

Accuro Quick Reference Guide

Quick Tips

ALT + Enter to edit patient demographics from any Patient field in Accuro (cursor must be flashing after the last letter of the patient name)

F1, Backspace, Enter (clear out) on a patient field to see the last 12 patients you have pulled up.

Alt + F12 to mask and unmask your screen or switch users quickly

% - or blank search field + Enter to pull all records – Use to search for patients by sounds like, I. E %ester% = ChESTER, ESTER, ForESTER...

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

Client Services 8am-8pm EST - 1-866-729-8889

Front Desk Workflow

Adding a New Patient (F6 Quick Pt Registration)

- 1. Press F6 to open New Patient screen
- 2. Enter Last Name
- 3. Enter First Name
- 4. Select Gender (dropdown beside Middle Name)
- 5. Enter **Health # with VC in Capitals**, no space after HCN (change province first for out of province cards in order to receive payment)
- 6. Select Referring Physician by clicking on the Magnifying Glass
- 7. Add in any additional Demographics
- 8. Press Add



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Booking a Patient Appointment

- 1. In the Scheduler, F1 to search for the patient
- 2. Make sure you are on the right day
- 3. Right-click and select Create Appointment, or drag patient name and drop on time slot or highlight time and click enter
- 4. Select Appointment Length in the appointment window (left-hand side)
- 5. Select Appointment Type (top right-hand side)
- Add any additional note on the appointment in Notes (bottom left-hand side) or a Pop Up Note on the Right hand side
- 7. Press OK
- **8.** To **CANCEL** an appointment Right click on the appointment and select **Cancel**, add a reason for the cancellation.
- **9.** Non-Pt Appointment with Pt selected follow same steps to create, select the radio button called No Patient in the appointment details window. (bottom left of the window)
- **10. To Find Next Appointment** Right click on appointment and select Find next appointment. A new window will open where you are able to enter the exact criteria for the appointment slot you need such as Day of the week, time frame or even suggestion on your calendar

Print a Day Sheet for the Full Day

- 1. In the Scheduler, go to the day you would like to print
- 2. Click anywhere in the physician's column
- 3. Click the printer icon (top left-hand side of the page)

Filing a Fax/Scan

- In the Documents, search for the patient (F1) If the patient's demographics have changed you can hit Alt + Enter to edit the pt demographics from this window.
- 2. Always work top-bottom on the right-hand side!!
- 3. Select Document Type and subtype if applicable
- 4. Set Dates CREATED DATE ONLY (D.O.S) if different from current date
- 5. Press **Send to Provider** for the doctor to review and to file in the patient's chart or **File** <u>without sending to provider</u>
- 6. To change directories from Faxes to Scans, click the **blue folder** icon at the bottom left and select the shared folder and left click on either Fax or Scan and click open to view your faxes or scans.



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Change a Document that was Filed in the Incorrect Folder or attached to the Wrong

Patient (from virtual chart or Documents inbox -steps 2-5)

- 1. Press F3 to open the patient's chart
- 2. Right-click on the document that was filed incorrectly
- 3. Select Modify
- 4. Correct the information, either patient name, provider or file type (Document, lab, image... relates to the folders and subfolder categories in the Documents Module (Incoming Faxes and scans)
- 5. Press OK

Send a Document from the Virtual Chart back to the Documents Section

- 1. Right Click on the Document you wish to send back to the Documents Section
- 2. Select Edit
- 3. Drag and drop the selected pages to the right hand pane and select Run
- 4. Select the appropriate folder to save to (i.e. S:/Scans or Faxes)
- 5. Right Click on the item you just edited as it will still be attached to virtual chart and click delete to avoid duplication

