

Med-Access EMR Introduction Instruction Sheets

EMR Introduction Instruction Sheets for new users.

Startup FAQs

- i. How do I log on?
 1. In the office
 2. Remotely
- ii. How do I access my schedule?
- iii. How do I get to my patient's chart?
- iv. How do I document a transaction:
 1. SOAP note,
 2. Order investigations,
 3. Labs,
 4. Forms
 5. Reference letters
 6. Prescriptions
 7. Billing/coding
- v. How do I access my inbox (assigned transactions/tasks)?
- vi. How do I access historical information?

Click on question to take you to page in document

Disclaimer: This is an independent quick reference guide on getting started with Med Access 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. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- ii. The EMR login window will open



Dr.

User Name:

Password:

- 2018 BC MSP Billing Calendar
- Introducing our new Hardware and Network Support options

TELUS | HEALTH

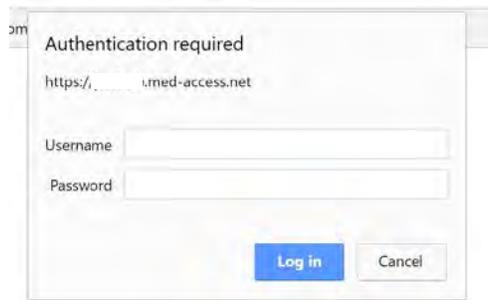
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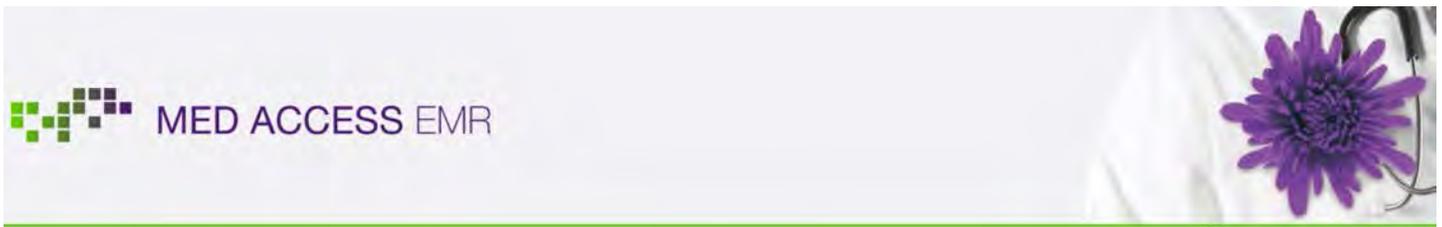
- iii. Type in the User Name and Password given to you by the office administrator. Login.

2. Remote Log in

- i. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- ii. The EMR login authentication window will open



- iii. For Username, type in the Clinic EMR 6-character label given to you by the clinic administrator. (same as the 6 characters in the clinic EMR URL)
For Password, type in the 20 alpha-numeric password given to you by the clinic administrator.
Log in.
- iv. The EMR login window will open



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- 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 visible in this window, including Tasks. This window is user configurable to show various types of displays.

The screenshot displays the EMR scheduler interface for a resident on Wednesday, February 28, 2018. The main window shows a schedule table with the following data:

Time	Patient	Primary # Chart #	Type	Concern	Appt Status	Billing Status	Bill	Diag
08:30								
08:45			regular	2w follow up (BP please)	Done	Pending	17100	401
09:00			regular	rx (BP please)	Done	Pending	17100	276, 348
09:15			regular	B 12 and rftis	Done	Pending	15300	728, 2811
09:30			regular	sick 2 weeks (BP please)	Done	Pending	00100	
09:45			Repeat Appt	diarrhea	Done	Pending	18100	244, 276
10:15			Repeat Appt	3 month follow up on kidney function	Done	Pending	18100	7844, 9853, 72743
10:30			Kati 1st Appt	MTD, school exam form	Done	Edit		
11:00			regular	fu reflux med (weight and height please)	Done	Pending	00100	53081
11:15			Physical w Pap Kati	HbWt & Pap "" regiside	Done	Pending	14500	708
12:00			Lunch Break		Template			
12:30			Staff Meeting		Template			

The right sidebar contains three sections:

- Urgent Tasks:** Nothing found to display
- All exclude Visits:** Nothing found to display
- Active Abnormal Lab Results:** Nothing found to display

How do I get to my patient's chart?

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

Time	Patient	Primary # Chart #	Type	Concern	Appt Status	Billing Status
08:30	Patient Test 03-Feb-1953 (65) M	book 20 min			▶ Booked	Edit
08:45	Baby Boy Test 17-Mar-2014 (3) M				▶ Booked	Edit
09:00	Billing Test 01-Jan-1956 (62) F				▶ Booked	Edit
09:15	Lynne Test 02-Nov-2011 (6) M				▶ Booked	Edit

- vii. Once the chart is opened, click on the tab name of the section you want to open

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in last year
HIV Test Not Done in Last 5 Years

Summary Search Family Help

Demog **Visits** Tasks Bills Allg Meds Profile Labs Invest Consults Imm Goals Appt

Visit filter - all visits

Task Start Date: All Start: All End: All Diagnosis: All Obs Template: Summary
Obs Name: Obs Value: Provider: All Status: All

Date	Provider	Concern	Diagnosis	Disposition
21Feb18			heart failure*, 428	✓
16Nov17		physical	obesity/hyperalimnt*, Chronic pain , 278, 338.4	✓
26Aug16			heart failure*, 428	✓
27Jul16			heart failure*, 428	✓
12Apr16			epistaxis , 784.7	RTC as required ✓
19Mar16			heart failure*, 428	✓
27Oct15			depressive disorder nec , 311	RTC 2 weeks ✓
19Oct14				

How do I document a transaction:

i. SOAP note

i. From the "Visits" tab window, click on the "New" icon in the upper right of the window

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults Imm Goals Appt

Visit filter - all visits

Task Start Date: All Start: All End: All Diagnosis: All Obs Template: Summary
Obs Name: Obs Value: Provider: All Status: All

Signed	Date	Provider	Concern	Diagnosis	Disposition
	21Feb18			heart failure*, 428	
	16Nov17		physical	obesity/hyperalimnet*, Chronic pain , 278, 338.4	
	26Aug16			heart failure*, 428	
	27Jul16			heart failure*, 428	
	12Apr16			epistaxis , 784.7	RTC as required
	19Mar16			heart failure*, 428	
	27Oct15			depressive disorder nec , 311	RTC 2 weeks
	19Oct14				

ii. This opens the default SOAP note set for you by the administrator. The default SOAP can be changed to a different SOAP note by the clinic administrator

