

Med-Access EMR Introduction Instruction Sheets

EMR Introduction Instruction Sheets for new users.

Startup FAQs

- i. How do I log on?
 1. In the office
 2. Remotely
- ii. How do I access my schedule?
- iii. How do I get to my patient's chart?
- iv. How do I document a transaction:
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 4. Forms
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 6. Prescriptions
 7. Billing/coding
- v. How do I access my inbox (assigned transactions/tasks)?
- vi. How do I access historical information?

Click on question to take you to page in document

Disclaimer: This is an independent quick reference guide on getting started with Med Access that has been created by physicians, for physicians, and was not authored by your EMR vendor or issued as part of their official documentation. Your EMR vendor support desk should be the first point of contact if you have questions or need additional workflow guidance with your EMR software, and can also provide you with any official training materials or help files for your system on request.

Should you have any feedback or suggestions for improvement on this quick reference guide, please send to tbc@doctorsofbc.ca

How do I log on?

1. In the office

- i. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- ii. The EMR login window will open



Dr.

User Name:

Password:

- 2018 BC MSP Billing Calendar
- Introducing our new Hardware and Network Support options

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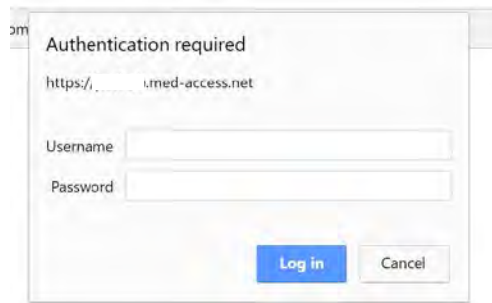
You have accessed a private and restricted system. All usage will be monitored and unauthorized activity may result in prosecution or disciplinary action. Further access to this system constitutes your acknowledgement of these terms of use.

TELUS HEALTH

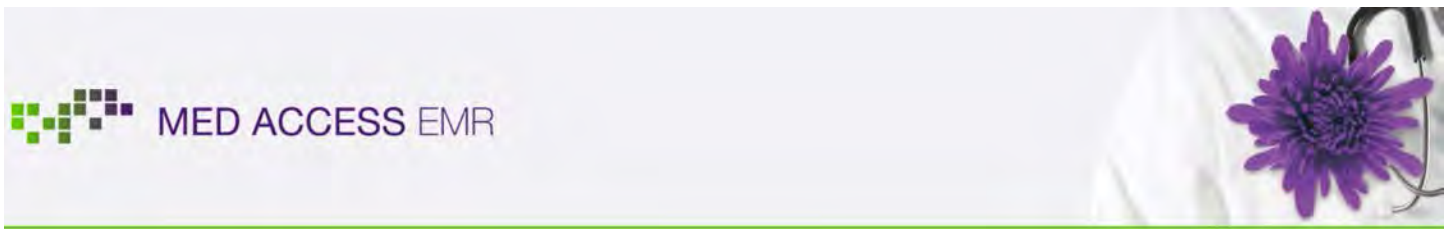
- iii. Type in the User Name and Password given to you by the office administrator. Login.

2. Remote Log in

- i. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- ii. The EMR login authentication window will open



- iii. For Username, type in the Clinic EMR 6-character label given to you by the clinic administrator. (same as the 6 characters in the clinic EMR URL)
For Password, type in the 20 alpha-numeric password given to you by the clinic administrator.
Log in.
- iv. The EMR login window will open



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- v. Type in the User Name and Password given to you by the office administrator. Login.

How do I access my schedule?

- i. When you log in, you will go to an initial screen that will be set up differently in each clinic but which will have a schedule in the window.
- ii. Other information may be visible in this window, including Tasks. This window is user configurable to show various types of displays.

The screenshot displays the EMR scheduler interface for a resident on Wednesday, February 28, 2018. The main window shows a schedule table with the following data:

Time	Patient	Primary # Chart #	Type	Concern	Appt Status	Billing Status	Bill	Diag
08:30								
08:45			regular	2w follow up (BP please)	Done	Pending	17100	401
09:00			regular	rx (BP please)	Done	Pending	17100	276, 348
09:15			regular	B 12 and rftls	Done	Pending	15300	728, 2811
09:30			regular	sick 2 weeks (BP please)	Done	Pending	00100	
09:45			Repeat Appt	diarrhea	Done	Pending	18100	244, 276
10:15			Repeat Appt	3 month follow up on kidney function	Done	Pending	18100	7844, 9853, 72743
10:30			Kati 1st Appt	MTD, school exam form	Done	Edit		
11:00			regular	fu reflux med (weight and height please)	Done	Pending	00100	53081
11:15			Physical w Pap Kati	HbWt & Pap "" regiside	Done	Pending	14500	708
12:00			Lunch Break		Template			
12:30			Staff Meeting		Template			

The right sidebar contains three sections:

- Urgent Tasks:** Nothing found to display
- All exclude Visits:** Nothing found to display
- Active Abnormal Lab Results:** Nothing found to display

How do I get to my patient's chart?

- vi. From your schedule, click on the patient name of the chart that you want to access.

Time	Patient	Primary # Chart #	Type	Concern	Appt Status	Billing Status
08:30	Patient Test 03-Feb-1953 (65) M	book 20 min			▶ Booked	Edit
08:45	Baby Boy Test 17-Mar-2014 (3) M				▶ Booked	Edit
09:00	Billing Test 01-Jan-1956 (62) F				▶ Booked	Edit
09:15	Lynne Test 02-Nov-2011 (6) M				▶ Booked	Edit

- vii. Once the chart is opened, click on the tab name of the section you want to open

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Summary Search Family Help

Demog **Visits** Tasks Bills Allg Meds Profile Labs Invest Consults Imm Goals Appt

Visit filter - all visits

Task Start Date: All Start: All End: All Diagnosis: All Obs Template: Summary
Obs Name: Obs Value: Provider: All Status: All

Date	Provider	Concern	Diagnosis	Disposition
21Feb18			heart failure*, 428	✓
16Nov17		physical	obesity/hyperalment*, Chronic pain , 278, 338.4	✓
26Aug16			heart failure*, 428	✓
27Jul16			heart failure*, 428	✓
12Apr16			epistaxis , 784.7	RTC as required ✓
19Mar16			heart failure*, 428	✓
27Oct15			depressive disorder nec , 311	RTC 2 weeks ✓
19Oct14				

How do I document a transaction:

i. SOAP note

i. From the "Visits" tab window, click on the "New" icon in the upper right of the window

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults Imm Goals Appt

Visit filter - all visits

Task Start Date: All Start: All End: All Diagnosis: All Obs Template: Summary
Obs Name: Obs Value: Provider: All Status: All

Signed	Date	Provider	Concern	Diagnosis	Disposition
	21Feb18			heart failure*, 428	
	16Nov17		physical	obesity/hyperalimnt*, Chronic pain , 278, 338.4	
	26Aug16			heart failure*, 428	
	27Jul16			heart failure*, 428	
	12Apr16			epistaxis , 784.7	RTC as required
	19Mar16			heart failure*, 428	
	27Oct15			depressive disorder nec , 311	RTC 2 weeks
	19Oct14				

ii. This opens the default SOAP note set for you by the administrator. The default SOAP can be changed to a different SOAP note by the clinic administrator