The document will now disappear from the Virtual Chart and appear as a new document at the bottom of the thumbnail pane in the documents section (Scans or Faxes) ready to be re-filed

| Jul 21, 201 | 5 Jul 21, 20 | 15 | CT report | | |
|-------------|---------------------|----|------------|--|---|
| Jul 21, 2 | Open | 15 | Diagnostic | ♦ Edit Document | < |
| | Preview | | | Virtual Chart Document New Do | 1 |
| | Edit Pages | | | 968 275-019 | |
| | Merge | | | | |
| | Print | | | | |
| | Print Entire Chart | | | | |
| | Fax | | | | |
| | Email | | | | |
| | Print/Fax Summary | | | | |
| | Delete | | | | |
| | View Log | | | | |
| | View Review History | | | | |
| | Send Message | | | | |
| | Send Task | | | v | |
| | Modify 🕨 | | | Run Cancel | |



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Faxing from the Virtual Chart (F3)

- 1. Right click on the Document you wish to Fax
- 2. Select Fax



- 3. Green + sign adds recipients from Address Book
- 4. The 2 person button adds the referring physician's information [Add Patients Physician(s)]
- 5. The 1 Person button adds a One Time Recipient. This allows you to send out a

fax without having to the contact to your Address Book **Related One Time Recipient** 6. The following choices are available within this window:



- Choose which pages to fax
- Preview fax before sending
- Add additional attachments to fax from the chart (NEW)

Resending a Fax

- 1. Click on Blue Fax Icon (bottom left-hand corner) looks like a kleenex box icon
- 2. Select All or select provider from the Provider dropdown
- 3. Select all faxes to be resent (checkmark box to the left of the fax)
- 4. Press Send Selected



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To print Different Labels

- 1. Go to the Red Target Icon (Accuro Start Menu) at the bottom left of the screen
- 2. Go to File/Print Label and expand the + sign to see other types of Labels
- 3. Select Label you wish to print, click print
- 4. To build your own label; File/Label Wizard

Generating a Letter and Letter Queue

- 1. The letter queue Icon is located at the bottom left hand corner of the screen and the designated Icon is a Blue Envelope
- 2. Electronic Drawer, select Note from the Left Hand side
- 3. **Type out BODY** of the letter and click **Gen. Letter** button at the bottom of the Note Window
- 4. Your Note will now have a Header and Footer
- 5. From the **left side of the screen** work top to bottom
- 6. Add recipient by selecting the magnifying glass, search address book
- 7. Add a Carbon Copy, if applicable, same process, magnifying glass, search address book
- 8. Select Header from first dropdown menu
- 9. Select Footer from second dropdown menu
- 10. Select Introduction from fourth dropdown menu
- 11. To Add or Remove Medical History from Letter
- 12. Click the Medical History Button under the fourth Drop down menu, deselect ALL
- 13. To add and attachment to the letter, Click the Green + under the Attachments window Select the Items you wish to attach by checking the box next to item and click send letter to send letter immediately OR
- 14. Click the **OPTIONS button** at the bottom of the screen and **set your status** for your letter, <u>I.E "Proofread and Send"</u> and add a note if you wish
- 15. Select the Add to Letter Queue button to add letter to the letter queue
- 16. The Dr. or Admin can open the letter queue and double click on the letter and open it to review
- 17. If letter is ok they can then change the note or status for the letter to "Send" or simply send letter.



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Tasks (F7) - Click on F7 to access or generate patient Tasks

| \$ | Pat | tient Tasks (F7) | | - 🗆 × |
|-------------------------------|-------------------|---------------------|---------------------|-------------------------|
| Patient: Kardashian, Kim | Work Pl | hone:(416) 000-0000 | Home Phone:(416) 00 | 00-000 |
| Tasks to Complete New None | | | ^ | New Task Delete Task |
| Patient Flags New None | | | ſ | Show Completed Tasks |
| Global Message None | | | | Open |
| User Message None | | | | New Message |
| Immunizations | | | ~ | |
| No Items Outstanding | | | | Close |
| | ١ | New Task | | - 🗆 × |
| Assign Task To: Accuro 2 | ✓ Patient: | Adams, Bill (spa | rky) | |
| | <u>T</u> ask: | B 1 week urgent | | * |
| Powerliser | Priority: | Normal | | ¥ |
| 🚨 Kawad | Due <u>D</u> ate: | 0 🗘 | Days | ~ |
| | | 06/20/2016 | | |
| | Note | | | |
| Attachments (0) | D Checkout | | | OK Cancel |
| 🖏 Recurring | | | | ۲ |
| Every 1 🗘 Days 🗸 u | ntil MM/DD/YYYY | | | |