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults Imm Goals Appt

Visit

Subjective

Concern

Assessment

Diagnosis

Billing Item

Plan

Print Care Plan Task Inv Con Lab Imm Med Draw

Workflow Step: Add-Ins

Disposition

Insurer Patient -

Date 28-Feb-2018 06:44 PM

Provider

Bill Provider

Save

Personal Health Record

Observations

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Subjective Note

Vital Signs

Weight kg
Pulse /min
Regular? Yes No
BP mm Hg sitting

Exam

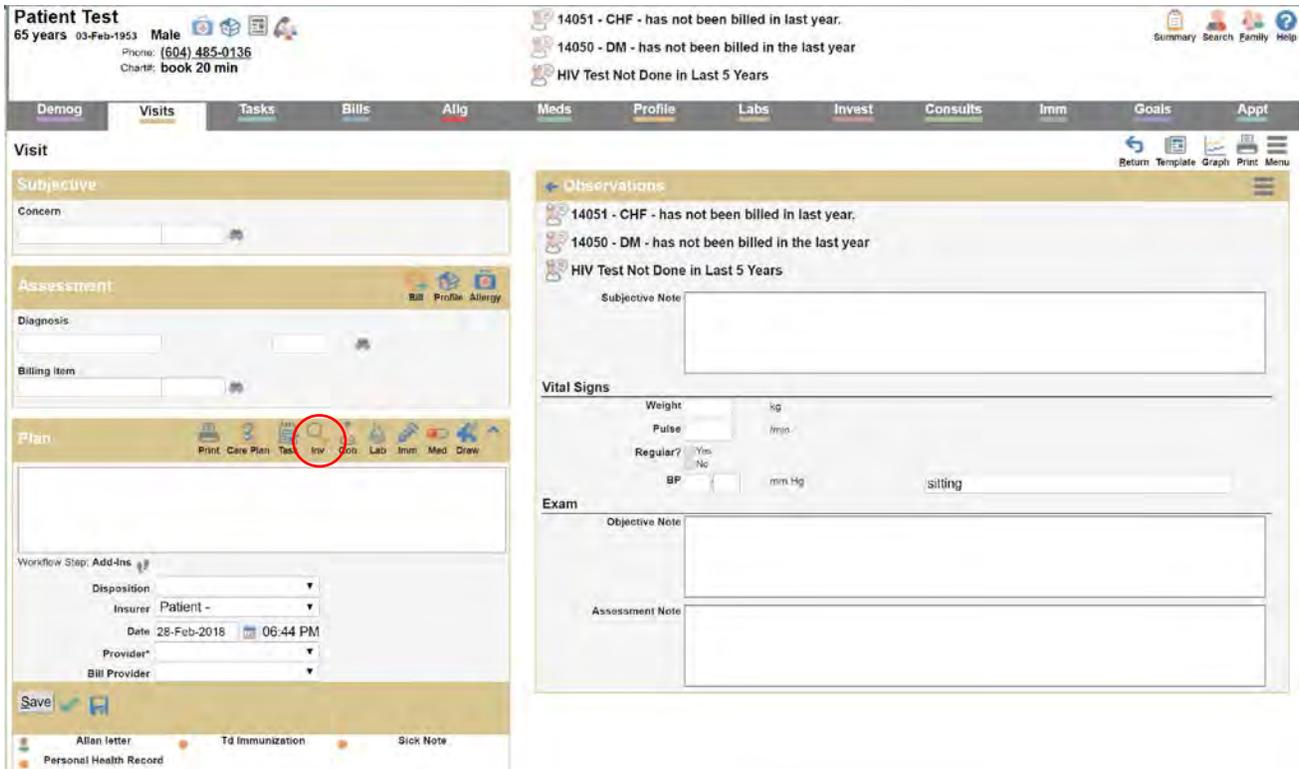
Objective Note

Assessment Note

iii. Once the notes are typed in, complete and close the visit by clicking on the green check icon in the lower left corner.

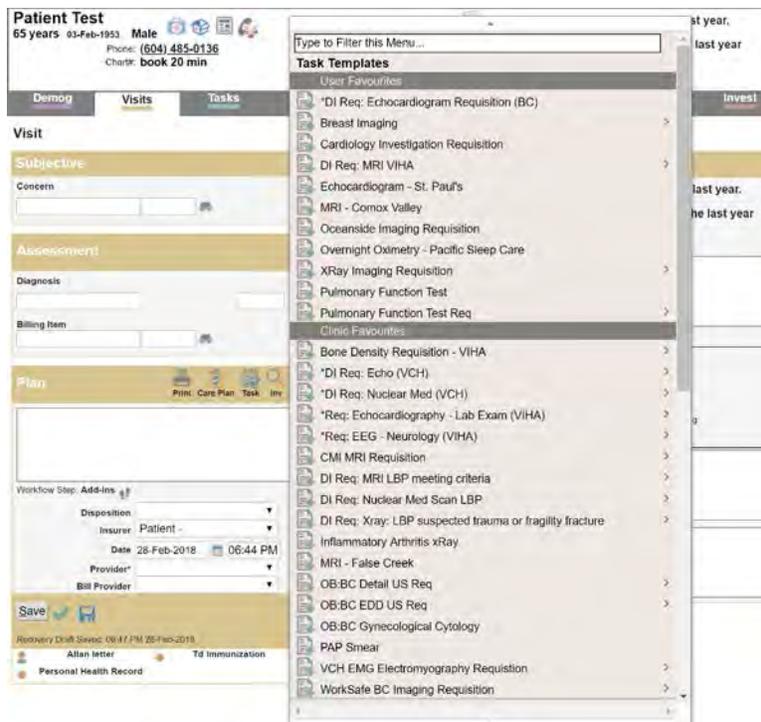
ii. order investigations

- i. When ordering investigations during a patient visit, click on the “Inv” icon  in the visit window.
- ii. This will open the default investigation (often an imaging requisition).



The screenshot shows a patient visit window for a 65-year-old male. The 'Plan' tab is active, and the 'Inv' icon is circled in red. The 'Observations' section on the right contains a list of items: '14051 - CHF - has not been billed in last year.', '14050 - DM - has not been billed in the last year.', and 'HIV Test Not Done in Last 5 Years'. The 'Vital Signs' section shows 'Weight' in kg, 'Pulse' in /min, 'Regular?' with 'Yes' and 'No' options, 'BP' in mm.Hg, and 'sitting' position. The 'Exam' section has 'Objective Note' and 'Assessment Note' fields.