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults Imm Goals Appt

Visit

Subjective

Concern

Assessment

Diagnosis

Billing Item

Plan

Print Care Plan Task Inv Con Lab Imm Med Draw

Workflow Step: Add-Ins

Disposition

Insurer Patient -

Date 28-Feb-2018 06:44 PM

Provider

Bill Provider

Save

Personal Health Record

Observations

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in the last year
HIV Test Not Done in Last 5 Years

Subjective Note

Vital Signs

Weight kg
Pulse /min
Regular? Yes No
BP mm Hg sitting


Exam

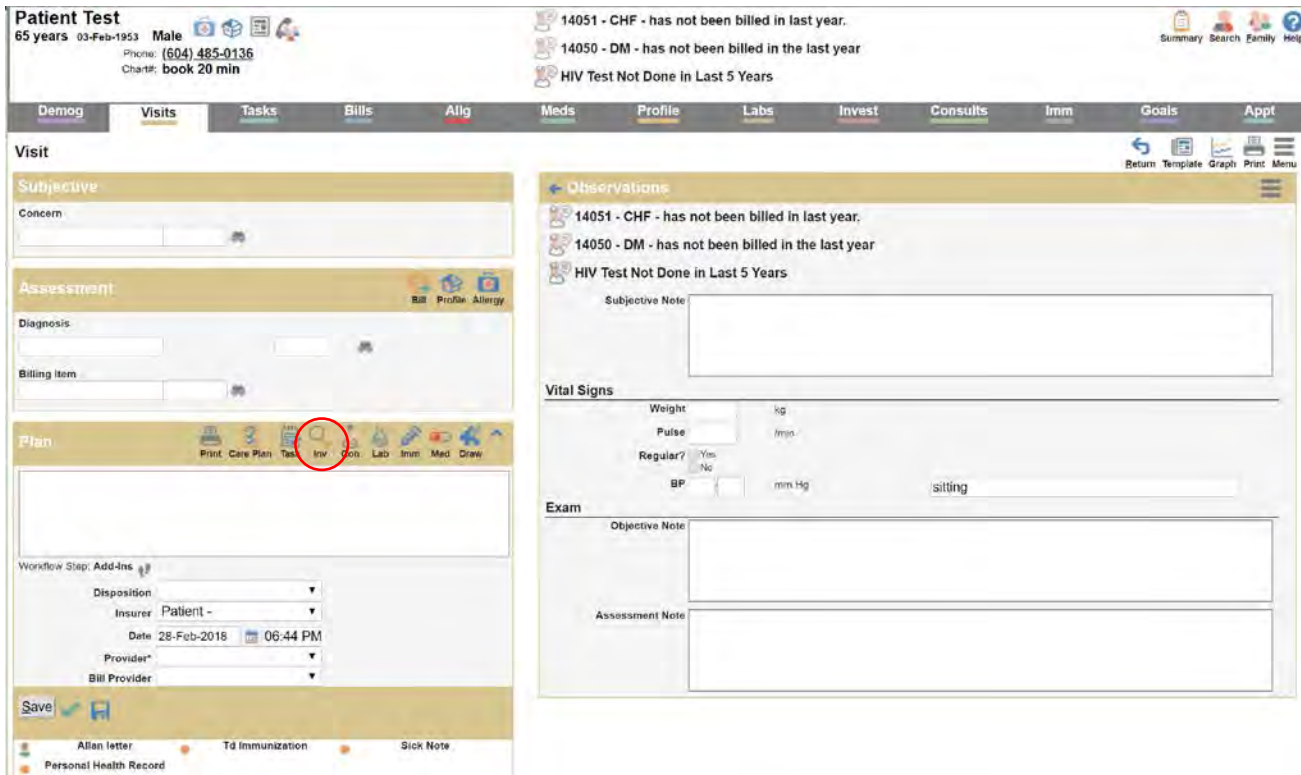
Objective Note


Assessment Note

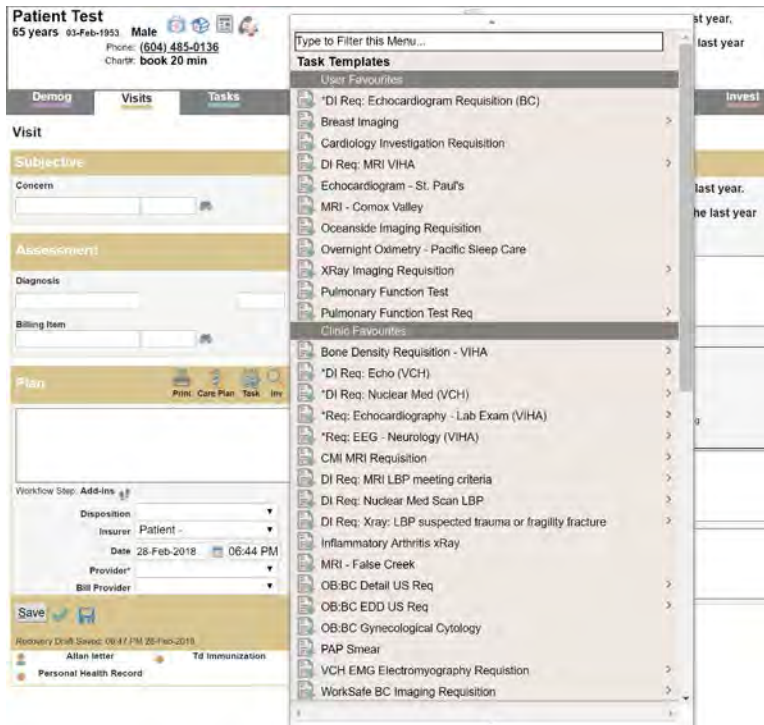
iii. Once the notes are typed in, complete and close the visit by clicking on the green check icon in the lower left corner.

ii. order investigations


- i. When ordering investigations during a patient visit, click on the “Inv” icon  in the visit window.
- ii. This will open the default investigation (often an imaging requisition).

