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www.AccuroEMR.com

ISC Clinical (Nurse/Physician) Accuro EMR User guide

Train the Trainer Content

Prepared for First Nations Inuit Health Branch

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CONTENT

INTRODUCTION

These Course Notes will support Nursing Staff assigned to ISC FNIHB stations that have implemented Accuro EMR.
It includes information needed to perform some administrative actions and all patient service duties in Accuro. Each user has access to the features in Accuro that comply with their specific role in the station.

ALL USERS WILL BE PROVIDED WITH A USERNAME AND PASSWORD TO ACCESS THE EMR – THERE WILL BE AN ACCURO EMR ICON ON EACH STATION DESKTOP. IF YOU ARE UNABLE TO LOG FOR ANY REASON – PLEASE CALL THE SUPPORT DESK FOR ASSISTANCE.

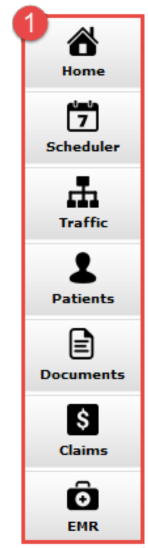
1.866.729.8889

NAVIGATION/ORIENTATION

FUNCTION KEYS
Keyboard strips are provided to staff when training and will be available at all station computers. This is a quick reference to the commands assigned to the Function Keys on the keyboard.

Patient Search	Provider Section	Patient Chart	Appointment History	Patient Documents	New Patient	Tasks	Status History	Chart Sheet	New Note
F1	F2	F3	F4	F5	F6	F7	F8	F9	F11

ACCURO LAYOUT/ORIENTATION



1. **Accuro Navigation Bar**: These are the Modules in Accuro that your role has access to.

2. **Accuro Start Menu**: Click on the Accuro Start Menu or press Alt to open the menus and tools available to your role.

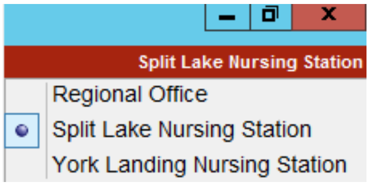
   Accuro User Guide: A searchable User Guide for all Sections in Accuro. Available under the Help section of the Accuro Start Menu.

Action Bar: Custom quick action buttons can be created in User Preferences, these are a quick way to access configured items e.g. e-Chart, Vitals panel, Forms etc. and are can be displayed in your Accuro window.

Patient Status Bar: The global Patient Status bar is found at the top of the Accuro window. When you search and select a patient, their demographic information appears in this bar.
**Tip – make sure this bar is always visible when completing forms/templates etc.*
**Tip – glance up when charting to ensure you are charting on the intended patient.*

NOTIFICATION AREA: in the bottom left of the accuro screen is your notification area. this will display a numerical count when there are items for your attention.

Moving between Offices (Stations): The EMR will be set up with multiple nursing stations – the station name is displayed in the top right-hand corner of the window in the red banner.
It is important when working in the EMR to ensure you are working in the correct Office/Station, if your account has been assigned to more than one. Clicking on the station name will enable a drop-down list to select from.



<u>If leaving your computer, to ensure privacy requirements are met you must lock your Accuro screen. There is an easy way to do this quickly</u>:

Screen Lock: Pres ALT +F12 to lock the screen. Press Alt +F12 again to unlock.

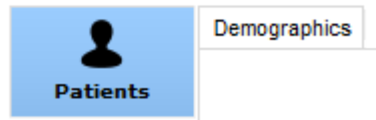
Contacting Accuro:

For general assistance, password resets etc. you will need to contact our service desk. This can be done either by phone, or by submitting a request via the help menu.

1. Call 1 (866) 729 – 8889
2. Accuro start icon > Help > Send Feedback. This will ask for your e-mail contact, a subject and type of feedback. *This is not an encrypted messaging tool – DO NOT send along any patient information via this method.

Accuro Log Out:
It is important at the end of your session you log out of the EMR. There will be a logout button configured in your quick action keys.

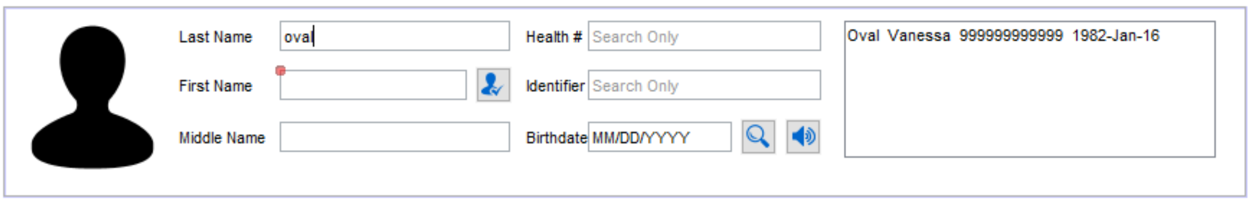
PATIENT MODULE



Patient Search

Patients can be searched, added and edited in this module.

To complete a patient search, press F1 to clear all fields. When information is entered in the search fields – patient results are shown in the box on the right. Patients can be searched using the following:



Last Name, First Name, Middle Name These can be complete names or 3 or more starting letters.

Health # Enter the Health-card or PHIN. If searching an Ontario card, do not use the version code.

Phone Number Search for the phone number by entering the 7 digit phone number with the dash after the first 3 digits. This does not include the Area Code.
For an example phone number of 123-456-7890 search **456-7890**
Complete the demographic tab with all basic patient information, special considerations:

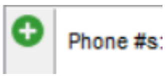
Birthdate Enter the date of birth in the format **MM/DD/YYYY**
A double click on any calendar field in Accuro will bring up a calendar to use.

**If you find the patient in the system – click on the name displayed in the results box and the patient details are loaded into the demographic tab below.*
**If you do not find your patient – they can be entered by completing the name fields along with the content in the demographic tab. Click on the 'add patient' button at the bottom to save.*
Special areas to consider:

Deceased
To mark a patient as deceased, click the Deceased checkbox. A date of death can be added as well as a note if needed. Once marked as deceased, any future appointments are deleted, and if the patient record is searched and selected – an alert will pop up to inform you that the patient is deceased. The font in the demographic status bar will also display in red.

Patient Address and Note
Enter the patient's address. Multiple addresses can be added for the patient by using the Add button on the left. The note field can be used to describe the different addresses.

Phone Numbers
Accuro can add three phone numbers for a patient, home, work and cell.
The Preferred Contact Method dropdown list sets which number the patient would prefer to be contacted on. This option bolds the selected phone number. There is an additional add icon to allow for any additional contact numbers.

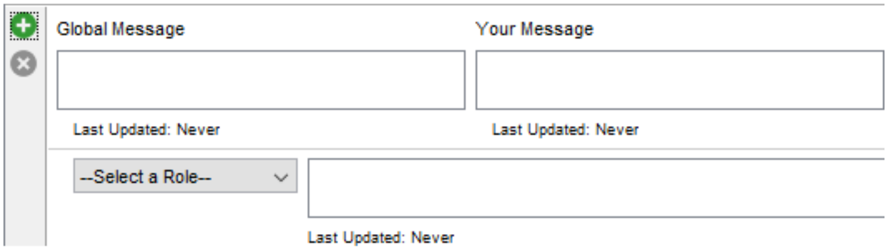


Custom Fields: There are also custom fields to complete regarding important patient information. These house information that has been created by ISC.

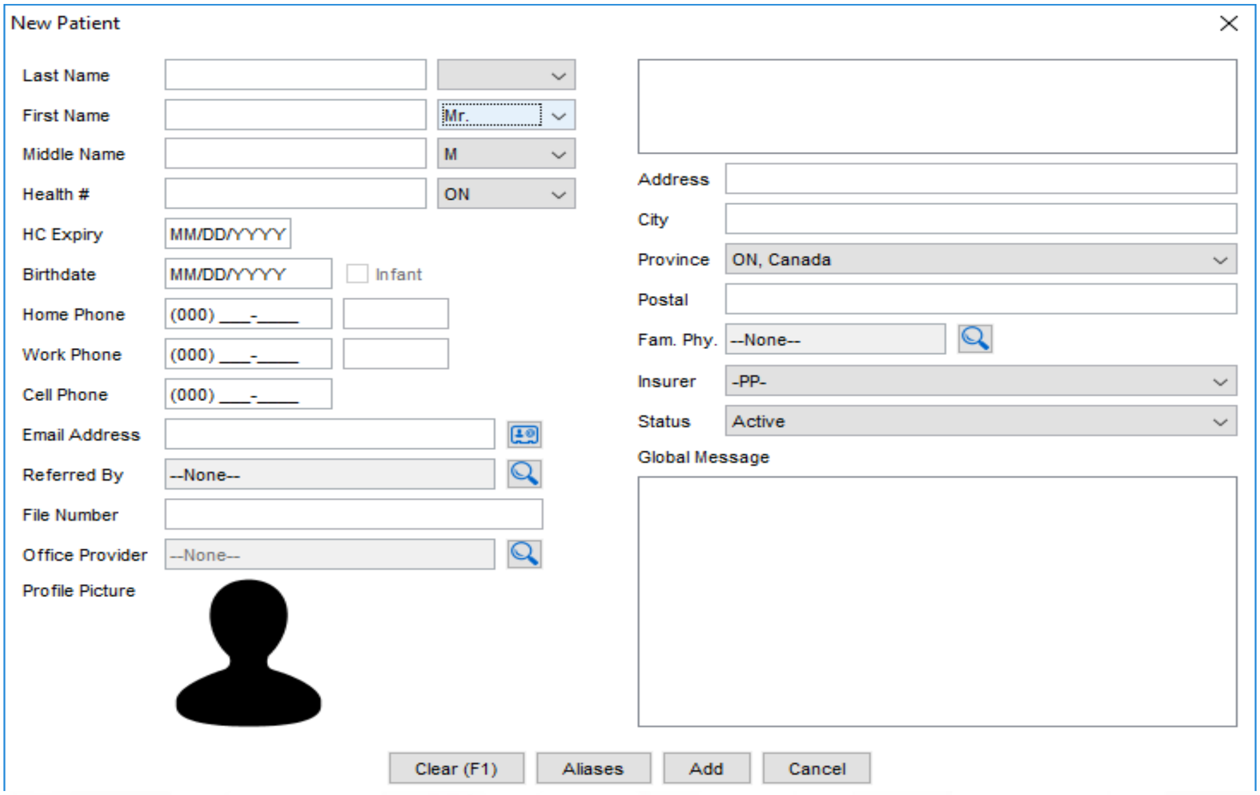
Alias
If the patient is 'known by' or has a 'preferred' name, this can be captured in the Alias field. First and Last Names are required, an Alias Type can be chosen. You can search a patient using their Alias name – the demographics will display in *italics,* but on selection load the confirmed patient name (as on their provincial health card).

Global Message
A saved global message acts as a Pop-Up alert when that patient is selected/loaded and if entered in 'Your Message' comes up only for your own user account.

Press the Add button on the left to create a new Global Message for a targeted role from the dropdown list. This will ensure messages can be viewed by the appropriate teams/groups.

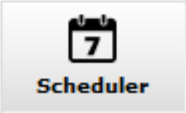


A patient registration can also be done by pressing **F6**. This is accessible from anywhere in Accuro.



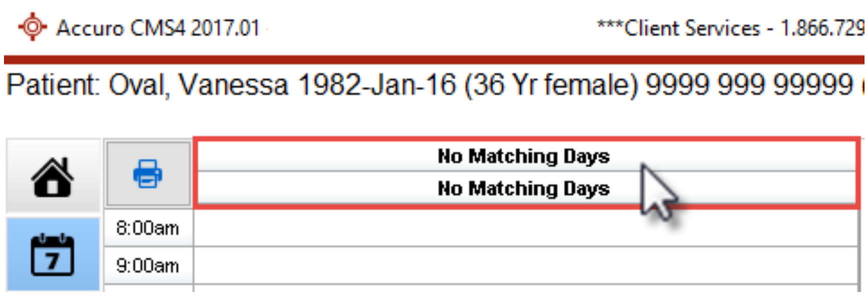
**This is considered a 'Quick Patient Add' and does not include all patient fields.*

SCHEDULER

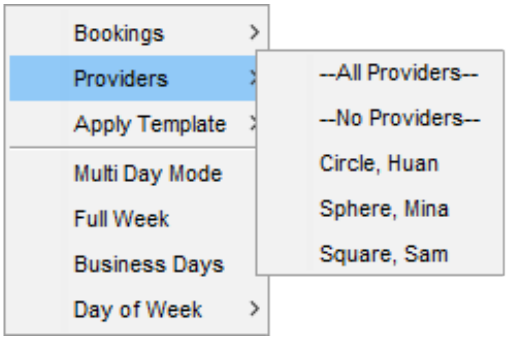


SCHEDULER VIEWS

The Accuro Scheduler Module displays the appointment schedule for the station. To select the displayed schedule, Right Click the Scheduler column header, Providers > Split Lake.



