

IntraHealth Profile EMR Introduction Instruction Sheets

EMR Introduction Instruction Sheets for new users.

Startup FAQs

- i. How do I log on?
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- ii. How do I access my schedule?
- iii. How do I get to my patient's chart?
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 3. Labs,
 4. Forms
 5. Referral letters
 6. Prescriptions
 7. Billing/coding
- v. How do I access my inbox (assigned transactions/tasks)?
- vi. How do I access historical information?

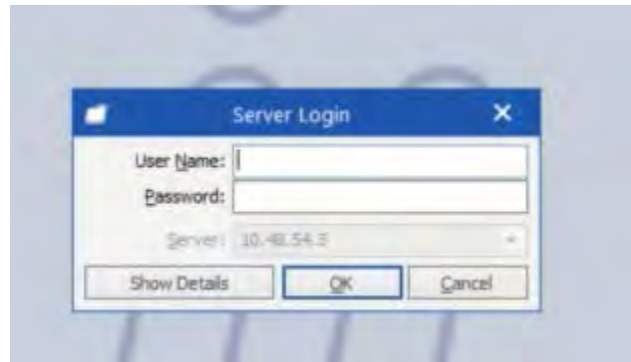
Disclaimer: This is an independent quick reference guide on getting started with IntraHealth that has been created by physicians, for physicians, and was not authored by your EMR vendor or issued as part of their official documentation. Your EMR vendor support desk should be the first point of contact if you have questions or need additional workflow guidance with your EMR software, and can also provide you with any official training materials or help files for your system on request.

Should you have any feedback or suggestions for improvement on this quick reference guide, please send to RandRCommittee@doctorsofbc.ca.

How do I log on?

1. In the office

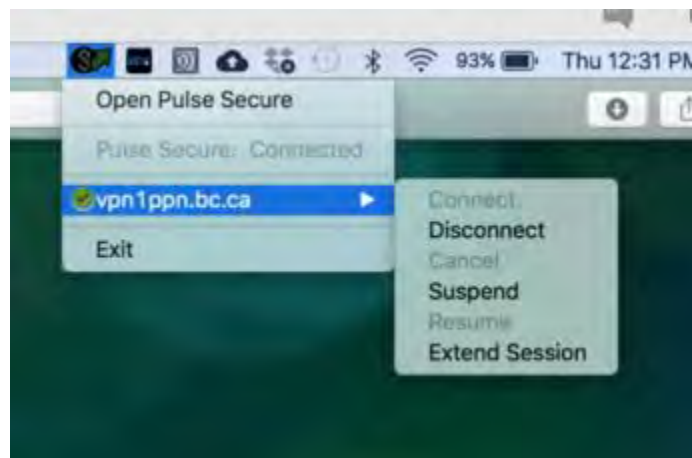
- i. Double on Profile icon on the desktop
- ii. The EMR login window will open



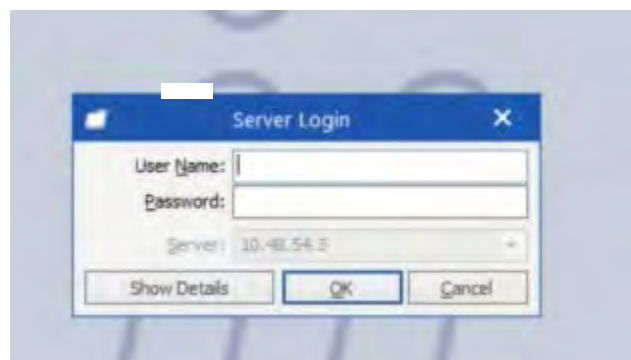
- iii. Type in the User Name and Password given to you by the office administrator. Login.

2. Remote Log in

- i. If unsure of your personal computer's installed software for remote access, contact IntraHealth Help desk @ 1-800-708-6442 to check and ask for help to install the appropriate remote access software.
- ii. The following is one possible method using Pulse Secure VPN software
- iii. Go to menu bar (on mac) and click on 'Pulse Secure' icon, then on VPN link (vpn1ppn.bc.ca in this example) and click connect



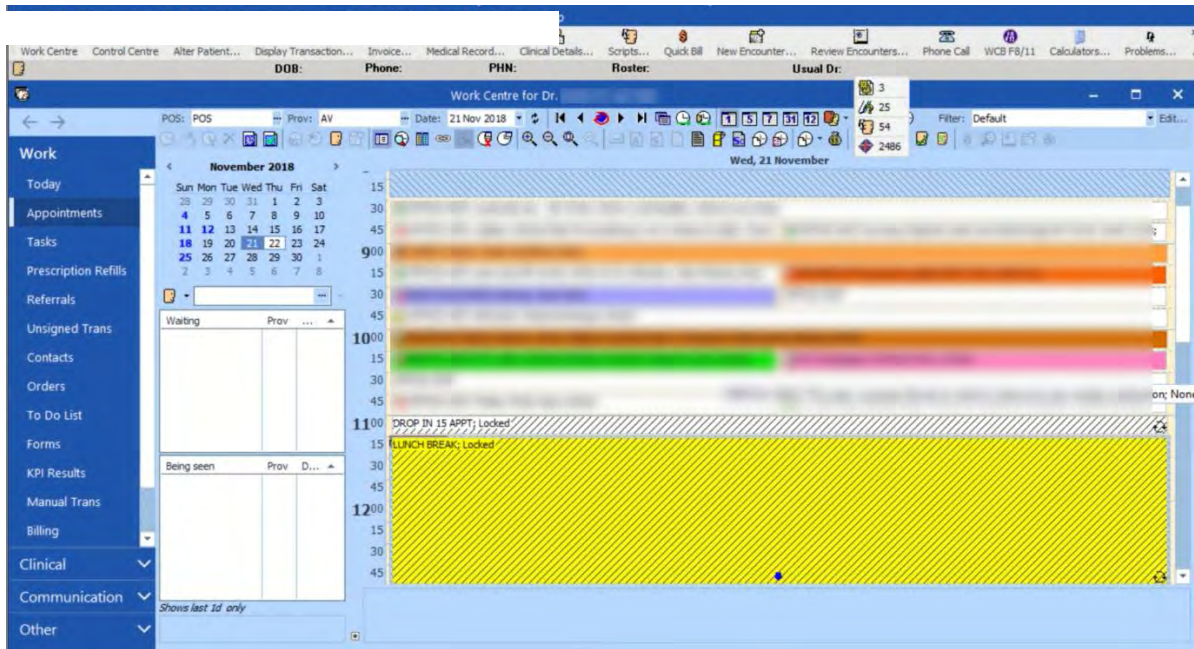
- iv. The EMR login window will open



- v. Type in the User Name and Password given to you by the office administrator. Login.

