

ISC Clinical (Nurse/Physician) Accuro EMR User guide

Train the Trainer Content Prepared for First Nations Inuit Health Branch

EMPOWERING PROVIDERS | CONNECTING PATIENTS

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Developed by QHR Technologies



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Version: 1.1



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	OHR
F1	F2	F3	F4	F5	F6	F7	F8	F9	F11	ACCURD.



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.

Patient: Oval, Vanessa 1982-Jan-16 (36 Yr female) 9999 999 99999 (416) 840-2136

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Home

7

Scheduler

1

Patients

\$

Claims



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.



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🖂 O

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:

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.

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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 N	ame oval	Health # Search Only	Oval Vanessa 99999999999 1982-Jan-16
First N	iame 🚺	Identifier Search Only	
Middle	Name	Birthdate MM/DD/YYYY	

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 <u>456-7890</u>

Complete the demographic tab with all basic patient information, special considerations:

Birthdate Enter the date of birth in the format <u>MM/DD/YYYY</u> 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.

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Ð	Global Message	Your Message
8		
	Last Updated: Never	Last Updated: Never
	Select a Role V	
		Last Updated: Never

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

New Patient						\times
Last Name		~				
First Name	Mr.	_ ~				
Middle Name	М	\sim				
Health #	ON	\sim	Address			
HC Expiry	MM/DD/YYYY		City			
Birthdate	MM/DD/YYYY Infant		Province	ON, Canada		\sim
Home Phone	(000) -		Postal			
Work Phone			Fam. Phy.	None	Q	
Cell Phone	(000)		Insurer	-PP-		\sim
Email Address		a	Status	Active		\sim
Email Address		9	Global Mes	ssage		
Referred By	None					
File Number						
Office Provider	None					
Profile Picture						
	Clear (F1)	Aliases	Add	Cancel		

*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).

Bookings	>	
Providers	2	All Providers
Apply Template	;	No Providers
Multi Day Mode		Circle, Huan
Full Week		Sphere, Mina
Business Days		Square, Sam
Day of Week	>	

*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.

Today		∢1m	∢1w	∢1d	Feb, 2018	1d ►	
-------	--	------------	------------	------------	-----------	------	--

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.

Patient			
No Patient Birthdate	t		

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.

Patient	ov, va		5.7 :		
No Dat	Patients				
Birthda	Last Name	First Name	Health Number	Birthdate	¢°
Work P Home F	Oval	Vanessa	9999999999999	1982-Jan-16	^

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1m>

1w▶

NURSE

Prenatal Clinic

Initial Prenatal



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.

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Appointment Details						×
Loads Settings from	n this Patient's Previous Appointment					Downtown Office
Z Circle, Huan	~	Confirmed Arrived				ð
Details Appointment Date	2018-Mar-01			Туре	Follow Up	~
Appointment Time	9:30am		Ø	Reason		~
Appointment Length	15 minutes (9:45am)		\sim	Location	O Provider's Office	~
Referred By	None			Priority		~
Other Providers			~ <i>Ø</i>	Insurer	OHIP	~
Room	None		▼ Q			
Notes			Popup Notes			
C Recurring						۲
○ No Patient	val, Vanessa					OK Cancel

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.

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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.

Thursd	ay (1)	Friday (2)		
0		0		
Our Ver				^
0/2	Create Ap	pointment		
	Create Gr	oup Appointment	-	
	Cancel Ap	pointment		
	Find Next	Appointment		
	Jump Ahe	ad		
	Book Day	Off		
	Assign Pa	tient Form		
	Archive			
	Retrieve D)etails		
	Set Note			
	Claim Deta	ils		
	Arrived			
	Confirmed	I	-	-
	No Show		-	-
	No Charge	e	-	
	Status		>-	
	Suggestio	n Templates	>	
6	Сору Арр	ointment		
Ê	Cut Appoi	ntment		
	Paste App	pointment		
	Recall Pat	ient		
	Appointme	ent Reminder		
	Open Wai	t List Booking		
	Print Selec	cted Column		
	Print Selec	cted Appts		
				¥

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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.

