

User Guide

Med Access EMR: Registering a 'New Immunization Patient' on the Appointment Daysheet

Log In and Select the Daysheet

1. Go to the EMR Med Access website and enter your username and password. Click the **Login** button. Please note that if this is the first log in of the day you will be required to enter your two factor authentication.
2. If you work at more than 1 location, you will need to select your location. Right click on the **site name** in the top left corner of the screen to display a drop-down list. Click the location you wish to view.
3. Select the correct room from the **Provider or Resource** drop-down list to view the appropriate daysheet.

User Name:

Password:

Login

EHR E.Bonavista Lions Club

- C. Wareham Church Hall
- E. Bonavista Lions Club**

Small, Deanne

Immunizer

Provider, Immunizer

Room

- E. Bonavista Lions Club-ROOM**
- Bonivista Lion's Club

Register a 'New Immunization Patient'

If 'New Immunization Patient' is seen in the 'Patient' column of the daysheet, this means the patient **does not** have an existing EMR chart. **IT IS IMPORTANT TO FOLLOW THE BELOW STEPS** to search, add and register the new patient in EMR.

09:10	New Immunization Patient 01-Jan-1920 (100) U	Immunization
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Please note: not following these steps may result in overwriting all other 'New Immunization Appointments' booked in ALL clinics throughout EMR.

1. Right click on **New Immunization Patient** in the 'Patient' column of the daysheet and select **Edit** from the drop-down list.
2. Note that the patient's name, MCP, gender and DOB will appear in the 'Concern' field. Note the patient's MCP number from the concern field. Tip: highlight the MCP number with your mouse and copy, to paste later.

- Edit**
- New Appt >
- Print >
- Edit Demographics
- Open Bookings
- Find Available

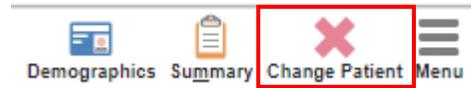
Concern

Chart, Test (2000-01-01 MALE 123456789000 mobile: 5144449227)

Notes

Booked online - Flu Immunization Appointment

3. Click on the **Change Patient** icon in the top right corner of the screen. This will open the 'Appointment' window.



4. Search for the patient in the local EMR, as follows:

a) Enter (or paste from the copy above) the patient's MCP number in the 'Insurer #' field and click the **Search** button in the top right corner.

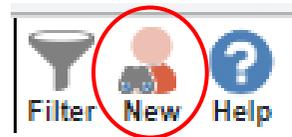


b) If results are found, select the patient's name, click the **Accept Selected PCR Data** button and proceed to Step 10 below. If results are not found, proceed to Step 5.



5. Search for the patient in the Client Registry, as follows:

a) Click the **New** icon in the top right corner of the 'Patient Search' window.



b) Enter (or copy from above) the patient's MCP or 3 demographics (i.e., first name, last name, date of birth or gender) and click the **Search Client Registry** button.

Search Client Registry before attempting to create a new patient.

Provincial Client Registry Patient Search

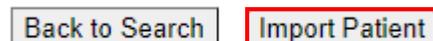
Primary PHN*: Type: NL PHN

Last Name*: First Name*:
 Middle Name: Birth Date:

Gender:

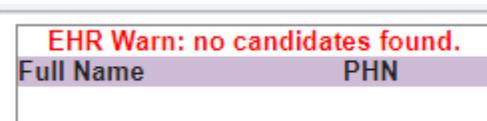
A valid search must contain either the PHN, or the Last Name, First Name, and (Date of Birth or Gender).

c) If the patient is found in Client Registry, select the patient's name and click the **Import Patient** button to create the patient chart in the local EMR. Proceed to Step 7 below.



Or

If the patient is **not** found, you will see 'EHR Warn: no candidates found'. To create a new patient chart, proceed to step 6 below.

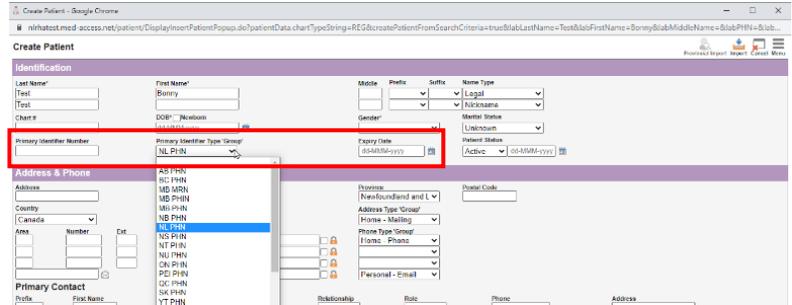


6. If the patient is **not found in the local EMR or Client Registry** you will need to create a new patient chart, as follows:

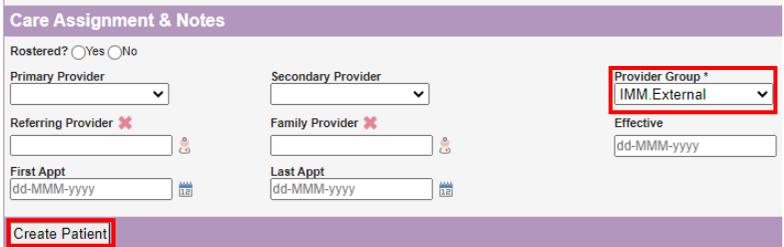
a) Click the **Create New Patient** button.



b) Proceed to enter the patient's demographic information in the 'Create Patient' window. **Please note that the 'Primary Identifier Number', 'Primary Identifier Type Group' and 'Expiry Date' fields will need to be completed if the patient is from out of province.**

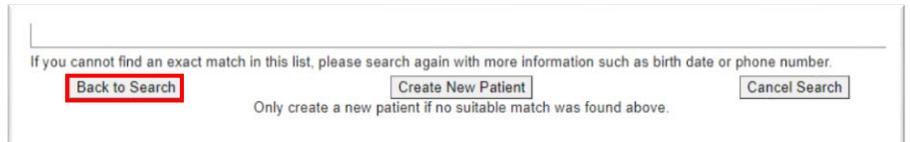


c) Select **IMM.External** from the 'Provider Group' drop-down list in the 'Patient Summary' window.