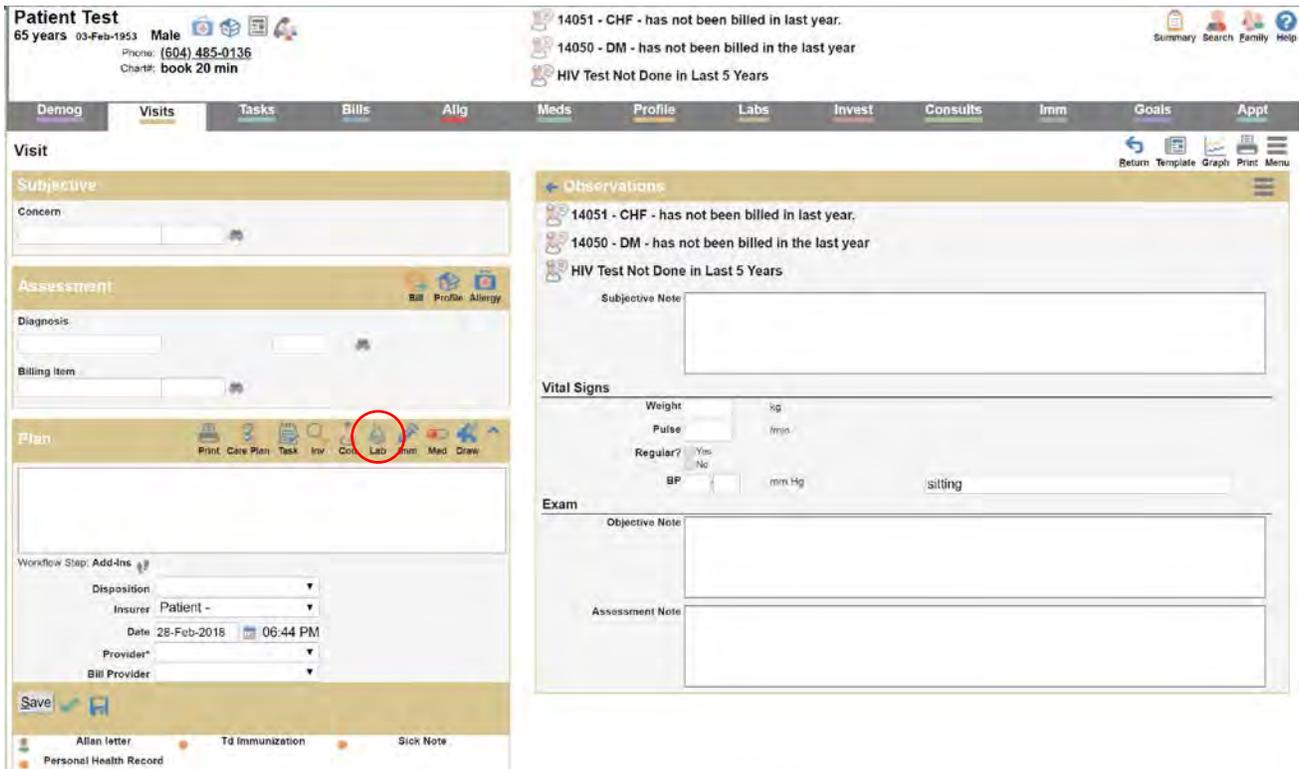
- iii. To see a list of other available investigations, **right** click on the “Inv” icon . Select the investigation from the dropdown list



The screenshot shows the same patient visit window, but with the 'Inv' icon right-clicked. A dropdown menu is open, displaying a list of investigation options. The menu is divided into 'Task Templates' and 'Clinic Favourites'. The 'Task Templates' section includes items like 'DI Req: Echocardiogram Requisition (BC)', 'Breast Imaging', 'Cardiology Investigation Requisition', 'DI Req: MRI VIHA', 'Echocardiogram - St. Paul's', 'MRI - Comox Valley', 'Oceanside Imaging Requisition', 'Overnight Oximetry - Pacific Sleep Care', 'XRay Imaging Requisition', 'Pulmonary Function Test', and 'Pulmonary Function Test Req'. The 'Clinic Favourites' section includes items like 'Bone Density Requisition - VIHA', 'DI Req: Echo (VCH)', 'DI Req: Nuclear Med (VCH)', 'Req: Echocardiography - Lab Exam (VIHA)', 'Req: EEG - Neurology (VIHA)', 'CMI MRI Requisition', 'DI Req: MRI LBP meeting criteria', 'DI Req: Nuclear Med Scan LBP', 'DI Req: Xray: LBP suspected trauma or fragility fracture', 'Inflammatory Arthritis xRay', 'MRI - False Creek', 'OB-BC Detail US Req', 'OB-BC EDD US Req', 'OB-BC Gynecological Cytology', 'PAP Smear', 'VCH EMG Electromyography Requisition', and 'WorkSafe BC Imaging Requisition'.

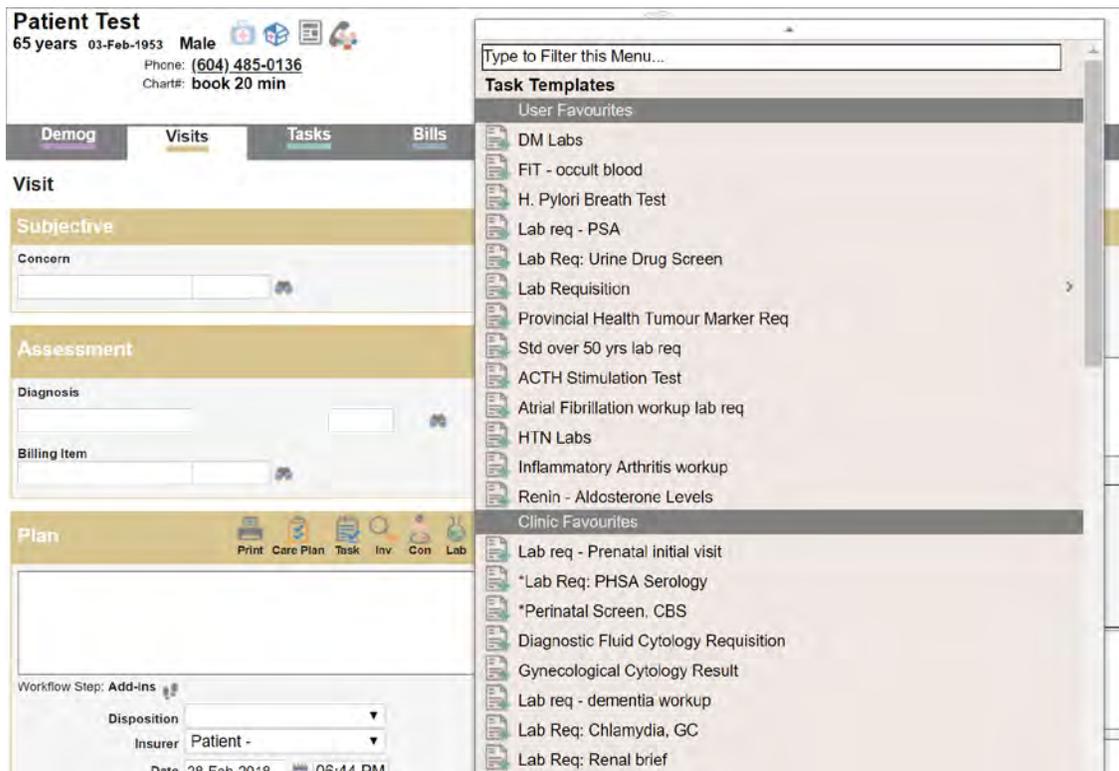
iii. Labs

- i. When ordering labs during a patient visit, click on the “Lab” icon  in the visit window.
- ii. This will open the default lab requisition.



The screenshot shows the 'Patient Test' window for a 65-year-old male patient. The 'Visits' tab is active. In the 'Plan' section, the 'Lab' icon is circled in red. The right-hand side of the window displays the 'Observations' section with a list of notes: '14051 - CHF - has not been billed in last year.', '14050 - DM - has not been billed in the last year', and 'HIV Test Not Done in Last 5 Years'. Below this is the 'Vital Signs' section with fields for Weight, Pulse, Regular?, and BP, and an 'Exam' section with 'Objective Note' and 'Assessment Note' fields.