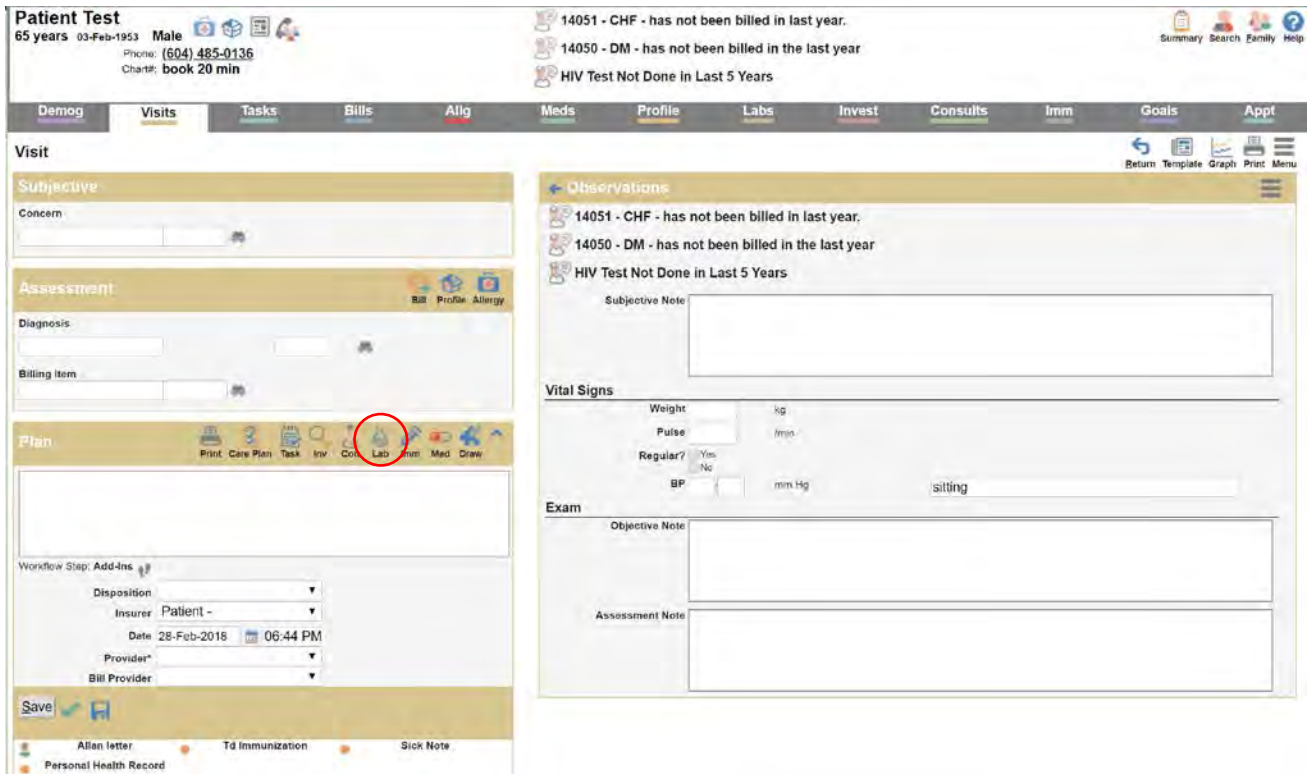


- iii. To see a list of other available investigations, **right** click on the “Inv” icon . Select the investigation from the dropdown list




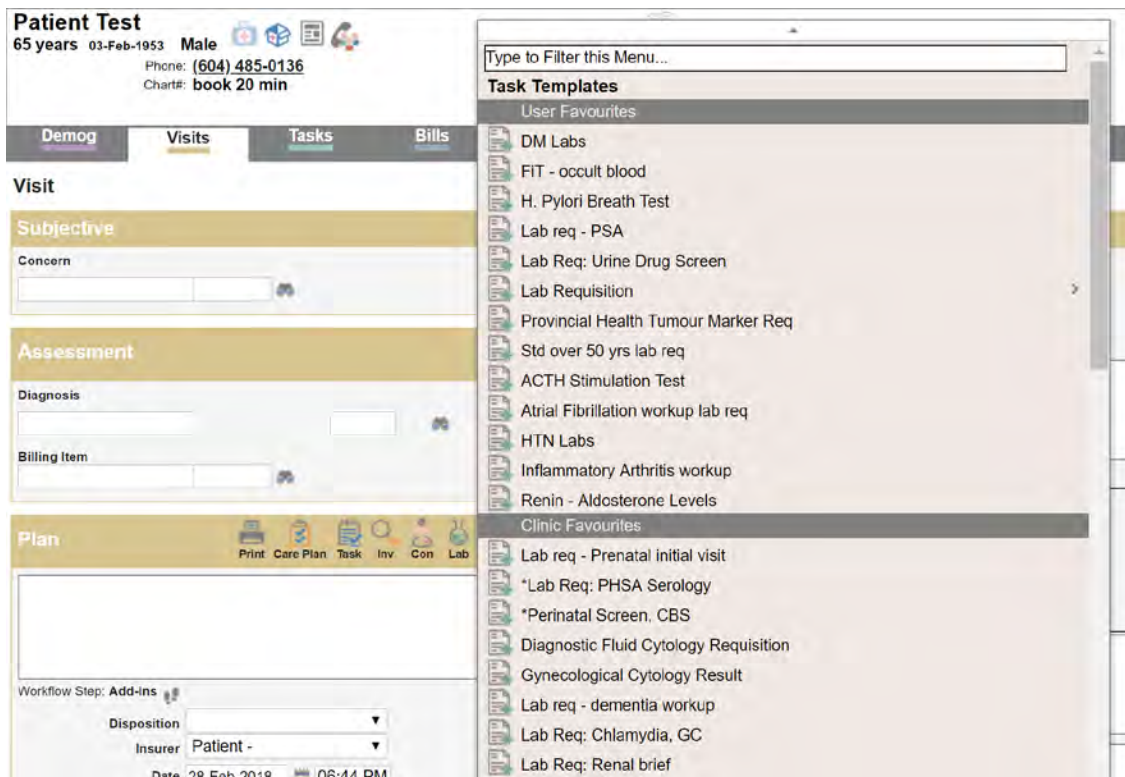
iii. Labs

- i. When ordering labs during a patient visit, click on the “Lab” icon  in the visit window.
- ii. This will open the default lab requisition.




The screenshot shows the 'Patient Test' window for a 65-year-old male patient. The 'Visits' tab is active. In the 'Plan' section, the 'Lab' icon is circled in red. The 'Observations' section on the right contains three entries: '14051 - CHF - has not been billed in last year.', '14050 - DM - has not been billed in the last year.', and 'HIV Test Not Done in Last 5 Years'. The 'Vital Signs' section shows fields for Weight, Pulse, Regular?, and BP. The 'Exam' section has fields for Objective Note and Assessment Note.

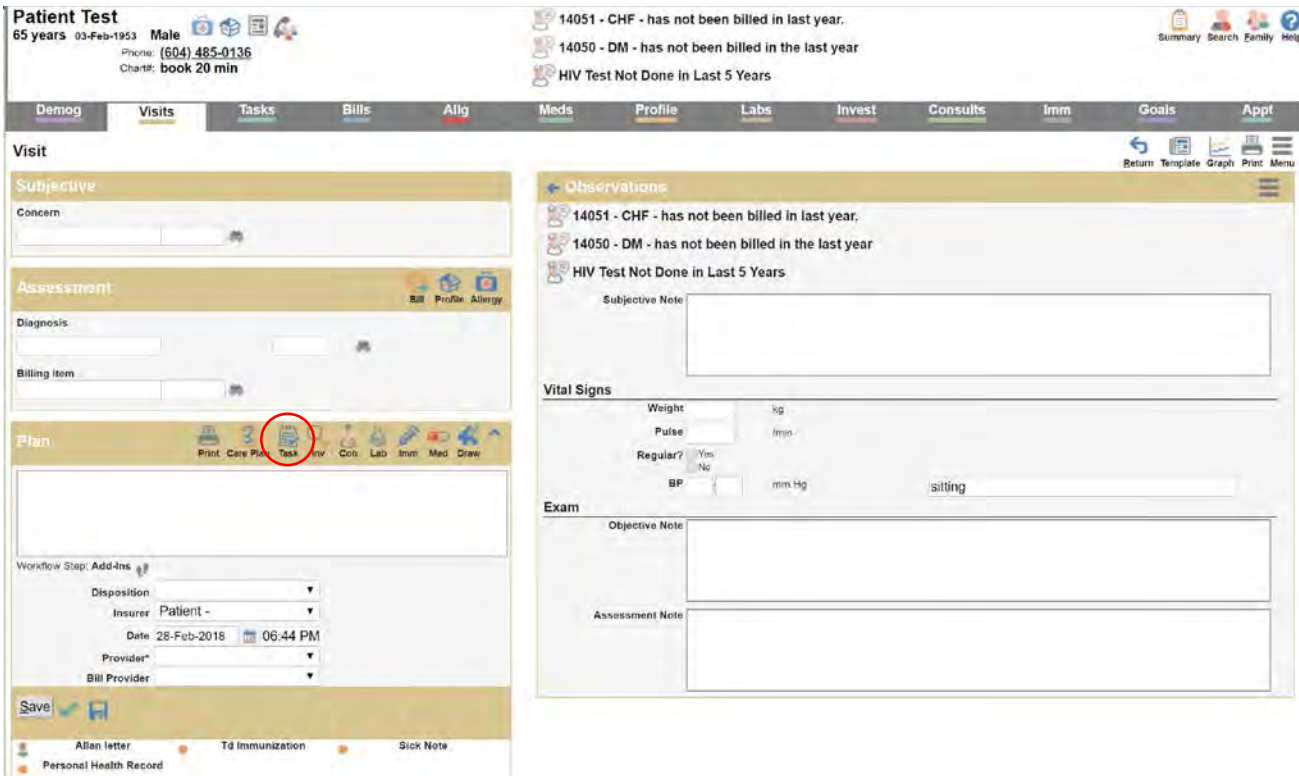
- iii. To see a list of other available lab requisitions, right click on the “Lab” icon . Select the Lab requisition you want from the dropdown list