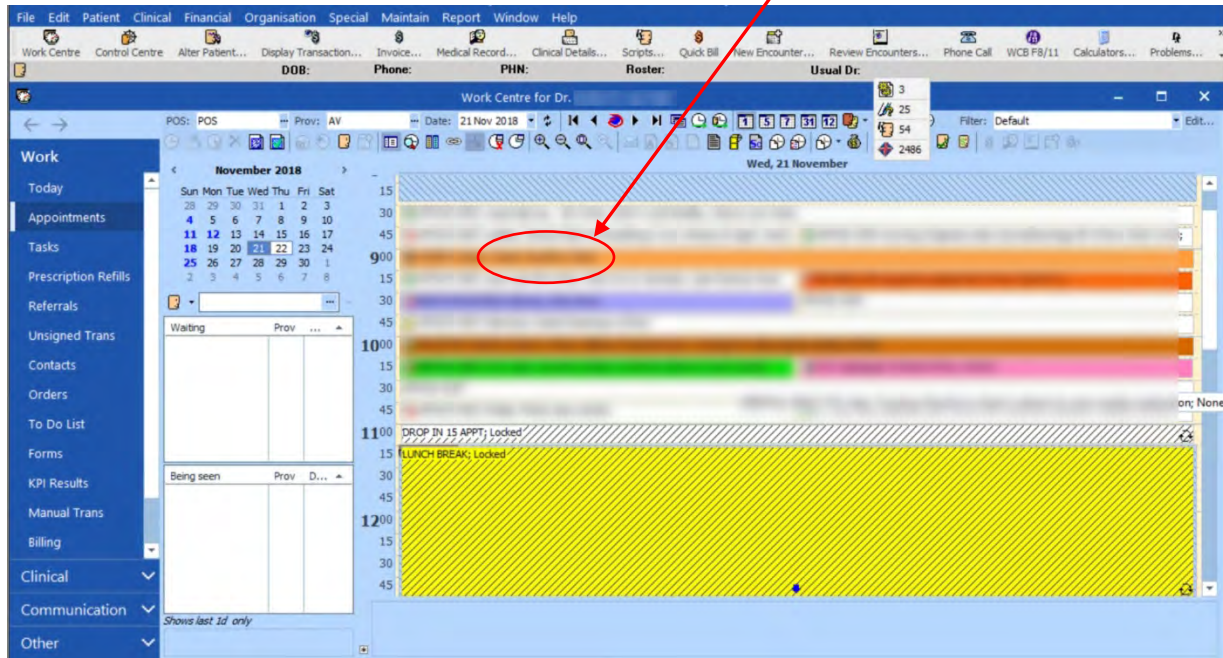
How do I access my schedule?

- i. When you log in, you will go to an initial screen that will be set up differently in each clinic, but which will have a schedule in the window.
- ii. Other information may be accessed in this window, including Tasks from the toolbar on the left. This window is user configurable to show various types of displays for different clinical or admin roles.

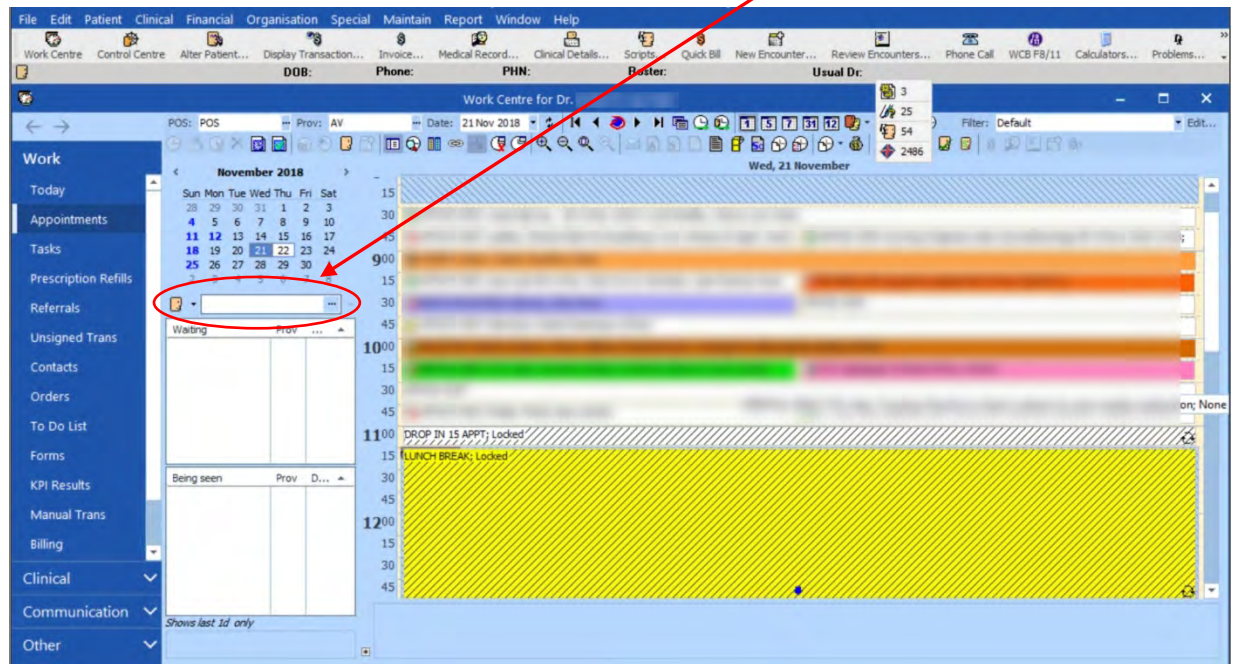


How do I get to my patient's chart?

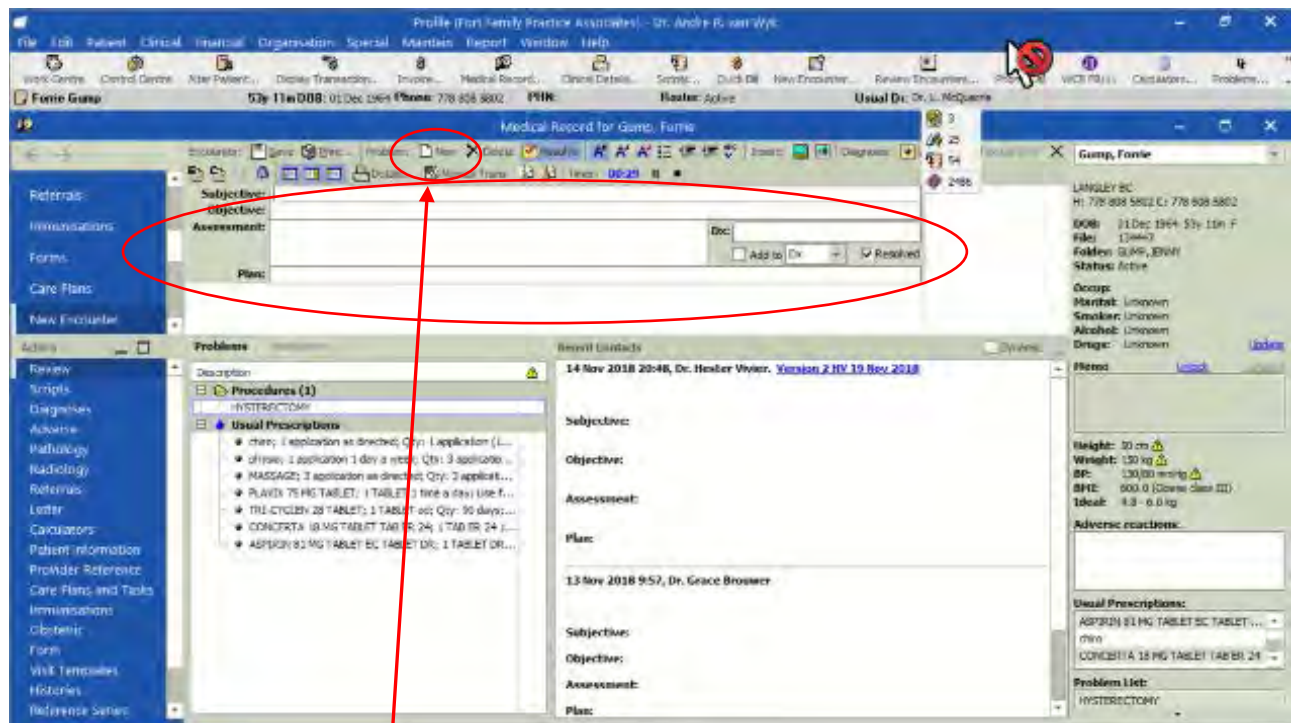
- i. From your schedule, double click on the patient name of the chart that you want to access.



- ii. To access a file not in schedule, type name into small box just under calendar on right then click medical record and patient file will open



- iii. Once the chart is opened, the default view is the default visit template window (which may be a SOAP note or another template). This can be personalized depending on your preferences, ask the clinic administrator.