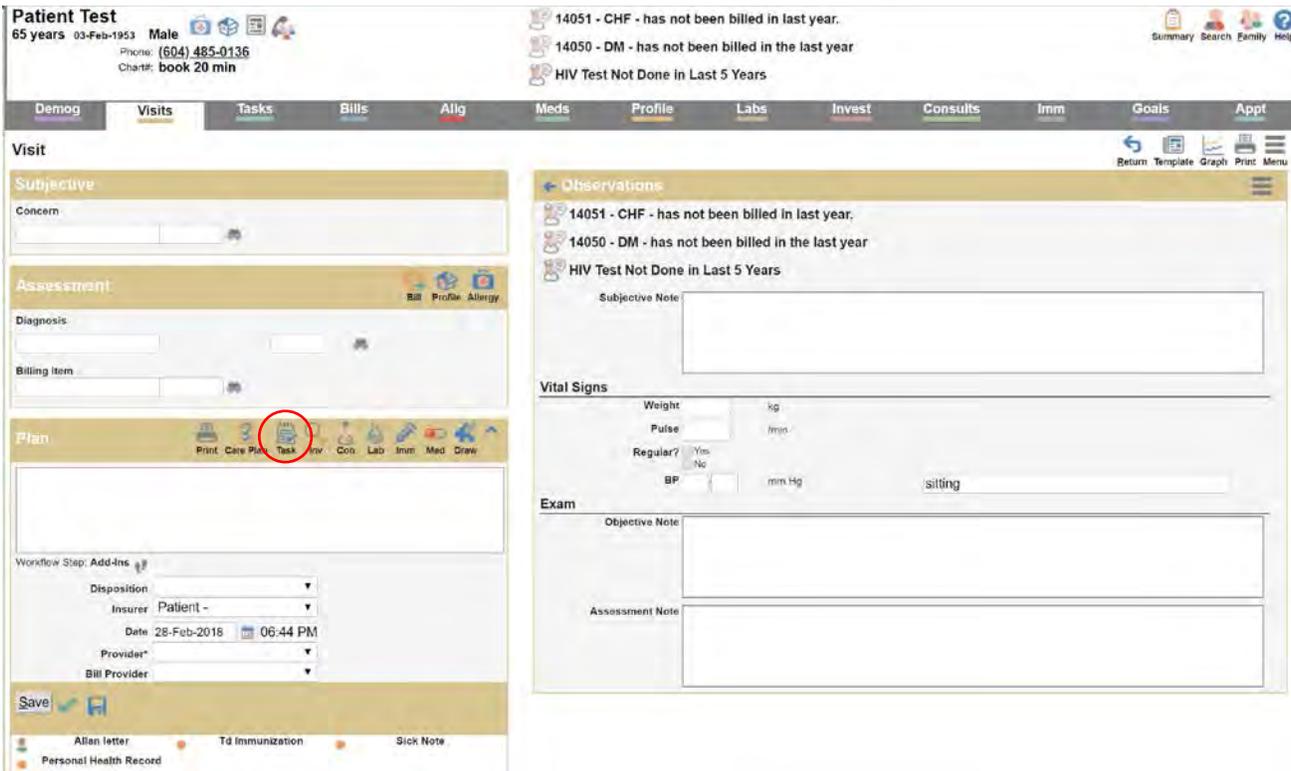
- iii. To see a list of other available lab requisitions, right click on the “Lab” icon . Select the Lab requisition you want from the dropdown list



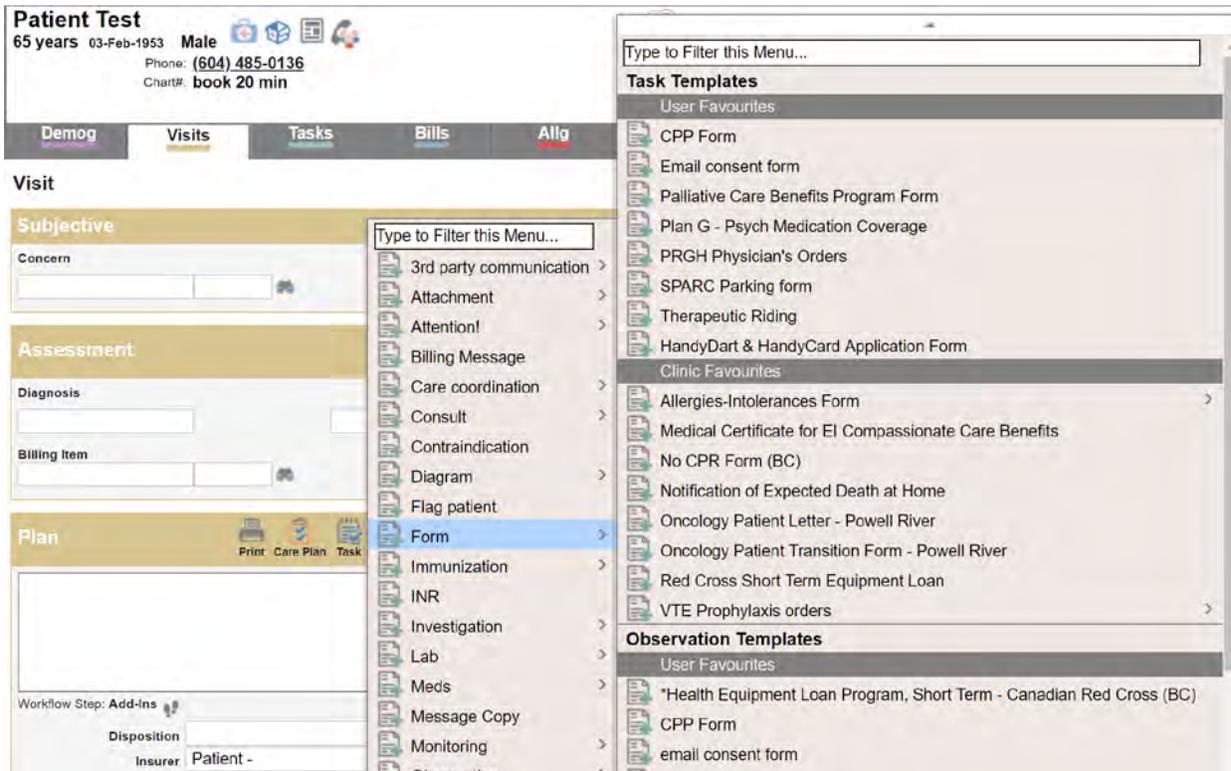
The screenshot shows the same patient visit window, but with the 'Lab' icon right-clicked. A dropdown menu is open, displaying a list of lab requisitions under the heading 'Task Templates'. The list includes 'User Favourites' and 'Clinic Favourites'. The 'User Favourites' list includes: DM Labs, FIT - occult blood, H. Pylori Breath Test, Lab req - PSA, Lab Req: Urine Drug Screen, Lab Requisition, Provincial Health Tumour Marker Req, Std over 50 yrs lab req, ACTH Stimulation Test, Atrial Fibrillation workup lab req, HTN Labs, Inflammatory Arthritis workup, Renin - Aldosterone Levels. The 'Clinic Favourites' list includes: Lab req - Prenatal initial visit, *Lab Req: PHSA Serology, *Perinatal Screen, CBS, Diagnostic Fluid Cytology Requisition, Gynecological Cytology Result, Lab req - dementia workup, Lab Req: Chlamydia, GC, and Lab Req: Renal brief.

iv. forms

- i. When wanting a form during a patient visit, right click on the "Task" icon  in the visit window.

