

# Guidelines and Process for Development of EMR Introduction Instruction Sheets

EMR Introduction Instruction Sheets for new users.

## Startup FAQs

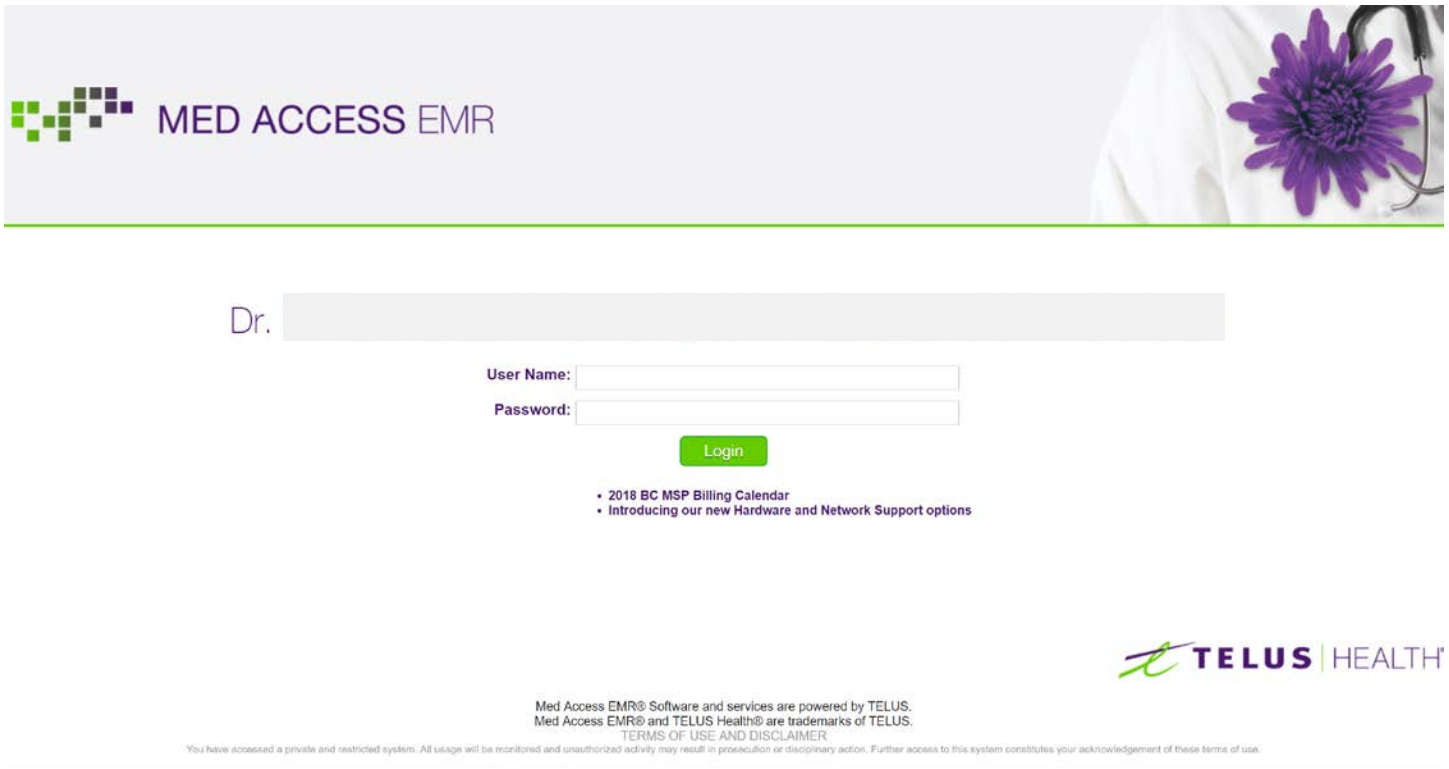
- i. How do I log on?
  - 1. In the office
  - 2. Remotely
- ii. How do I access my schedule?
- iii. How do I get to my patient's chart?
- iv. How do I document a transaction:
  - 1. SOAP note,
  - 2. order investigations,
  - 3. labs,
  - 4. forms
  - 5. reference letters
  - 6. Prescriptions
  - 7. 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**

## 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



The login screen for Med Access EMR features a header with the logo (a grid of green and purple squares) and the text "MED ACCESS EMR". To the right is a photograph of a white lab coat with a purple flower pinned to it and a stethoscope. Below the header is a login form with a "Dr." label followed by a grey input field. Below this are two input fields labeled "User Name:" and "Password:". A green "Login" button is positioned below the password field. Under the button, there are two links: "2018 BC MSP Billing Calendar" and "Introducing our new Hardware and Network Support options". At the bottom right is the "TELUS HEALTH" logo. Centered at the bottom is a disclaimer: "Med Access EMR® Software and services are powered by TELUS. Med Access EMR® and TELUS Health® are trademarks of TELUS. TERMS OF USE AND DISCLAIMER". At the very bottom, in small text, is a statement: "You have accessed a private and restricted system. All usage will be monitored and unauthorized activity may result in prosecution or disciplinary action. Further access to this system constitutes your acknowledgement of these terms of use."

Dr.

