



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	
F1	F2	F3	F4	F5	F6	F7	F8	F9	F11	

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**



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)
6. 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

1. 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 without sending to provider**
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.



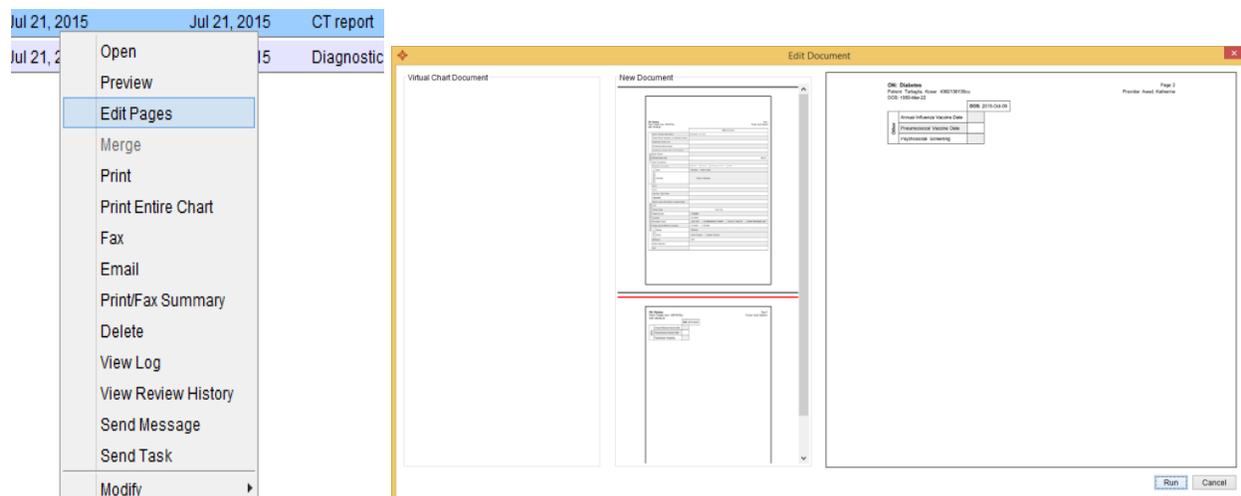
Change a Document that was Filed in the Incorrect Folder or attached to the Wrong Patient (from virtual chart or Documents inbox –steps 2-5)

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

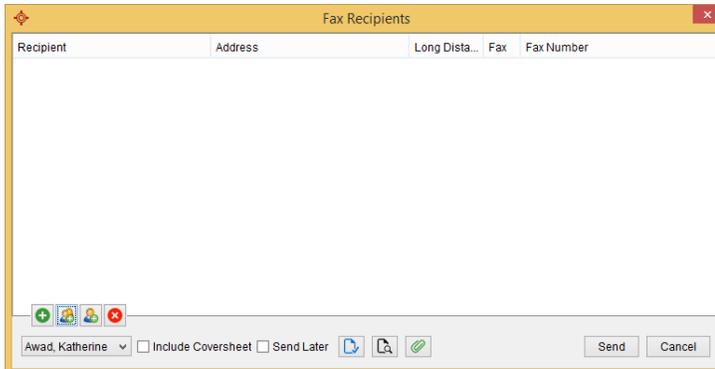
The document will now disappear from the Virtual Chart and appear as a new document at the bottom of the thumbnail pane in the documents section (Scans or Faxes) ready to be re-filed



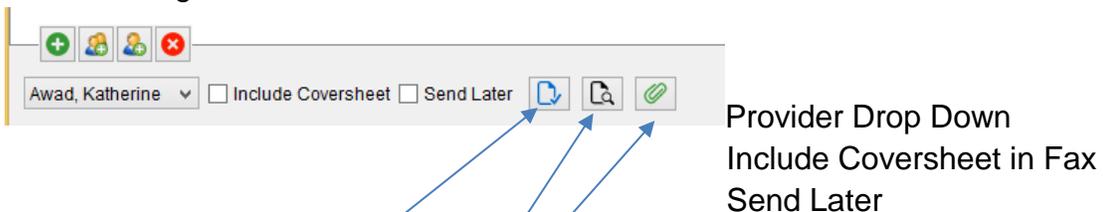


Faxing from the Virtual Chart (F3)

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



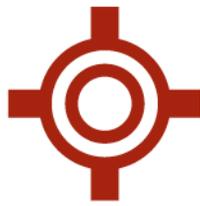
3. Green + sign adds recipients from Address Book
4. The 2 person button adds the referring physician's information
5. The 1 Person button adds a One Time Recipient. This allows you to send out a fax without having to the contact to your Address Book
6. The following choices are available within this 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**



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, I.E **“Proofread and Send”** 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.



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

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.