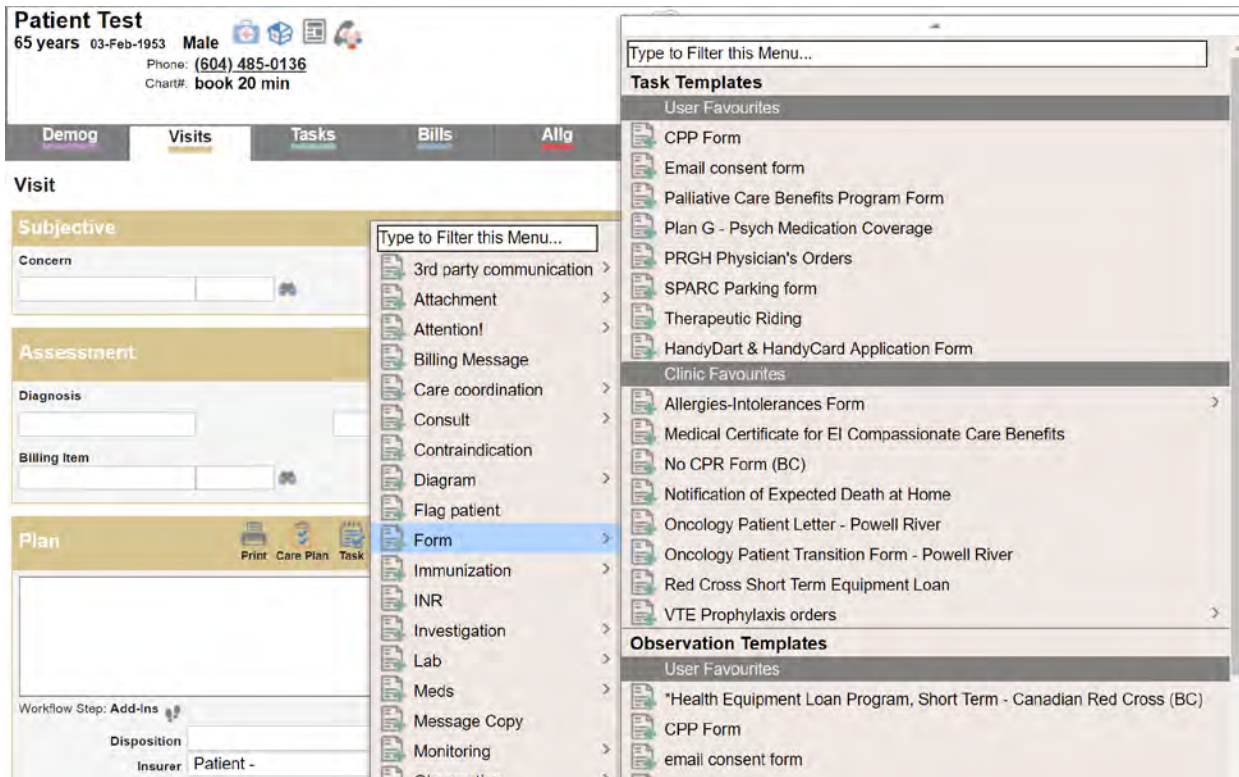
The screenshot shows the same patient visit window, but with the 'Lab' icon right-clicked. A dropdown menu is open, displaying a list of lab requisitions. The menu is divided into 'User Favourites' and 'Clinic Favourites'. The 'User Favourites' list includes: DM Labs, FIT - occult blood, H. Pylori Breath Test, Lab req - PSA, Lab Req: Urine Drug Screen, Lab Requisition, Provincial Health Tumour Marker Req, Std over 50 yrs lab req, ACTH Stimulation Test, Atrial Fibrillation workup lab req, HTN Labs, Inflammatory Arthritis workup, Renin - Aldosterone Levels. The 'Clinic Favourites' list includes: Lab req - Prenatal initial visit, *Lab Req: PHSA Serology, *Perinatal Screen, CBS, Diagnostic Fluid Cytology Requisition, Gynecological Cytology Result, Lab req - dementia workup, Lab Req: Chlamydia, GC, and Lab Req: Renal brief.

iv. forms


- i. When wanting a form during a patient visit, right click on the "Task" icon  in the visit window.