User Name:

Password:

Login

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

TELUS HEALTH

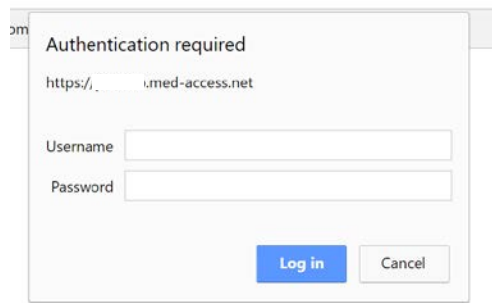
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Med Access EMR® and TELUS Health® are trademarks of TELUS.  
TERMS OF USE AND DISCLAIMER

You have accessed a private and restricted system. All usage will be monitored and unauthorized activity may result in prosecution or disciplinary action. Further access to this system constitutes your acknowledgement of these terms of use.

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

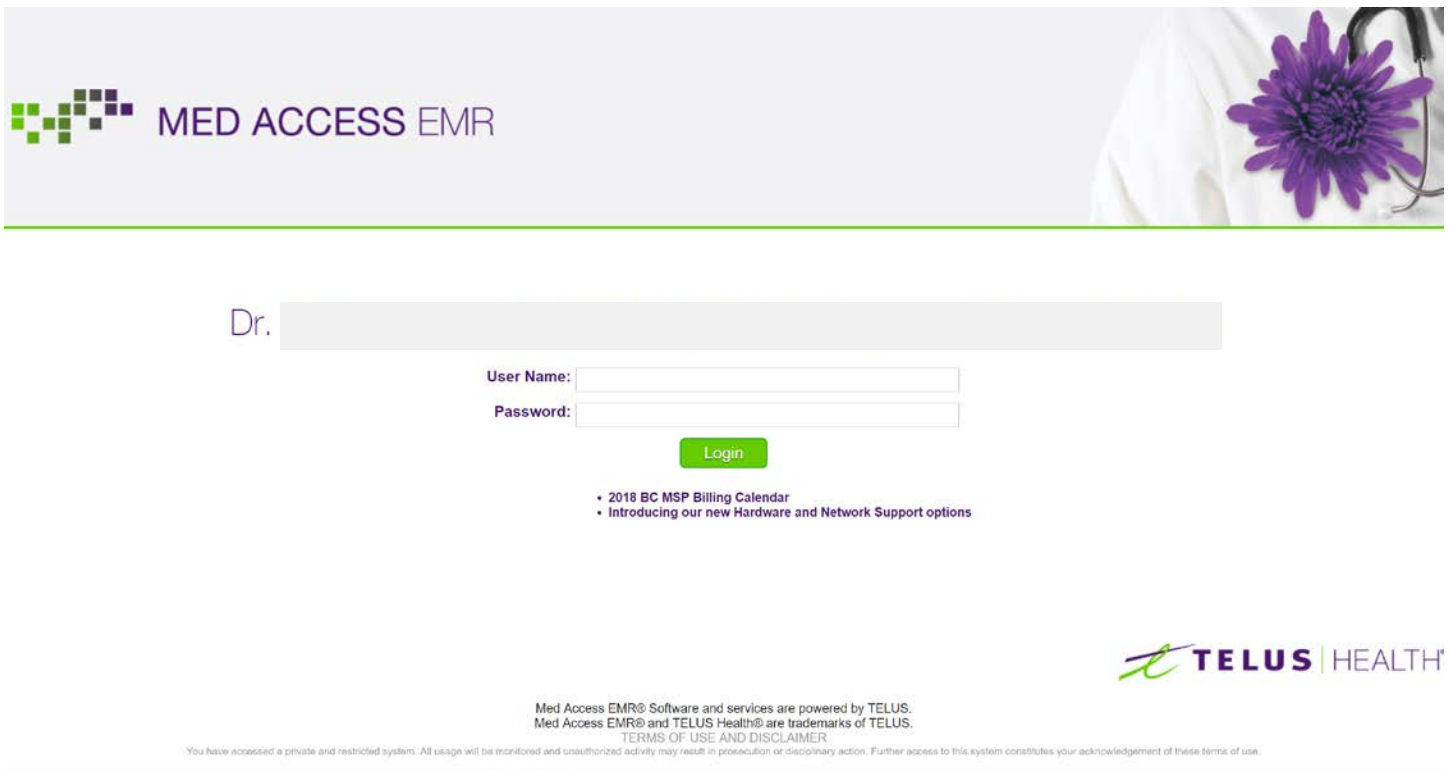
## 2. Remote Log in

- 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



A small dialog box titled "Authentication required" with a light gray background. It contains the URL "https://\*\*\*\*\*.med-access.net" and two input fields labeled "Username" and "Password". At the bottom right are two buttons: "Log in" (blue) and "Cancel" (gray).

- 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



The main login page for Med Access EMR. It features a header with the "MED ACCESS EMR" logo on the left and a medical-themed image on the right. Below the header is a large gray input field for the doctor's name, preceded by "Dr.". Underneath are fields for "User Name:" and "Password:", followed by a green "Login" button. A small list of links is visible: "2018 BC MSP Billing Calendar" and "Introducing our new Hardware and Network Support options". At the bottom, there is a "TELUS HEALTH" logo, a disclaimer about the system being private and restricted, and a link to "TERMS OF USE AND DISCLAIMER".

- 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 a medical practice management software interface. At the top, there is a navigation bar with various icons for different functions. Below this, a header section shows the date "Wed Feb 28, 2018" and a "Resident" label. The main area is a schedule table with columns: Time, Patient, Primary #, Chart #, Type, Concern, Appt Status, Billing Status, Bill, and Diag. The schedule shows appointments from 08:30 to 12:30. On the right side, there are three panels: "Urgent Tasks", "All exclude Visits", and "Active Abnormal Lab Results", all showing "Nothing found to display".