- 1. Click New Task to generate a new Task Assign a recipient to the task
- 2. Decide if the task is Patient related or not
- 3. Select Task i.e Pharmacy Request
- 4. Assign a priority and Due Date
- 5. Add instructions regarding this task to the Note pane
- 6. Click the attachment button to attached items from the patient's chart to this task.
- 7. For recurring tasks i.e. yearly appointments select how often this task is to recur

TIP: *When tasking from a document, (Right Click on document in virtual chart and select send task) the document is automatically attached to your task.



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Conversations regarding Tasks

Fig1

To send a message regarding a task, L click once on task in Task inbox and

- 1. Select the **New Conversation** button. This allows you to have a back and forth discussion regarding a task while still maintaining ownership of this task in your inbox. All conversations regarding tasks will be received as a Mail Message with a Task Icon attached to it.
- 2. Search for Recipient (i.e Recept1), type in Body of Message
- 3. Click Share, to send conversation as mail message Fig 1
- To respond to a message click **Reply** Button on the Message Fig 2

Reply to Conversation - Task: Recall _ 🗆 🗙 New Conversation - Task: Recall 😰 General Note - Chewning, Jackie Normal ~ 🔊 General Note - Chewning, Jackie Normal ~ Message Message Please provide additional details regarding task. Thanks No les --All---O New Conversation = Tasks Share D L Search For Recipients Share D L Search For Recipients Dr. K. Awad 😣 (RECEPT1 (2) Fig2 & Recept1 Priorit Date From ject Patient Mail Tasks Docur Labs Kawad QHR Technolog 2015-Oct-07 1:29 PM Normal Task Recall Chewning, Jackie 2015-Sep-21 10:20 AM 2015-Sep-17 4:25 PM 2015-Sep-17 4:25 PM 2015-Sep-11 9:44 AM 2015-Sep-11 9:42 AM Mac OSX El Capitan and Accuro 2015 AccuroEMR Summit - Only. Task: Recall Task: Recall QHR Tech Reply 🗧 🔀 Reply All 🕻 Message Left 😣 Delete 🖶 Print Review 🖂 🗄 😽 Forward 🗐 General Note **C**I No Answer 🛅 File @ Attachments Created 2015-Oct-07 1:29 PM Recall 2015-Oct-07 1:29 PM Kawad Please provide additional details regarding task. This task is due today RECEPT1 Patient Chewning, Jackie Task Created By OptiMEDirect Date Due 10/07/2015 Priority Normal Assigned To Kawad Notes



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Patients Past, Present and Future Appointments. Right Click on appt to add codes to the Claim Details Labs pane displaying lab results and Views, Use the dropdown to change view

Use the Green + to add information to the Bands

| - \$ - | Family History |
|---------------|------------------------------------|
| History | |
| Asthma | ^ |
| Cancer | |
| Diabetes | |
| Heart Dis | ease Y |
| Details | Colon ~ |
| Note | |
| Date | MM/DD/YYYY |
| End Date | MM/DD/YYYY |
| Relation | Brother v |
| Age at Onset | 35 |
| Life Stage | ~ |
| Treatment | |
| | Negative |
| Delete | Save and New Save and Close Cancel |
| | |