- iv. Clicking "New" opens up a new problem field with new diagnosis box

How do I document a transaction:

- i. SOAP note
 - i. Start dictating or typing in the SOAP note box.

Encounter: Save Print... Problem: New X Delete Resolve Insert: Diagnosis: Lookup
Subjective: in for urti
Objective: cough
Assessment: viral
Dx:
☐ Add to Dx ☒ Resolved
Plan: Pt advised to drink plenty fluids, take Advil PRN and return if not better in 5- 10 days. Report any change or fever.

- ii. In the 'Dx' field, enter either the diagnosis partial or complete text or ICD9 code. This will populate the appropriate diagnosis in the billing to MSP.

Encounter: Save Print... Problem: New X Delete Resolve Insert: Diagnosis: Lookup
Subjective: in for urti
Objective: cough
Assessment: viral
Dx: upp res
Acute upper respiratory infections multiple or unspecified site ICD-9-CM 465.9
Other and unspecified diseases of upper respiratory tract ICD-9-CM 478.9
Other diseases of upper respiratory tract ICD-9-CM 478
Suppressed lactation ICD-9-CM 676.5
Upper respiratory infection URI ICD-9-CM 465.9
Upper respiratory inflammation due to fumes and vapors ICD-9-CM 506.2
Upper respiratory tract hypersensitivity reaction, site unspecified ICD-9-CM 478.8
Upper respiratory tract, part unspecified ICD-9-CM 165.0
All matches are shown
Problems: 14 Nov 2018 20:48, Dr. Hester
Procedures (1)
HYSTERECTOMY

- iii. Once the notes are typed in, complete and close the visit by clicking on the 'X' to either close encounter or close record in the upper left corner of the window. The visit will be complete if the 'resolved' field is checked. It is incomplete and available to edit if this box is left unchecked.

Medical Record for Gump, Forrie
Encounter: Save Print... Problem: New X Delete Resolve Insert: Diagnosis: Lookup
Subjective: in for urti
Objective: cough
Assessment: viral
Dx: Acute upper respiratory infections mu
☐ Add to Dx ☒ Resolved
Plan: Pt advised to drink plenty fluids, take Advil PRN and return if not better in 5- 10 days. Report any change or fever.

- iv. If you want to capture a second problem, click on the 'New' button above the SOAP note and a new set of SOAP fields opens below the original SOAP note

The screenshot shows the top toolbar of the software with the 'New' button circled in red. Below the toolbar, the SOAP note fields are visible. The 'Assessment' field contains 'viral'. The 'Dx' field contains 'Acute upper respiratory infections m/'. The 'Plan' field contains 'Pt advised to drink plenty fluids, take Advil PRN and return if not better in 5- 10 days. Report any change or fever.' The 'Subjective' and 'Objective' fields are empty. The 'Assessment' field is also empty. The 'Problems' section is at the bottom.

- v. If you want to capture discrete information, e.g. BP, type in 'bp 120/80' and push space bar

The screenshot shows the SOAP note fields. The 'Subjective' field contains 'bp check' and the 'Objective' field contains 'bp 120/80'. Both fields are circled in red. The 'Assessment' field is empty. The 'Problems' section is at the bottom.

The screenshot shows the SOAP note fields. The 'Objective' field contains 'Blood Pressure: 120/80 mmHg', which is circled in red. The 'Subjective' field contains 'bp check'. The 'Assessment' field is empty. The 'Problems' section is at the bottom.

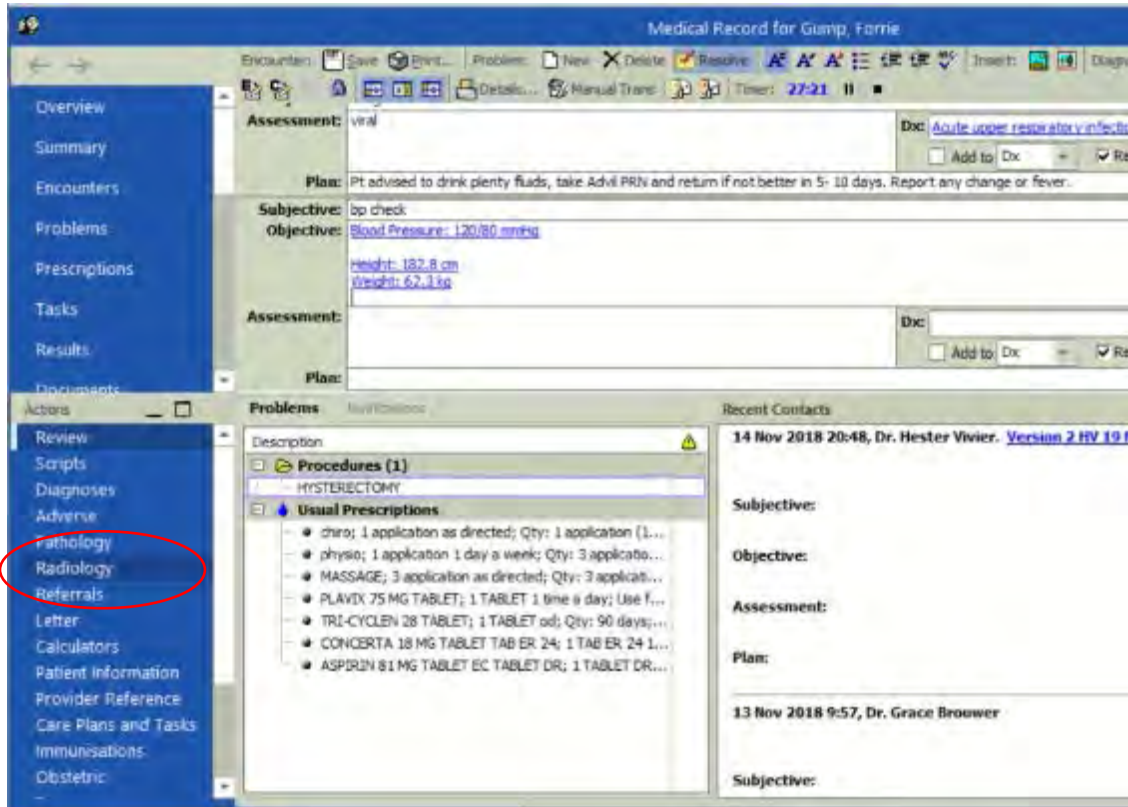
- vi. If you want to convert from inches to cm when recording height (same if wanting to convert pounds to kg, except type in 'wt'). Type in 'ht 72in' and push the space bar

The screenshot shows the SOAP note fields. The 'Objective' field contains 'height 72in', which is circled in red. The 'Subjective' field contains 'bp check'. The 'Assessment' field is empty. The 'Problems' section is at the bottom.