Time	Patient	Primary #	Chart #	Type	Concern	Appt Status	Billing Status	Bill	Diag
08:30									
08:45	1	1		regular	2w follow up (BP please)	Done	Pending	17100	401
09:00				regular	rx (BP please)	Done	Pending	17100	276, 346
09:15				regular	B12 and retilis	Done	Pending	15300	728, 2811
09:30				regular	sick 2 weeks (BP please)	Done	Pending	00100	
09:45				Recall Appt	diarrhea	Done	Pending	16100	244, 276
10:15				Recall Appt	3 month follow up on kidney function	Done	Pending	16100	7944, 9953, 72743
10:30	B	e		Kali 1st Appt	MTD, school exam form	Done	Edit		
11:00				regular	su reflux med ( weight and height please)	Done	Pending	00100	53081
11:15				Physical w Pap Kals	HbWt & Pap *** req/slide	Done	Pending	14500	709
12:00				Lunch Break		Template			
12:30				Staff Meeting		Template			

## 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.

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

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

## 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

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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 Filter Print New Help

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

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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 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).

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

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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**

**Subjective**  
Concern

**Assessment**  
Diagnosis  
Billing Item

**Plan**  
Print Care Plan Task Inv Gon Lab Imm Med Draw

Workflow Step: Add-Ins  
Disposition  
Insurer Patient -  
Date 28-Feb-2018 06:44 PM  
Provider\*  
Bill Provider

Save


Allan letter Td Immunization Sick Note  
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. To see a list of other available investigations, right click on the “Inv” icon . Select the investigation from the dropdown list

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

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

Workflow Step: Add-Ins  
Disposition  
Insurer Patient -  
Date 28-Feb-2018 06:44 PM  
Provider\*  
Bill Provider

Save

Recovery Draft Saved: 06:47 PM 28-Feb-2018  
Allan letter Td Immunization  
Personal Health Record

Type to Filter this Menu...

**Task Templates**


User Favourites

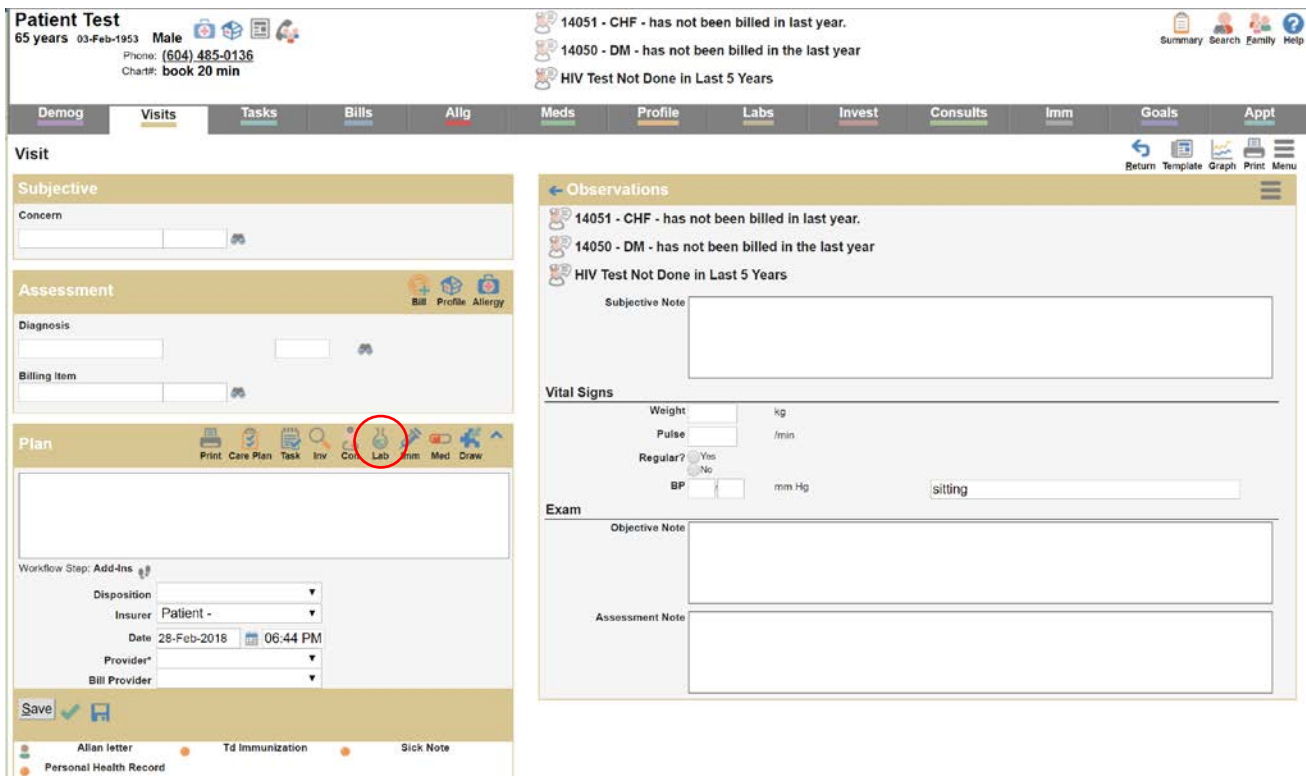
- \*DI Req: Echocardiogram Requisition (BC)
- Breast Imaging
- Cardiology Investigation Requisition
- DI Req: MRI VIHA
- Echocardiogram - St. Paul's
- MRI - Comox Valley
- Oceanside Imaging Requisition
- Overnight Oximetry - Pacific Sleep Care
- XRay Imaging Requisition
- Pulmonary Function Test
- Pulmonary Function Test Req