Conversations regarding Tasks

To send a message regarding a task, 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
4. To respond to a message click **Reply** Button on the Message – Fig 2

Fig1

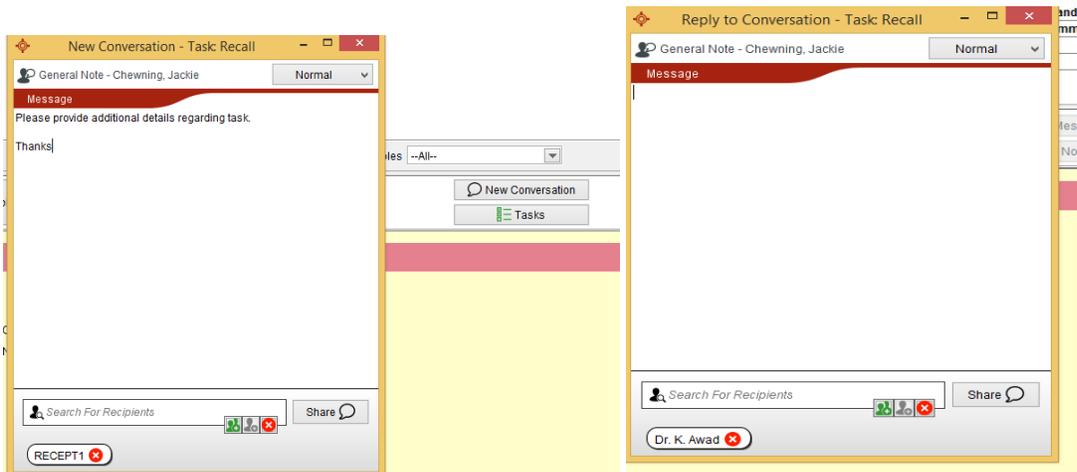
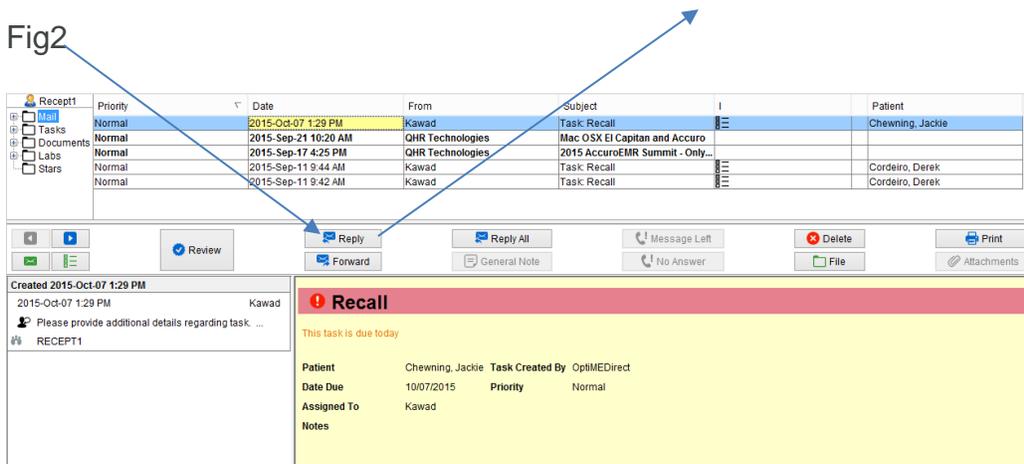
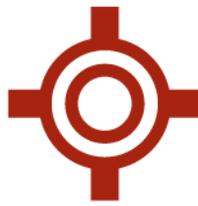


Fig2





Encounter Notes Tab

Electronic Drawer Containing Letter templates on the Left and Forms on the Right

Use Green + to prescribe new medications or the Star to choose from your favourites list

Patients Past, Present and Future Appointments.