The Scheduler can display either a single day at a time, or multiple days. In Split Lake – you will view a single day view. This will display multiple bookings columns for Nurses and other services (MD, Mental Health Therapist).



*Business and Full week may be used in other stations.

- **Business Days:** Shows Monday to Friday only.
- **Full Week:** Include Saturday and Sunday in the week.

To move between dates:

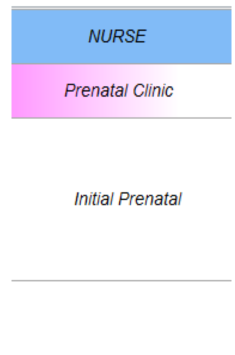
Calendar: Click on a date in the Calendar in the bottom right to jump to a specific day in the Scheduler.

Jump Ahead: Right Click on the Scheduler and select Jump Ahead to move the Scheduler forward a custom amount.

Navigation Bar: Change the displayed day or week by using the arrow buttons on the Navigation Bar below the Scheduler.

Move back or ahead one day, week or month at a time.

Today: This button moves the Scheduler to today's date.



Scheduler columns will have suggestion labels applied – these will guide where certain types of appointments can be booked.

*The NIC for each station will guide staff on booking schedule views/templates.

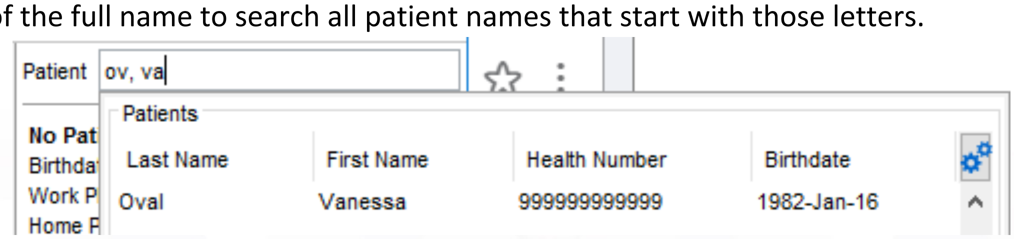
FINDING A PATIENT IN THE SCHEDULE MODULE

The Patient Search box is to the top right of the Scheduler. Use F1 to move your cursor to the search box automatically.

Various criteria can be used to find a patient.

Search by Name

Type the Last Name, then a comma and the First Name. You can also enter a few letters instead of the full name to search all patient names that start with those letters.



To search for a patient named Vanessa Oval, type in **oval, vanessa** or as little as **ov, va**

First name – type a comma first and then the name e.g. ,vanessa

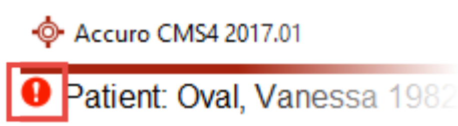
Healthcard or **PHIN**: Entering at least the first 3 digits of the Healthcard or PHIN starts showing the search results.

Phone Number: Search for the phone number by entering the 7 digit phone number with the dash after the first 3 digits. This does not include the Area Code.
For an example phone number of 123-456-7890, search for **456-7890**

Date of Birth: Enter the date of birth in the format **MM/DD/YYYY**

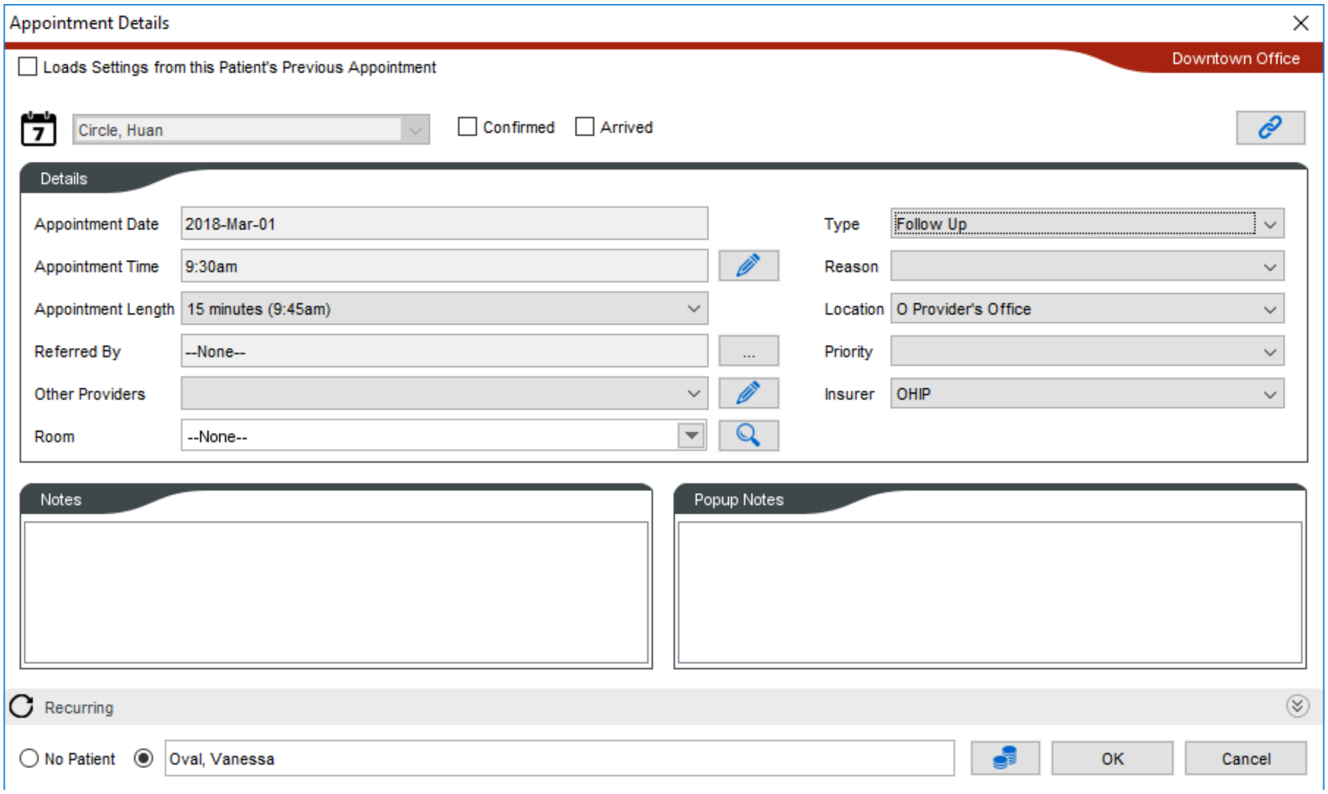
**Press Enter in an empty search box for a list of the last 12 patients that you've viewed.*

The global Patient Status bar at the top of the window shows the patient you have selected and alerts staff to any flags or outstanding tasks related to the patient.



CREATE AN APPOINTMENT
There are three ways to book an appointment.

- Drag and drop from the patient information section on the right side of the Scheduler to the correct time slot in the provider schedule.
- Right Click on the time slot and choose create appointment.
- Click on the desired time slot and press Enter.
- The same Appointment Details screen shows for all three methods.



Choose an **Appointment Type** and /or **Appointment Reason**.

Appointment Length: Adjust time as necessary. If the Appointment Length does not match the schedule intervals, they are adjusted to fit the Appointment Length.

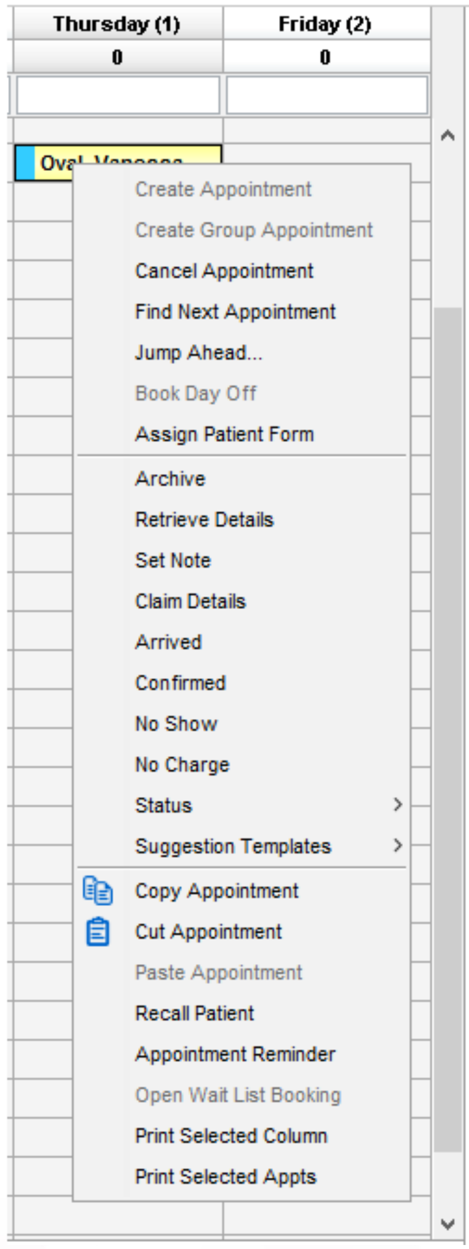
Notes: Information entered as a Note is shown in the appointment box on the schedule after the patient name. It is also printed on the day sheet.

Popup Messages: A popup reminder that appears when selecting that appointment.

Non-Patient Booking:
Selecting the No Patient radio button creates an appointment not related to a patient. This is commonly used for Drug reps or Meetings etc.

ACCURO® Electronic Medical Records

ONCE YOU HAVE AN APPOINTMENT BOOKED, RIGHT CLICK IT TO SELECT AN ACTION, HERE ARE THE MOST COMMON OPTIONS YOU WILL USE.



Edit Appointment:
To edit an appointment, Double Click the appointment in the Scheduler or Right Click it and select Retrieve Details.

Cancel Appointments: The appointment is cancelled, and a record is kept. Cancelled appointments are visible in the Quick Patient Appointments View (F4).

Reschedule: In order to reschedule, first cut the existing appointment from the Scheduler. Pick a new time. Right Click and select Paste to reschedule the appointment in the new time slot.

Arrived: Adds an “A” or custom symbol beside the appointment to indicate the patient has arrived for their visit. This automatically moves the patient name to the Traffic Manager Waiting Room.

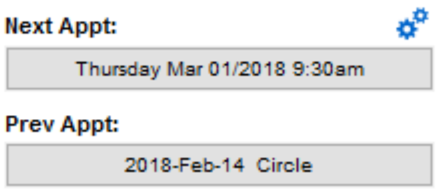
No Show: To indicate the patient has not shown up for their visit.

Copy Appointment: Right click and copy – move to the next appointment you would like to book. And right click – paste.

Status: This will allow you to add a custom status – each station may have different options e.g. Transport Required

**Appointment History: Patient appointment history can be found using F4 – including Cancelled appointments and No Shows.*

Next and Previous Appointment: Displays the next or previous appointment for the current patient under the patient demographics. Hovering above the appointment shows the details. Clicking the button takes you directly to the appointment in the Scheduler.