Clinic Favourites


- 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
- WorkSafe BC Imaging Requisition

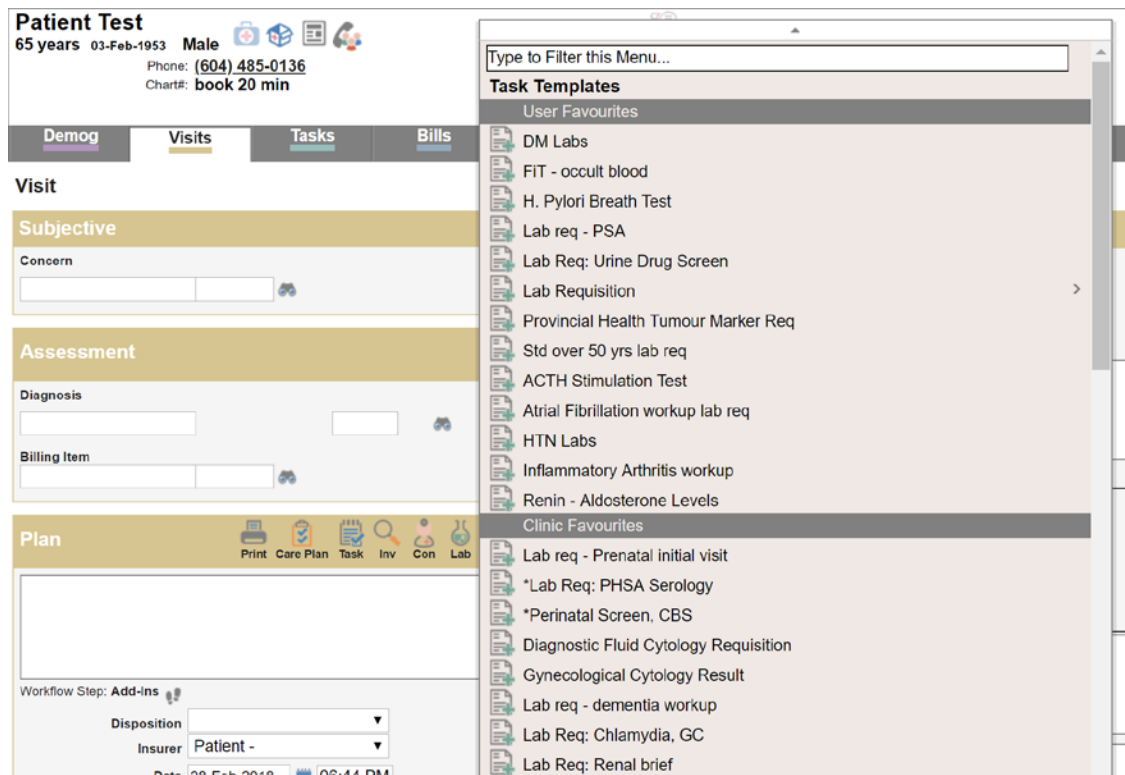
iii. Labs

- 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' interface for a 65-year-old male patient. The top navigation bar includes tabs for Demog, Visits, Tasks, Bills, Allg, Meds, Profile, Labs, Invest, Consults, Imm, Goals, and Appt. The 'Visits' tab is active. The 'Plan' section at the bottom has a toolbar with icons for Print, Care Plan, Task, Inv, Con, Lab, Imm, Med, and Draw. The 'Lab' icon is 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 includes fields for Weight, Pulse, Regular?, BP, and a dropdown for sitting. The 'Exam' section has fields for Objective Note and Assessment Note.

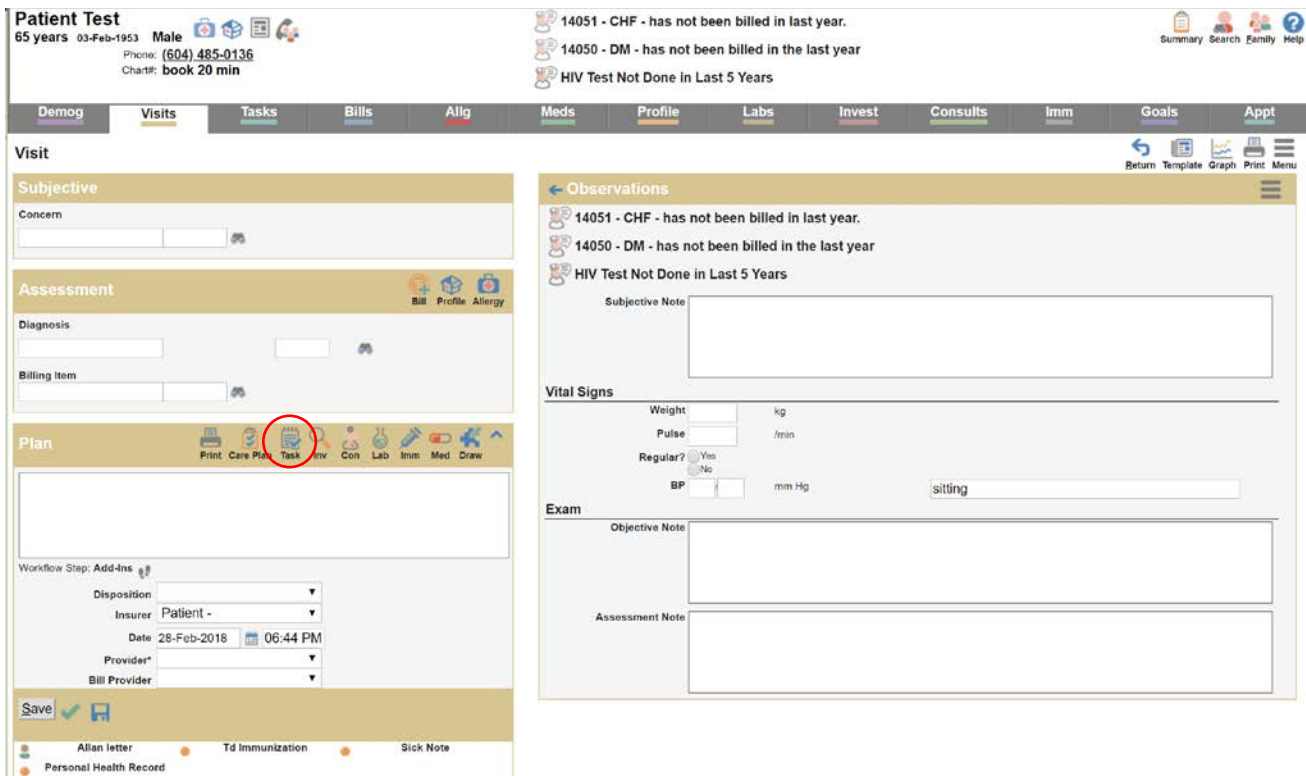
- iii. To see a list of other available lab requisitions, right click on the “Lab” icon . Select the Lab requisition you want from the dropdown list