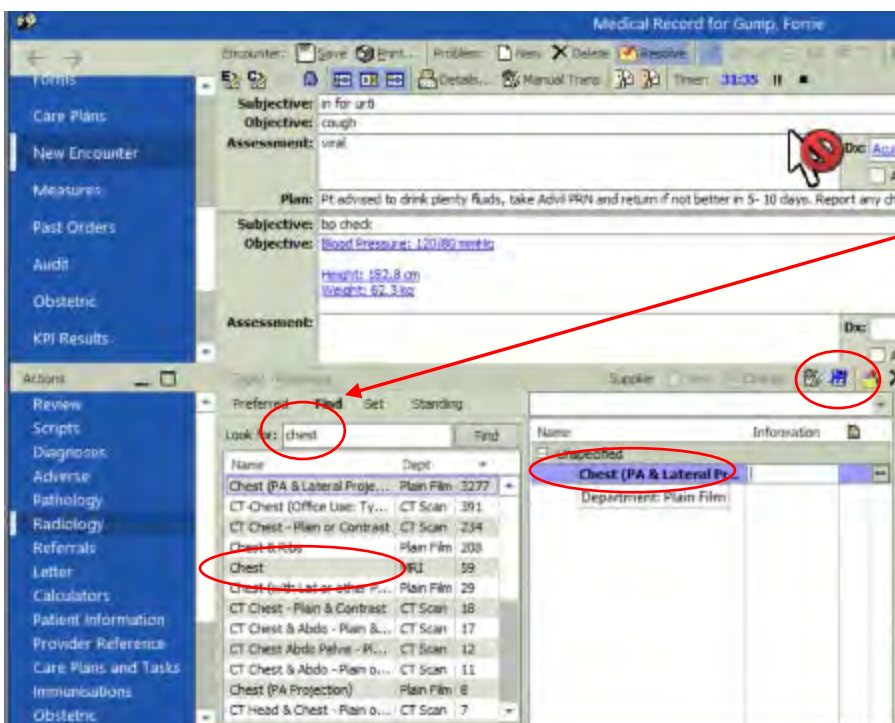
The screenshot shows the SOAP note fields. The 'Objective' field contains 'Height: 182.8 cm' and 'Weight: 62.3 kg', which are circled in red. The 'Subjective' field contains 'bp check'. The 'Assessment' field is empty. The 'Problems' section is at the bottom.

ii. Order Diagnostic Imaging

- i. When ordering Imaging during a patient visit, click on the 'Radiology' label in the 'action' column to the left and below the SOAP note window.



- ii. This will open the available imaging.



In the 'Look for:' field, type in the type of requisition and body area you want and select from the list that appears beneath the window.

Not all types of imaging requisitions or body areas are in the list. Ad hoc items (like 'x-ray left 5th finger') can be added by clicking on the blue icon on the same line as the 'Supplier' tab.

- iii. To add a 'cc' to another physician, click on Prov, CC, pay tab and type name and search in the 'cc:' field

The screenshot shows the 'Prov, CC, Pay' tab selected. The 'Prov:' field is populated with 'Dr. Andre R. van Wyk'. The 'CC:' field is empty and highlighted with a red circle. The 'Payer:' field is also empty. The 'Other:' checkbox is unchecked. The 'Payer number:' field is empty. The 'Details' tab is also visible, showing 'Chest (PA & Lateral Pr... ? pneumonia ri'.

- iv. To add in clinical information, click on 'Details' tab and type or cut and paste from clinical notes

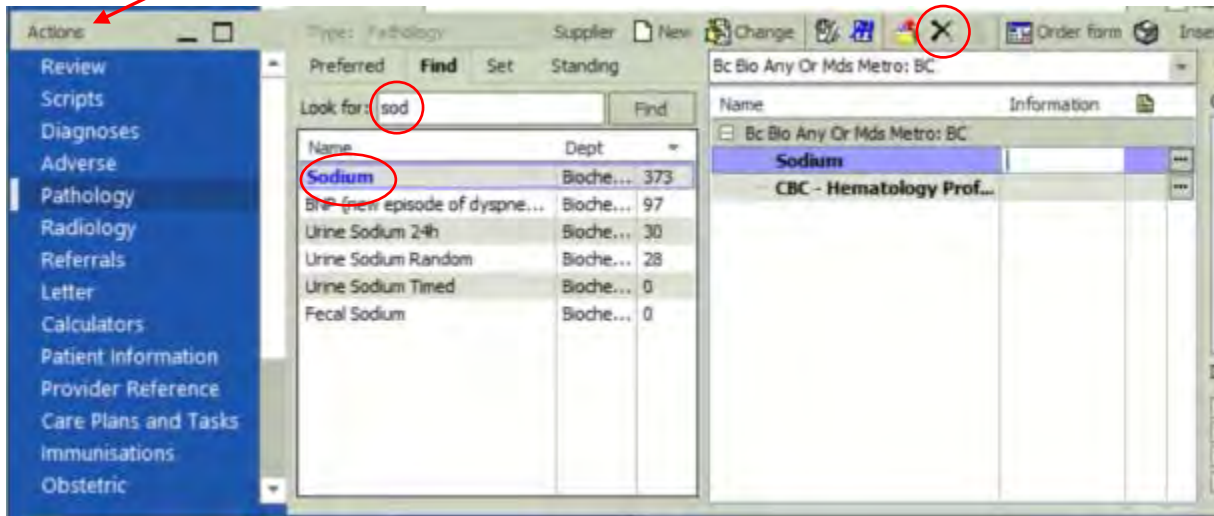
The screenshot shows the 'Details' tab selected. The 'Clinical Details' field is highlighted with a red circle and contains the text 'cough, fever'. The 'Diagnosis' field is empty. The 'Rx:' field contains 'Current med/last dose'. The 'Anon' checkbox is unchecked. The 'Print' checkbox is checked. The 'Instructions' checkbox is unchecked. The 'Include Rx' checkbox is unchecked. The 'Urgent' checkbox is unchecked. The 'Supplier Notes' checkbox is unchecked. The 'Fasting' checkbox is unchecked. The 'Sep Summary' checkbox is checked. The 'Signature' checkbox is checked. The 'Pregnant' checkbox is unchecked. The 'Sep Page' checkbox is checked. The 'Clinical Information' checkbox is checked.

- v. You can either print the requisition by clicking on the print icon, or when you close the patient's chart you will be prompted to print any outstanding unprinted documents.
- vi. If two items are to be printed, click on the small page icon to separate the requisitions into two pages.

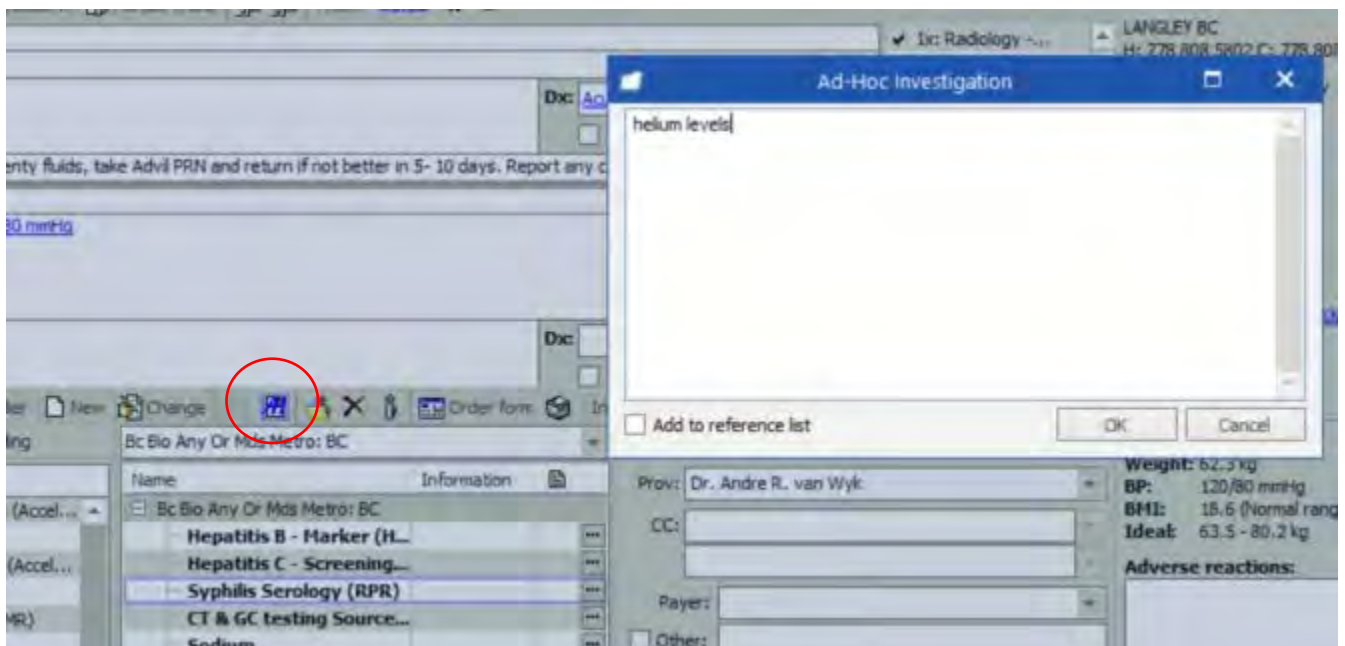
The screenshot shows the 'Details' tab selected. The 'Print' icon is highlighted with a red circle. The 'Small page icon' is also highlighted with a red circle. The 'Prov:' field is populated with 'Dr. Andre R. van Wyk'. The 'CC:' field is empty. The 'Payer:' field is empty. The 'Other:' checkbox is unchecked. The 'Payer number:' field is empty. The 'Details' tab is also visible, showing 'CT Chest - Plain or Con...' and 'Chest (PA & Lateral Pr... ? pneumonia ri'.