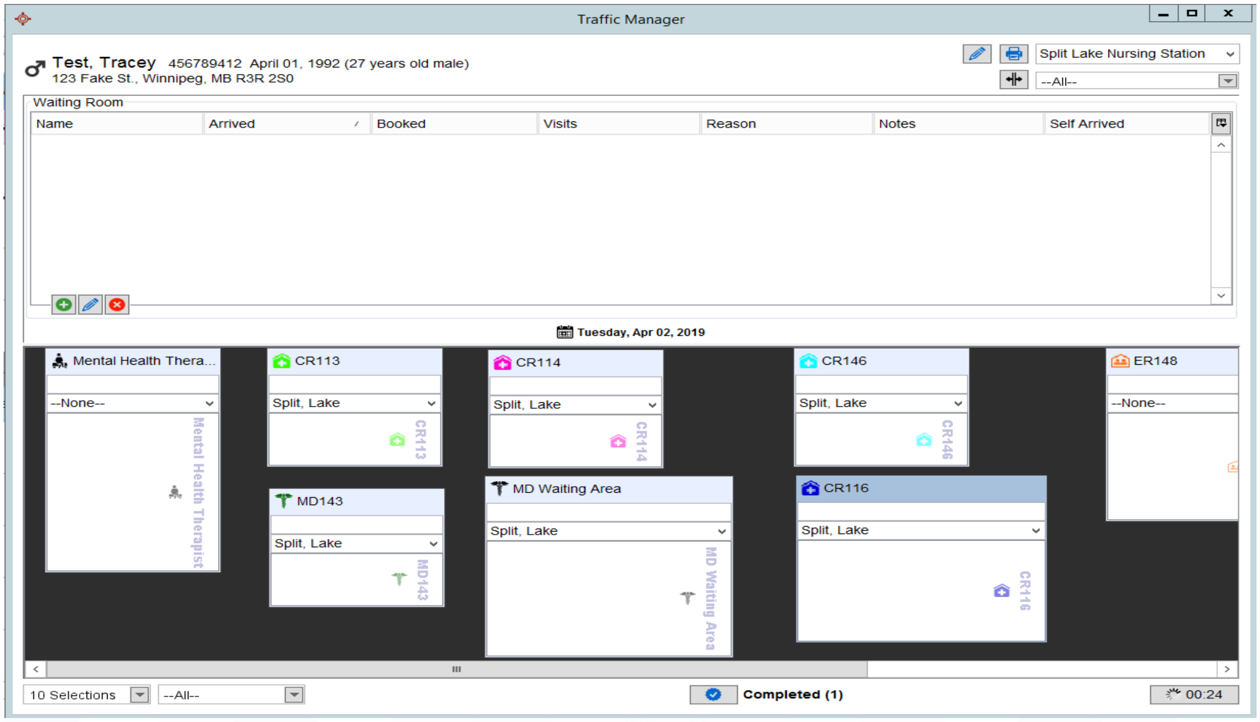


TRAFFIC MANAGER

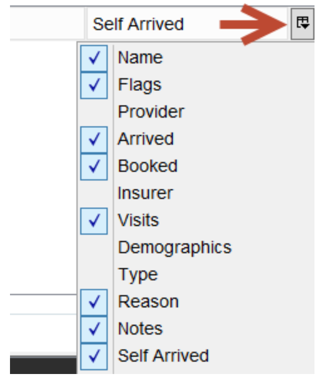
The Traffic Manager Module allows you to manage the flow of the patient – from arrival in the waiting room, to the exam room and completion of the visit.
To open Traffic Manager click on the Traffic icon.

The traffic manager window displays 2 main sections:

- **the waiting room, the white area at the top**
- **The exam rooms on the bottom section.**



Waiting room layout: Columns display patient and appointment details in the waiting room section. These can be enabled or disabled by clicking on the column select icon at the top right.

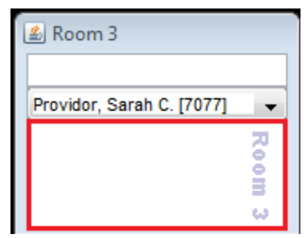


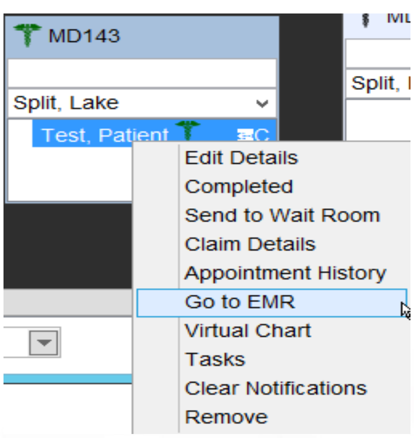
Room layout: The room layout can be managed for each user. Click and hold on the blue area at the top of the room and drag to the desired area. A right click on the black background can lock the chosen layout for your account.

Arriving the patient: Front desk staff will right click on the patient appointment and select 'Arrive' this will move the patient name to the waiting room section of traffic manager with their arrival time.

Moving the patient to an exam room: Nurses are responsible for moving the patient from the waiting room to the exam room. Click on the patient name and drag over the exam room and release. Click OK.

**Drag the patient details into the red-highlighted area of the treatment room, see below, any other area in the treatment room does not move the patient*



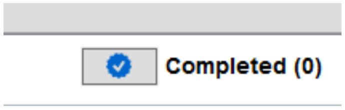


Patient Charting: To start your visit notes, right click on the patient name and select 'Go to EMR' – this will ensure you are charting on the correct patient. Ensure you are in the Encounter Note tab.

Completing the visit: There are 2 ways to complete the visit (this removes the patient name from the exam room). Either drag and drop the name onto the Complete button at the bottom of the window, or right click on the name and select completed.

Once a patient is completed – the process will start again, you will collect the next patient in the waiting room and move to the exam room ready for charting.

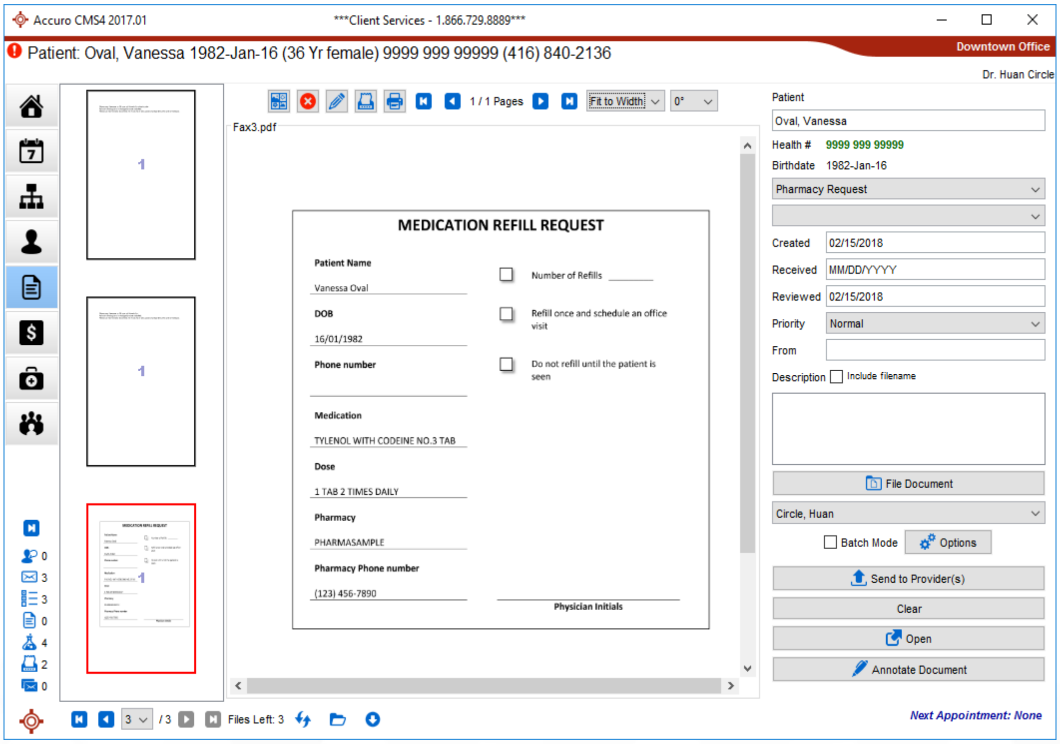
Clicking on the 'Completed' button will display patients that have been seen at the station that day – the column picker icon will let you select appropriate information.



**NIC will help with room layout, filters etc. if needed on-site.*

DOCUMENT MANAGEMENT

The Documents Section of Accuro is where you can upload and view scanned documents or faxes. The Documents can be attached to a patient's chart and sent to a Nurse or Physician to review if required.

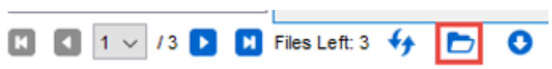


CURRENT DIRECTORY

There are typically separate folders for where the Faxes and Scans are stored before they are attached to a patient chart.

Click on the ‘Choose Directory’ button (the folder icon) to elect either your scan or fax folder.

**The NIC at the station will be able to direct you to the required folders.*



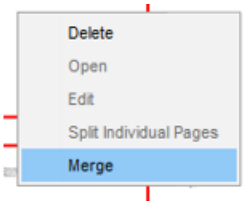
Documents in the selected folder are visible in a thumbnail view on the left side of the Documents Section.
The selected document has a red border and is previewed in the main document viewer.

At the top of the Document section, you can use the management buttons to review and modify the document, before attaching it to a patient.

1. Show or hide thumbnails of the pages in the selected document.
2. Delete
3. Edit Document
4. Fax
5. Print
6. First Document, Last Document, and advance pages.
7. Fit to width, for easier viewing, or zoom to resize the document.
8. Rotate Document - To permanently rotate documents, highlight it and choose how much to rotate it form the dropdown list

A right click on a document thumbnail will allow you to manipulate the document before filing. Documents can be:

- Deleted
- Opened
- Edited
- Split
- Merged



Most commonly used functions:

Delete: Deletes the document that you have selected (Ensure that you have 'Do not permanently delete documents' enabled in Options).

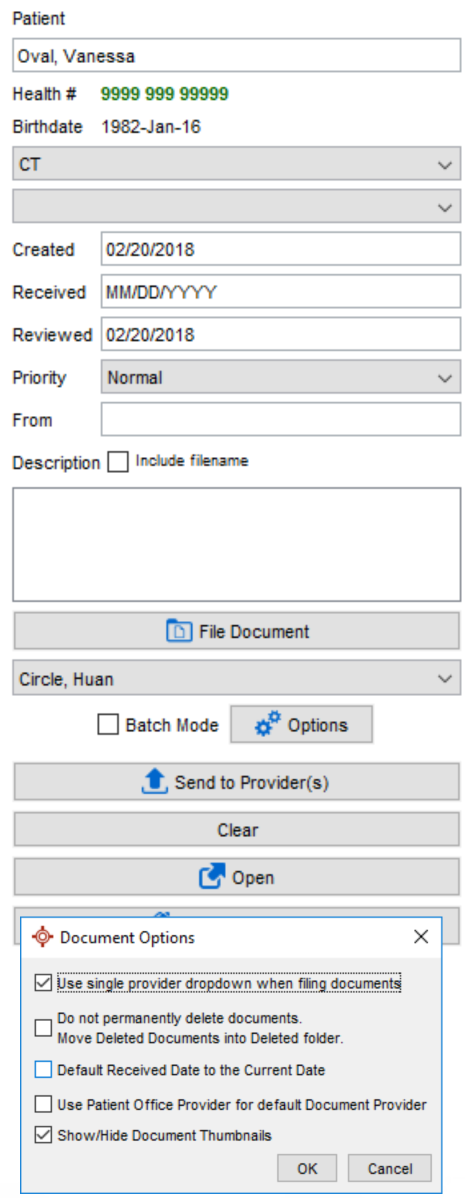
Edit: This allows you to remove certain pages. E.g. a Cover Page or to custom split a document.

Split individual pages: Splits one multi page PDF into single pages.

Merge: Multiple thumbnails can be selected at once by holding down the control key, right click and merge. This will result in one merged document.

**Make sure in these instances that you do not save the originals.*

F1 TO SEARCH FOR A PATIENT.
Use the same criteria as you would in the to select the correct patient.



Categorize: Click the drop down to choose the appropriate Category/name that represents the content of the document.

Dates: Fill in the relevant dates
Created is the date of the test or report. This is the most important date.

Free text area: Enter optional details to help describe the contents of the document.

File Document: The document goes straight to the patient's chart without review from the provider. **Description does NOT need to be checked*

Provider: Choose the correct provider, or leave blank.

Send to Provider: Files the document to the chart and sends it to a named provider's inbox for review.
If you are unsure, always send it to the provider for review.

Options Button: Change settings in the Document Section. Turn on/off document thumbnails, use default providers, enable an option to not delete documents permanently.

Error handling:
A document may get filed to the wrong chart, provider or category.
To change this, go to the Virtual Chart **(F3)** and Right Click the document and expand the Modify option.