The screenshot shows the 'Patient Test' interface with the 'Lab' icon right-clicked, displaying a dropdown menu. The menu is titled 'Task Templates' and lists various lab requisitions under '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.

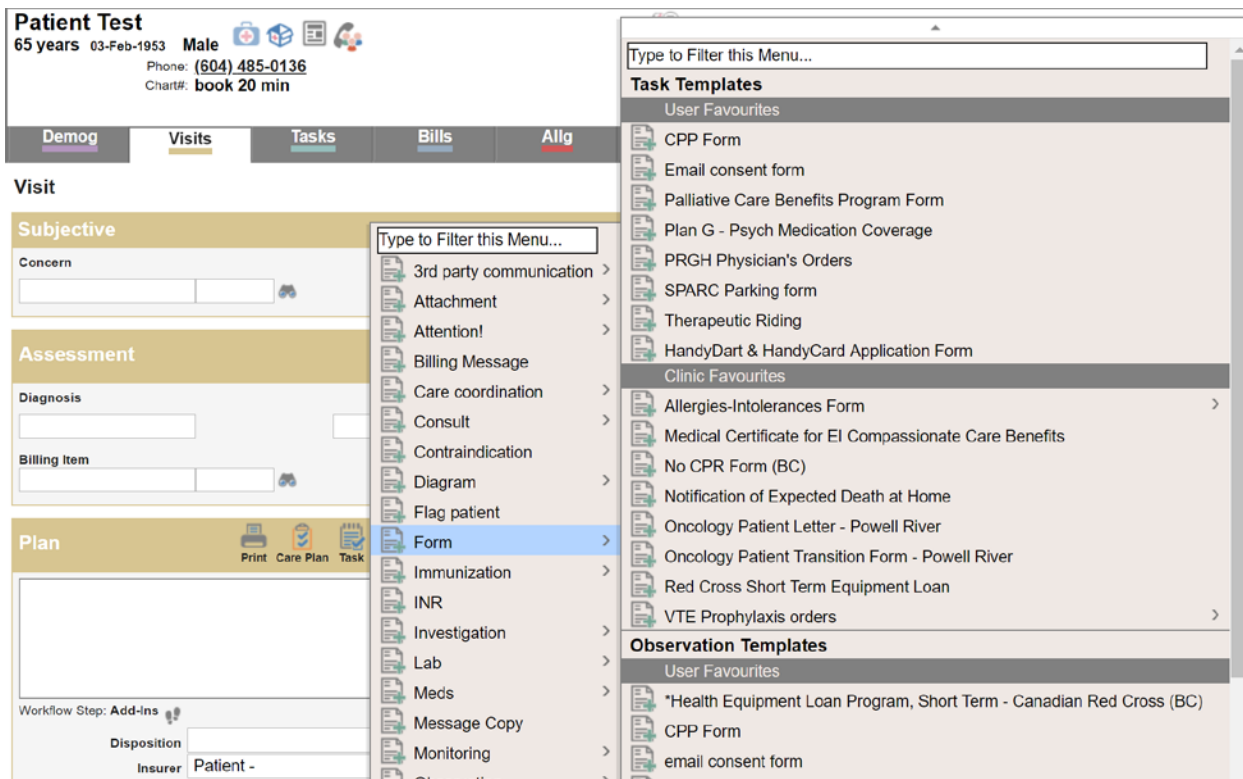
iv. forms

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




The screenshot shows the 'Patient Test' visit window for a 65-year-old male. The 'Visit' tab is active, and the 'Task' icon in the 'Plan' section is circled in red. The 'Observations' section on the right lists medical history 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 includes fields for Weight, Pulse, Regular?, BP, and a dropdown for 'sitting'. The 'Exam' section has fields for Objective Note and Assessment Note. The 'Plan' section includes a 'Workflow Step: Add-Ins' dropdown and a 'Save' button.

