

User Guide

Med Access EMR: Manually Booking Immunization Appointments

Log In and Select the Daysheet

1. Go to the Med Access EMR 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.

User Name:

Password:

Login

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.

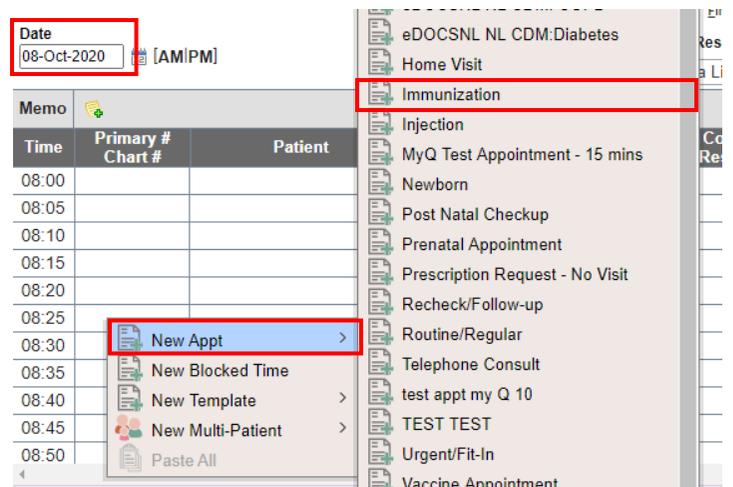


3. Select the correct room from the **Provider or Resource** drop-down list to view the appropriate daysheet.



Select the Appointment Slot

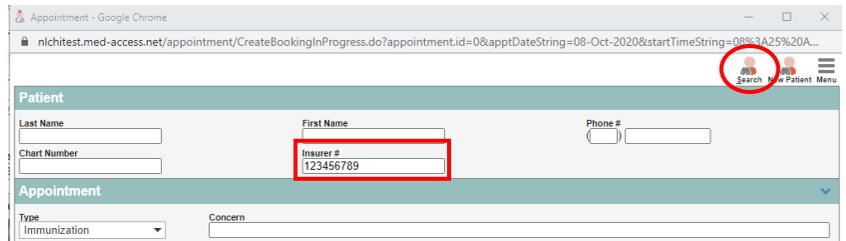
1. Left click on the **Date** in the top left corner of the screen above the daysheet to select a date for the appointment.
2. Identify the desired time for the appointment on the daysheet and right click anywhere in that row to view the drop-down list.
3. Hover over **New Appt** and then select **Immunization** from the drop-down list to open the 'Appointment' window.



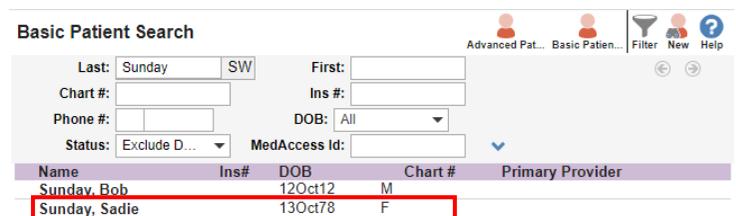
Search for the Patient

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

a) Enter the patient's Insurer # (i.e., health card number) and click the **Search** button to see if the patient already has a local EMR chart.



b) If the patient **has** a local EMR chart, select the correct patient name, if prompted, from the list provided and proceed to the **'Book the Appointment'** section below for further instruction.



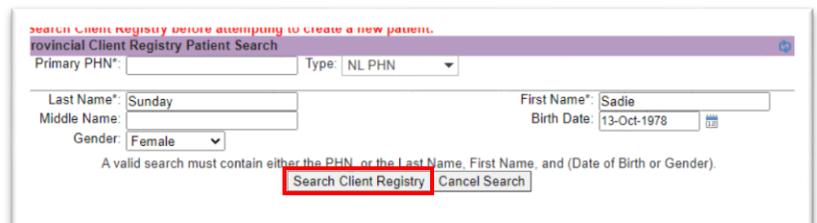
Name	Ins#	DOB	Chart #	Primary Provider
Sunday, Bob		12Oct12	M	
Sunday, Sadie		13Oct78	F	

2. If the patient **does not** have a local EMR chart, you will see 'Nothing found to display'. Proceed to the search for the patient in the Client Registry, as follows:

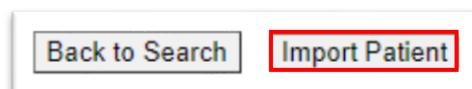
a) Click the **New** icon in the top right corner of the 'Patient Search' window.



b) Enter 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.