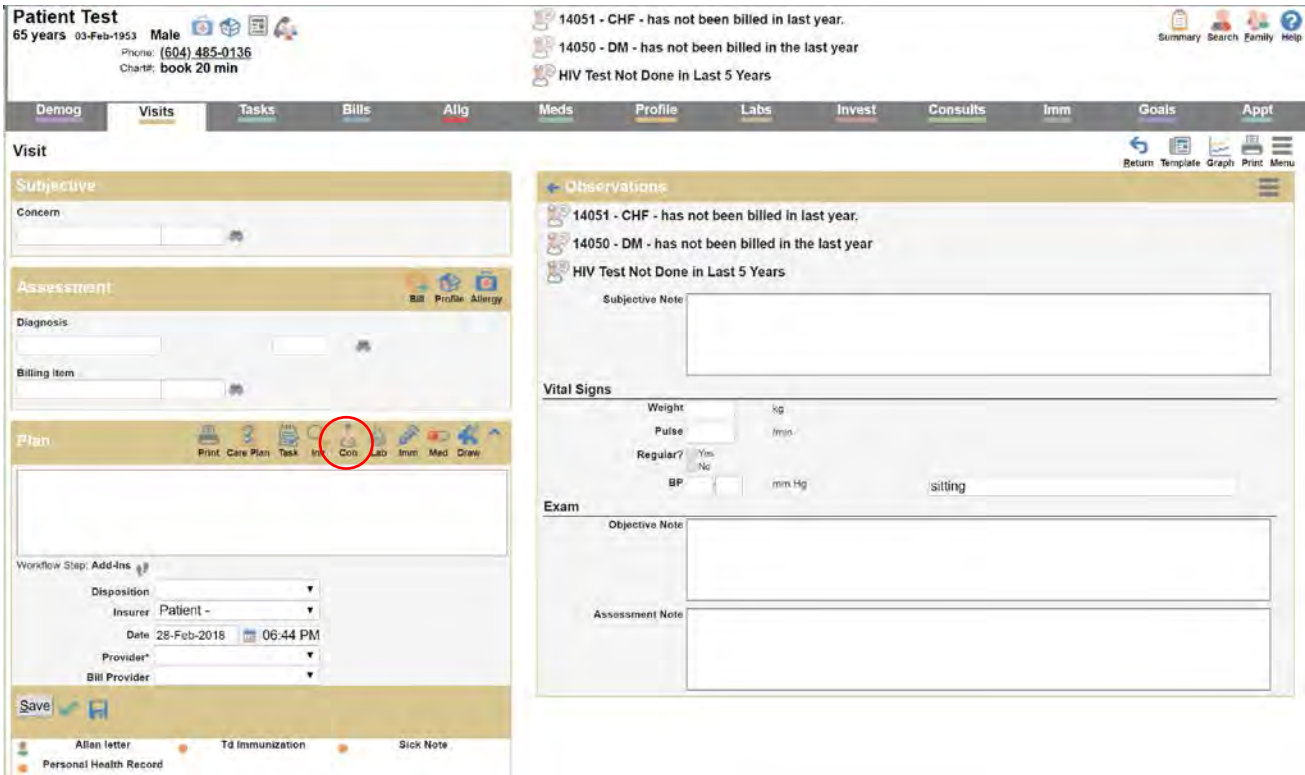



- ii. Slide the mouse pointer over "Form" on the dropdown list, this will open another dropdown list to select the Form you want from that dropdown list

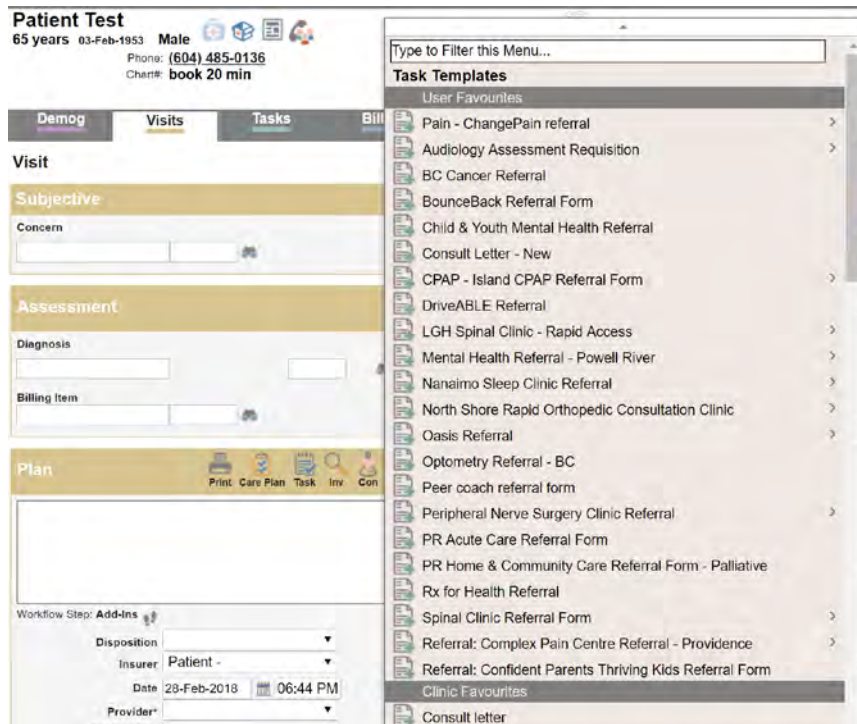


v. referral letters


- i. When writing a consult request during a patient visit, click on the “Con” icon  in the visit window.
- ii. This will open the default consult template

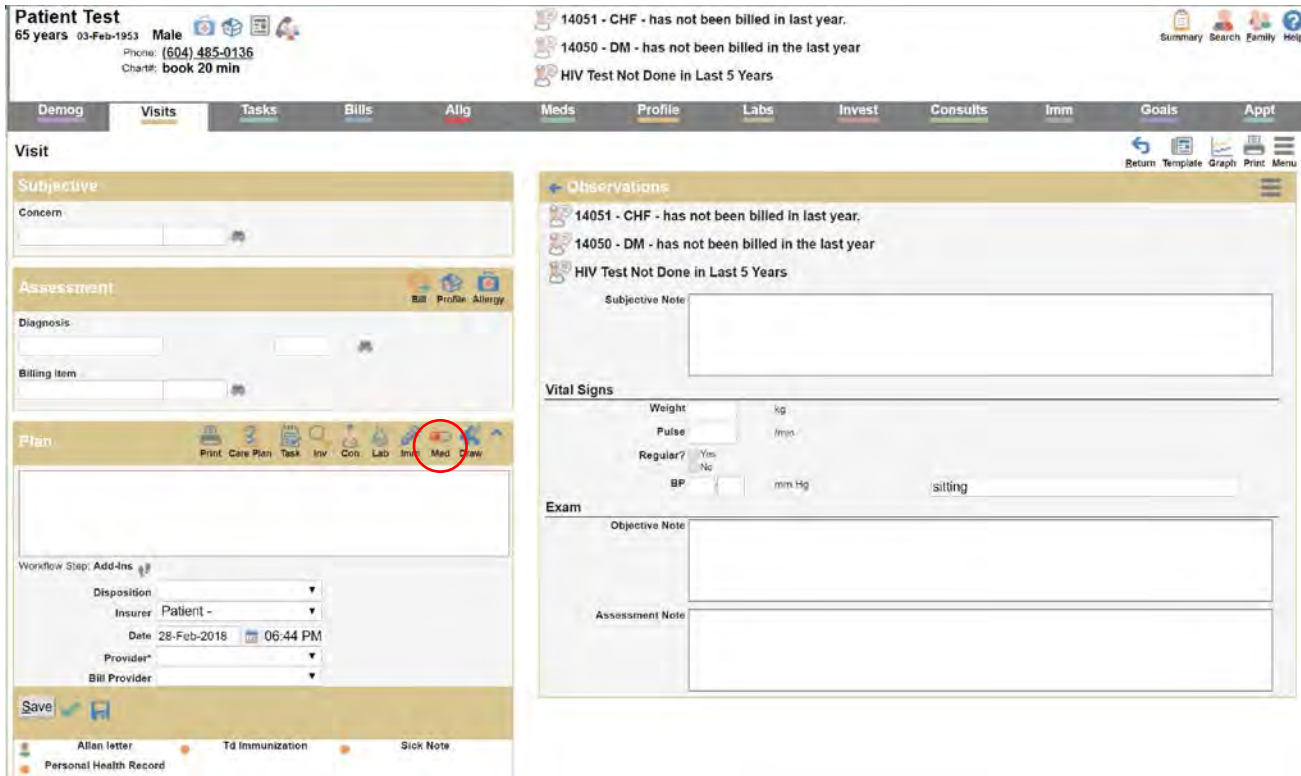


- iii. To see a list of other available consult requests, right click on the “Lab” icon . Select the consult request you want from the dropdown list