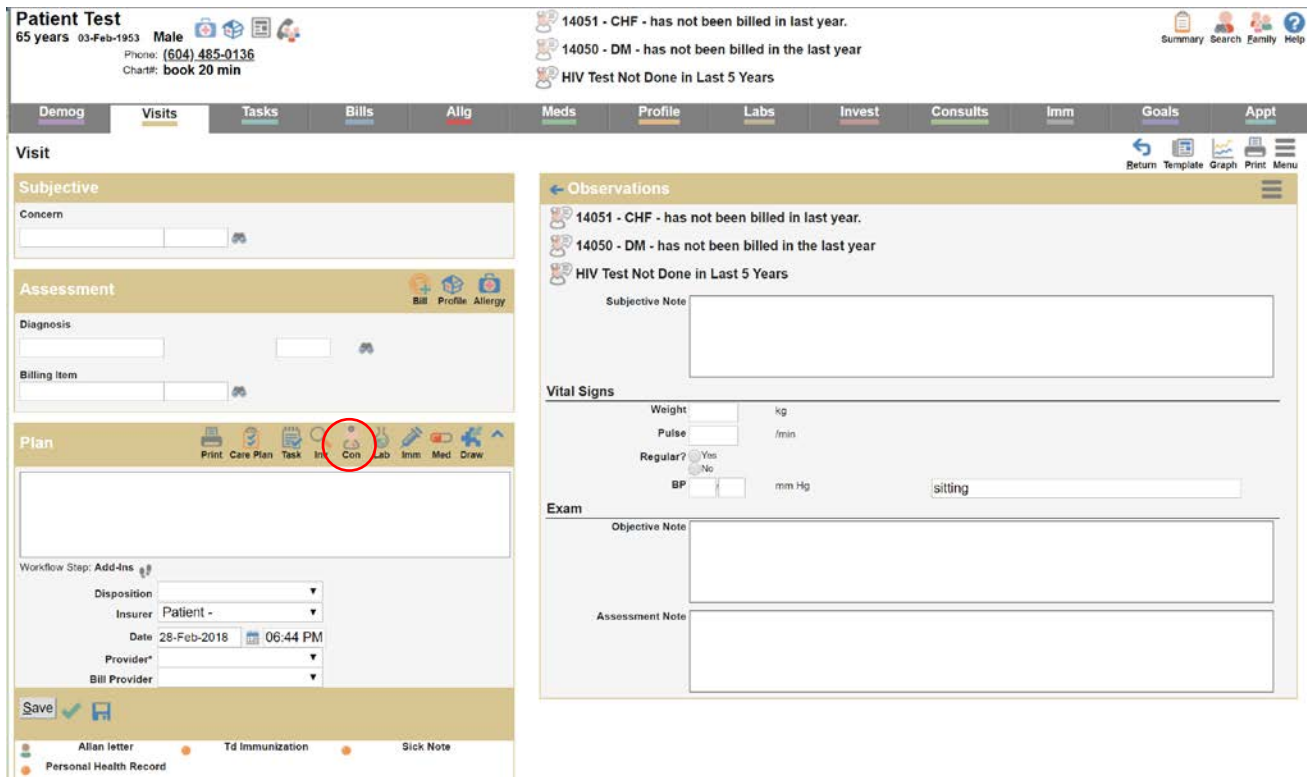
- ii. Slide the mouse pointer over “Form” on the dropdown list, this will open another dropdown list to select the Form you want from that dropdown list



The screenshot shows the 'Patient Test' visit window with the 'Task' icon dropdown menu open. The menu is titled 'Type to Filter this Menu...' and lists various forms under 'Task Templates' and 'Observation Templates'. The 'Form' option is highlighted in blue. The 'Task Templates' list includes: 'User Favourites', 'CPP Form', 'Email consent form', 'Palliative Care Benefits Program Form', 'Plan G - Psych Medication Coverage', 'PRGH Physician's Orders', 'SPARC Parking form', 'Therapeutic Riding', 'HandyDart & HandyCard Application Form', 'Clinic Favourites', 'Allergies-Intolerances Form', 'Medical Certificate for EI Compassionate Care Benefits', 'No CPR Form (BC)', 'Notification of Expected Death at Home', 'Oncology Patient Letter - Powell River', 'Oncology Patient Transition Form - Powell River', 'Red Cross Short Term Equipment Loan', and 'VTE Prophylaxis orders'. The 'Observation Templates' list includes: 'User Favourites', '\*Health Equipment Loan Program, Short Term - Canadian Red Cross (BC)', 'CPP Form', and 'email consent form'.

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



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Chart#: book 20 min

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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**

**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


Allan letter Td Immunization Sick Note  
Personal Health Record

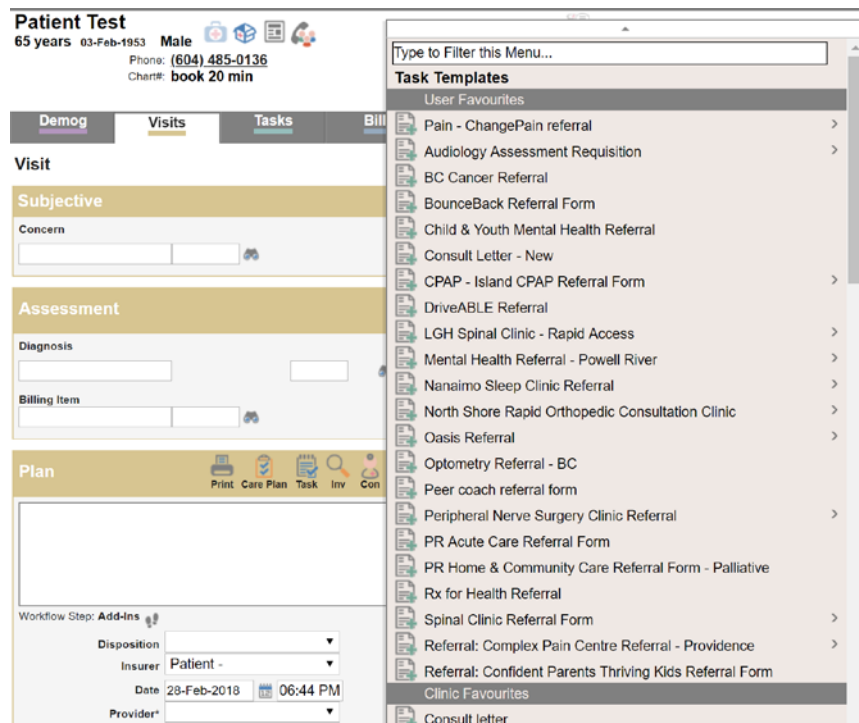
**Observations**  
14051 - CHF - has not been billed in last year.  
14050 - DM - has not been billed in the last year  
HIV Test Not Done in Last 5 Years