iii. Labs

- i. When ordering labs during a patient visit, click on the 'Pathology' label to the left and below the SOAP note in the 'Actions' area.
- ii. Use the 'Look for:' field to type in the individual labs (e.g. CBC) that you want and double click on the item in the list to have it populate the field to the right. You can add other items (e.g. sodium) and double click or drag it into the order field.
- iii. Items in the order field can be removed by highlighting and clicking on the 'x' icon.



- iv. To add 'ad hoc' items that may not be listed, click the blue 'ad hoc' icon and type in the item you want to order



iv. Forms

- i. When ordering labs during a patient visit, click on the 'Form' label to the left and below the SOAP note in the 'Actions' area.

Name	Count
WCB F8/11 Form	426
Imaging - MRI; BC (AccelEMR)	171
SCARED - hs	170
Anxiety - GAD-7; Generic (AccelEMR)	154
Mental Health - Depression - PHQ-9; Generic (AccelEMR)	134
Mental Health\ Mental Health - Depression - PHQ-9; Generic (AccelEMR)	116
Respiratory - Services - Sleep Apnea/CPAP/Oximetry - General (Private); BC (AccelEMR)	93
Kutcher Adolescent Depression Scale (KADS)	71
Mental Health - Depression - PHQ-9; Generic (AccelEMR)	62
Driving - SIMARD MD; 4 pgs; Generic (AccelEMR)	51
Path - Cytology - Gynecological (PAP); BC (AccelEMR)	46
SNAP-IV_18	46
BC Special Authority Form	45
BC CDM Hypertension	44
BC CDM Diabetes	38

- ii. Different clinics and users have different forms available from the dropdown list. These forms that display are previous forms used for that patient only. Click on the 'New' icon to get a list of forms available for the clinic.

v. Referral letters

- i. When writing a consult request during a patient visit, click on the 'Referrals' label in the Actions box column, scroll and find the common specialists that have been frequently used and double click on the name or click 'New Referral' (make sure that the 'Outward' button is selected).

Referred to	Letter	Count
Dr. Jani Surkes	Standard	217
Dr. Albert Chan - Orthopedics	Standard	198
Dr. Carolyn Anderson	Standard	176
Dr. Elaine Mah	Standard	161
Dr. Kevin P. McDermid	Standard	147
Dr. Mile Jovanovic	Standard	144
Dr. Len Vu	Standard	139
Dr. Carolyn Anderson	Standard	119
Dr. S.E. Cowie	Standard	115
Langley Emergency Department	Standard	115
Dr. Zakrzewski	Standard	112
Dr. Margo S. Clarke - RETIRED	Standard	89
Dr. David E. O'Brien	Standard	81
Dr. Jason Archambault	Standard	69
Dr. Mitra Maharsaj	Standard	60

- ii. Some EMRs may be configured such that when you click on the 'Referral' label, it opens the default consult template.

- iii. This will open the default consult template. The body of the letter can be typed or dictated in the 'Narrative' text box field. Office notes, lab reports, and x-ray results can be added into this field from the menu line above the text of the letter.

The screenshot shows the 'Formie Gump' software interface. At the top, patient information is displayed: '53y 11m DOB: 01 Dec 1964 Phone: 778 808 5802 PHN: Roster: Active Usual Dr: Dr. L. McQuarrie'. Below this are buttons for 'Save', 'Save & Close', 'Print', 'Advice', and 'Redirect'. The 'General' tab is selected, showing fields for 'Providers' (From, To), 'POS:', 'Provider:', and 'Ext Prov:'. To the right, there are status fields: 'Status: Open', 'Case:', 'Privacy:', and 'Appt:'. Below these are sections for 'Address:', 'Phones:', 'Fax:', and 'E-Mail:'. The 'Reason for Referral:' section contains 'Diagnosis: Essential hypertension BP' and 'Treatment:'. The 'Narrative:' field is a large text area, highlighted with a red circle. On the right side, there are checkboxes for 'Pat', 'Advice', and 'Notes'.

- iv. To see a list of physicians, from which you can select the physician you want to send the consult to. Click the mouse in the 'Ext Prov:' text box and click the space bar. There are many ways to find a specialist, either by typing the first few letters of a name, or selecting the specialty type from the 'Specialty:' field and type the first few letters of the city in the 'City:' field

The screenshot shows the 'Formie Gump' software interface with the 'Select External Provider' dialog box open. The 'Ext Prov:' field in the background is highlighted with a red circle. The dialog box has a 'Search Criteria' section with fields for 'Name:', 'City:', 'Identifier:', 'Type:', 'Region:', 'Specialty:', and 'Phone:'. The 'Specialty:' dropdown is highlighted with a red circle and set to 'Dermatology'. Below the search criteria is a table of providers:

Full Name	Address	Specialty	Reference	Uses
Dr. Lorne Allred	603 - 13737 96 Ave, Surrey BC V3V 0C6	Dermatology	00398	8
Dr. Gurbir Dhadwal	#20 - 15300 - 105th Ave, Surrey BC V3R 6A7	Dermatology	66804	1
Dr. Soudabeh Zandi	603 - 13737 96 Ave, Surrey BC V3V 0C6	Dermatology	66235	1
Dr. Monica Li	#603 - 13737 96 Ave, Surrey BC V3V 0C6	Dermatology	62649	
Only Seeing Re-Ref...	South Surrey Medical, 101-15850 26 Ave, Surrey BC V3...	Dermatology	08384	
Dr. Chih-Ho Hong	#20 - 15300 - 105th Ave., Surrey BC V3R 6A7	Dermatology	25861	12
Dr. Zulfiqar K. Rahim	103-13798 94A Ave, Surrey BC V3V 1N1	Dermatology	06193	8

Below the table, there is a section for 'References:' with details for 'MSPD 00398', 'Specialty: Dermatology', and 'Preferred: Lorne'. It also lists 'Postal:', 'Street:', 'Phones:', 'Cell phones:', and 'Fax:' information. At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

- v. To add attachments to the consult referral letter, click on the 'Attachments' tab