vi. Prescriptions

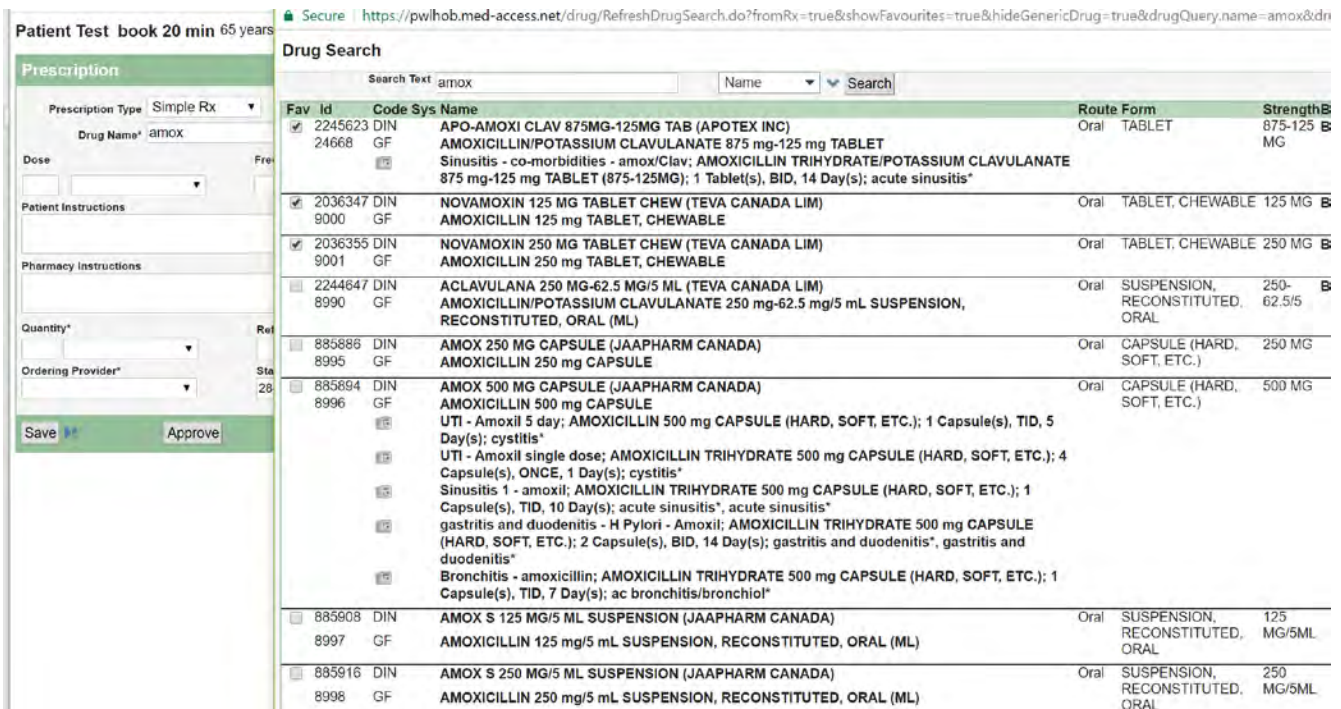
- i. When writing a prescription during a patient visit, click on the “Med” icon  in the visit window.



The screenshot shows a patient visit window for 'Patient Test', a 65-year-old male. The 'Plan' section at the bottom has a 'Med' icon circled in red. The 'Observations' section on the right lists medical conditions: '14051 - CHF - has not been billed in last year.', '14050 - DM - has not been billed in the last year', and 'HIV Test Not Done in Last 5 Years'. The 'Vital Signs' section shows fields for Weight, Pulse, Regular?, BP, and sitting position.

- ii. This will open the prescription writing window.

- iii. Type in the first few characters of the medication name and click enter to show a list of medications to choose from.



The screenshot shows the 'Drug Search' window with 'amox' entered in the search text. The results table is as follows:

Fav	Id	Code	Sys. Name	Route	Form	Strength
	2245623	DIN	APO-AMOXI CLAV 875MG-125MG TAB (APOTEX INC)	Oral	TABLET	875-125 MG
	24668	GF	AMOXICILLIN/POTASSIUM CLAVULANATE 875 mg-125 mg TABLET Sinusitis - co-morbidities - amox/Clav; AMOXICILLIN TRIHYDRATE/POTASSIUM CLAVULANATE 875 mg-125 mg TABLET (875-125MG); 1 Tablet(s), BID, 14 Day(s); acute sinusitis*			
<input checked="" type="checkbox"/>	2036347	DIN	NOVAMOXIN 125 MG TABLET CHEW (TEVA CANADA LIM)	Oral	TABLET, CHEWABLE	125 MG
	9000	GF	AMOXICILLIN 125 mg TABLET, CHEWABLE			
<input checked="" type="checkbox"/>	2036355	DIN	NOVAMOXIN 250 MG TABLET CHEW (TEVA CANADA LIM)	Oral	TABLET, CHEWABLE	250 MG
	9001	GF	AMOXICILLIN 250 mg TABLET, CHEWABLE			
<input checked="" type="checkbox"/>	2244647	DIN	ACLAVULANA 250 MG-62.5 MG/5 ML (TEVA CANADA LIM)	Oral	SUSPENSION, RECONSTITUTED, ORAL	250-62.5/5
	8990	GF	AMOXICILLIN/POTASSIUM CLAVULANATE 250 mg-62.5 mg/5 mL SUSPENSION, RECONSTITUTED, ORAL (ML)			
<input checked="" type="checkbox"/>	885886	DIN	AMOX 250 MG CAPSULE (JAAPHARM CANADA)	Oral	CAPSULE (HARD, SOFT, ETC.)	250 MG
	8995	GF	AMOXICILLIN 250 mg CAPSULE			
<input checked="" type="checkbox"/>	885894	DIN	AMOX 500 MG CAPSULE (JAAPHARM CANADA)	Oral	CAPSULE (HARD, SOFT, ETC.)	500 MG
	8996	GF	AMOXICILLIN 500 mg CAPSULE UTI - Amoxil 5 day; AMOXICILLIN 500 mg CAPSULE (HARD, SOFT, ETC.); 1 Capsule(s), TID, 5 Day(s); cystitis* UTI - Amoxil single dose; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 4 Capsule(s), ONCE, 1 Day(s); cystitis* Sinusitis 1 - amoxil; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 1 Capsule(s), TID, 10 Day(s); acute sinusitis*, acute sinusitis* gastritis and duodenitis - H Pylori - Amoxil; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 2 Capsule(s), BID, 14 Day(s); gastritis and duodenitis*, gastritis and duodenitis* Bronchitis - amoxicillin; AMOXICILLIN TRIHYDRATE 500 mg CAPSULE (HARD, SOFT, ETC.); 1 Capsule(s), TID, 7 Day(s); ac bronchitis/bronchiol*			
<input checked="" type="checkbox"/>	885908	DIN	AMOX S 125 MG/5 ML SUSPENSION (JAAPHARM CANADA)	Oral	SUSPENSION, RECONSTITUTED, ORAL	125 MG/5ML
	8997	GF	AMOXICILLIN 125 mg/5 mL SUSPENSION, RECONSTITUTED, ORAL (ML)			
<input checked="" type="checkbox"/>	885916	DIN	AMOX S 250 MG/5 ML SUSPENSION (JAAPHARM CANADA)	Oral	SUSPENSION, RECONSTITUTED, ORAL	250 MG/5ML
	8998	GF	AMOXICILLIN 250 mg/5 mL SUSPENSION, RECONSTITUTED, ORAL (ML)			

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

Patient Test book 20 min 65 years (604) 485-0136     

Prescription

Prescription Type: Simple Rx Continuous Short Term

Drug Name*: AMOXICILLIN 250 mg CAPSULE

Generic Drug Name: AMOXICILLIN

Dose: 1 Capsule(s) Frequency: TID - Thre PRN: Duration: 5 Day(s)