Next Ap	opt:	¢
٦	Thursday Mar 01/2018 9:30am	
Prev Aj	opt:	
	2018-Feb-14 Circle	



				Traffic Man	ager					_ □
Test, Tracey	456789412 /	April 01, 1992 (2 R 2S0	?7 years old mai	e)			4		Split Lake Nu	rsing Station
Waiting Room									7.81	
Name	Arrived	I .	Booked	Visits	Reason		Notes		Self Arrived	
0 🖉 😣										
				🛗 Tuesday, Apr	02, 2019					
🌲 Mental Health	h Thera	2 CR113		6 CR114		2 CR146			4	ER148
None		Split Lake		Split Lake	-	Split Lake				None
	Mental H		CR113				CR146			
	ealth	T MD143		TMD Waiting Area		😭 CR116				
	The			Split Lake		Split Lake				
	rapist	Split, Lake	> MD143	opin, Edito	MD Waitin			CR116		
					g Area					
¢			11	и	g Area					



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

🖆 Room 3	
Providor, Sarah C. [7077]	•
	Ro
	ŝ

🎌 MD143		*
		Split, I
Split, Lake	~	op.n., i
Test, Pat	ient 🌹 📴 🧝 🖬	
	Edit Detai	ils
	Complete	d
	Send to V	Vait Room
	Claim Det	ails
	Appointm	ent History
	Go to EM	R
	Virtual Ch	art
	Tasks	
	Clear Not	ifications
	Remove	

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.

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Self Arrived



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.

🔶 Accuro	CMS4 2017.01	***Client Services - 1.866.729.8889***		- 🗆 ×
Patien	t: Oval, Vanessa 19	82-Jan-16 (36 Yr female) 9999 999 99999 (416) 840-2136		Downtown Office
				Dr. Huan Circle
	Record Series A. R. and Statistical Series.	🔠 😣 🧪 🛄 🖨 🚺 🖪 1 / 1 Pages 🕨 闭 Fit to Width 🗸 0° 🗸		Patient
		Fax3.pdf		Oval, Vanessa
7			^	Health # 9999 999 99999
	1			Birthdate 1982-Jan-16
÷				Pharmacy Request V
•		MEDICATION REFILL REQUEST		~
L				Created 02/15/2018
		Patient Name Number of Refills		Received MM/DD/YYYY
E		Vanessa Oval		Reviewed 02/15/2018
	. The set of the set	DOB Refill once and schedule an office visit		Priority Normal V
\$		16/01/1982		From
Ô	1	Phone number Do not refill until the patient is seen		Description Include filename
		Medication		
(1)		TYLENOL WITH CODEINE NO.3 TAB		
		Dase		
		1 TAB 2 TIMES DAILY		File Document
		Bharmary		Circle, Huan ~
M	MIDOMOR MILLINGUM	P HALING Y		Ratab Mada
🏖 0	Markan C Strandors	Phone and the second se		
⊠ 3	NAME AND ADDRESS OF AD	Pharmacy Phone number		1 Send to Provider(s)
8 3	1.50.00000 Mexery Automation Harrisoften state	[123] 456-7890 Physician Initials		Clear
≡ 0 Å 4	NOTION REPORT			C Open
2			~	🖉 Annotate Document
· · · · · · · · · · · · · · · · · · ·		¢	>	
•	K 🚺 3 🧹 / 3 💽	🖬 Files Left: 3 😽 🖿 🔮		Next Appointment: None

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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

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

- Deleted
- Opened
- Edited
- Split
- Merged

Open Edit
Edit
0.01.01.01.01.01.01.01.01.01.01.01.01.01
Split Individual Page
Merge

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.

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F1 TO SEARCH FOR A PATIENT.

Use the same criteria as you would in the to select the correct patient.

Patient

Oval, Vanessa

Birthdate 1982-Jan-16

9999 999 99999

02/20/2018

Received MM/DD/YYYY

Normal

Description 🗌 Include filename

Batch Mode

Document Options

File Document

Send to Provider(s)

Clear

🛃 Open

Use single provider dropdown when filing documents

Use Patient Office Provider for default Document Provider

Do not permanently delete documents. Move Deleted Documents into Deleted folder. Default Received Date to the Current Date

Show/Hide Document Thumbnails

💣 Options

×

Reviewed 02/20/2018

Health #

СТ

Created

Priority

From

Circle, Huan

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.

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OK Cancel



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.



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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.

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💠 New Task			_		×
Assign Task To:	✓ Patient: Task:	Oval, Vanessa			~
Physician	Priority:	Normal			\sim
🤱 hcircle	Due Date:	0 🌩	Days		~
& msphere ssquare		02/05/2018			
Power User	Note				
🚨 jarc					
Attachments (0)	eckout		ОК	С	ancel
📸 Recurring					۲

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.

 Tasks to Complete New...
 2018-Oct-17: hcircle, jarc; Check MIMS [*Demo Task* CA(2018-Jul-28: Physician, Power User, ja...; Check MIMS [*C
 2018-May-25: Physician, Power User, hc...; Recall [*Demo 2018-Apr-22: Physician, Power User; -- [*Demo Task* ACR'

Completed tasks are shown with a green check icon.