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The Electronic Drawer

| | | Ö |
|--|---|----------|
| Notes | Forms | ~ |
| Antenatal (Form Letter) | ✓ Standard Forms: | ^ |
| Cardiology Consult Colposcopy Consultation (Form Letter) Colposcopy Follow Up (Form Letter) Congestive Heart Failure Consult Letter Example MS Clinic | *Phone Call *Routine Exam *RX-SCRIPT *Updated Antenatal Record v1.3 2013 Ontario Laboratory Requisition 4422-84 | 1 |
| External MEDS Form 2 Letter Example Gyne Consult (Form Letter) Hypertension Knee and Hip Consult Medical Hx Bands Neurology Sample | CCAC - Palliative Care Services CCAC - Peel CML Cytology CML Histopathology Requisition Colposcopy report Dec 4 Cytogenetics - NYGH Copy 1 | · |
| Note Referral Letter | Form 2 Letter Example Gam X-Ray | ¥ |
| | Edit | |

Search your drawer by form or template name, or Click Edit to clean up your drawer and hide those forms and templates that you do not need or use.

Form Categories

- Standard Forms these are not trackable in the system
- **Requisition Forms** These are TRACKABLE in the system
- Chart Sheets Accessible through F9 Key from anywhere in



Accuro

Double click on the **bolded** categories in the drawer to collapse or expand the category

To Add a manual Lab – Click the Green +



Choose the applicable test you would like to enter results for and click ok



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| ¢ | | | Lab Res | sults Ent | ry - Kardashian, Kim | | | - | |
|-----------------|------------|--------------|------------|-----------|-------------------------|----------|-----------|------------|-----------|
| 2/2 | D O Physi | ical History | , | | | Imper | ial Units | Source: Ma | nual Entr |
| Collection Date | 08/17/2016 | Time 10 | :31 AM | | Observation Date 08/17/ | 2016 | Time | 10:31 AM | |
| Lab Order #: | | | | | Received Date 08/17/ | 2016 | | | |
| Laboratory | | | | , | Requisition Date MM/DD |)/YYYY | v 🗳 | | |
| Result Name | Value | | Ref. Range | Units | Flag | Show All | Note | | |
| BP - Systolic | 120 | | | | Normal | | | | |
| BP - Diastolic | 80 | | | | Normal | | | | |
| Temperature | 35.8 | | | С | Normal | | | | |
| O2Sat | | | | % | Normal | | | | |
| Heart Rate | | | | bpm | Normal | | | | |
| Weight | 165 | | | lb | Normal | | | | |
| Height | 5'7" | | | in | Normal | | | | |
| Head Circ. | | | | in | Normal | | | | |
| BMI | 25.8 | | | | Normal | | | | |
| Notes | | | | | | | | | |

Add results and click OK to Save and Close Window.

Use the Imperial Units check box to switch between Metric and Imperial units of measure.

An impression of the results

By clicking send to provider a copy of the manually entered lab will be sent to the Provider's lab inbox for review.

| La | bs | | Q | Ģ | INR | á | 0 | Ø | By Tests | ~ |
|-----|--------------------|---------|---|---|-----|---|---|---|----------|---|
| ė-F | hysical History (C | ptimed) | | | | | | | | ^ |
| | - O2Sat | 78 | | | | | | | | |
| | Heart Rate | 76 | | | | | | | | |
| | BP - Systolic | 120 | | | | | | | | |
| | BP - Diastolic | 80 | | | | | | | | |
| | Temperature | 35.8 | | | | | | | | |
| | Weight | 165 | | | | | | | | |
| | - Height | 5' 7" | | | | | | | | |
| | BMI | 25.8 | | | | | | | | * |



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Trackable forms will be added to outstanding requisitions referrals and orders automatically. For orders or referrals out that are outside of Accuro, you can use the **NEW ORDER** button to add them manually to the tracker. Patient orders are searchable by type, patient or status.