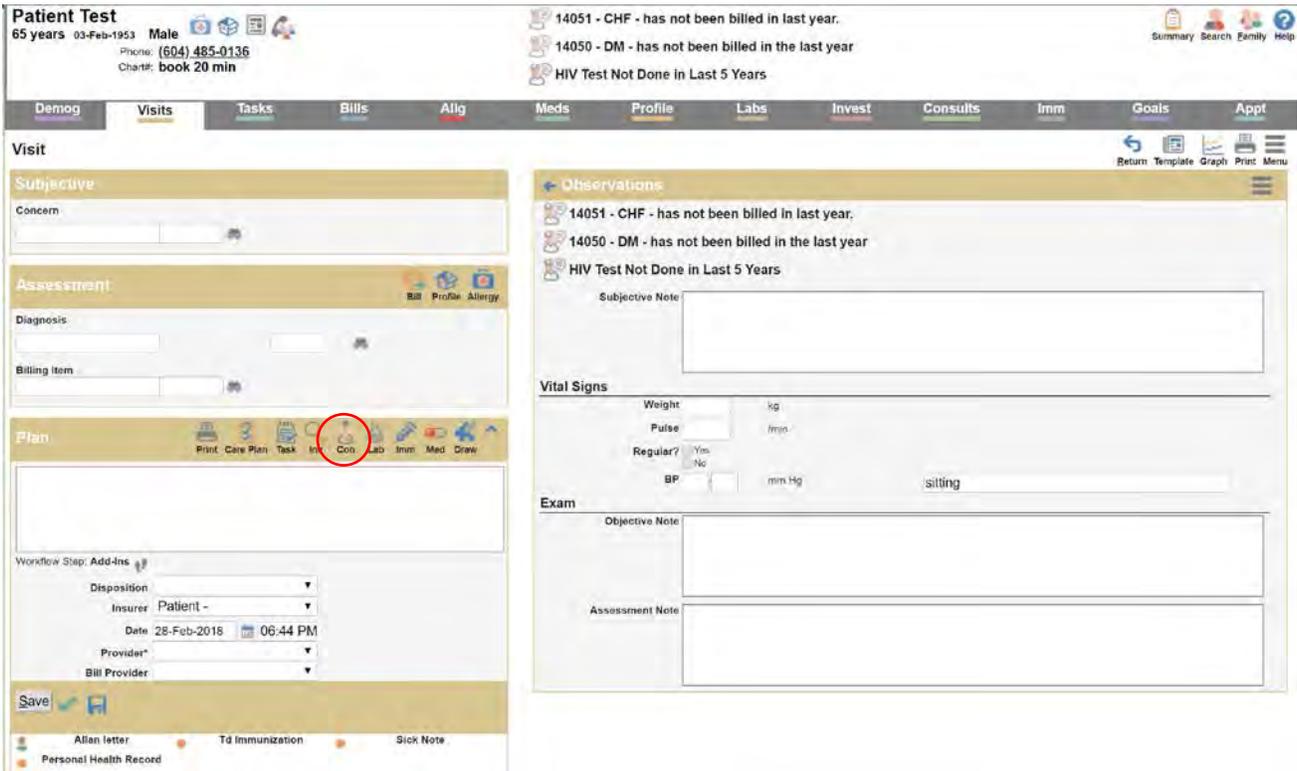


- ii. Slide the mouse pointer over "Form" on the dropdown list, this will open another dropdown list to select the Form you want from that dropdown list

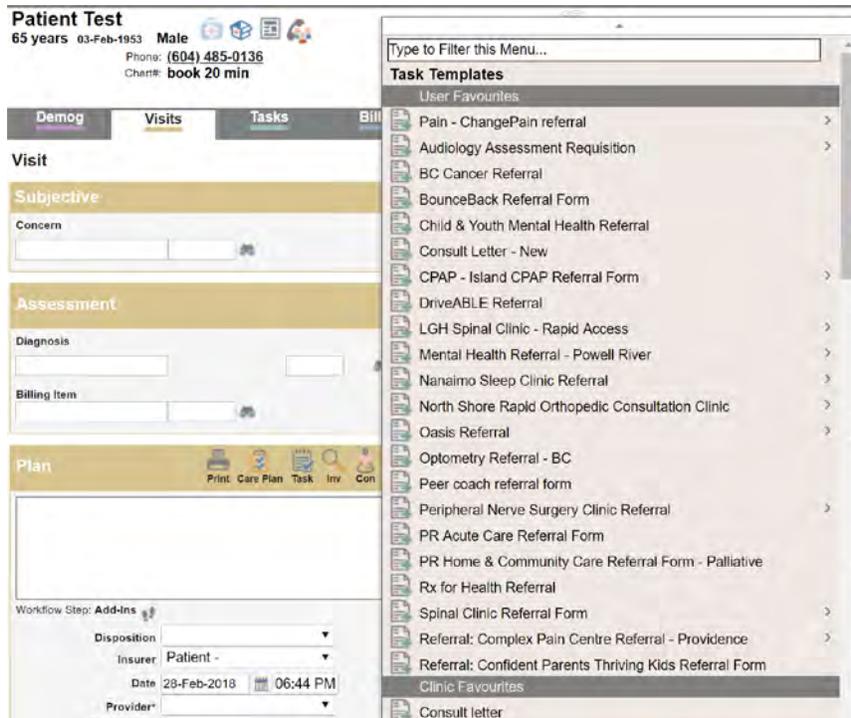


v. referral letters

- i. When writing a consult request during a patient visit, click on the “Con” icon  in the visit window.
- ii. This will open the default consult template