Right Click on apt to add codes to the Claim Details

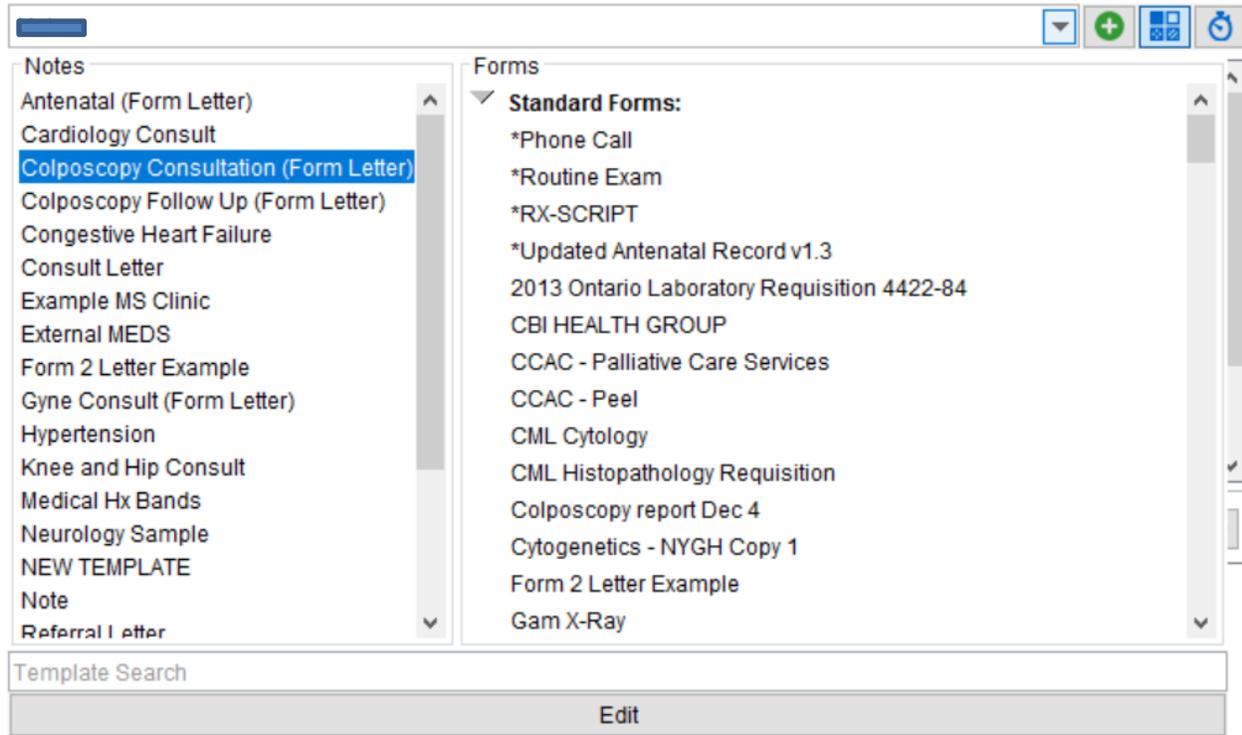
Labs pane displaying lab results and Views,

Use the dropdown to change view

Use the Green + to add information to the Bands



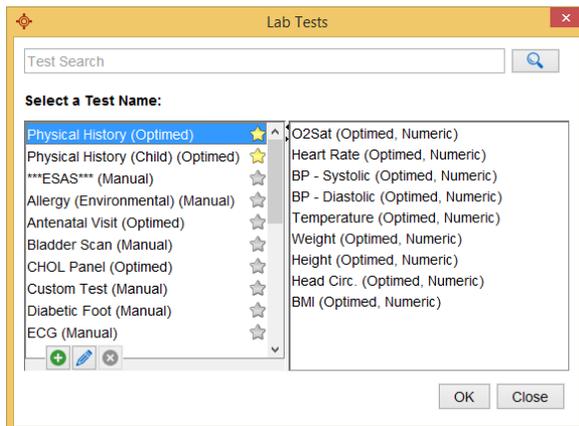
The Electronic Drawer



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

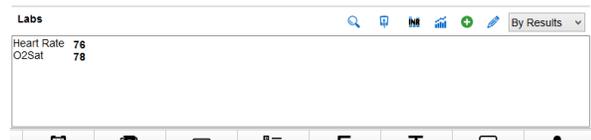
- **Standard Forms** – these are not trackable in the system
- **Requisition Forms** – These are TRACKABLE in the system
- **Chart Sheets** – Accessible through F9 Key from anywhere in



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



Lab Results Entry - Kardashian, Kim

2/2 Physical History Imperial Units Source: Manual Entry

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

Result Name	Value	Ref. Range	Units	Flag	Show All	Note
BP - Systolic	120			Normal	...	
BP - Diastolic	80			Normal	...	
Temperature	35.8		C	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: _____

Awad, Katherine

Send to Provider Reviewed Contact Patient

Apply OK Cancel

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.

Labs

Physical History (Optimed)

O2Sat	78
Heart Rate	76
BP - Systolic	120
BP - Diastolic	80
Temperature	35.8
Weight	165
Height	5' 7"
BMI	25.8



Outstanding Requisitions, Referrals and Orders



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.

Provider	Patient	Type	Order	Age	Order Date	Status	Description	Specific	Location	Last Modified	Booked Date	Contact
Awad, Kat...	Abbott, As...	Referral	Neurologist	0	Jun 20, 2016	ORDERED				Jun 20, 2016...		

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



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

Provider	Patient	Type	Order	Age	Order Date	Status	Description	Specific	Location	Last Modified	Booked Date	Contact
Smith, St...	Gibbons...	Referral	Dr. Cliff Huxt.	1113	May 17, 2013	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 Ontario...	ALT, CK	1113	May 17, 2013	ORDER...				May 17, 2013 1:2...		
Smith, St...	Gibbons...	Southlake C...		1113	May 17, 2013	ORDER...				May 17, 2013 1:1...		
Smith, St...	Gibbons...	SJHC - TO - ...		1113	May 17, 2013	ORDER...				May 17, 2013 9:5...		
Smith, St...	Gibbons...	SJHC - TO - ...		1113	May 17, 2013	ORDER...				May 17, 2013 9:5...		

*****Items can be reconciled within the Tracker, F4 Patient Orders Tab and F7 (Tasks)**