Account contact:	AARDVARK,RITA	Account contact:	MOUSE,MARY
Rel to patient:	Self	Rel to patient:	Self
SSN & type:	xxxx-xx-6610	SSN & type:	xxxx-xx-0000 Standard Unkn
Sex:	F Birth date: 10/19/1966	Sex:	F Birth date: 3/1/1956
Home phone:	713-555-1212	Home phone:	713-898-7788
Work phone:	713-555-1313	Work phone:	
Mobile phone:	713-555-1414	Mobile phone:	
Email:	none@none.com	Email:	mm@email.com

To ensure correct information is accessible for guarantors in billing, the **Guarantor's Patient** field on the **Guarantor Demographics** form must have the correct patient information listed.

Incorrect information entered in the **Guarantor's Patient** field can cause access issues with **MyChart** billing.

It's important the **Guarantor** name matches the name in the **Guarantor's Patient** field. This is how the guarantor record is linked with the patient record, so these should be the same person.

Note: Follow the guarantor record assignment policy and procedure.

Guarantor Name and Guarantor's Patient field

1. In Epic, if the guarantor's relationship to patient is **self** (patient and guarantor is the same person), the **Guarantor's Patient** field auto-populates with the patient name.
2. If the guarantor is not the patient, click the **Select** button in the **Guarantor's patient** section to search for the patient record.

Guarantor Demographics	
Service area:	HOUSTON METHODIST SERVICE
Account type:	Personal/Family Active? <input type="checkbox"/>
Name:	MOUSE,MARY
Address link?	Yes
Address:	123 Main St
City (or ZIP):	HOUSTON
State:	TX ZIP: 77098
County:	HARRIS Country: US
Account status:	1
Account contact:	MOUSE,MARY
Rel to patient:	Self
SSN & type:	xxxx-xx-0000 Standard Unkn
Sex:	F Birth date: 3/1/1956
Home phone:	713-898-7788
Work phone:	
Mobile phone:	
Email:	mm@email.com

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Note: Hover over the information tool tip icon  for the definition of this field.

Guarantor Demographics

Service area: HOUSTON METHODIST SERVICE Account status: 1

Account type: Personal/Family Active? Y Account contact: MOUSE, MARY


Name: MOUSE, MARY Guarantor's patient: MOUSE, MARY Select 

This field sets the associated patient record in the system for this guarantor. The patient in this field should be the same person as the guarantor.

Address: 123 Main St SSN & type: xxx-xx-0000 Standard Unknd

City (or ZIP): HOUSTON Sex: F Birth date: 3/1/1956

State: TX ZIP: 77098 Home phone: 713-898-7788

County: HARRIS Country: US Work phone: Mobile phone: Email: mm@email.com 

3. Use the appropriate patient look up workflow to ensure the correct patient account is selected.

Select a patient to be associated with this guarantor

Select Patient Patient Search Recent Patients

Name/MRN: SSN: Birth date: Phone # Alt Phone #

EPI ID: Sex: Transplant Pt: Zip Code Department

Use sounds-like

Scan Patient Find Patient Clear Accept Cancel

PATIENT NAME	MRN	Sex	DOB	Street Address	SSN	Pho
Aardvark, Rita	100453912	F	10/19/1966	2550 Holly Hall, HOUSTON TX 77054	xxx-xx-6610	713

Note: To search for the correct patient record, use the following sequence:

- A. **First**
 1. Use the full SSN (if available)
 2. Full first and last name
 3. Date of Birth
 4. Gender
- B. **Second**
 1. Partial SSN (if available)
 2. Full first and last name
 3. Date of Birth
 4. Gender
- C. **Third**
 1. Full Last Name
 2. Partial First Name (first three characters)
 3. Date of Birth

4. If you can't find the correct patient record, leave the **Guarantor's Patient** field blank.

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5. If the guarantor and the associated patient's demographic information (first and last name, SSN, DOB and gender) isn't the same, warning messages display on the guarantor verification record on the registration sidebar checklist. The information should be corrected to complete guarantor verification.

A screenshot of a software interface showing a guarantor verification record. At the top, it says "Guarantor P/F - MOUSE,M..." with a red circle containing the number "5" and the word "ified" next to it. Below this, it says "Verified until 12/20/2021". There are four warning messages, each starting with a yellow triangle icon. The messages describe mismatches between the guarantor's and associated patient's SSN, sex, date of birth, and name. Each message includes instructions to click the "Guarantor Demographics" link and update the necessary information, followed by a reference code in brackets. The screenshot has a torn paper edge effect on the right side.

Guarantor
P/F - MOUSE,M... 5 ified

Verified until 12/20/2021

- ▲ There is a mismatch between the Guarantor's SSN and the SSN of the Associated patient for the Guarantor. Click the Guarantor Demographics link and correct the patient record of the guarantor and update the necessary information. [R-670916]
- ▲ There is a mismatch between the Guarantor's sex and the sex of the Associated patient for the Guarantor. Click the Guarantor Demographics link and correct the patient record of the guarantor and update the necessary information. [R-670917]
- ▲ There is a mismatch between the Guarantor's date of birth and the date of birth of the Associated patient for the Guarantor. Click the Guarantor Demographics link and correct the patient record of the guarantor and update the necessary information. [R-670918]
- ▲ There is a mismatch between the Guarantor's name and the name of the Associated patient for the Guarantor. Click the Guarantor Demographics link and correct the patient record of the guarantor and update the necessary information. [R-670919]