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:
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   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?
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.
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.
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.

vii. Once the chart is opened, click on the tab name of the section you want to open.
How do I document a transaction:

i. SOAP note

ii. From the “Visits” tab window, click on the “New” icon in the upper right of the window

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

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

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

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

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).

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).

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

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   i. When writing a consult request during a patient visit, click on the “Con” icon in the visit window.
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   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.