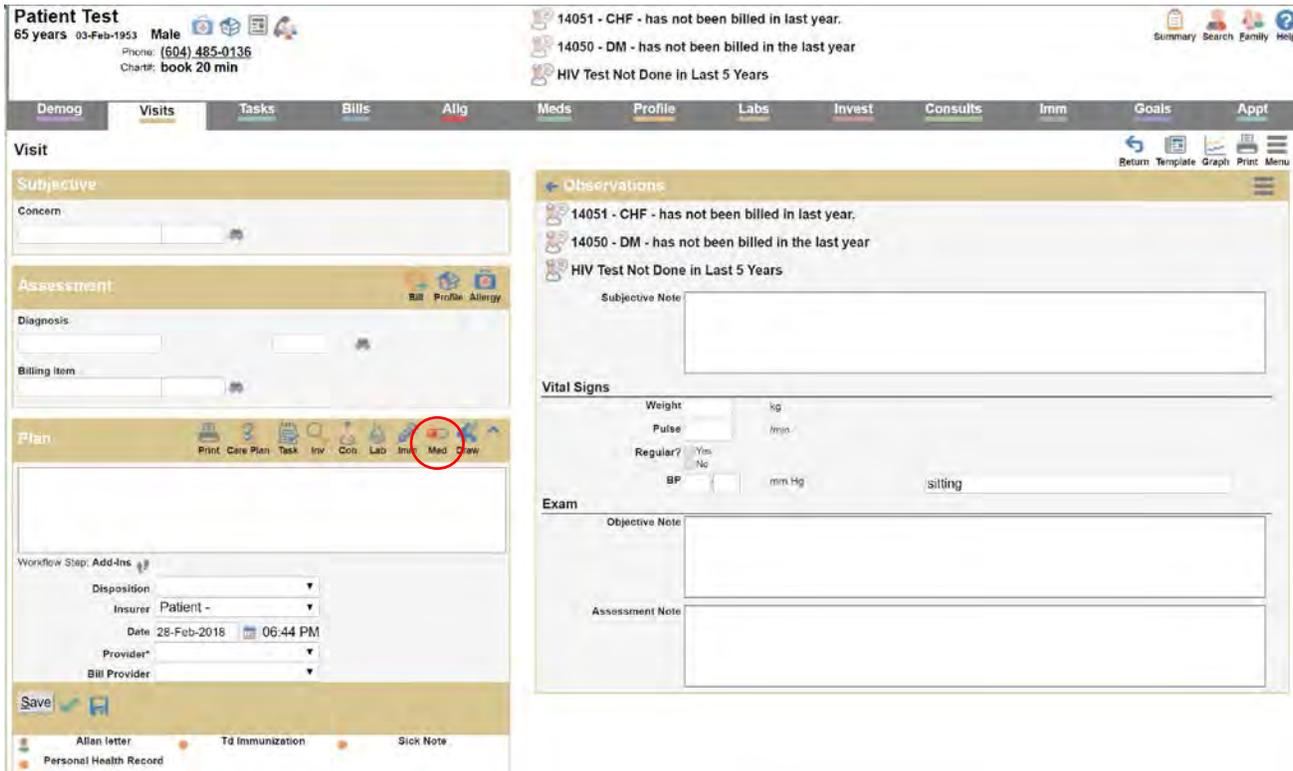


- iii. To see a list of other available consult requests, right click on the “Lab” icon . Select the consult request you want from the dropdown list



vi. Prescriptions

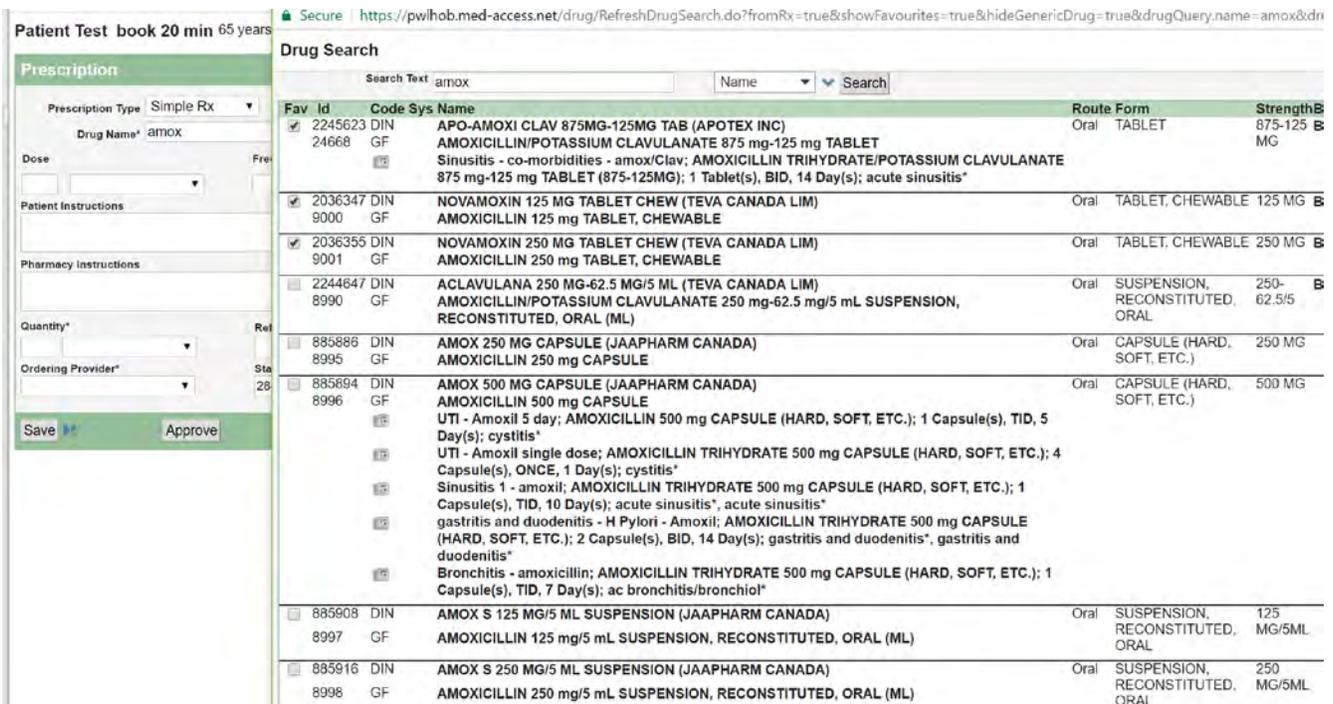
- i. When writing a prescription during a patient visit, click on the “Med” icon  in the visit window.



The screenshot shows a patient visit window for 'Patient Test', a 65-year-old male. The 'Plan' section at the bottom has a 'Med' icon circled in red. The 'Observations' section on the right lists medical conditions: '14051 - CHF - has not been billed in last year.', '14050 - DM - has not been billed in the last year', and 'HIV Test Not Done in Last 5 Years'. The 'Vital Signs' section shows 'sitting' for BP. The 'Exam' section has an 'Objective Note' field.

- 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.



The screenshot shows a 'Drug Search' window with 'amox' entered in the search text. The results table is as follows:

Fav	Id	Code	Sys. Name	Route	Form	Strength
2245623	DIN	24668	APO-AMOXI CLAV 875MG-125MG TAB (APOTEX INC)	Oral	TABLET	875-125 MG
2036347	DIN	9000	NOVAMOXIN 125 MG TABLET CHEW (TEVA CANADA LIM)	Oral	TABLET, CHEWABLE	125 MG
2036355	DIN	9001	NOVAMOXIN 250 MG TABLET CHEW (TEVA CANADA LIM)	Oral	TABLET, CHEWABLE	250 MG
2244647	DIN	8990	ACLAVULANA 250 MG-62.5 MG/5 ML (TEVA CANADA LIM)	Oral	SUSPENSION, RECONSTITUTED, ORAL	250-62.5/5
885886	DIN	8995	AMOX 250 MG CAPSULE (JAAPHARM CANADA)	Oral	CAPSULE (HARD, SOFT, ETC.)	250 MG
885894	DIN	8996	AMOX 500 MG CAPSULE (JAAPHARM CANADA)	Oral	CAPSULE (HARD, SOFT, ETC.)	500 MG
885908	DIN	8997	AMOX S 125 MG/5 ML SUSPENSION (JAAPHARM CANADA)	Oral	SUSPENSION, RECONSTITUTED, ORAL	125 MG/5ML
885916	DIN	8998	AMOX S 250 MG/5 ML SUSPENSION (JAAPHARM CANADA)	Oral	SUSPENSION, RECONSTITUTED, ORAL	250 MG/5ML

- i. Select the medication that you want and then fill in the rest of the prescription template with the appropriate instructions.