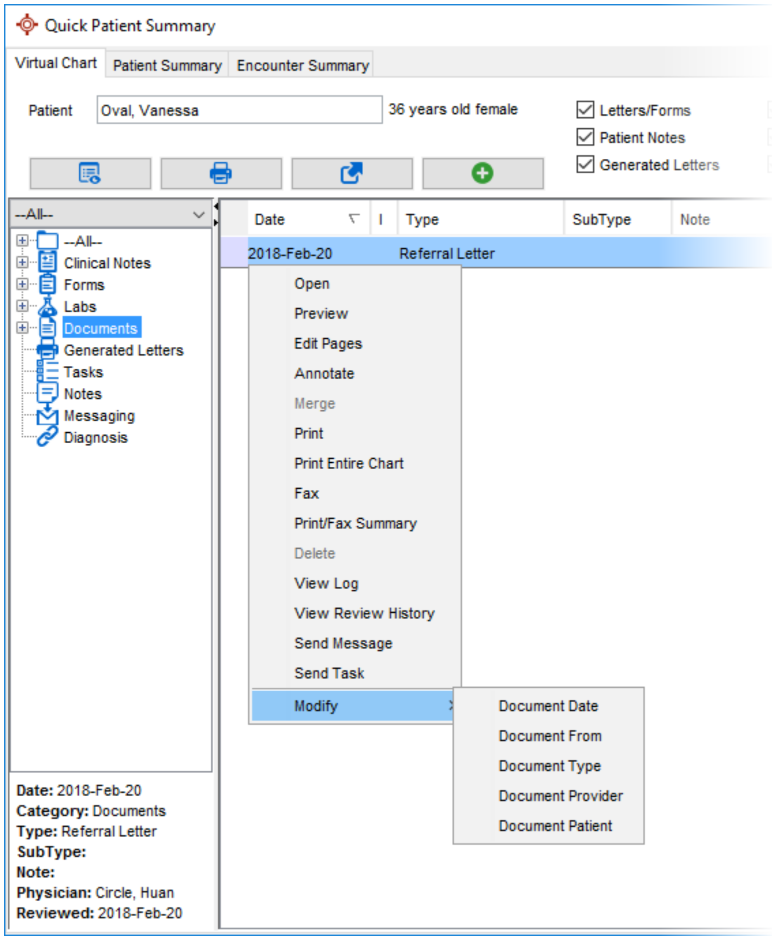
Document Dates:
Change the dates for the document. Double click to pick the date from a calendar or type in the new date.

Document From
Change who the document was received from

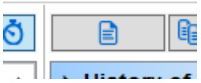
Document Type
Change the type by using the dropdown lists for documents types and sub types.

Document provider.
Select a different provider and send to their inbox if desired.

Modify Patient
Choose a new patient by searching for them in the To Patient field.

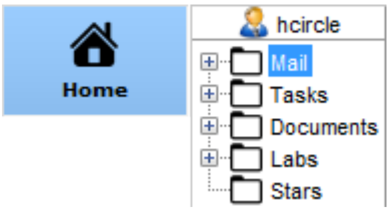


**Filed documents can be viewed in the Virtual Chart F3, or from the Encounter Note tab in the EMR by clicking on the Document button – just above the medical History Bands.*



HOME SECTION:

The Home module is the main internal communication center of Accuro.



HOME FOLDERS

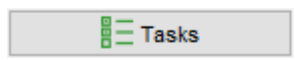
The Home Section contains the Mail, Tasks, Documents, Labs, and Stars folders.
This course outlines the 2 main communication functions – Messaging (mail) and Tasks (To-Do or Recall items).

Mail is for patient or non-patient care messages, this can be between users, and also with users in different 'Offices' or stations. Great for dialogue back and forth.

Tasks are for patient or non-patient related directives or items that need to be sent to a user(s) in the station, in another station or can be used to send yourself a reminder to complete an item. Much more of a 'To-Do' item than a message.

CREATE A TASK

There are several ways to create a task in Accuro, depending on where you are. If reviewing labs or documents, you have a dedicated icon in that view.

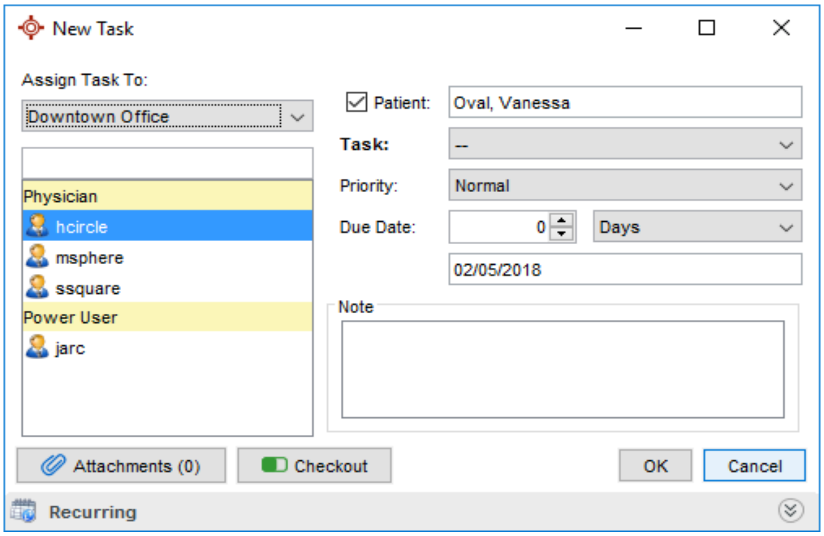


F7 anywhere in Accuro for a New Task or choose New Task from your quick action buttons.
A right click on most chart items will also allow you to start a Task, including that item as an attachment.

Selecting the recipient(s):

- Click on an individual user name
- User CTRL and select multiple users
- Click on the Role in yellow – to select a group of users performing the same role.

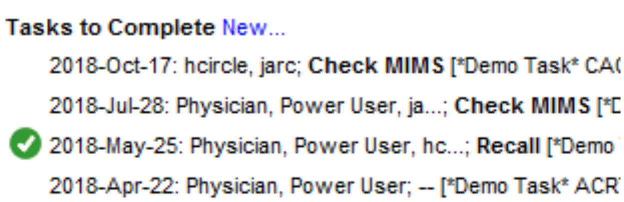
If the user works at another office/station – use the drop down under 'Assign Tasks To' to see the appropriate users.



If a task is sent to a group, everyone in that group receives it in their personal task inbox.

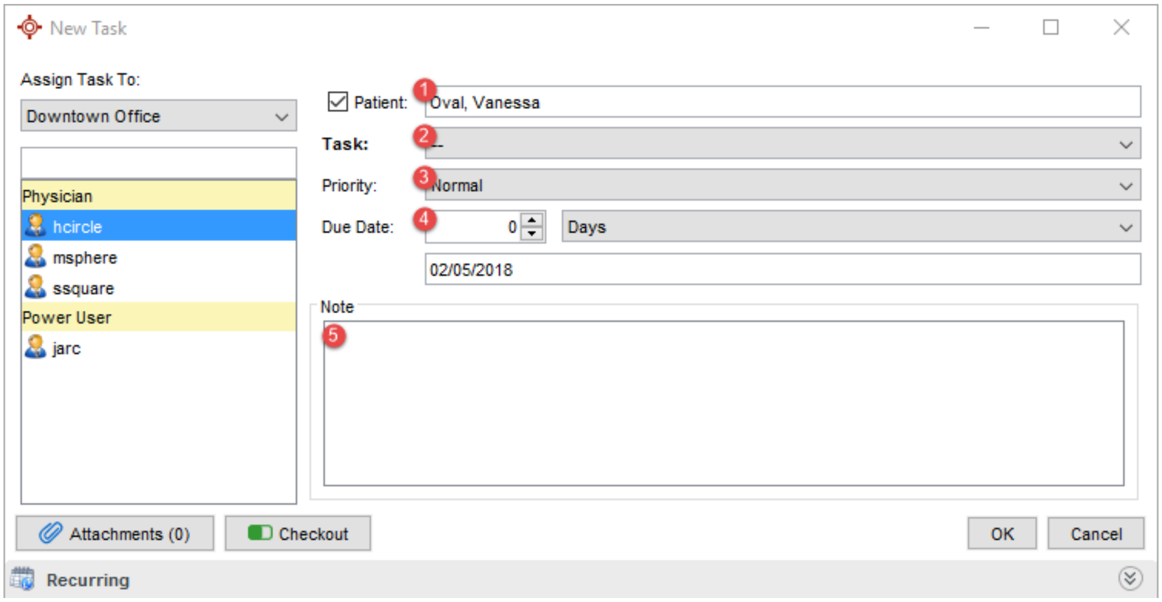
The checkout option means that one person from that group can take ownership of the task, other users will see who the tasks is checked out to. It will only be removed from the list when it has been completed.

Completed tasks can still be view on a patient chart using F7, by selecting show selected tasks.



Completed tasks are shown with a green check icon.

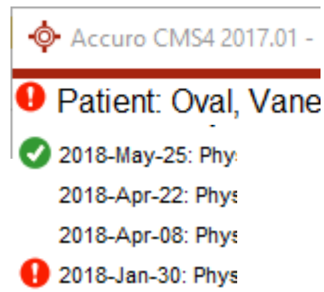
A task may be Patient or Non-patient related.



1. If you are creating a task from a document or a lab result, the patient is automatically included. Otherwise include it here if needed.
2. Choose a task Title from the drop down menu or leave it blank.
3. Choose your Priority. This may be "Normal" "Urgent or "Very Urgent".
   Normal: sends to the recipient(s)
   Urgent: tasks shows up in red in the inbox view
   Very Urgent: pops up when sent to a single recipient (does not pop-up if sent to multiple people).
4. You may choose a Due Date. This is the date the item will appear in the recipient(s) inbox (double clicking on the date brings up the calendar to select a specific date). Sending a task with a due date as zero (0) send the task immediately to the recipient inbox.
5. Free text can be added in the notes section.

When you complete these steps, you click "OK" to send the task.
You now see that the task lives in the Patient Tasks (F7) as well as in the recipient's inbox.

Any patient that has an uncompleted task has a red exclamation mark at the top right corner of the screen in the demographic status bar. Double click on the icon to display tasks.

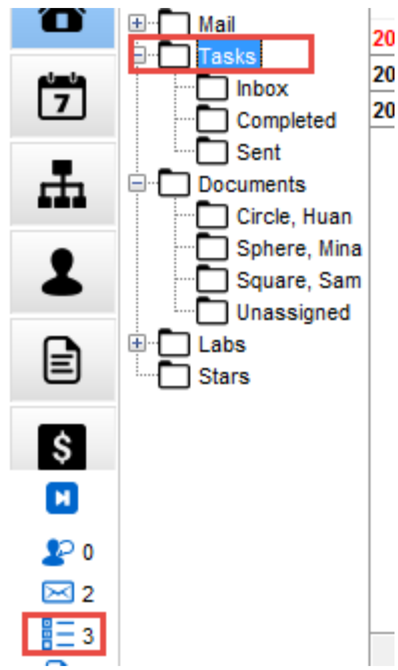


Completed tasks have a green check mark.
Uncompleted tasks have a red exclamation mark.

**F7 is a useful dashboard to display other outstanding patient information*

Task List

To see your outstanding tasks or To Do List, click on the task icon in your notification areas.



Tasks can be sorted by clicking the Column header - Priority to sort by urgency, or Date to sort tasks by due date.

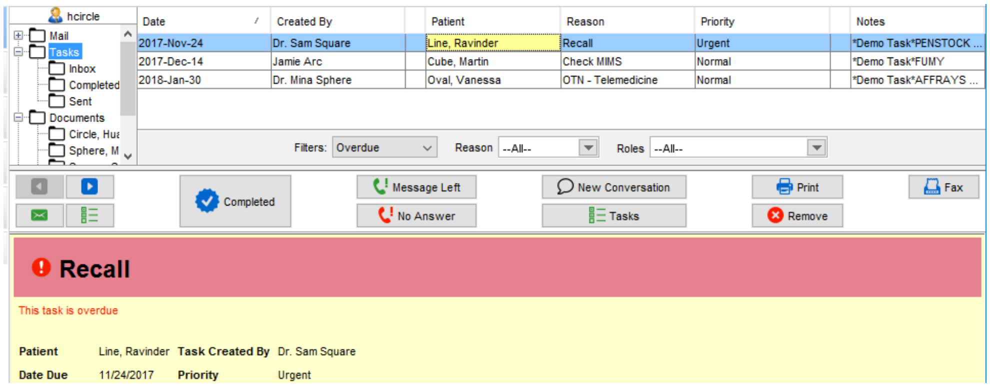
Use the Filters to choose which of your outstanding tasks you want to view.

Your “Due Date” filter corresponds with the due date that was set on your task. This is general set to ‘Overdue’ only. So that future dated tasks are not visible until they are required to be complete.

For your “Reason” filter, please keep on “ALL” unless you are comfortable filtering task titles separately.
Note: Remember to get back to “ALL” tasks you need to unclick all choices to see all outstanding tasks.

Dealing with a task:

Clicking on a task at the top of the screen, the task details appear in the bottom part of the screen.



There are some common quick keys that can be applied when dealing with a task:

- Complete – if you have dealt with the action and it is complete
- Message left – date and time stamps your task with the attempt to contact patient
- No Answer – date and time stamps with your attempt to contact the patient
- Print – if you want the task printed
- Remove – this will permanently remove the item
- Or a tax can be faxed from here

The new conversation button allows you to indicate a customized message. You can also use New Conversation to reply to the person who sent the task and ask a question. All conversations are available in the F7 Task Screen and recorded in the Tasks in the Virtual Chart.

When you have completed this task, click on Completed button. This takes the item out of the Patient Tasks and marks the item in the Virtual Chart as Completed. If this task was sent to multiple people, clicking on ‘complete’ takes it out of Everyone’s outstanding tasks.