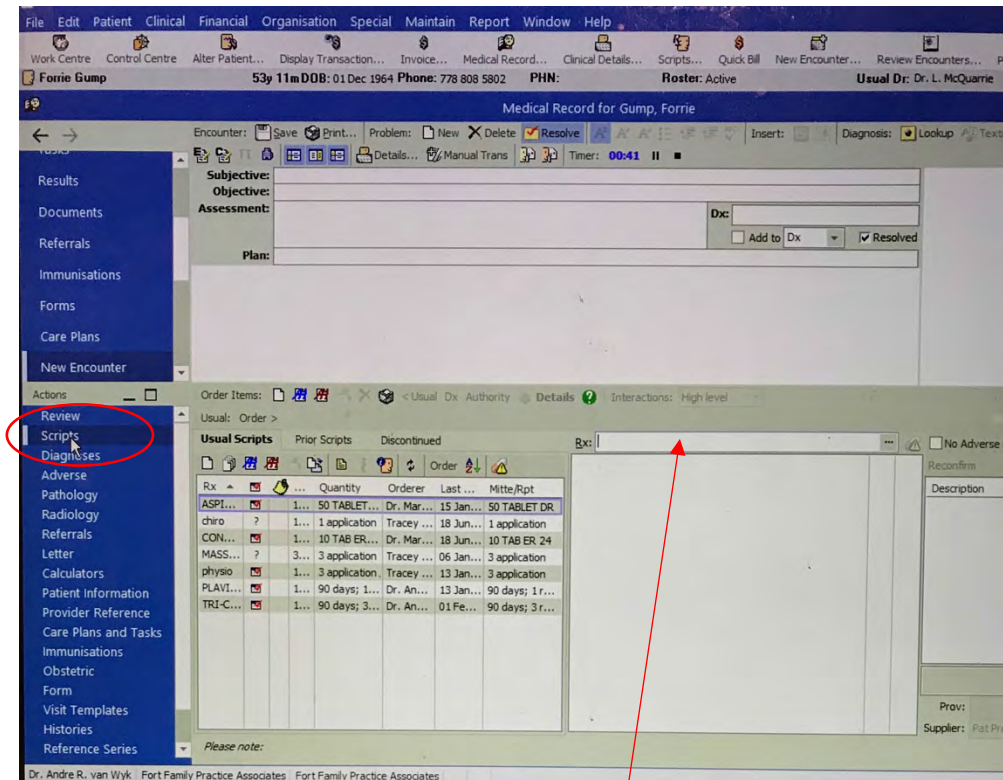
The screenshot shows the 'Forrie Gump' patient record interface. At the top, patient information is displayed: '53y 11m DOB: 01 Dec 1964 Phone: 778 808 5802 PHN:'. Below this, there are tabs for 'General', 'Reason Letter', and 'Attachments'. The 'Attachments' tab is selected and circled in red. The interface includes fields for 'Providers' (From, To), 'PQS', 'Provider', 'Ext Prov', 'Status' (Open), 'Case', 'Privacy', and 'Appt'. There are also sections for 'Address', 'Phones', 'Fax', and 'E-Mail'. The 'Reason for Referral' section contains a 'Diagnosis' field with the text 'Essential hypertension BP' and a 'Treatment' field. A large 'Narrative' text area is at the bottom. On the right side, there are checkboxes for 'Pat', 'Advice', and 'Notes'.

- vi. Check the attachments you want included in the consult letter. The small + boxes expand the different attachment categories so that specific items from that category can be added

The screenshot shows the 'Attachments' tab in the 'Forrie Gump' patient record interface. The tab is selected and circled in red. Below the tab, there are buttons for 'Open...', 'Show All', 'Load More', and 'Refresh'. A note states: 'The items you check here will be attached to the referral in Profile and print automatically with the reason letter. NOTE: Each node displays only the most recent 20 items. Click 'Load More' to see additional items.' Below the note is a list of attachment categories, each with a small + box to its left. The categories are: 'Administrative', 'Adverse', 'Diagnosis', 'Documents', 'Flow Sheets', 'Forms', 'Pathology', 'Procedures', 'Radiology', 'Social/Risk', and 'Usual Medications'. The 'Documents' category is expanded, showing a list of items: 'Referral', '02 Mar 2017', and 'referral'. The 'Procedures' category is also expanded, showing 'HYSTERECTOMY'.

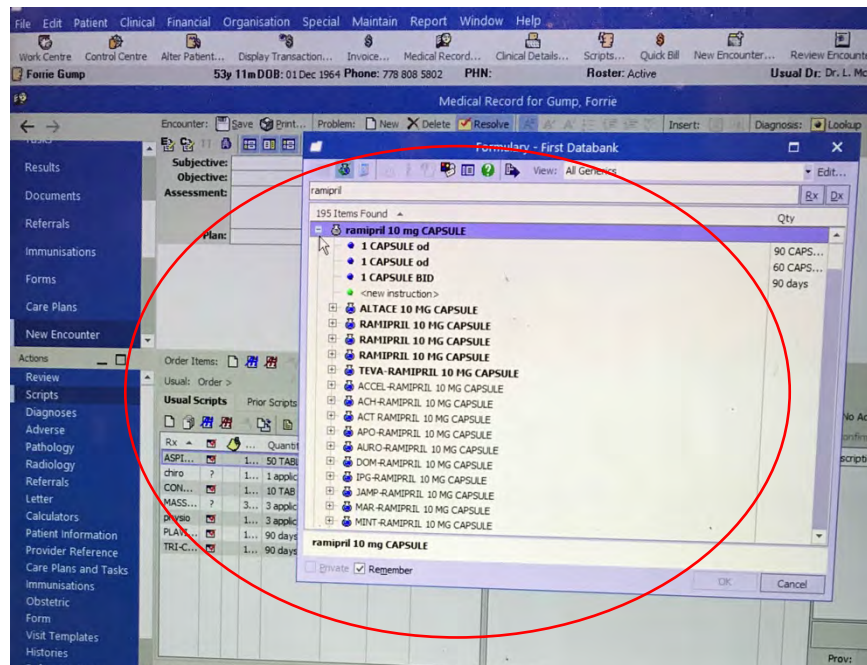
vi. Prescriptions

- i. When writing a prescription during a patient visit, click “Scripts”



- ii. This will open the prescription writing window.

- iii. Type in the first few characters of the medication name and click enter to show a list of medications to choose from.



- iv. Select the medication that you want and then fill in the rest of the prescription template with the appropriate instructions. Note, the “OK” button will be grey unless all the conditions for a legal script are met. (Drug, Dose, Instructions, Duration etc.)

The screenshot shows a medical software interface with a menu bar (File, Edit, View, etc.) and a toolbar. The main window is titled "Formulary - First Databank" and displays a list of 195 items found. The selected item is "RAMIPRIL 10 MG CAPSULE". The form below the list contains the following fields and options:

- Dose Type:** Normal
- Dose:** 1 CAPSULE
- Ereq:** (empty field)
- Route:** (empty field)
- Qty:** 90 day
- Duration:** (empty field)
- Repeat:** 1
- Written:** Approx: 24 Nov 2018
- Starts:** Approx: 24 Nov 2018
- Expires:** (empty field)
- Pickup by:** (empty field)
- Orderer:** Internal Dr. Andre R. van Wyk (AV)
- Auto-calculate:** (checked)
- Brand substitution not permitted:** (unchecked)
- Paper copy required:** (unchecked)
- Long Term:** (unchecked)
- Adapt not allowed:** (unchecked)
- Private:** (unchecked)
- Remember:** (checked)
- Preferred:** (unchecked)

At the bottom right of the form are "OK" and "Cancel" buttons. Red arrows point to the "Print" icon in the toolbar, the "OK" button, and the "Remember" checkbox.