Patient Instructions:

Pharmacy Instructions:

Quantity*: 15 Capsule(s) Refills: Route*: Oral

Ordering Provider*: Start Date*: 28-Feb-2018 End Date*: 05-Mar-2018

Warnings


Type
Drug-Allergy/Intolerance Interaction

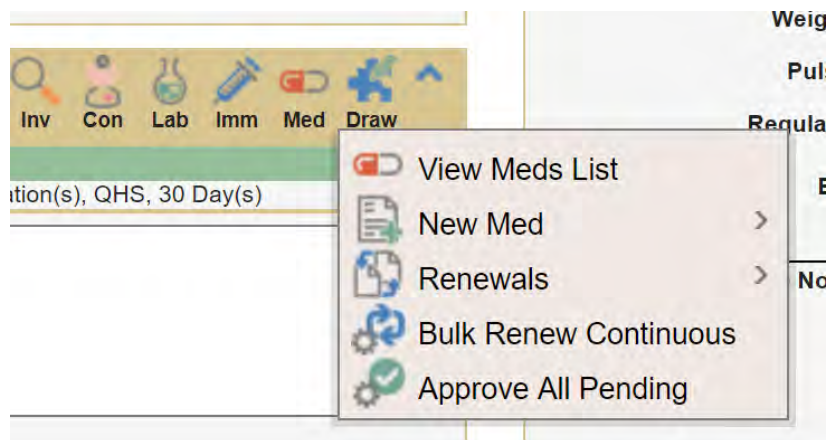
Drug Allergies and Intolerance

penicillin
Penicillins: PENICILLIN V POTAS
Ace Inhibitors: RAMIPRIL 10 mg

Observations

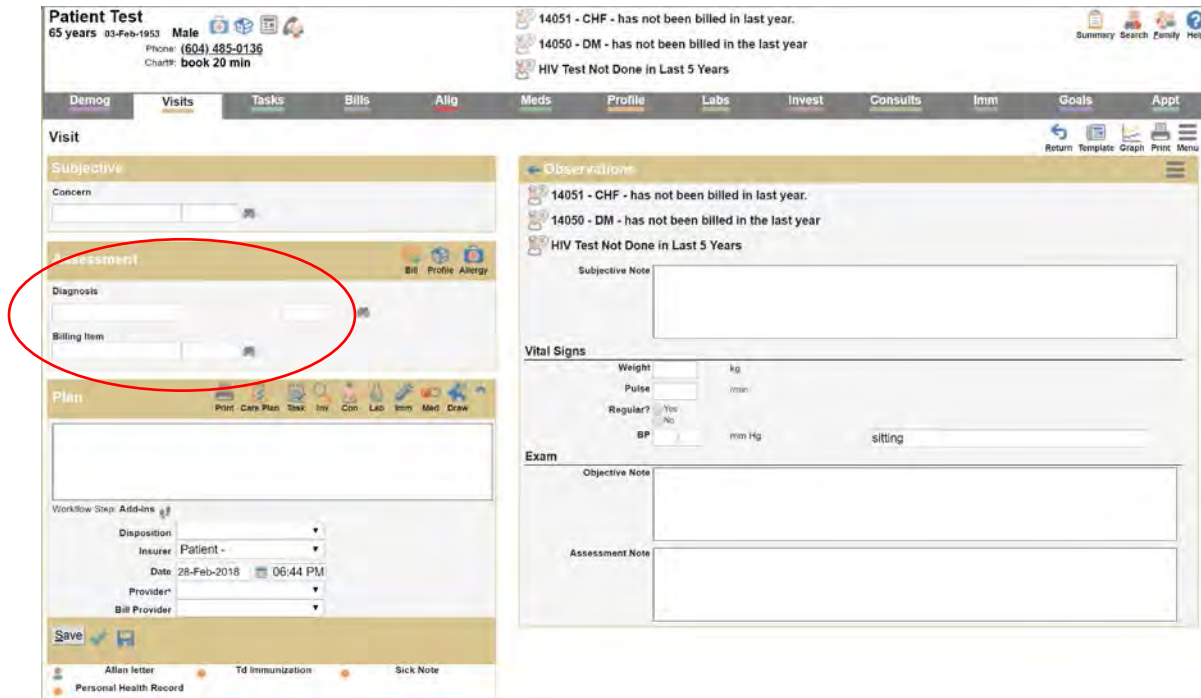
Signature

- ii. To print, click on "Approve and Preview". Then click on the blue "Print" button of the window that opens.
- iii. Note the prescription warning on the right to indicate that the patient has a penicillin allergy. The prescriber would have to manually over-ride the warning in order to print the prescription.
- iv. To see a list of other prescription tasks (like renew), right click on the "Med" icon . Select the task (like "Renewals" or "View Meds List") you want from the dropdown list



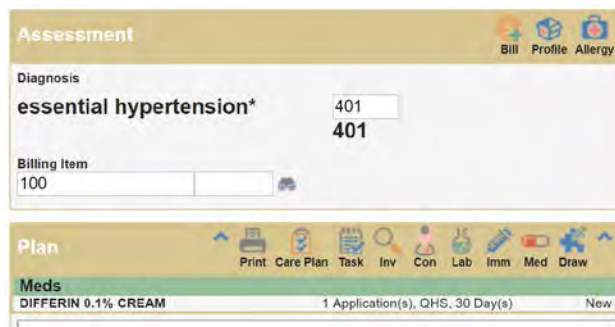
vii. Billing/coding

- i. Entering a billing and diagnostic code can be done from within patient visit



- ii. Enter either text (e.g. "Hypertension") or ICD9 code (e.g. "401") in the "Diagnosis" box to display a list of available diagnostic descriptions or codes. Select the appropriate diagnostic code or description from the list displayed.

- iii. In the "Billing Item" type in the last 3 numbers of the billing code for 100 or 120 series and hit "enter" key, the first two numbers relating to the patient age will automatically enter. Use the full 5-digit diagnostic code for other billing codes (e.g. 14053, 14066, etc.).



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

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

The screenshot shows the EMR interface for Dr. Katayoun Bahadori on February 28, 2018. The top navigation bar includes icons for 'My Tasks' (circled in red), 'My Bills', 'My Appointments', 'Import', 'Outcomes', 'Reports', 'Msg', and 'Providers'. The main window displays a schedule window with a table of appointments. The table has columns for Time, Patient, Primary #, Type, Concern, Appt Status, Billing Status, Bill, and Diag. The appointments are listed from 08:30 to 12:30. A sidebar on the right shows 'Urgent Tasks', 'All exclude Visits', and 'Active Abnormal Lab Results', all with 'Nothing found to display'.

- ix. The new window that opens has a list of all unfinished tasks, including new labs, electronic documents (e.g. referral consult responses, etc.), tasks from MOAs (e.g. phone messages, etc.), scanned results attached to a message task (e.g. investigation results)

The screenshot shows the 'My Tasks' window. The window has a header with filters for Start, End, Group, Owner, Category, Type, and Description, and a Status dropdown set to 'Complete'. The main area displays a list of tasks with columns for Due, Patient, Description, Reason, and Recur. The task 'Lab, TSH' is circled in red. The window also includes a 'Brief' button and a 'Filter' button.

- x. Click on any description to open the task on that line. The task can be completed from the within the window that opens.

How do I access historical information?

- xi. To access any historical items from the patient's chart, click on the appropriate tab (e.g. visits, Tasks, Bills, Allg, Meds, Profile, Labs, Invest, Consults, Imm, Goals).