Accessing completed task conversations.

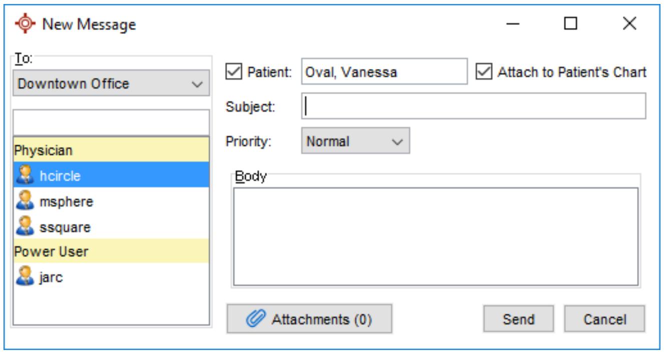
Any completed tasks and conversations are saved into the patient’s Virtual Chart. As well as in the F7 window if show completed tasks is selected.

Tasks that you have completed are found in the completed folder in the home module.

MAIL

To create a new mail message, click on the New Message button in the Home Section or use a configured quick action key.

The new message window is very similar to the Task window – but does not allow a due date to be applied. Messages are sent right away. There are also no preset headings – a subject will be free typed in.



Recipients are selected in the same way as in a task.

A message allows you to choose not to attach to the patient chart (*tasks are always attached to the chart).

Normal sends to the recipient in the normal fashion.
Urgent brings the message to the top of the list in the recipient's outstanding mail inbox.
Very Urgent creates a pop-up on the screen of the recipient indicating that there is a very important message to review.

In the Body, type the contents of your message and click send when done.

**Unlike tasks, messages sent to multiple recipients are not removed from the inbox when reviewed by one user. Each user must Review their messages separately to remove the message from their inbox.*

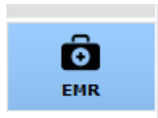
Dealing with mail messages is the same as Tasks, you can use the Message Left and No Anser options etc. – other than when a message has been seen, responded to etc. it will be 'Reviewed' rather than completed.

If 'Attach to Patient Chart' has been checked – the message will be visible in the Virtual Chart F3.

EMR ORIENTATION

The EMR module houses all patient clinical information – and is the common area for Providers to work for all aspects of charting.

Click on the EMR icon to access



The EMR module has multiple tabs:

Day Sheet: The Day Sheet is loaded with all the appointments for the day selected in the drop-down list of the Date Navigation bar and for the physician selected, **at Split Lake it shows all patients visiting the station that day*. The background color of each appointment corresponds to the color chosen for the appointment type.

Encounter Notes: Encounter Notes is the area of Accuro where you can view all the information related to a patient's visit. On this tab you can quickly and easily view appointment history, notes and letters, lab work and summary items configured for the station (family history, allergies etc.)

Depending upon what is opened from this tab, some documents may open in a separate window. When you change to another patient, if you have documents still open for a previous patient, you will be prompted and asked to either leave the documents open or to save and close.

Virtual Chart: The Virtual Chart tab of the EMR section is used to quickly view any item placed in a patient's chart. Various filters can be applied to quickly drill down on chart items. Items can be printed, faxed. A double click will open the item you have selected.

Encounter Summary: Displaying the Encounter Summary tab is an Accuro user preference. The encounter information displayed on this tab is the same as is displayed on the Encounter Notes tab but allows a scrolling format – rather than viewing items one at a time.

Medications: Medications contains a patient's medication record and allergy information. Prescriptions can be printed out and renewed from this area of Accuro, as well as general medication management. Items can be discontinued. Any expired medications remaining on the Active Medication list are displayed in red.

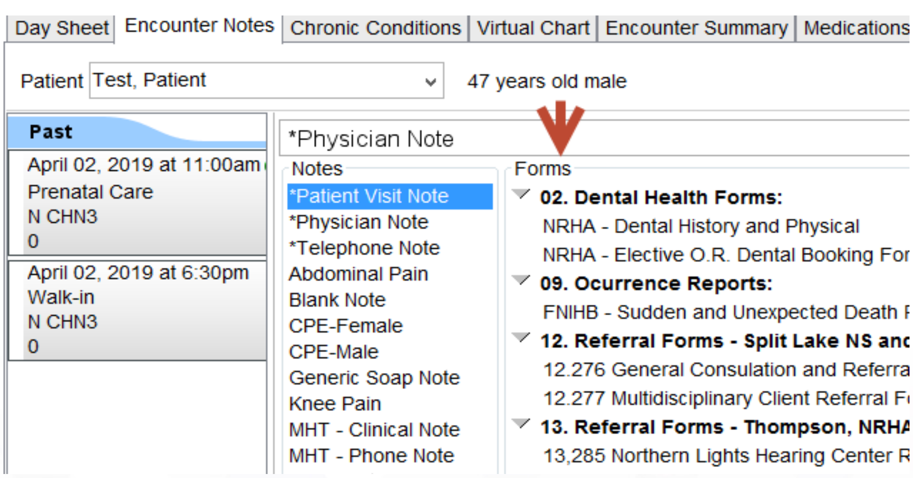
Patient Information: General demographic information is available in the last tab, along with Task and Message/Note information.

**A patient can only be looked up in the Encounter Summary Tab patient search box*
**Function Key shortcuts will also display aspects of the patient chart:*

- *F3 Virtual Chart (Full patient record)*
- *F5 Documents that have been uploaded to that patient chart*
- *F7 A dashboard to display outstanding/key items*

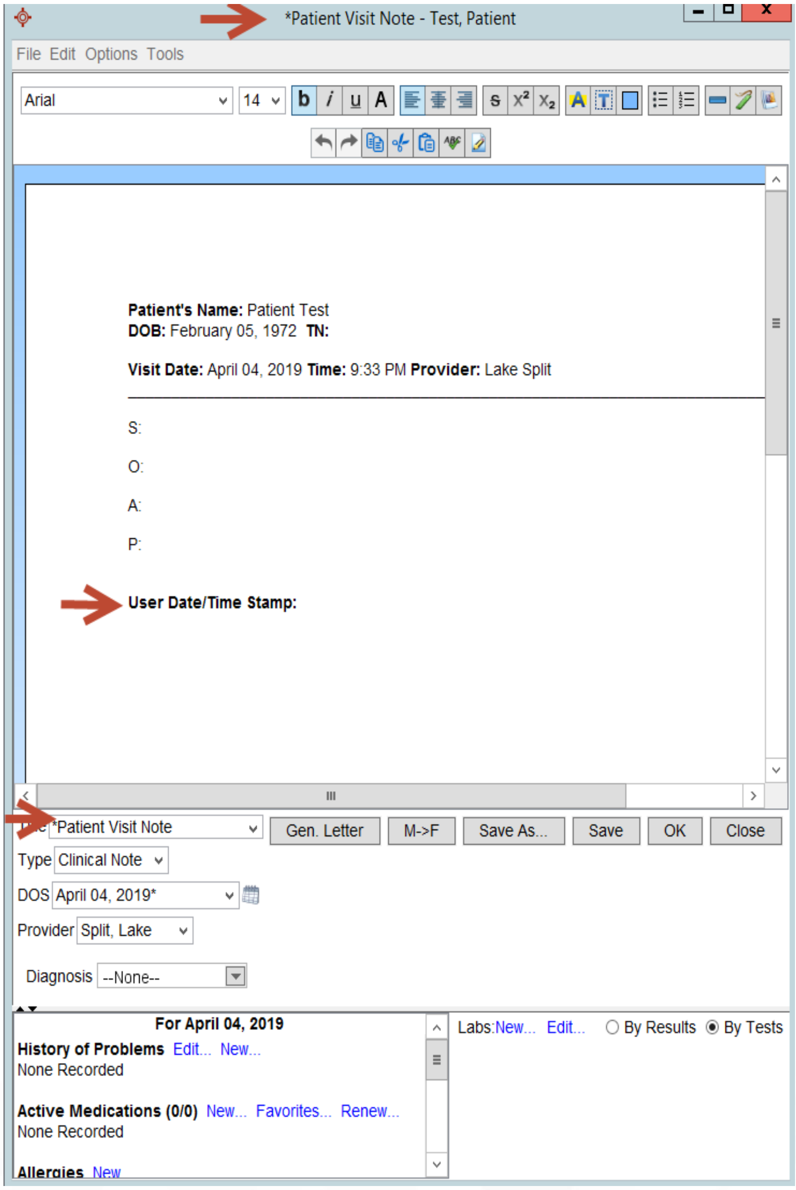
ENCOUNTER NOTE – GENERAL CHARTING

The Encounter Note tab is the primary tab for patient charting and a focus for all Nurses and Physicians.
Users can either navigate to the Encounter Note tab via the EMR module – or while seeing patients, right click on the patient name from the Traffic Manager Room and go to EMR.



Selecting the drop down underneath the patient age and gender opens the e-drawer. Templates for the patient encounter can be selected from the Notes menu on the left with a single click. The NIC will guide on which templates are used.

**Accuro windows can be re-sized and positioned, and these settings will be remembered. Position your clinic note so that the demographic status bar is still visible – as well as the Medical History Bands*



1) Patient name will be displayed at the top of the template note, as well as tagged in the content of the note.
2) Complete your nursing note as per ISC FNIHB requirements following protocol.
3) Use F12 to 'sign off' on your encounter note.
4) In title – enter your diagnosis for the patient visit.
5) Ok to save and close your encounter note.
6) Right click and select 'Lock' once you have completely finished your charting.

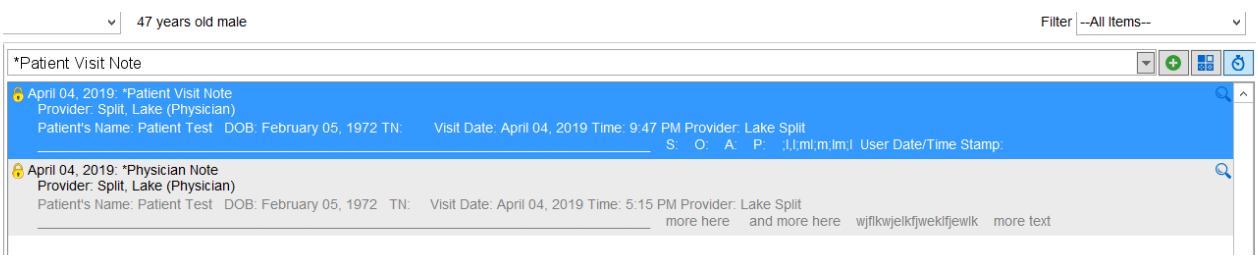
**Any additions to the note will be added as an addendum.*

Saved encounter notes display in date order in the main encounter note window.

There are additional filter buttons at the top right that allow either to view by date, or by category (notes and forms will be split up).

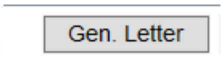
You can use the looking glass icon at the far right to have a quick view of the note, or use the encounter note summary tab for a scrolling view of all encounter notes.
A right click on the saved note will allow you to perform these functions at the station:

- Generate to a letter format (add header and footer)
- Send as a message or task
- Print
- Lock – the encounter note will now be locked and cannot be edited
- Add note – to add an addendum if you need to add extra content