Subjective Note

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

**Exam**  
Objective Note  
Assessment Note

- iii. 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



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

Demog Visits Tasks Bills

**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

Type to Filter this Menu...

**Task Templates**


User Favourites

- Pain - ChangePain referral
- Audiology Assessment Requisition
- BC Cancer Referral
- BounceBack Referral Form
- Child & Youth Mental Health Referral
- Consult Letter - New
- CPAP - Island CPAP Referral Form
- DriveABLE Referral
- LGH Spinal Clinic - Rapid Access
- Mental Health Referral - Powell River
- Nanaimo Sleep Clinic Referral
- North Shore Rapid Orthopedic Consultation Clinic
- Oasis Referral
- Optometry Referral - BC
- Peer coach referral form
- Peripheral Nerve Surgery Referral
- PR Acute Care Referral Form
- PR Home & Community Care Referral Form - Palliative
- Rx for Health Referral
- Spinal Clinic Referral Form
- Referral: Complex Pain Centre Referral - Providence
- Referral: Confident Parents Thriving Kids Referral Form

Clinic Favourites

- Consult letter

## vi. Prescriptions

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

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65 years 03-Feb-1953 Male  
Phone: (604) 485-0136  
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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**

**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

Allan letter Td Immunization Sick Note  
Personal Health Record

**Observations**  
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

Subjective Note

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

**Exam**  
Objective Note  
Assessment Note

- 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.

**Patient Test** book 20 min 65 years

**Prescription**  
Prescription Type Simple Rx  
Drug Name\* amox  
Dose  
Patient Instructions  
Pharmacy Instructions  
Quantity\*  
Ordering Provider\*  
Save Approve

**Drug Search**  
Search Text amox Name Search

Fav	Id	Code	Sys	Name	Route	Form	Strength
✓	2245623	DIN	GF	APO-AMOXI CLAV 875MG-125MG TAB (APOTEX INC)	Oral	TABLET	875-125 MG
	24668	GF		AMOXICILLIN/POTASSIUM CLAVULANATE 875 mg-125 mg TABLET Sinusitis - co-morbidities - amox/Clav; AMOXICILLIN TRIHYDRATE/POTASSIUM CLAVULANATE 875 mg-125 mg TABLET (875-125MG); 1 Tablet(s), BID, 14 Day(s); acute sinusitis*			
✓	2036347	DIN	GF	NOVAMOXIN 125 MG TABLET CHEW (TEVA CANADA LIM)	Oral	TABLET, CHEWABLE	125 MG
	9000	GF		AMOXICILLIN 125 mg TABLET, CHEWABLE			
✓	2036355	DIN	GF	NOVAMOXIN 250 MG TABLET CHEW (TEVA CANADA LIM)	Oral	TABLET, CHEWABLE	250 MG
	9001	GF		AMOXICILLIN 250 mg TABLET, CHEWABLE			
	2244647	DIN	GF	ACLAVULANA 250 MG-62.5 MG/5 ML (TEVA CANADA LIM)	Oral	SUSPENSION, RECONSTITUTED, ORAL	250-62.5/5
	8990	GF		AMOXICILLIN/POTASSIUM CLAVULANATE 250 mg-62.5 mg/5 mL SUSPENSION, RECONSTITUTED, ORAL (ML)			
	885886	DIN	GF	AMOX 250 MG CAPSULE (JAAPHARM CANADA)	Oral	CAPSULE (HARD, SOFT, ETC.)	250 MG
	8995	GF		AMOXICILLIN 250 mg CAPSULE			
	885894	DIN	GF	AMOX 500 MG CAPSULE (JAAPHARM CANADA)	Oral	CAPSULE (HARD, SOFT, ETC.)	500 MG
	8996	GF		AMOXICILLIN 500 mg CAPSULE UTI - Amoxil 5 day; AMOXICILLIN 500 mg CAPSULE (HARD, SOFT, ETC.); 1 Capsule(s), TID, 5 Day(s); cystitis* UTI - Amoxil single dose; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 4 Capsule(s), ONCE, 1 Day(s); cystitis* Sinusitis 1 - amoxil; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 1 Capsule(s), TID, 10 Day(s); acute sinusitis*, acute sinusitis* gastritis and duodenitis - H Pylori - Amoxil; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 2 Capsule(s), BID, 14 Day(s); gastritis and duodenitis*, gastritis and duodenitis* Bronchitis - amoxicillin; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 1 Capsule(s), TID, 7 Day(s); ac bronchitis/bronchiol*			
	885908	DIN	GF	AMOX S 125 MG/5 ML SUSPENSION (JAAPHARM CANADA)	Oral	SUSPENSION, RECONSTITUTED, ORAL	125 MG/5ML
	8997	GF		AMOXICILLIN 125 mg/5 mL SUSPENSION, RECONSTITUTED, ORAL (ML)			
	885916	DIN	GF	AMOX S 250 MG/5 ML SUSPENSION (JAAPHARM CANADA)	Oral	SUSPENSION, RECONSTITUTED, ORAL	250 MG/5ML
	8998	GF		AMOXICILLIN 250 mg/5 mL SUSPENSION, RECONSTITUTED, ORAL (ML)			