- v. To print, click on “Print” icon. The EMR should also prompt for printing when you close an encounter.
- vi. Note the prescription warning window should appear when prescribing interacting or allergic medications. The prescriber may manually over-ride the warning in order to print the prescription.

vii. Billing/coding

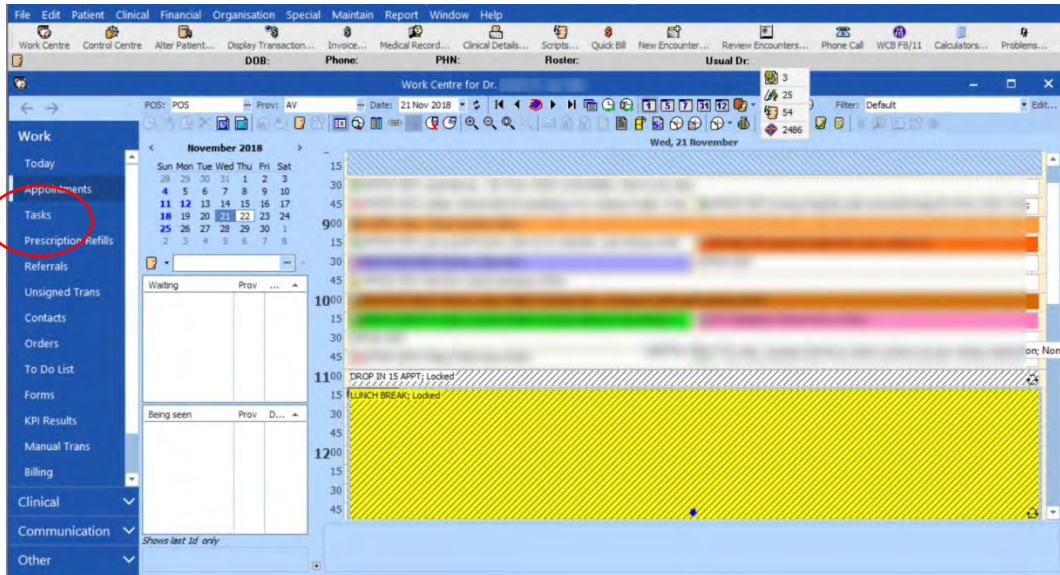
- i. Any one office may do its billing differently. Discuss the office's billing process with the office staff. The following method uses the "Quick Bill" method by the physician.
- ii. Entering a billing and diagnostic code can be done from within patient visit by clicking on the "Quick Bill" icon below.

The screenshot displays a medical billing software interface. At the top, a menu bar includes options like 'Work Centre', 'Control Centre', 'Alter Patient...', 'Display Transaction...', 'Invoice...', 'Medical Record...', 'Clinical Details...', 'Scripts...', 'Quick Bill', 'New Encounter...', and 'Review Encounter'. The 'Quick Bill' icon is circled in red. Below the menu, patient information for 'Fannie Gump' is shown, including age (53y 11m), DOB (01 Dec 1964), phone (778 808 5802), and PHN. The 'Payor' is 'Medical Services Plan'. The 'Provider' is 'Dr. Andre B. van Veld (A40)'. The 'Service' is 'VIST IN OFFICE (AGE 50-59)'. The 'Qty' is 1.00, 'Unit' is 33.35, 'Unit%' is 100.00, and the total is \$33.35. The 'Diagnosis 1' is 'Acute upper respiratory infections multiple or unspecified site (465)' and 'Diagnosis 2' is 'Essential hypertension BP (401)'. The 'Referral' is 'External - Out'. The 'Date/Time' is '22 Nov 2018 12:46'. The 'Location' is 'Practitioner's Office - In Community'. The 'Description' is 'VIST IN OFFICE (AGE 50-59)'. The 'Notes' field is empty. On the right, the 'Disease Coding Assistant' window shows '465: Acute upper respiratory infections multiple or unspecified site' and '401: Essential hypertension BP'. At the bottom, a status bar indicates 'Patient PHN is not assigned. Province is not assigned for the patient. Patient Eligibility: Not checked.' and 'Sources: Claims, Encounters, Problem List'.

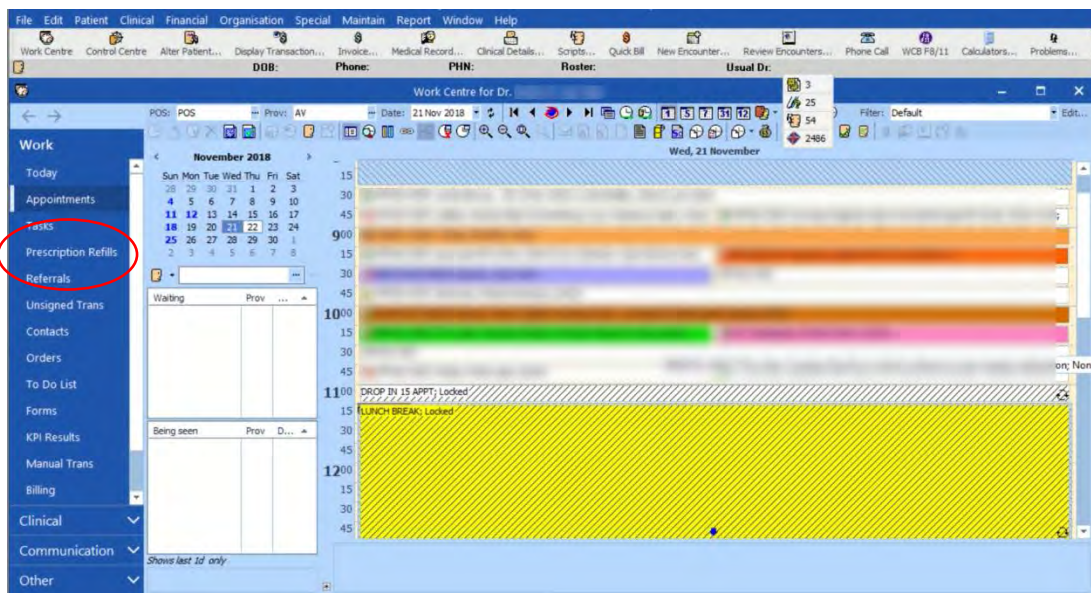
- iii. Enter the service provided and the relevant diagnosis. The EMR should auto-populate these fields if your encounter was completed.
- iv. In the bottom of the billing window, a billing integrity review is displayed. A green check indicates no issues found.

How do I access my inbox (assigned transactions/tasks)?

- A. To show all tasks for all your patients or for generic messages
 - i. Access tasks from the opening screen after log on by clicking on 'Tasks' label in the left column.
 - 1. From this task screen can also create new tasks for your self or for others—is a new task button on menu bar.

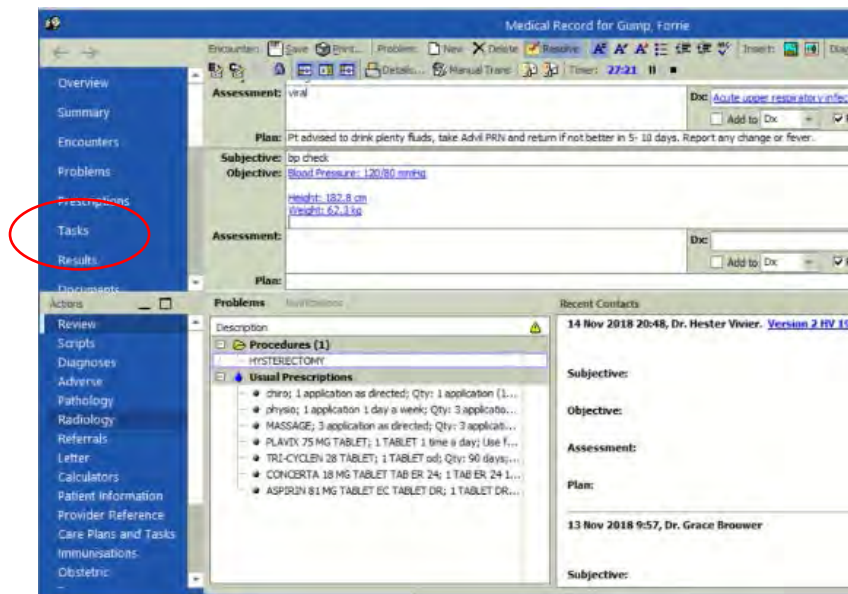


- ii. Unsigned Transactions to review (suggest you add this as not in current cheat sheet)
 - 1. On the initial screen after login there is a list of available boxes listed on left hand of screen
 - 2. "Unsigned Transactions" will display a list of all the labs, X-rays, reports, etc. for all patients that have not been reviewed and signed off.
 - 3. Can review these and sign them off (by clicking "Sign" button then they disappear from this box to patient chart
 - 4. If you want to action something based on the result press "Annotate" button to create a task that will be associated with this result. Can direct task to yourself or MOA (like call patient back to discuss result). Need to put name of person task is directed to in task box.