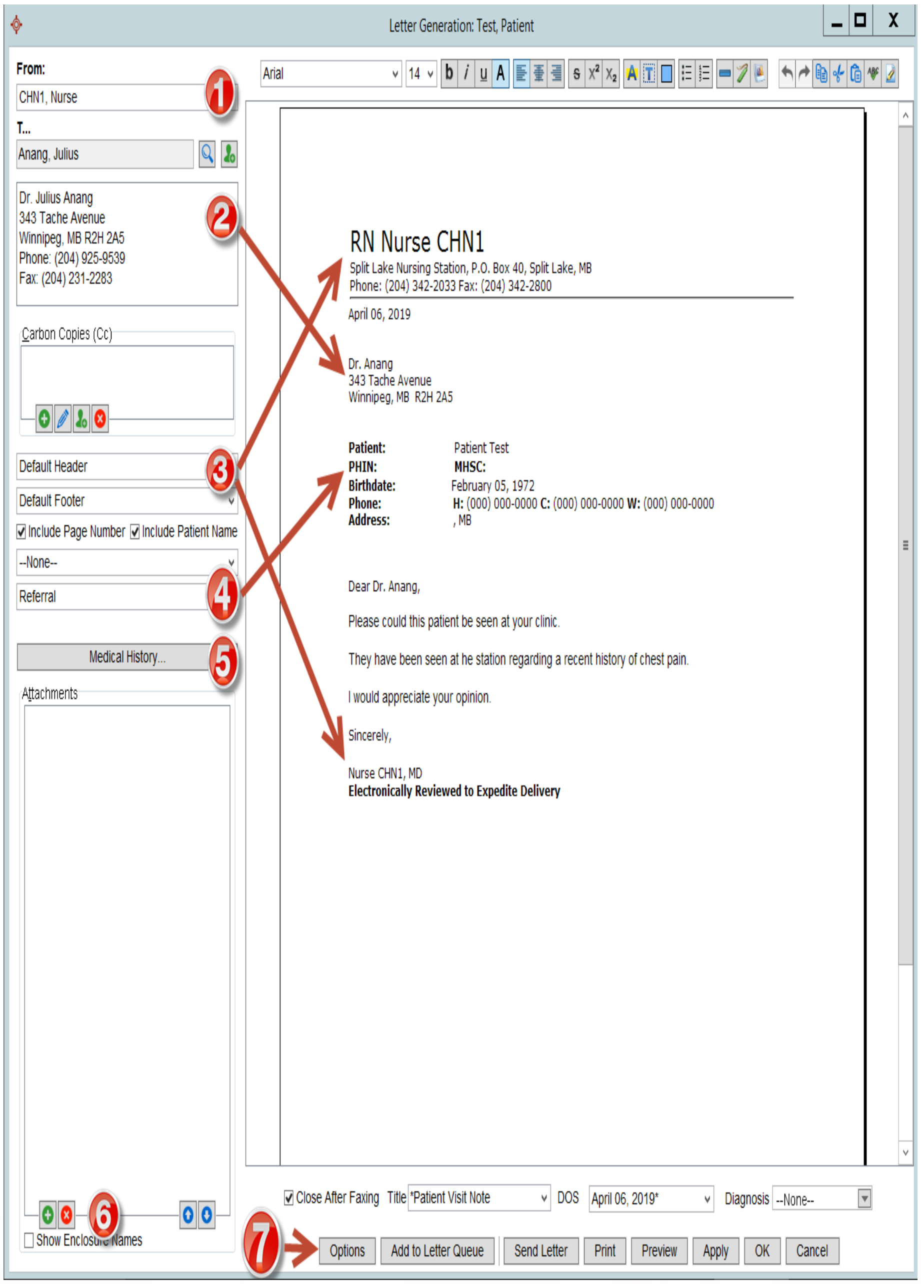


GENERATING A LETTER

A letter can be generated from a note in Accuro, this applies a letterhead, recipient and additional information/attachments etc. if needed.
Type main body of your letter > Gen Letter button at the bottom of the open encounter note.



The Gen Letter function allows you to format your outgoing letter by working through the options on the left.



1 – User name will appear in the 'From' field

2 – Recipient can be selected in the 'To' field. Using the looking glass icon will allow you to search the address book.

3 - The Station letterhead will be applied. The footer will display user sign off.

4 - The introduction will display the format of the recipient and patient information.

5 – Medical History items can be applied from the bands in the EMR.

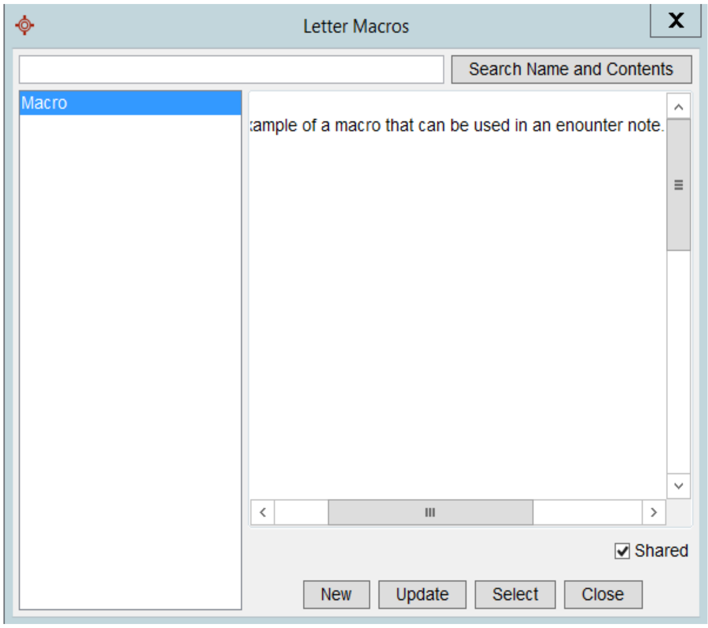
6 – Using the green add allows you to add patient documents from the patient chart.

7 – Your options to send, print or queue.

MACROS

Using Macros: Each station will have a set list of macros that can be used for certain conditions and exams, to reduce the need for typing repetitive text. Phrases and text used regularly are saved under macro names.

To use a macro: Right click anywhere in your template/encounter note and select find macro.



The Letter Macros window appears.

Macro titles will be displayed in the left column.

The content of the macro is displayed in the main window.

The shared checkbox means the macro is shared to all users in the station.

Selecting the macro title and then select will apply the content to your encounter note.

**Typing the macro name/title directly into the encounter note and CTRL + L is also a quick way to insert a macro into your note.*

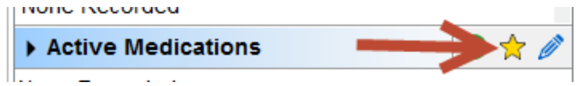
**Users in stations will not create their own macros – a list of preset macros will be available for use.*

PHARMACY

A list of preset medications is available in Accuro for Nurse prescribing/dispensing. This list will need to be downloaded first to your Accuro user profile before issuing.

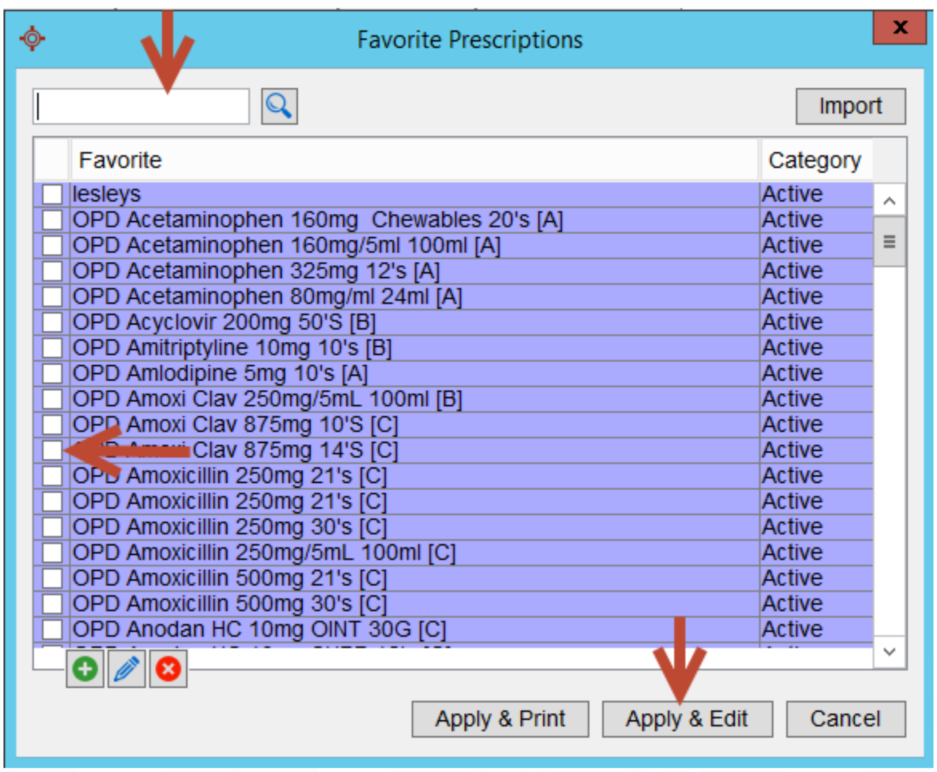
Download Pharmacy List:

Start in the Encounter Note Tab and select the yellow star icon in the Active Medications Band.



Select the Import button > Click on User OPDMS > select Import All.
This will load the list of pre-set medications to your profile ready to prescribe/dispense.

Issuing an item from the Pharmacy list: Ensure you have the correct patient loaded in Accuro. Select the favorite icon in the Active Medication list.

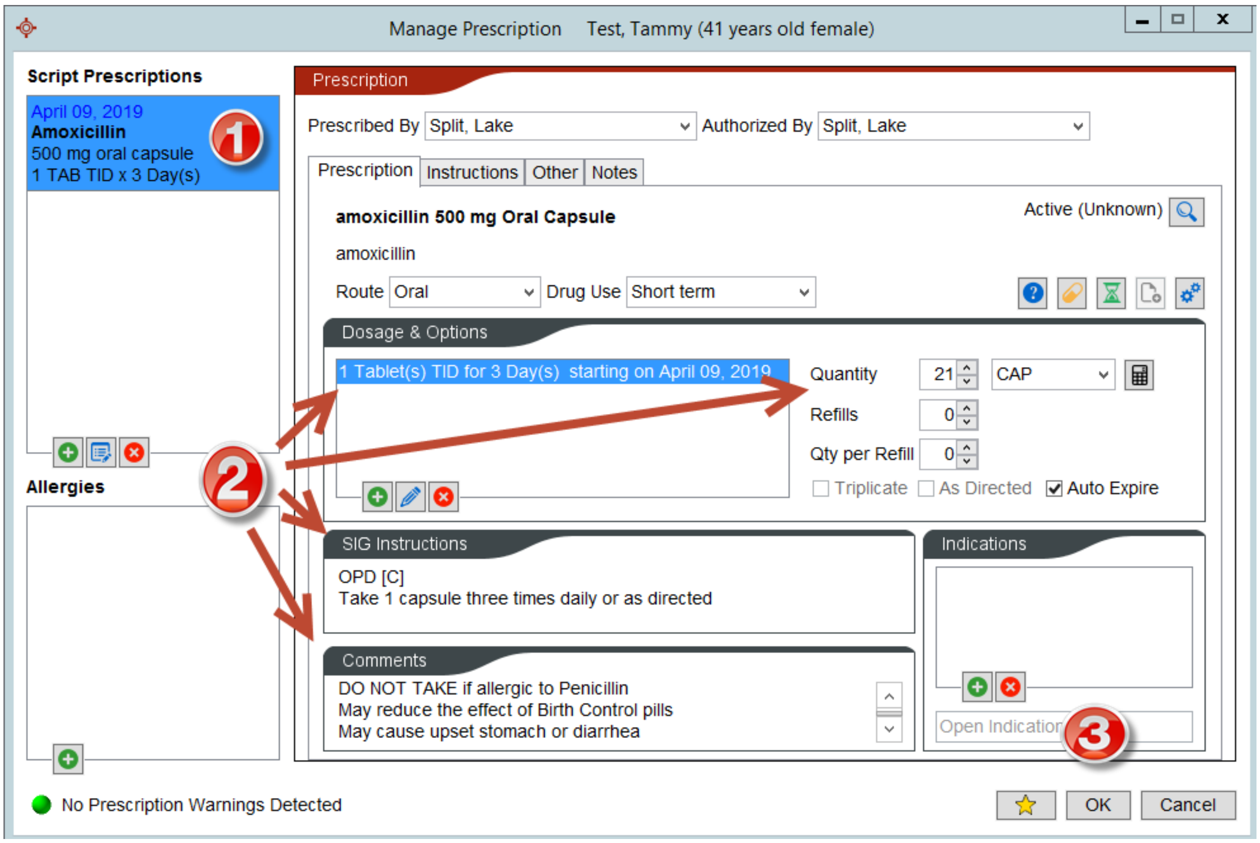


Favorites can be quickly searched at the top of the window.

Select the medication(s) you are issuing by selecting the checkbox next to the drug name.

Apply & Edit

**Do not go to Apply & Print as you are required to enter additional information.*



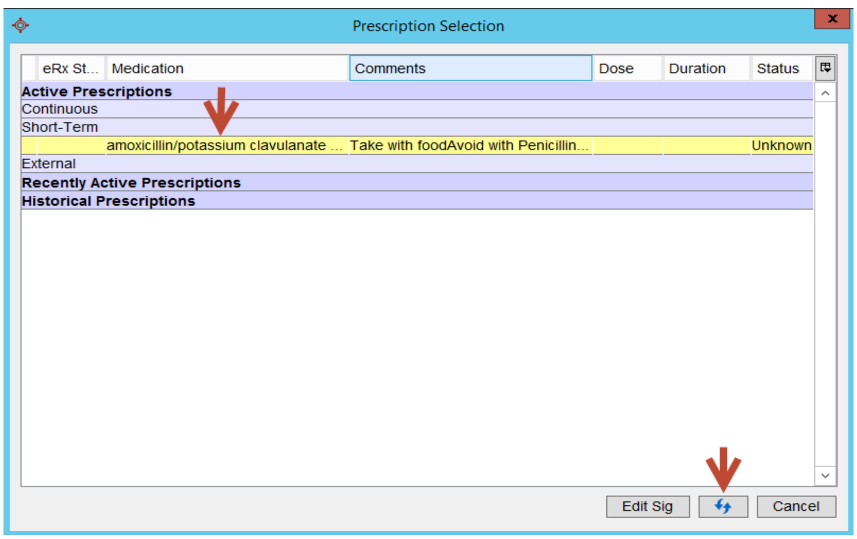
1. The Manage Prescription dialogue box opens – the medication is displayed in the Script Prescriptions box in the top left of the window.
2. The Dosage/Options, Instructions and Comments have been configured already by the Pharmacy. You will add a diagnosis in the SIG instructions section.
3. OK when you have checked/completed the information.
4. Print/Fax?