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds **Profile** Labs Invest Consults Imm Goals Appl

Visit filter - all visits

Task Start Date: All Start: All End: All Diagnosis: All Obs Template: Summary
Obs Name: Obs Value: Provider: All Status: All

Date	Provider	Concern	Diagnosis	Disposition
21Feb18			heart failure*, 428	
16Nov17		physical	obesity/hyperalimant*, Chronic pain, 278, 338.4	
26Aug16			heart failure*, 428	
27Jul16			heart failure*, 428	
12Apr16			epistaxis, 784.7	RTC as required
19Mar16			heart failure*, 428	
27Oct15			depressive disorder nec, 311	RTC 2 weeks
19Oct14				

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

Patient Test
65 years 03-Feb-1953 Male
Phone: (604) 485-0136
Chart#: book 20 min

14051 - CHF - has not been billed in last year.
14050 - DM - has not been billed in last year
HIV Test Not Done in Last 5 Years

Demog Visits Tasks Bills Allg Meds Profile Labs **Labs** Invest Consults Imm

All Labs

Complete Results

Date	Test Group Name	Observations	Results
09Feb18 12:04 PM	Renal function	Creatinine 84 Estimated GFR 72 Urine ACR (Albumin/Creatinine Ratio) 1.7	umol/l 64-100 ml/min 60-90 mg/mmol m: <2.0, f: <2.8
01Feb18 12:05 PM Final		TSH 3.1	mU/L 0.34-4.82
18Jul16 09:02 AM	PAP result		
15Feb16 12:05 PM Final		Hemoglobin A1c 7.2	% H < 7.0
30Jul14 01:03 PM	*Lab Results: OB (BC)	Hemoglobin (3rd TM) 123 Maternal prenatal screening SIPs reassuring GBS Screen positive Copy to hospital	g/L 110 - 150
31May14 09:00 AM	INR Follow-up	Pattern for dose 1 2 days/wk Pattern dose 1 5 Pattern dose 2 8 Recurrence 1/12 Warfarin general guidelines	mg mg
05Apr13 03:38 PM Final	Joint Fluid Culture	Patient: Test Patient 03FEB1943 M [Lab] Patient: PP Opted Out Test Patient 03FEB1933 M [EMR] Specimen Source Right elbow joint Aspirate	Gram Stain

3+ Polymorphonuclear cells
No organisms seen

Report broadcast to: SMHEMG01 Date: 05/04/13 Time: 1916
Culture Staphylococcus epidermidis Isolated from broth culture only.
***** Updated Result *****
A prior result that was reported as final has been changed. Please note: Organism has been further identified. Susceptibilities have been added to this report. PLEASE NOTE THE ADDITION OF DAPTOMYCIN SUSCEPTIBILITY TO FINAL REPORT. MIC of DAPTOMYCIN is 0.5 mg/L. Interpretation: SUSCEPTIBLE

Penicillin R
Ampicillin R
Cloxacillin R
Cefazolin R
Clindamycin S
Vancomycin S

A. How do I log on?

1. In the office

- i. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- ii. The EMR login window will open
- iii. Type in the User Name and Password given to you by the office administrator. Login.

2. Remote Log in

- i. Open Web-browser and type in Clinic EMR URL (a 6-character label: *****.med-access.net)
- ii. The EMR login authentication window will open
- iii. For Username, type in the Clinic EMR 6-character label given to you by the clinic administrator. (same as the 6 characters in the clinic EMR URL)
For Password, type in the 20 alpha-numeric password given to you by the clinic administrator.
Log in.
- iv. The EMR login window will open
- v. Type in the User Name and Password given to you by the office administrator. Login.

3. How do I access my schedule?


- i. When you log in, you will go to an initial screen that will be set up differently in each clinic but which will have a schedule in the window.
- ii. Other information may be visible in this window, including Tasks. This window is user configurable to show diverse types of displays.

4. How do I get to my patient's chart?



- i. From your schedule, click on the patient name of the chart that you want to access.
- ii. Once the chart is opened, click on the tab name of the section you want to open

5. How do I document a transaction:



i. SOAP note

- i. From the "Visits" tab window, click on the "New" icon in the upper right of the window
- ii. This opens the default SOAP note set for you by the administrator. The default SOAP can be changed to a different SOAP note by the clinic administrator
- iii. Once the notes are typed in, complete and close the visit by clicking on the green check  icon in the lower left corner.


ii. order investigations

- i. When ordering investigations during a patient visit, click on the "Inv" icon  in the visit window.
- ii. This will open the default investigation (often an imaging requisition).
- iii. To see a list of other available investigations, **right** click on the "Inv" icon . Select the investigation from the dropdown list

iii. Labs



- i. When ordering labs during a patient visit, click on the "Lab" icon  in the visit window.
- ii. This will open the default lab requisition.
- iii. To see a list of other available lab requisitions, **right** click on the "Lab" icon . Select the Lab requisition you want from the dropdown list

iv. forms



- i. When wanting a form during a patient visit, **right** click on the "Task" icon  in the visit window.

- ii. Slide the mouse pointer over “Form” on the dropdown list, this will open another dropdown list to select the Form you want from that dropdown list

v. referral letters

- i. When writing a consult request during a patient visit, click on the “Con” icon  in the visit window.
- ii. This will open the default consult template
- iii. To see a list of other available consult requests, **right** click on the “Lab” icon . Select the consult request you want from the dropdown list

vi. Prescriptions

- i. When writing a prescription during a patient visit, click on the “Med” icon  in the visit window.
- ii. This will open the prescription writing window.
- iii. Type in the first few characters of the medication name and click enter to show a list of medications to choose from.
- iv. Select the medication that you want and then fill in the rest of the prescription template with the appropriate instructions.
- v. To print, click on “Approve and Preview”. Then click on the blue “Print” button of the window that opens.
- vi. Note the prescription warning on the right to indicate that the patient has a penicillin allergy. The prescriber would have to manually over-ride the warning in order to print the prescription.
- vii. To see a list of other prescription tasks (like renew), **right** click on the “Med” icon . Select the task (like “Renewals” or “View Meds List”) you want from the dropdown list

vii. Billing/coding

- i. Entering a billing and diagnostic code can be done from within patient visit
- ii. Enter either text (e.g. “Hypertension”) or ICD9 code (e.g. “401”) in the “Diagnosis” box to display a list of available diagnostic descriptions or codes. Select the appropriate diagnostic code or description from the list displayed.
- iii. In the “Billing Item” type in the last 3 numbers of the billing code for 100 or 120 series and hit “enter” key, the first two numbers relating to the patient age will automatically enter. Use the full 5-digit diagnostic code for other billing codes (e.g. 14053, 14066, etc.).

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

1. On the schedule window, click on the “My Tasks” icon in the upper right
2. The new window that opens has a list of all unfinished tasks, including new labs, electronic documents (e.g. referral consult responses, etc.), tasks from MOAs (e.g. phone messages, etc.), scanned results attached to a message task (e.g. investigation results)
3. Click on any description to open the task on that line. The task can be completed from the within the window that opens.

C. How do I access historical information?

1. To access any historical items from the patient’s chart, click on the appropriate tab (e.g. visits, Tasks, Bills, Allergies, Meds, Profile, Labs, Invest, Consults, Immunizations, Goals).
2. This opens the historical items in this category. Any one-line item can be opened by clicking on the observation.