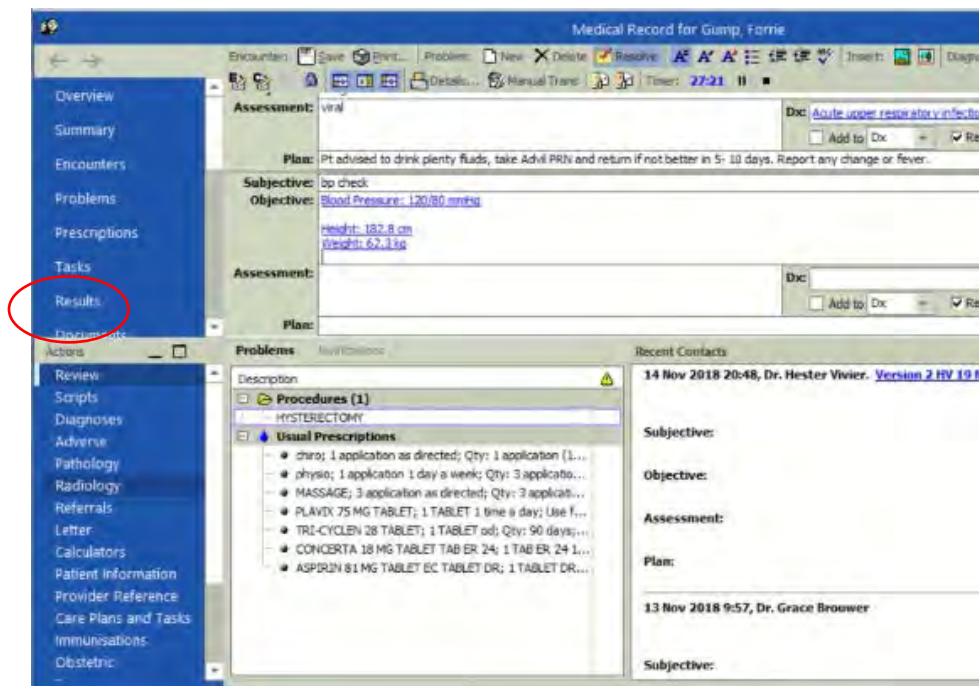


B. To show tasks for an individual patient from within the chart:

- i. From the schedule window, click on the “Tasks” area on the left upper pane.

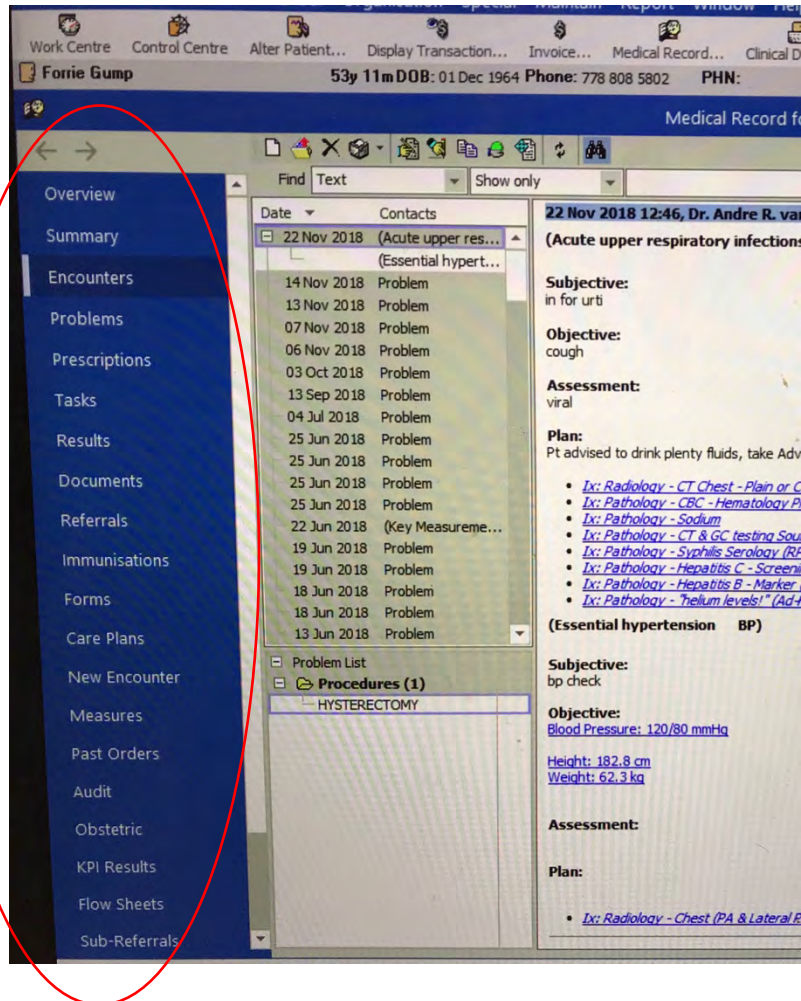


- ii. The new window that opens has a list of all unfinished tasks and tasks from MOAs (e.g. phone messages, etc.) This are can include task assigned to you by any team member including yourself.
- iii. Click on any description to open the task on that line. The task can be completed from the within the window that opens.

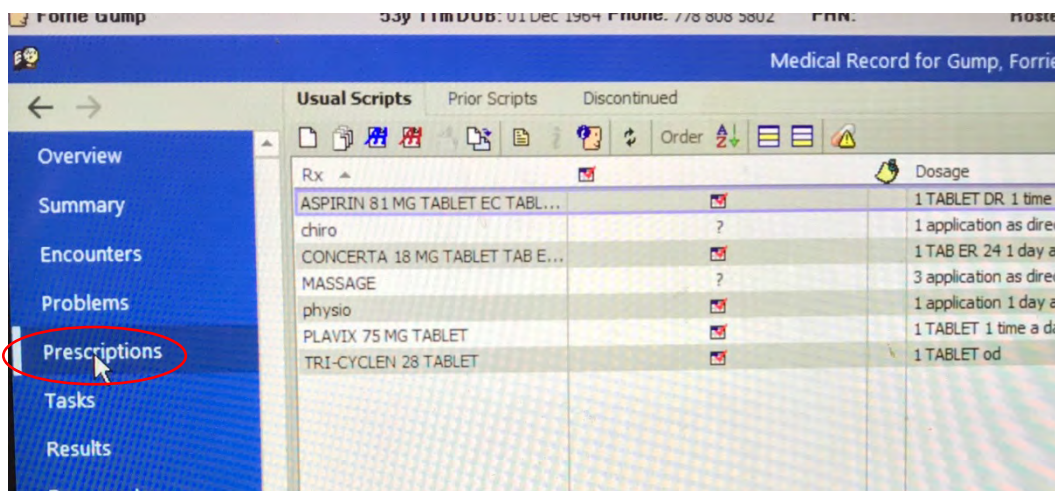


- iv. For unsigned results click on “Results “
- v. The new window that opens has a list of all unsigned labs, electronic documents (e.g. referral consult responses, etc.), scanned results attached to a message task (e.g. investigation results)

How do I access historical information?



To access historical items from the patient's chart, click on the appropriate tab e.g. Encounters (visits), Tasks, Billing, Prescription (Meds), Pathology (Labs), Referrals (Consults) Immunizations, .



- vi. This opens the historical items in this category. Any one-line item can be opened by double clicking on the observation or using the edit button.