🔶 New Task	-	- [) ×
Assign Task To:			
Downtown Office \sim	Patient: Oval, Vanessa		
	Task: 4		~
Physician	Priority: Glormal		~
S hcircle	Due Date: 4 0 🖨 Days		~
🤱 msphere	02/05/2018		
🚨 ssquare	010012010		
Power User	Note		
🤽 jarc	5		
Attachments (0)	ckout	ОК	Cancel
👸 Recurring			۲

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".
 - <u>Normal</u>: sends to the recipient(s)

Urgent: tasks shows up in red in the inbox view

<u>Very Urgent</u>: 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.

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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.

2 hoircle						
	Date	Created By	Patient	Reason	Priority	Notes
	2017-Nov-24	Dr. Sam Square	Line, Ravinder	Recall	Urgent	*Demo Task*PENSTOCK
	2017-Dec-14	Jamie Arc	Cube, Martin	Check MIMS	Normal	*Demo Task*FUMY
	2018-Jan-30	Dr. Mina Sphere	Oval, Vanessa	OTN - Telemedicine	Normal	*Demo Task*AFFRAYS
Sent						
Documents						
Circle, Hu	ŧ					
Sphere, I	V	Filters: Overdue	✓ ReasonAll	RolesAll	•	
	-	C! Me	ssage Left	O New Conversation	🖶 Print	📇 Fax
	Complete	ed - 🥊 🕴 🗤	Answer	E Tacke	C Demove	
		<u> </u>	Allawer	n_ rusks	- Kellove	
Reca	II					
This task is overdue	•					
Patient Lin	e, Ravinder Task Created B	V Dr. Sam Square				
Date Due 11/	24/2017 Priority	Urgent				

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.

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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).

💠 New Message		– 🗆 ×
Io: Downtown Office ~	Patient: Oval, Vanessa	Attach to Patient's Chart
Physician	Priority: Normal ~	
🤱 hcircle	Body	
🚨 msphere		
🚨 ssquare		
Power User		
🚨 jarc		
	Attachments (0)	Send Cancel

Normal sends to the recipient in the normal fashion.

<u>Urgent</u> brings the message to the top of the list in the recipient's outstanding mail inbox. <u>Very Urgent</u> 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.

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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 Encounter Notes Chronic Conditions Virtual Chart Encounter Summary Medications Patient Information

Day Sheet: The Day Sheet is loaded with all the appointments for the day selected in the dropdown 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.

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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.

Patient Test, Patient	→ 47	years old male
Past April 02, 2019 at 11:00am Prenatal Care N CHN3 0 April 02, 2019 at 6:30pm Walk-in N CHN3 0	*Physician Note Notes *Patient Visit Note *Physician Note *Telephone Note Abdominal Pain Blank Note CPE-Female CPE-Female CPE-Male Generic Soap Note Knee Pain MHT - Clinical Note MHT - Phone Note	 Forms O2. Dental Health Forms: NRHA - Dental History and Physical NRHA - Elective O.R. Dental Booking For O9. Ocurrence Reports: FNIHB - Sudden and Unexpected Death f 12. Referral Forms - Split Lake NS and 12.276 General Consulation and Referra 12.277 Multidisciplinary Client Referral Fi 13. Referral Forms - Thompson, NRHA 13,285 Northern Lights Hearing Center R

Day Sheet Encounter Notes Chronic Conditions Virtual Chart Encounter Summary Medications

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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

- 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.
- Right click and select 'Lock' once you have completely finished your charting.

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

🔶 🔶 *Patient Visit Note - Test, Patient	x
File Edit Options Tools	
	17 🕑
	^
Patient's Name: Patient Test DOB: February 05, 1972 TN:	=
Visit Date: April 04, 2019 Time: 9:33 PM Provider: Lake Split	
S:	
O:	
A:	
P:	
User Date/Time Stamp:	
	~
W	>
Patient Visit Note Gen. Letter M->F Save As Save OK	Close
Type Clinical Note V	
DOS April 04, 2019* v	
Provider Split, Lake V	
DiagnosisNone	
For April 04, 2019 A Labs:New Edit O By Results	By Tests
None Recorded	
Active Medications (0/0) New Favorites Renew None Recorded	
Allergies New Y	



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

 47 years old male 	FilterAll Items	~
*Patient Visit Note		ð
 April 04, 2019: "Patient Visit Note Provider: Split, Lake (Physician) Patient's Name: Patient Test_DOB: February 05, 1972 TN: Visit Date: April 04, 2019 Time: 9:47 PM Provider: Lake Split S: O: A: P .l,ml,m,lm,l User Date/Time Stamp: 		Q ^
April 04, 2019: "Physician Note Provider: Split, Lake (Physician)		Q
Patient's Name: Patient Test DOB: February 05, 1972 TN: Visit Date: April 04, 2019 Time: 5:15 PM Provider: Lake Split more here and more here wjflkwjelkfjweklfjewlk more te:	xt	

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.