| ¢ | | | | | | Outs | tanding Requi | sitions, Refe | rrals, and C | orders | | | - 🗇 🗙 |
|------------|------------|-------------------|-------------------|----------|--------------|---------|---------------|-----------------|--------------|-------------------|-------------|---------|-------|
| Search | | Patien | t Abbott, Ashley | | • | | | | | | | | |
| Providers | | Туре | | Sta | tus | | | | | | | | |
| All | [| ▼AII | | ~A | ll | | ✓ Show req | uisitions older | than 6 month | s Find Orders | | | |
| | | - | | | | | | | | | | | |
| Awad, Kat. | Abbott. As | l ype Referral | Order | Age 0 | Jun 20, 2016 | ORDERED | Description | Specific | Location | Last Modified | Booked Date | Contact | L¥ |
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| | | | Recon | cile | New Order | Delete | e Order Virtu | ial Chart | | Reconcile Histor | У | Close | |

To view a history of tracked items click the **Review History** Button.



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Updating the Tracker

There are 2 times you should be updating your Outstanding Requisition Referrals and Orders Tracker.

- When an appointment confirmation or notification letter is received in the Documents section of Accuro as a fax advising you that your patient is booked to see the Doctor on a specific date and time.
- When an imaging or other Report is being tracked in the tracker and the Report is received
 - 1. F4, F1 to load patient
 - 2. Click Patient Orders Tab to add the information as follows:
 - 3. *Description*: Patient notified, patient refused appt, unable to reach patient
 - 4. *Specific:* Appointment Time and or specifics such as arrive 15 mins prior to appointment
 - 5. Location: Location details for the appointment venue
 - 6. Booked Date: Date the appointment has been booked on
 - 7. *Contact:* Whom the appointment is taking place with

| ¢ | | | | | | | | Quid | ck Patien | t Appointments View | | | | - | × |
|--------|----------------|-------------|----------------------|----------|----------------|-------------|--------------------|-------------|------------|---------------------|---------------------------|-------------------|--------------|------------|-------|
| File T | ools | | | | | | | | | | | | | | |
| Patier | dibbons, Jo | ohn | | | Insure | r | A/R | Credit | | | | | | | |
| | 53 years old | d male 🗹 Sh | ow All Procedures | | OHI | 0 | \$0.00 | \$0.00 | | | | | | | |
| Appoi | ntment History | Wait List H | listory Patient Orde | ers Arcl | nived Appointr | ment Histor | y Private Billing | | | | | | | | |
| Searc | h | | | | | | | | | | | | | | |
| Provi | ters | т | ype | | Status | | 🗌 Include | Reconciled | d Orders | | | | | | |
| All- | - | v - | -All | ~ | All | | ✓ Show I | equisitions | older tha | n 6 months | | | | | |
| | | | | | | | | | | | | | | | |
| Provi | ler Patient | Туре | Order | Age | Order Date | Status | Description | | | Specific | Location | Last Modified | Booked Date | Contact | rų. |
| smith, | St Gibbons | Referral | Dr. Cliff Huxt. | 1113 | May 17, 201 | ORDER. | . Patient Notified | | | Appt time 3:30pm | Hospital 3rd Floor S. 303 | May 17, 2013 1:3 | Jun 30, 2016 | Brown, Bob | ^ |
| Smith, | St Gibbons | 2012 Onta | ario ALT, CK | 1113 | May 17, 201 | 3 ORDER. | | | | | | May 17, 2013 1:2 | | | |
| Smith, | St Gibbons | Southlake | C | 1113 | May 17, 201 | 3 ORDER. | | | | | | May 17, 2013 1:1 | | | |
| smith, | St Gibbons | SJHC - TO |) | 1113 | May 17, 201 | ORDER. | | | | | | May 17, 2013 9:5 | | | |
| sinut, | St GIDDUIIS | SJHC - TC |) | 1113 | Ividy 17, 201 | ORDER. | • | | | | | Widy 17, 2013 9.5 | | | |
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| | | | | | | | | | | | | | | | Close |

***Items can be reconciled within the Tracker, F4 Patient Orders Tab andF7 (Tasks)



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