Once issued in Accuro – the medication will show in the Active medications tab in the Medical History Bands. A duration will ensure that when the medication expires (based on the issue date) it will automatically move to the Recently Active medications in the Medications Tab.

**If a duration cannot be calculated (creams/eye drops etc.) a medication can be automatically in-activated in the Medication tab.*

If the medication exists in the patient chart – and they require more, and item can be re-issued by selecting the pencil icon in the Active Medication Banner.

Once selected the prescription selection window will present.



Single click on the medication (or hold CTRL and if there are multiple items)

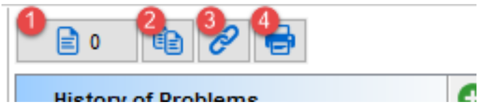
Click on the Renew Prescription button.

This will class the item as re-issued. Finish details (diagnosis as usual).

Medications dispensed from Stations included in the Pharmacy initiative all need to be recorded in the patient chart (as well as your encounter note) in this way.

****Medications can also be added from an open clinical note – click on the Favorites or Renew button in the bottom section of your note.***

MEDICAL HISTORY BANDS & BUTTONS



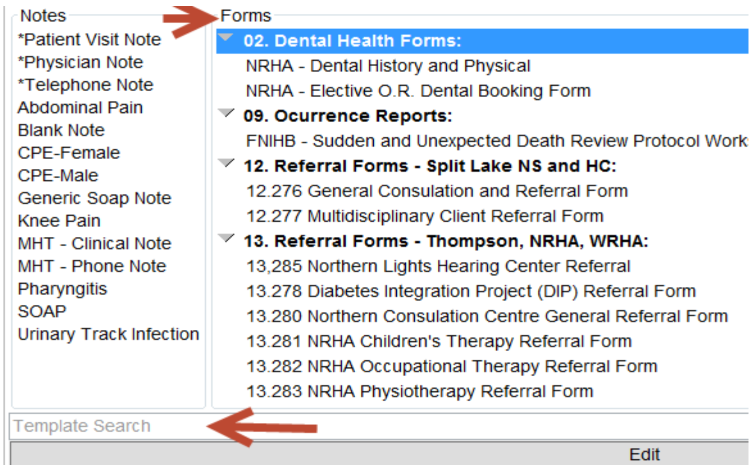
1. Documents includes all scanned and faxed documents that are uploaded to the patient's chart.
2. Medical History allows you to copy all the medical history items and paste into a note in Accuro or third-party software.
3. Diagnosis Linking links appointments, lab results, and documents to problem list conditions. Click Add under each section to see a list of items to select from.
4. Print Summary prints out a Medical history summary for the patient.

Under these buttons are the Medical History Bands.
Information entered into the patient chart is easily referenced here and can quickly be checked when viewing the chart or pulled into forms and templates. Bands are configured acting as picking lists in most cases.
The order of Medical history bands can be configured in user preferences – there is an add icon in each banner to allow you to add information.

EXAMPLES OF MEDICAL HISTORY BANDS:

History of Problems
The active problem or diagnosis list. For example, diabetes, COPD, asthma.
Active Medication
A list of the current medications as prescribed by the facility provider.
Allergies
The list of patient's drug and/or environmental allergies.
Immunization Schedule/Summary
The list of immunizations that have been given or are due.
Family History
The recorded and known problems of family members, parents, siblings etc.
Primary Care Indicators
Flowsheets related to the diagnosed problems or a patients age.
Lifestyle
A record of the patient's lifestyle or social habits.
Medical & Surgical Histories
A list of the patient's past surgeries and conditions.

Requisition Forms: Requisition forms are also found in the e-drawer of the Encounter Note tab, in the right-hand column under Forms.

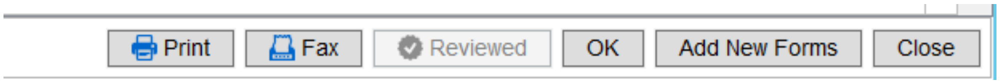


Forms are structured in different categories or folders, a single click on the form name will open the form.

**Type in the name of your Form or a keyword in the Form name to quickly filter the forms list.*

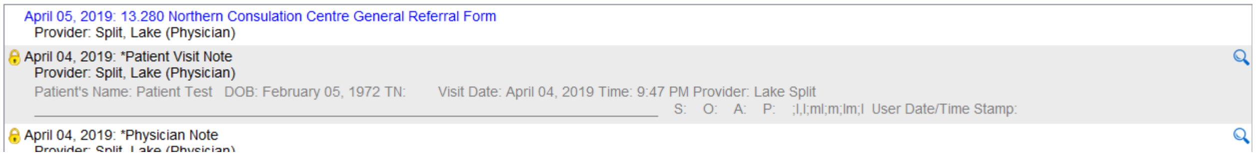
Once open a form may have a combination of free text areas, drop down menus, check boxes etc. Any form requiring the Nurse/MD signature will apply a digital signature (this will be captured at the station with the NIC)

Once completed the form options are most commonly:



1) Print
2) Fax – adding a recipient from the address book
3) Ok – to save and close
4) Close

Forms will also save to the main area of the Encounter Note tab – labelled in blue. They do not have the looking glass icon – but can be double clicked to re-open if needed.



A right click on a saved form will also allow the form to be printed, faxed, messaged or tasked.

All entries made on either a template/note or a form are also visible in the Virtual Chart tab / F3

Created	I	Type	Note
April 04, 2019		Clinical Note	*Physician Note
April 04, 2019		Clinical Note	*Patient Visit Note
April 05, 2019		13.280 Northern Consulation Centre General Referral Form	

Naming conventions are extremely important, in order to quickly find items and navigate a patient chart efficiently.

**A completed form can be used again, right click on existing saved form > open as new. You can choose to clear content – or keep and then this becomes a new instance of the form saved under the current date.*

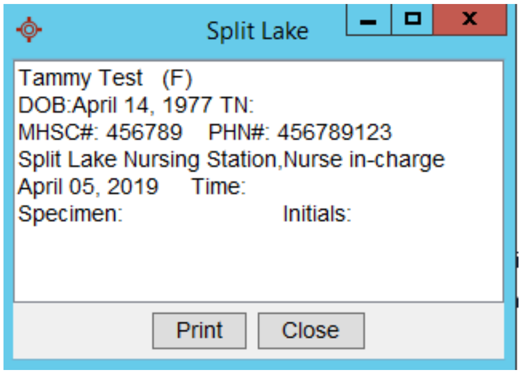
LABEL PRINTING – specimen bottles

Requisition forms will generate complete with patient and station demographic information, but a label is still required for any specimen bottles.

The station has already created formatted labels for this purpose.

To print labels:

- Ensure you have the correct patient loaded in Accuro.
- Single click on the patient details in the demographic status bar
- Select print on the preview window
- Select number of labels required and print.



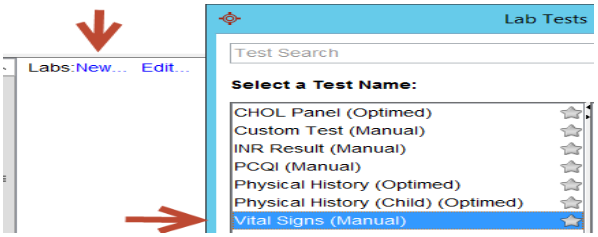
Alternatively – you can click on the Accuro start menu > File > Print Label and select from the list. **Split Lake labels have been specifically designed to fit the bottle/label size.*

PATIENT VITALS & CTAS

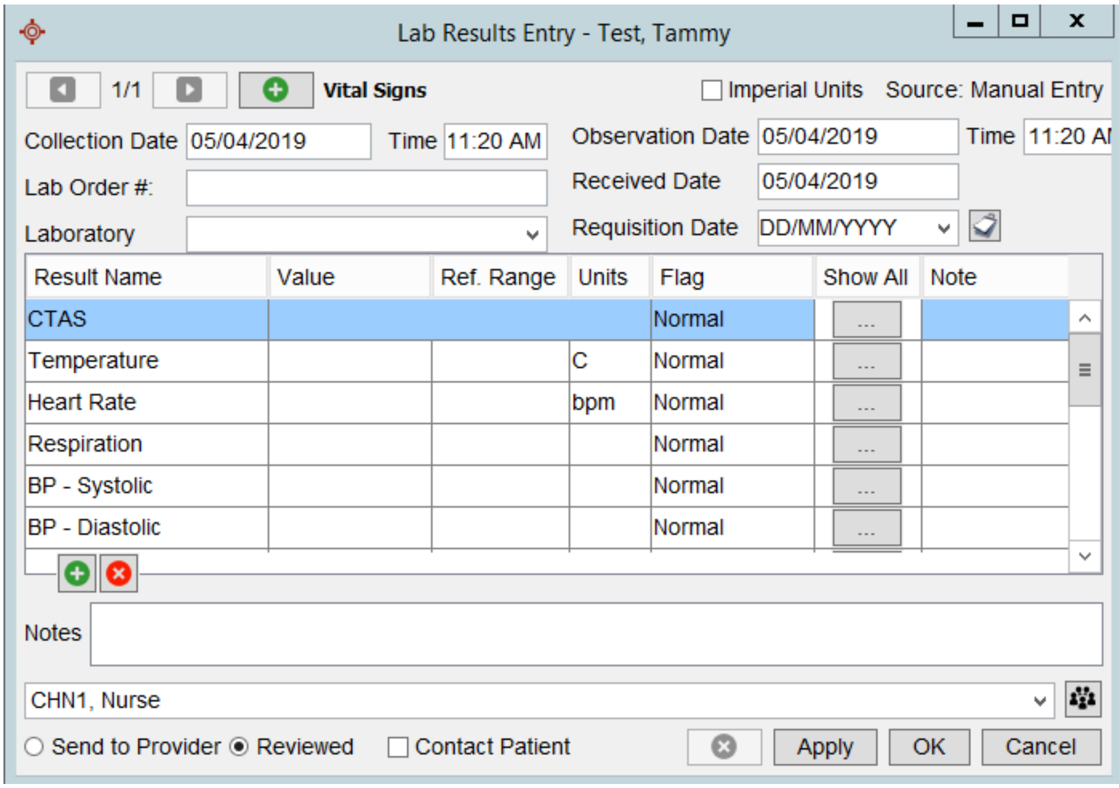
During the visit the CTAS along with patient vitals can be captured easily. There are 2 approved workflows for this.

1. A quick action key will be configured to your Accuro user profile – Vital Signs. Clicking on the action button will open the Vital Signs panel for data entry.

2. In an open clinical note template, in the lower right section select 'New' under the Labs header, then select vital signs.



The Vital Signs panel will open for the loaded patient.