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 the **'Book the Appointment'** section below for further instruction.

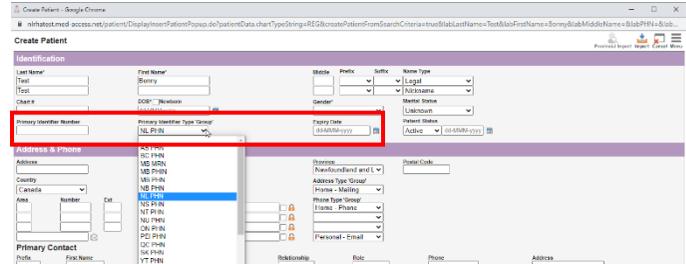


3. If the patient is **not found in the local EMR or Client Registry** you will need to create a new patient chart, as follows:

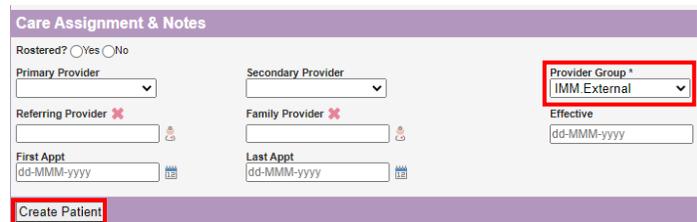
a) Click the **Create New Patient** button.



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.

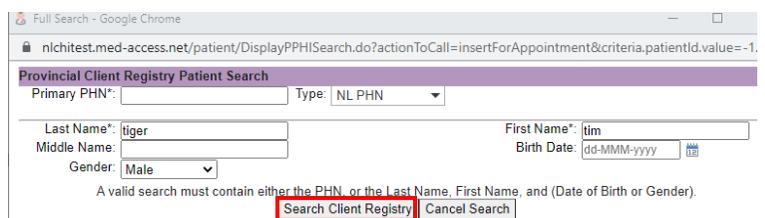


d) When complete, click the **Create Patient** button. Click the **x** in the top right corner to exit the 'Patient Summary' window.

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

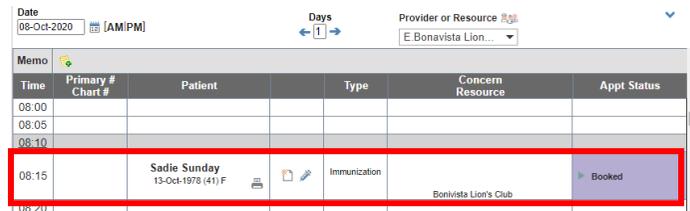


f) Enter the patient's MCP or 3 demographics and click the **Search Client Registry** button. If prompted, select the patient's name from the list and click the **Import Patient** button. Proceed to the **'Book the Appointment'** section below for further instruction.



Book the Appointment

- Once in the 'Appointment' window, ensure that the correct date and time are selected for the appointment.
- When all applicable fields in the 'Appointment' window are complete, click the **Save** button.
- Verify that the patient's immunization appointment appears on the daysheet for the identified date and time slot. The immunization appointment has now been successfully booked in MedAccess EMR.

Time	Primary # Chart #	Patient	Type	Concern Resource	Appt Status
08:00					
08:05					
08:10					
08:15		Sadie Sunday 13-Oct-1978 (41) F	Immunization	Bonivista Lion's Club	Booked
08:20					

'Unrestrict' the Patient Chart

- 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.