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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 Stationletterhead will beapplied. The footer willdisplay 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.

Version: 1.1



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.

¢	Letter Macros	X	The Letter Macros window appears.
Macro	ample of a macro that can be used in an eno	nd Contents	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.
	< III	> > Shared	Selecting the macro title and then select will apply the content to your encounter note.
	New Update Select (Close	

*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.

Favorite Prescriptions	X
	Import
Favorite	Category
	Active
OPD Acetaminophen 160mg Chewables 20's [A]	Active
OPD Acetaminophen 160mg/5ml 100ml [A]	Active =
OPD Acetaminophen 325mg 12's [A]	Active
OPD Acetaminophen 80mg/ml 24ml [A]	Active
OPD Acyclovir 200mg 50'S [B]	Active
OPD Amitriptyline 10mg 10's [B]	Active
OPD Amlodipine 5mg 10's [A]	Active
OPD Amoxi Clav 250mg/5mL 100ml [B]	Active
OPD Amoxi Clav 875mg 10'S [C]	Active
Clav 875mg 14'S [C]	Active
OPD Amoxicillin 250mg 21's [C]	Active
OPD Amoxicillin 250mg 21's [C]	Active
OPD Amoxicillin 250mg 30's [C]	Active
OPD Amoxicillin 250mg/5mL 100ml [C]	Active
OPD Amoxicillin 500mg 21's [C]	Active
OPD Amoxicillin 500mg 30's [C]	Active
OPD Anodan HC 10mg OINT 30G [C]	Active
	×
Apply & Print Apply &	Edit Cancel

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.

Version: 1.1



\$	Manage Prescription Test, Tammy (41 years old female)
Script Prescriptions April 09, 2019 Amoxicillin 500 mg oral capsule 1 TAB TID x 3 Day(s)	Prescription Prescribed By Split, Lake Prescription Instructions Other Notes amoxicillin 500 mg Oral Capsule Active (Unknown)
Allergies	Arrioxicilin Route Oral v Drug Use Short term v Dosage & Options 1 Tablet(s) TID for 3 Day(s) starting on April 09, 2019 Refills 0 ¢ Qty per Refill 0 ¢ Triplicate As Directed V Auto Expire
0	SIG Instructions OPD [C] Take 1 capsule three times daily or as directed Comments DO NOT TAKE if allergic to Penicillin May reduce the effect of Birth Control pills May cause upset stomach or diarrhea
 No Prescription Warnings De 	etected Cancel

- 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?

Version: 1.1



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.

Active Medications	

Once selected the prescription selection window will present.

\$	Prescription Selection				x	Single click on the
eRx St Medication	Comments	Dose	Duration	Status	E₽	medication (or hold CTRL
Active Prescriptions Continuous Short-Term amoxicillin/potassium clavulanate External Decently Active Prescriptions	Take with foodAvoid with Penicillin		л 	Unknowr		and if there are multiple items)
Historical Prescriptions						Click on the Renew Prescription button.
						This will class the item as re- issued. Finish details (diagnosis as usual).
		Edit S	ig 😽	Canc	el	

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.

Version: 1.1



MEDICAL HISTORY BANDS & BUTTONS

 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.

Revision Date: February 22, 2018



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

April 05, 2019		13.280 Northern Consulation Centre General Referral Form	
April 04, 2019	8	Clinical Note	*Patient Visit Note
April 04, 2019	8	Clinical Note	*Physician Note
Created	I	Туре	Note

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.

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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.

- 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.









	Lat	o Results Entr	y - Test,	Tammy			_		x
	• Vital Signs			🗌 Imj	perial Unit	ts Sou	irce: Ma	nual Ei	ntry
Collection Date 05/04/2	2019 Time	e 11:20 AM	Observ	ation Date	05/04/20	19	Tim	e 11:2	20 AI
Lab Order #:			Receive	ed Date	05/04/20	19			
Laboratory		~	Requisi	tion Date	DD/MM/Y	YYY	v 🗳		
Result Name	Value	Ref. Range	Units	Flag	Sh	ow All	Note		
CTAS				Normal					^
Temperature			С	Normal					≡
Heart Rate			bpm	Normal					
Respiration				Normal					
BP - Systolic				Normal					
BP - Diastolic				Normal					
•••••••••••••••••••••••••••••••••••••••									
Notes									
CHN1, Nurse								~	222
\bigcirc Send to Provider \odot F	Reviewed 🗌 C	ontact Patien	t	8	Apply	(ОК	Cance	ł

- Patient Vitals are entered in the 'Value' column
- No need to add units as these are already configured
- Use the $\uparrow \downarrow$ 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.