Patient Test book 20 min 65 years (604) 485-0136     

Prescription

Prescription Type: Simple Rx Continuous Short Term

Drug Name*: AMOXICILLIN 250 mg CAPSULE 

Generic Drug Name: AMOXICILLIN

Dose: 1 Capsule(s) Frequency: TID - Thre PRN Duration: 5 Day(s)

Patient Instructions:

Pharmacy Instructions:

Quantity*: 15 Capsule(s) Refills: Route*: Oral

Ordering Provider*: Start Date*: 28-Feb-2018  End Date*: 05-Mar-2018 

Warnings

Type
Drug-Allergy/Intolerance Interaction

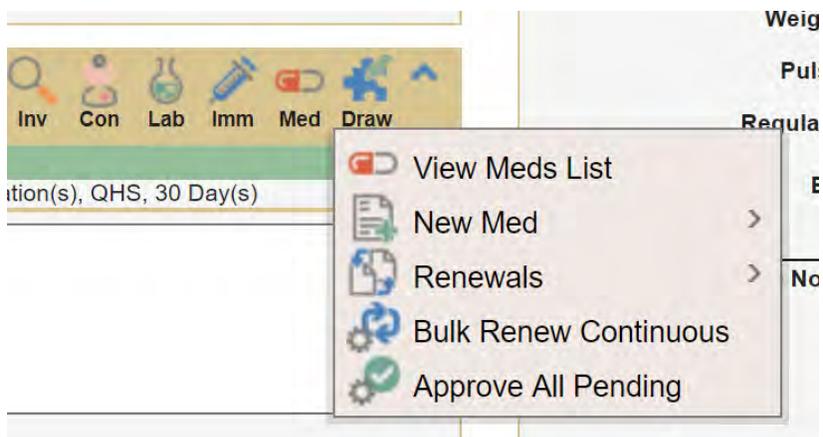
Drug Allergies and Intolerance

-  penicillin
- Penicillins: PENICILLIN V POTAS
- Ace Inhibitors: RAMIPRIL 10 mg

Observations

Signature

- ii. To print, click on "Approve and Preview". Then click on the blue "Print" button of the window that opens.
- iii. Note the prescription warning on the right to indicate that the patient has a penicillin allergy. The prescriber would have to manually over-ride the warning in order to print the prescription.
- iv. To see a list of other prescription tasks (like renew), right click on the "Med" icon . Select the task (like "Renewals" or "View Meds List") you want from the dropdown list



vii. Billing/coding

- i. Entering a billing and diagnostic code can be done from within patient visit

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults Imm Goals Appt

Visit

Subjective
Concern

Assessment
Diagnosis
Billing Item

Observations
14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Vital Signs
Weight: kg
Pulse: /min
Regular? Yes/No
BP: mm Hg sitting

Exam
Objective Note
Assessment Note

Disposition: Patient -
Date: 28-Feb-2018 06:44 PM
Provider:
Bill Provider:

Save
Allan letter TD Immunization Sick Note
Personal Health Record

- ii. Enter either text (e.g. "Hypertension") or ICD9 code (e.g. "401") in the "Diagnosis" box to display a list of available diagnostic descriptions or codes. Select the appropriate diagnostic code or description from the list displayed.

- iii. In the "Billing Item" type in the last 3 numbers of the billing code for 100 or 120 series and hit "enter" key, the first two numbers relating to the patient age will automatically enter. Use the full 5-digit diagnostic code for other billing codes (e.g. 14053, 14066, etc.).

Assessment
Diagnosis
essential hypertension* 401
Billing Item
100

Plan
Meds
DIFFERIN 0.1% CREAM 1 Application(s), QHS, 30 Day(s) New

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

- viii. On the schedule window, click on the “My Tasks” icon in the upper right

The screenshot shows the EMR interface for Dr. Katayoun Bahadori on February 28, 2018. The top navigation bar includes icons for 'Home', 'COM Billing', 'COI', 'Multi View', 'ODR - 30 Mos.', 'Pain OI', 'My Tasks' (circled in red), 'My Bills', 'My Apprx', 'Import', 'Outcomes', 'Reports', 'Msg', and 'Providers'. The main window displays a schedule window with a table of appointments. The right sidebar shows 'Urgent Tasks', 'All exclude Visits', and 'Active Abnormal Lab Results', all with 'Nothing found to display'.

Time	Patient	Primary # Chart #	Type	Concern	Appt Status	Billing Status	Bill	Diag
08:30								
08:45			regular	2w follow up (BP please)	Done	Pending	17100	401
09:00			regular	rx (BP please)	Done	Pending	17100	276, 348
09:15			regular	B12 and refills	Done	Pending	15300	728, 2811
09:30			regular	sick 2 weeks (BP please)	Done	Pending	00100	
09:45			Recall Appt	diarrhea	Done	Pending	18100	245, 276
10:15			Recall Appt	3 month follow up on kidney function	Done	Pending	18100	7844, 1053, 72743
10:30			Kali. for Appt	MTD, school exam form	Done	Edit		
11:00			regular	flu reflex med (weight and height please)	Done	Pending	00100	53081
11:15			Physical w Pap Kali.	H/Wt & Pap *** regiside	Done	Pending	14500	709
12:00			Lunch Break		Template			
12:30			Staff Meeting	Lunch's Assessment	Template			

- ix. The new window that opens has a list of all unfinished tasks, including new labs, electronic documents (e.g. referral consult responses, etc.), tasks from MOAs (e.g. phone messages, etc.), scanned results attached to a message task (e.g. investigation results)

The screenshot shows the 'My Tasks' window in the EMR system. The window displays a list of tasks with columns for Due, Patient, Description, Reason, and Recur. The task 'Lab, TSH' is circled in red.

Due	Patient	Description	Reason	Recur
28Feb18		Investigation, Ultrasound, US thyroid t/u, done 2016, needs 2019		none
28Feb18		Lab, General Information, Blood Gases Cord Arterial, General Information, Blood Gases Cord Venous, General Information, Bilirubin, General Information, Bilirubin		none
28Feb18		Lab, General Information, Blood Gases Cord Arterial, General Information, Blood Gases Cord Venous, General Information, Bilirubin, General Information, Bilirubin, General Information, Bilirubin		none
28Feb18		Consult, OE, Consultation Note		none
28Feb18	rela	Visit, ROUTINE PELVIC EXAM INCLUDING PAP, 14560, Female adult physical	other skin disorders*, pap smear ,709	none
28Feb18	rlr	Lab, PCCA Gynecological Cytology Report (PAP), PAP result		none
28Feb18		Lab, TSH		none
28Feb18		Investigation, X-Ray, chest- normal limits		none
28Feb18	ed,	Billing Message, Payee Payment Summary		none
28Feb18	role	Visil, VISIT IN OFFICE (AGE 50-59), 15300, SOAP with WT/HR/BP	dis of musclediff/fascia*, b12 defic anemia rec, neck tightness and choking sensation , 728, 281.1	none
28Feb18		Lab, Occult Blood Fecal		none
28Feb18	P	Lab, Occult Blood Fecal		none
28Feb18		Lab, Occult Blood Fecal		none

- x. Click on any description to open the task on that line. The task can be completed from the within the window that opens.