- 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

Save
Approve
Approve & Preview

### Warnings

Type

**Drug-Allergy/Intolerance Interaction**

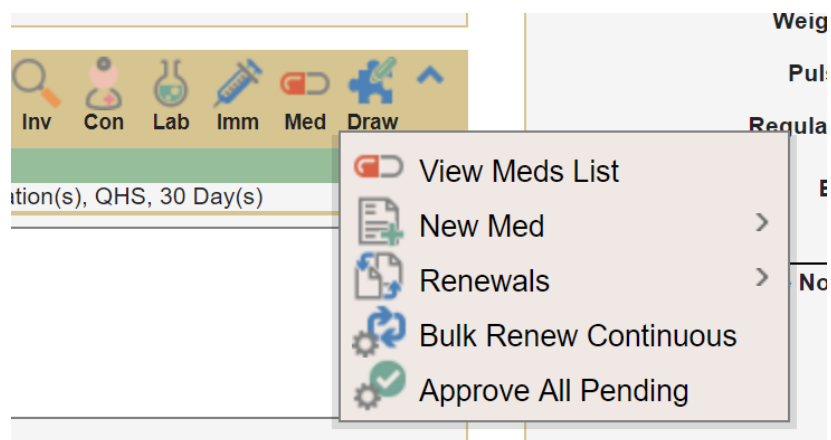
**Drug Allergies and Intolerance**

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

The screenshot shows the 'Patient Test' interface for a 65-year-old male. The top navigation bar includes tabs for Demog, Visits, Tasks, Bills, Allg, Meds, Profile, Labs, Invest, Consults, Imm, Goals, and Appt. The 'Assessment' section is highlighted with a red circle, showing fields for 'Diagnosis' and 'Billing Item'. The 'Observations' section on the right contains a list of alerts: '14051 - CHF - has not been billed in last year.', '14050 - DM - has not been billed in last year', and 'HIV Test Not Done in Last 5 Years'. Below the alerts are sections for 'Vital Signs' and 'Exam'.

- 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.).

The screenshot shows the 'Assessment' section with the 'Diagnosis' field containing 'essential hypertension\*' and the 'Billing Item' field containing '100'. The 'Plan' section below shows a medication entry: 'DIFFERIN 0.1% CREAM' with instructions '1 Application(s), QHS, 30 Day(s)' and a status of '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 Messenger interface. At the top, there's a header with user information: "Dr. D. Marentette, Dr. C. Van Zyl, Dr. P. Simpson & Dr. K. Bahadori" and "Bruce Campbell Hobson". Below this is a navigation bar with various icons. The "My Tasks" icon, which looks like a calendar with a checkmark, is circled in red. The main area displays a patient schedule for "Wed Feb 28, 2018 - Dr. Katayoun Bahadori". The schedule table has columns for Time, Patient, Primary #, Type, Concern, Appt Status, Billing Status, Bill, and Diag. The right sidebar shows sections for "Urgent Tasks", "All exclude Visits", and "Active Abnormal Lab Results", all of which currently show "Nothing found to display".

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. It has a filter bar at the top with options for Start, End, Group, Owner, Category, Type, Description, and Status. Below the filter bar is a table of tasks. The table has columns for Due, Patient, Description, Reason, and Recur. One task is circled in red: "Lab, TSH".

Due	Patient	Description	Reason	Recur
28Feb18	ssia	Investigation, Ultrasound, US thyroid f/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, 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	iel	Visit, ROUTINE PELVIC EXAM INCLUDING PAP, 14560, Female adult physical	other skin disorders", pap smear , 709	none
28Feb18	rlv	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	Visit, VISIT IN OFFICE (AGE 50-59), 15300, SOAP with WT/HR/BP	dis of musclediffifascia", b12 defic anemia nec, neck tightness and choking sensation , 726, 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 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	Hobson, Bruce Campbell		heart failure* , 428	
16Nov17	Hobson, Bruce Campbell	physical	obesity/hyperalimnet* , Chronic pain , 278, 338.4	
26Aug16	Hobson, Bruce Campbell		heart failure* , 428	
27Jul16	Van Zyl, Charles		heart failure* , 428	
12Apr16	Roehlig, Natalia		epistaxis , 784.7	RTC as required
19Mar16	Van Zyl, Charles		heart failure* , 428	
27Oct15	Hobson, Bruce Campbell		depressive disorder nec , 311	RTC 2 weeks
19Oct14	Hobson, Bruce Campbell			

- 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 Warfein general guidlines
05Apr13 03:38 PM Final	Joint Fluid Culture	Patient: Test, Patient 03FEB1943 M [Lab] Patient: PP Opted Out Test, Patient 03FEB1953 M [EMR] Specimen Source Right elbow joint Aspirate 3+ Polymorphonuclear cells No organisms seen Report broadcast to: SMHEMG01 Date: 05/04/13 Time: 1816 Culture Staphylococcus epidermidis Isolated from broth culture only. ***** Updated Result ***** 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

Gram Stain

## 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.