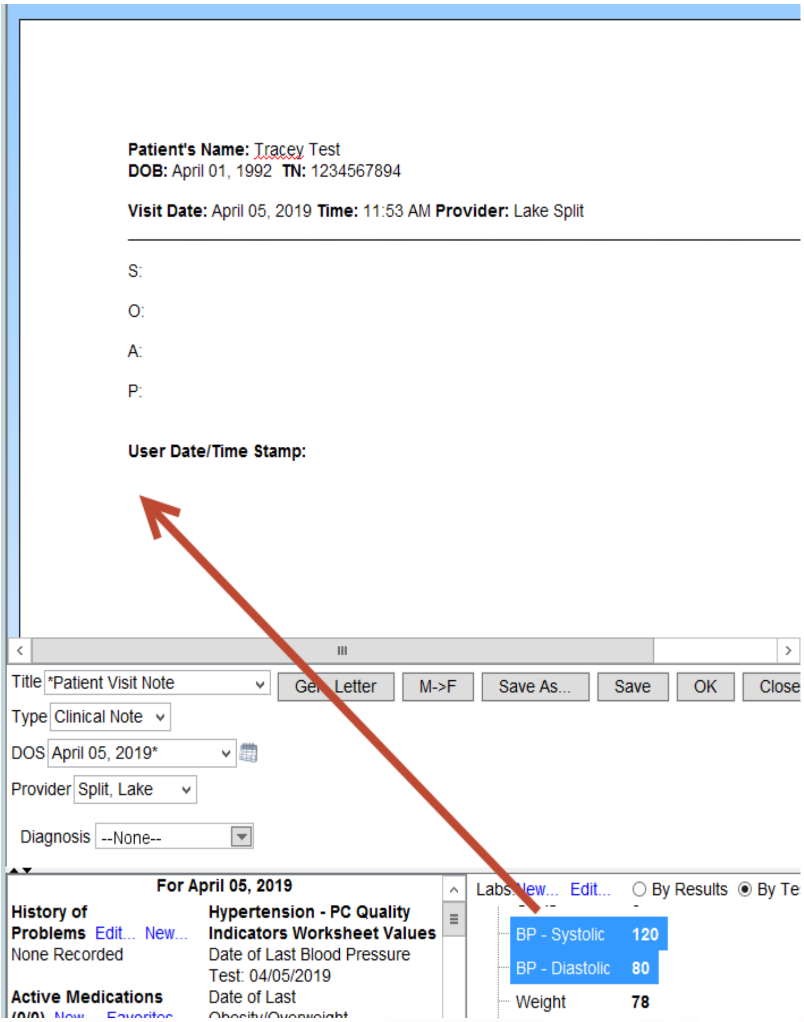


- Patient Vitals are entered in the ‘Value’ column
- No need to add units as these are already configured
- Use the ↑ ↓ arrows on your keyboard to easily move between fields
- The entries can be made in Metric or Imperial (for imperial select the check box at the top of the window)
- Apply – OK to finish.
- Send to Provider would allow you to send these values to a Nurse/MD for review

**BMI Is automatically calculated automatically on the entry of a height and weight.*

Once values are saved – they display in the Labs section of the Encounter Note tab. There is a drop-down menu, this allows you to view the information in different ways.

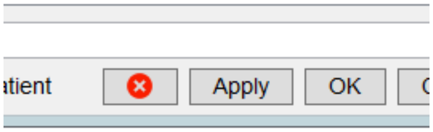
To include Vitals into your clinical note while working:



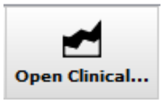
- CTRL A – to select all
- Or hold CTRL and select specific items
- Drag into main body of clinical note.
- Ok to save Note

To edit values: Use the pencil icon to re-open the Vital Signs Panel to edit an entry.

To delete values: Vitals can be deleted from the patient chart (i.e. if added on the wrong patient/duplicate entries) use the pencil icon to open the panel, click on the red remove button at the bottom of the screen.



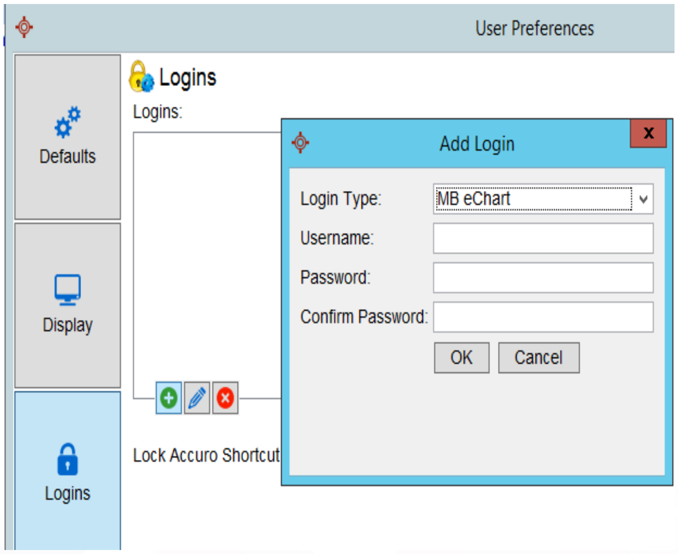
Infant/Child Vital Signs: Infant vitals are entered using the same panel. Height weight and Head circumference will allow plotting onto a Growth Chart.
A quick action button will be configured on your account to plot a growth chart.



**Child Growth Charts do not need to be saved to the patient chart (unless needed to send out with a referral as a document).*

MANITOBA E-CHART ACCESS

Set Up: E-Chart credentials need to be saved in your Accuro account.



Accuro start > File > User Preferences > Log ins

Login Type: MB eChart
Username
Password
Confirm Password
Ok > Apply > OK

**Each time your password changes – it will need to be changed back in here to ensure you can continue to access eChart.*

Using eChart from the EMR: Once set up – eChart can be accessed directly from within the EMR.

Your Accuro user account will be configured with a quick access key
For eChart access. When a patient is loaded – click on the action key to open Manitoba eChart. Minimize the window during your session, each time you need eChart data, clicking the action key will open for the active patient in Accuro.

COMPLETING A VISIT
Completing a visit links back to Traffic Manager – the tool that enables us to manage the flow of the patient through the station.

On completion of your patient encounter > Open Traffic Manager

- Right click on patient name and select Complete
- Drag and drop patient name onto Complete button at the bottom of the window

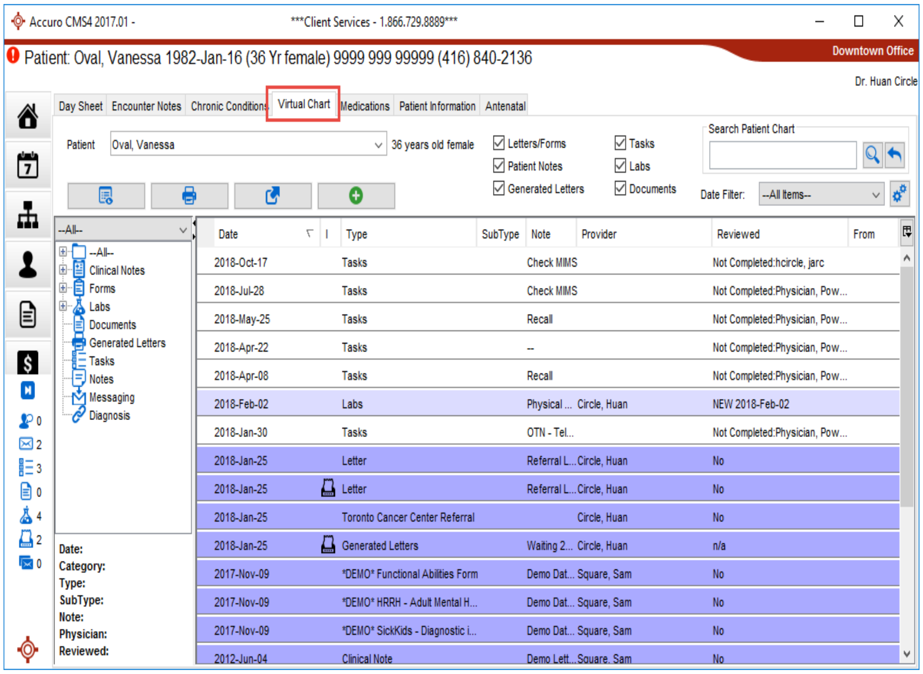
Either action will remove the patient name from the room in Traffic Manager.

Clicking on the Complete button will show you a list of names of patients that have been through the station. **A right click will allow you to move the patient back to the waiting room if needed.*

GENERAL

Virtual Chart Overview

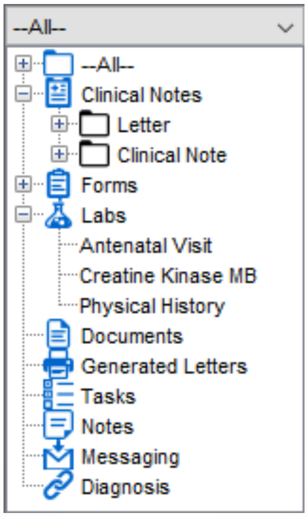
The Virtual chart is an additional view of the complete chart with added functionality.
All patient transactions from any Accuro module are recorded in the virtual chart. You can access the Virtual Chart by clicking on the **Virtual Chart** tab of the **EMR** section, or from anywhere in Accuro by simply pressing **F3.**



You can click on the column headings at the top to sort by that heading.
Example, if you click on **"Type"**, it sorts category types together, alphabetically.

If you click on **"Date"** it sorts all items in chronological order. Click again to reverse the order of the sort from ascending to descending.

VIRTUAL CHART FILTERS: Allow you to see only the items that you have selected. If you click on Documents, only Documents appear in the main table. **Click on All again to show everything.*



Above the Chart, you can search for a specific document with the Search Patient chart field. Search Patient Chart works with keywords form the document or its title.

All documents in the virtual chart are searchable based on the information entered into Accuro, but the PDF itself is not searchable.
Example: wrist, knee, MRI, x-Ray or names "Dr. Jones".

Under the Search Patient field, you can further filter the list by selecting a date range from the Date Filter dropdown.

Fax Options

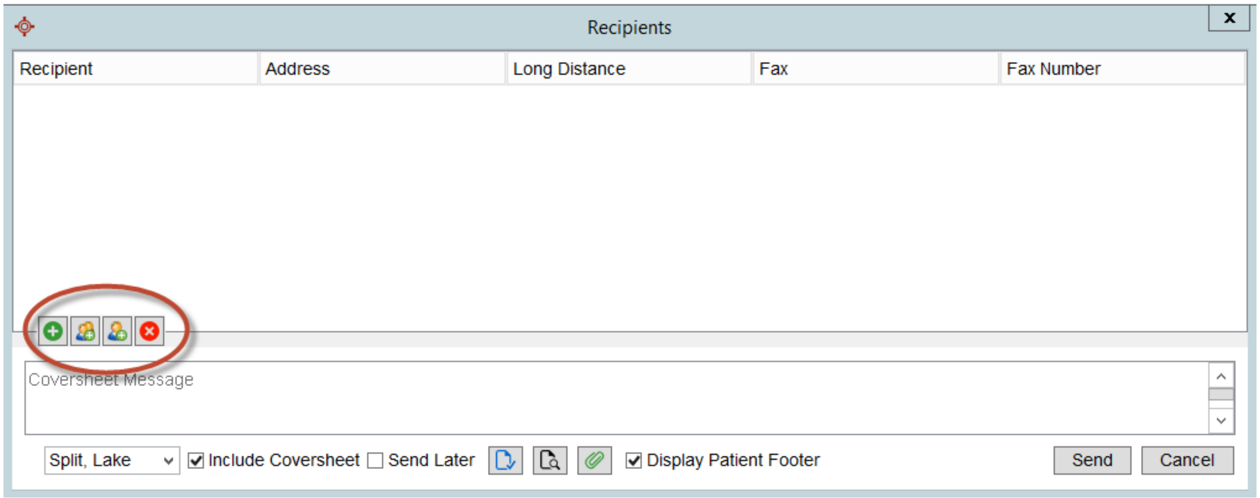
Users will have the ability to fax items directly out of the EMR. Recipients are looked up in the Accuro address book.

There are various ways to fax from the EMR:

- An open form will have a fax button option
- A generated letter will allow you to 'Send Letter'
- Items can be selected in the Virtual Chart view and right click > Fax

**To select multiple items – hold CTRL and then single click on each document*

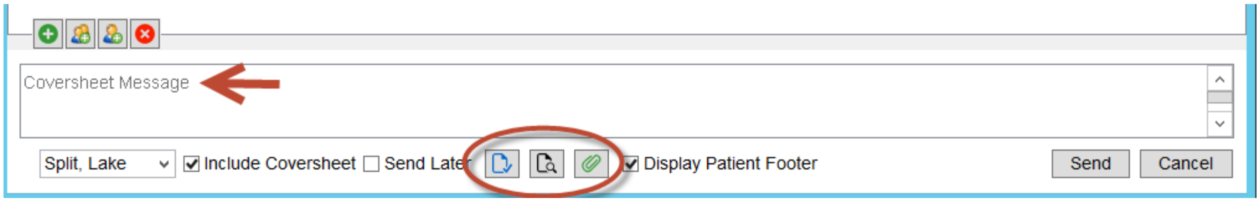
The fax dialogue window will present to select the recipient.



1. Green add to look up a contact in the address book
2. Double head icon will allow you to add patient's physicians (referring or family if captured in demographics)
3. Add a one-time recipient
4. Delete a recipient

The station name will display in a drop down – and a coversheet will be added by default.

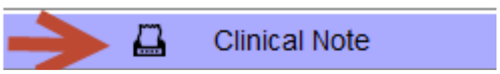
**Do not use the send later function*



You can type any supporting text into the Coversheet Message area.

1. Select pages to fax
2. Preview your fax before sending
3. Add further documents to be faxed out

If a chart item has been faxed there will be an icon displayed next to the document type:



You can also right click on a faxed item > print/fax summary to see details (User that faxed, recipient – date and time).