How do I access historical information?

- xi. To access any historical items from the patient's chart, click on the appropriate tab (e.g. visits, Tasks, Bills, Allg, Meds, Profile, Labs, Invest, Consults, Imm, Goals).

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg **Profile** Labs Invest Consults Imm Goals Appl

Visit filter - all visits

Task Start Date: All Start: All End: All Diagnosis: All Obs Template: Summary
Obs Name: Obs Value: Provider: All Status: All

Date	Provider	Concern	Diagnosis	Disposition
21Feb18			heart failure*, 428	
16Nov17		physical	obesity/hyperalimant*, Chronic pain, 278, 338.4	
26Aug16			heart failure*, 428	
27Jul16			heart failure*, 428	
12Apr16			epistaxis, 784.7	RTC as required
19Mar16			heart failure*, 428	
27Oct15			depressive disorder nec, 311	RTC 2 weeks
19Oct14				

- xii. This opens the historical items in this category. Any one line item can be opened by clicking on the observation.

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds **Profile** **Labs** Invest Consults Imm

All Labs

Complete Results

Date	Test Group Name	Observations
09Feb18 12:04 PM	Renal function	Creatinine 84 umol/l 64-100 Estimated GFR 72 ml/min 60-90 Urine ACR (Albumin/Creatinine Ratio) 1.7 mg/mmol m: <2.0, f: <2.8
01Feb18 12:05 PM Final		TSH 3.1 mU/L 0.34-4.82
18Jul16 09:02 AM	PAP result	
15Feb16 12:05 PM Final		Hemoglobin A1c 7.2 % H < 7.0
30Jul14 01:03 PM	*Lab Results: OB (BC)	Hemoglobin (3rd TM) 123 g/L 110 - 150 Maternal prenatal screening SIPs reassuring GBS Screen positive Copy to hospital
31May14 09:00 AM	INR Follow-up	Pattern for dose 1 2 days/wk Pattern dose 1 5 mg Pattern dose 2 8 mg Recurrence 1/12 Warfarin general guidelines
05Apr13 03:38 PM Final	Joint Fluid Culture	Patient: Test Patient 03FEB1943 M [Lab] Patient: PP Opted Out Test Patient 03FEB1933 M [EMR] Specimen Source Right elbow joint Aspirate 3+ Polymorphonuclear cells No organisms seen Gram Stain Report broadcast to: SMHEMG01 Date: 05/04/13 Time: 1916 Culture Staphylococcus epidermidis Isolated from broth culture only. ***** Updated Result ***** A prior result that was reported as final has been changed. Please note: Organism has been further identified. Susceptibilities have been added to this report. PLEASE NOTE THE ADDITION OF DAPTOMYCIN SUSCEPTIBILITY TO FINAL REPORT. MIC of DAPTOMYCIN is 0.5 mg/L. Interpretation: SUSCEPTIBLE Penicillin R Ampicillin R Cloxacillin R Cefazolin R Clindamycin S Vancomycin S

A. How do I log on?

1. In the office

- i. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- 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. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- ii. The EMR login authentication window will open
- iii. For Username, type in the Clinic EMR 6-character label given to you by the clinic administrator. (same as the 6 characters in the clinic EMR URL)
For Password, type in the 20 alpha-numeric password given to you by the clinic administrator.
Log in.
- iv. The EMR login window will open
- v. Type in the User Name and Password given to you by the office administrator. Login.

3. 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 visible in this window, including Tasks. This window is user configurable to show diverse types of displays.

4. How do I get to my patient's chart?

- i. From your schedule, click on the patient name of the chart that you want to access.
- ii. Once the chart is opened, click on the tab name of the section you want to open

5. How do I document a transaction:

i. SOAP note

- i. From the "Visits" tab window, click on the "New" icon in the upper right of the window
- ii. This opens the default SOAP note set for you by the administrator. The default SOAP can be changed to a different SOAP note by the clinic administrator
- iii. Once the notes are typed in, complete and close the visit by clicking on the green check  icon in the lower left corner.

ii. order investigations

- i. When ordering investigations during a patient visit, click on the "Inv" icon  in the visit window.
- ii. This will open the default investigation (often an imaging requisition).
- iii. To see a list of other available investigations, **right** click on the "Inv" icon . Select the investigation from the dropdown list

iii. Labs

- i. When ordering labs during a patient visit, click on the "Lab" icon  in the visit window.
- ii. This will open the default lab requisition.
- iii. To see a list of other available lab requisitions, **right** click on the "Lab" icon . Select the Lab requisition you want from the dropdown list

iv. forms

- i. When wanting a form during a patient visit, **right** click on the "Task" icon  in the visit window.

- ii. Slide the mouse pointer over “Form” on the dropdown list, this will open another dropdown list to select the Form you want from that dropdown list

v. referral letters

- i. When writing a consult request during a patient visit, click on the “Con” icon  in the visit window.
- ii. This will open the default consult template
- iii. To see a list of other available consult requests, **right** click on the “Lab” icon . Select the consult request you want from the dropdown list

vi. Prescriptions

- i. When writing a prescription during a patient visit, click on the “Med” icon  in the visit window.
- 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.
- v. To print, click on “Approve and Preview”. Then click on the blue “Print” button of the window that opens.
- vi. Note the prescription warning on the right to indicate that the patient has a penicillin allergy. The prescriber would have to manually over-ride the warning in order to print the prescription.
- vii. To see a list of other prescription tasks (like renew), **right** click on the “Med” icon . Select the task (like “Renewals” or “View Meds List”) you want from the dropdown list

vii. Billing/coding

- i. Entering a billing and diagnostic code can be done from within patient visit
- ii. Enter either text (e.g. “Hypertension”) or ICD9 code (e.g. “401”) in the “Diagnosis” box to display a list of available diagnostic descriptions or codes. Select the appropriate diagnostic code or description from the list displayed.
- iii. In the “Billing Item” type in the last 3 numbers of the billing code for 100 or 120 series and hit “enter” key, the first two numbers relating to the patient age will automatically enter. Use the full 5-digit diagnostic code for other billing codes (e.g. 14053, 14066, etc.).

B. How do I access my inbox (assigned transactions/tasks/lab work)?

1. On the schedule window, click on the “My Tasks” icon in the upper right
2. The new window that opens has a list of all unfinished tasks, including new labs, electronic documents (e.g. referral consult responses, etc.), tasks from MOAs (e.g. phone messages, etc.), scanned results attached to a message task (e.g. investigation results)
3. Click on any description to open the task on that line. The task can be completed from the within the window that opens.

C. How do I access historical information?

1. To access any historical items from the patient’s chart, click on the appropriate tab (e.g. visits, Tasks, Bills, Allergies, Meds, Profile, Labs, Invest, Consults, Immunizations, Goals).
2. This opens the historical items in this category. Any one-line item can be opened by clicking on the observation.