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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:



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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.



Open Clinical.

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

¢			User Preferences	Accuro start > File > User Preferences >
p efaults	Cogins Logins	\$	Add Login	Login Type: MB eChart
		Login Type:	MB eChart v	Password
		Username: Password:		Confirm Password Ok > Apply > OK
Display		Confirm Password:	OK Cancel	*Each time your password changes – it will need to be changed back in here to ensure
Logins	Lock Accuro Shortcut			you can continue to access eChart.

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

Version: 1.1



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**.



Accu	iro CMS4 20	17.01 -			***Clie	nt Se	rices - 1.866.729.8889***				-		Х
Patie	ent: Oval,	Vanessa 198	82-J	lan-16 (36)	(r female	e) 99	99 999 99999 (416)	840-213	36		D	owntown	Off
												Dr. Hua	in C
	Day Sheet	Encounter Notes	Chr	onic Conditions	Virtual Cha	art N	dications Patient Informatio	n Antenat	al		- Search Datiant Chart		
4	Patient	Oval, Vanessa					✓ 36 years old femal	e 🗹 Let	ters/Forms	Tasks	Search Patient Chart	Q	+
ں ا			-	C	,		0	✓ Pai ✓ Ge	nerated Lette	ers 🗹 Documents	Date Filter:All Items	~	\$
1	All	\ \	4	Date	Γ	L	ype	SubType	Note	Provider	Reviewed	From	_
2	⊞ · 🗋Al	II ical Notes		2018-Oct-17		1	isks		Check MIM	S	Not Completed:hcircle, jarc		
	E Fon	ms		2018-Jul-28		1	isks		Check MIM:	S	Not Completed:Physician, Pow		
	Lab	is cuments		2018-May-25		1	sks		Recall		Not Completed:Physician, Pow		
	Ger	nerated Letters		2018-Apr-22		1	isks		-		Not Completed:Physician, Pow		
	Not	iks es		2018-Apr-08		1	sks		Recall		Not Completed:Physician, Pow		
	Mes	ssaging		2018-Feb-02		1	ibs		Physical	Circle, Huan	NEW 2018-Feb-02		
0	Ulai	gnosis		2018-Jan-30		1	isks		OTN - Tel		Not Completed:Physician, Pow		
2				2018-Jan-25		I	tter		Referral L.	.Circle, Huan	No		
0				2018-Jan-25		<u>,</u>	tter		Referral L.	.Circle, Huan	No		
4				2018-Jan-25		1	ronto Cancer Center Referra	I		Circle, Huan	No		
2	Date:			2018-Jan-25		Π,	enerated Letters		Waiting 2	Circle, Huan	n/a		
0	Category:	:		2017-Nov-09			EMO* Functional Abilities For	m	Demo Dat	. Square, Sam	No		
	SubType:			2017-Nov-09			EMO* HRRH - Adult Mental H		Demo Dat	. Square, Sam	No		
	Note: Physician			2017-Nov-09			EMO* SickKids - Diagnostic i		Demo Dat	. Square, Sam	No		
)-	Reviewed	t:		2012- Jun-04			inical Note		Demo Lett	Square Sam	No		

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.

	~
🖳All	
🖃 🔛 Clinical Notes	
🗄 🚺 Letter	
🗄 🚺 Clinical Note	
🗄 💼 Forms	
🖹 🚵 Labs	
Antenatal Visit	
Creatine Kinase MB	
Physical History	
Documents	
🚽 🖶 Generated Letters	
Tasks	
Notes	
📩 Messaging	
🥜 Diagnosis	

All



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.

		Recipients			x
Recipient	Address	Long Distance	Fax	Fax Number	
Coversheet Message					
					~
Split, Lake ✓ ✔ Includ	e Coversheet 🗌 Send Later [Display Patien	nt Footer	Send Canc	el

- 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.

VE131011. 1.1



*Do not use the send later function

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[Coversheet Message 🔶	
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	Split, Lake v 🗹 Include Coversheet 🗋 Send Late 🕞 🔯 🖉 🗹 Display Patient Footer Send Cancel	

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).

Version: 1.1