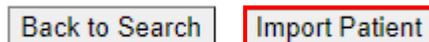
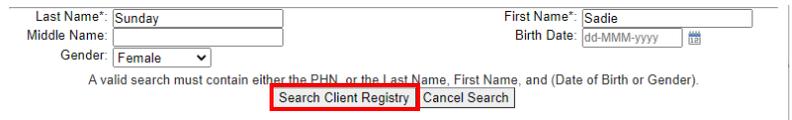


d) When complete, click the **Create Patient** button. Click the **x** in the top right corner to exit the 'Patient Summary' window.

e) Return to the 'PPHI Search' window and click the **Back to Search** button.



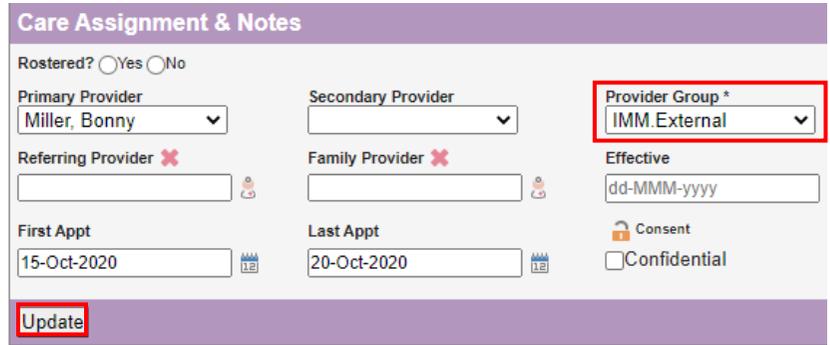
f) Enter (or copy from above) the patient's MCP or 3 demographics and click the **Search Client Registry** button. If prompted, select the patient's name from the list and click the **Import Patient** button. Proceed to the 'Finalize the Registration and Log Out' section below for further instruction.



7. Left click on the **patient's name** on the daysheet.



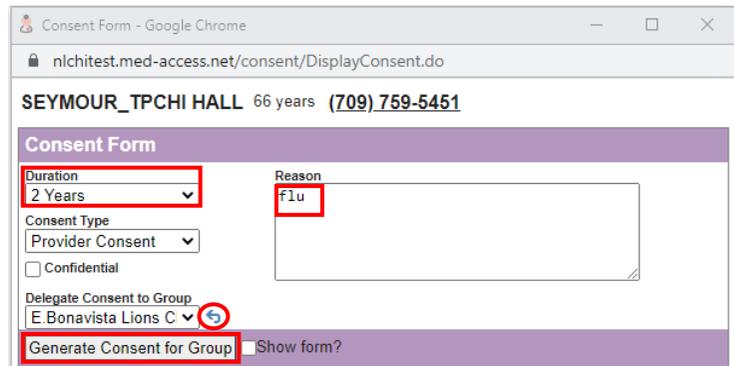
- In the 'Care Assignment & Notes' section, select **IMM.External** from the 'Provider Group' drop-down list and click the **Update** button.
- Click the **x** in the top right corner to close the patient chart and proceed to Step 10.



- If prompted, click the word **Restricted** at the top of the 'Patient Summary' window to generate a 'Consent Form' window.

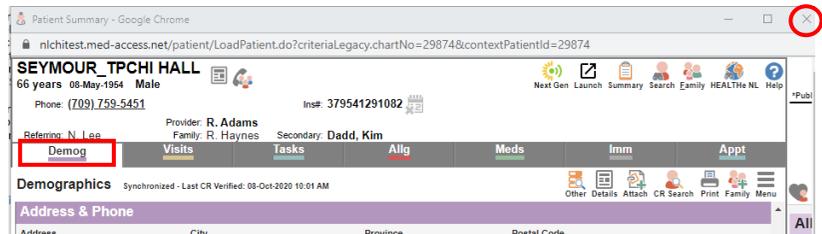


- Select **2 Years** from the 'Duration' drop-down list.
- Enter **flu** in the 'Reason' box. Double click on **flu** to display the reason for consent.
- Click the **blue arrow** to select the appropriate 'Delegate Consent to Group' option.



- Click the **Generate Consent for Group** button.

- Click the **Demog** heading to display the patient's demographic information.



- Click the **x** in the top right corner to close the patient chart. Finalize the registration, as detailed below in the 'Finalize Registration and Log Out' section.

Finalize the Registration and Log Out

- Identify the patient's name on the daysheet list and click the **green arrow** in the 'Appt Status' column to advance the appointment status from 'Booked' to 'Checked In'.
- At the end of the clinic day, click the **Logout** icon in the top left corner of the screen to log out of Med Access EMR.

