

User Guide

Med Access EMR: COVID-19 Vaccine - Booking Patient Appointments

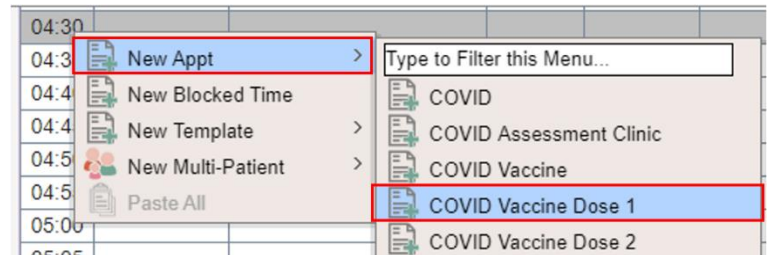
Log In and Select the Daysheet

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.
2. Ensure you choose the correct group on the top left. If you are admin staff, you may also have to ensure that a provider is listed in the in the [Working For](#) box to ensure you have access to the Client Registry to create patient charts
3. Select the correct group from the Provider or Resource drop-down list to view the appropriate daysheet.



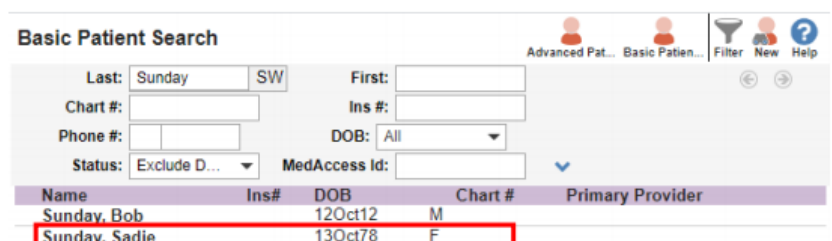
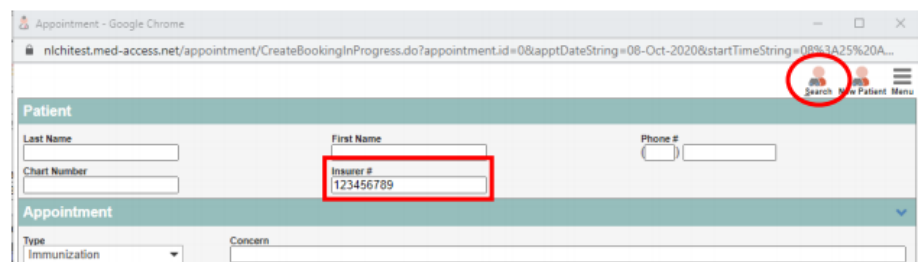
Booking Appointment for COVID Dose 1

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 [COVID Dose 1](#) from the drop-down list to open the 'Appointment' window.
4. Proceed to search for patient chart



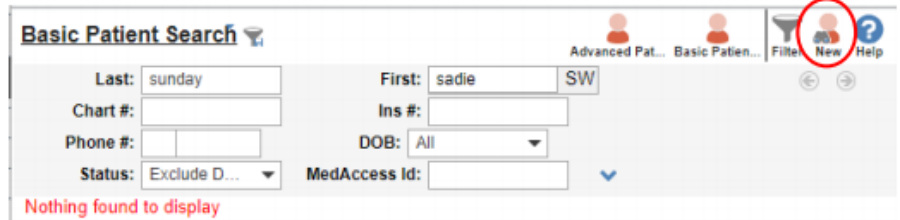
Search for Patient

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.

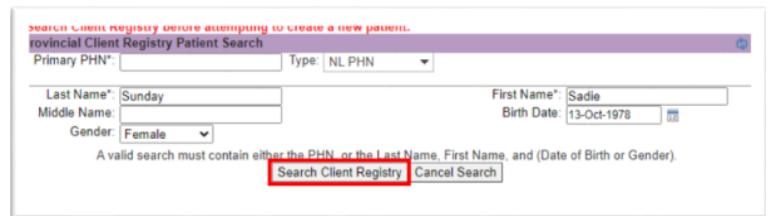


2. If the patient **does not** have a local EMR chart, you will see 'Nothing found to display'. Proceed to the search for the patient in the Client Registry, as follows:

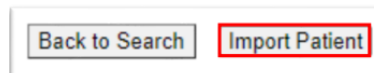
a) Click the **New** icon in the top right corner of the 'Patient Search' window.



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.

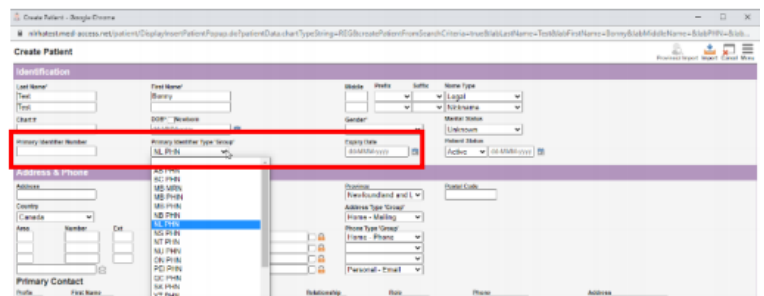


3. If the patient is **not found in the local EMR or Client Registry** you will need to create a new patient chart, as follows:

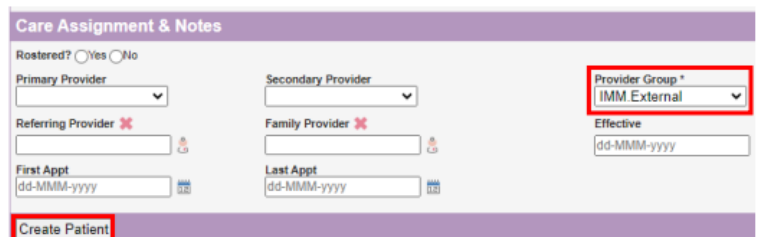
a) Click the **Create New Patient** button.



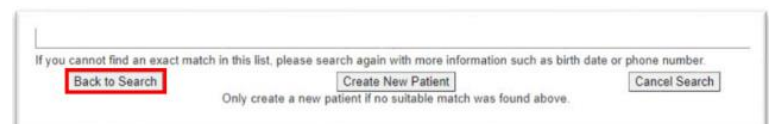
b) Proceed to enter the patient's demographic information in the 'Create Patient' window. Please note that the 'Primary Identifier Number', 'Primary Identifier Type Group' and 'Expiry Date' fields will need to be completed if the patient is from out of province.



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

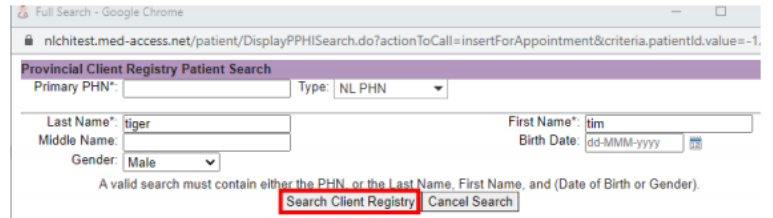


d) When complete, click the **Create Patient** button. Click the **x** in the top right corner to exit the 'Patient Summary' window.



- 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

1. Once in the 'Appointment' window, ensure that the correct date and time are selected for the appointment.

2. When all applicable fields in the 'Appointment' window are complete, click the [Save](#) button.

3. 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. If the patient displays as "restricted" please follow steps 4-9.

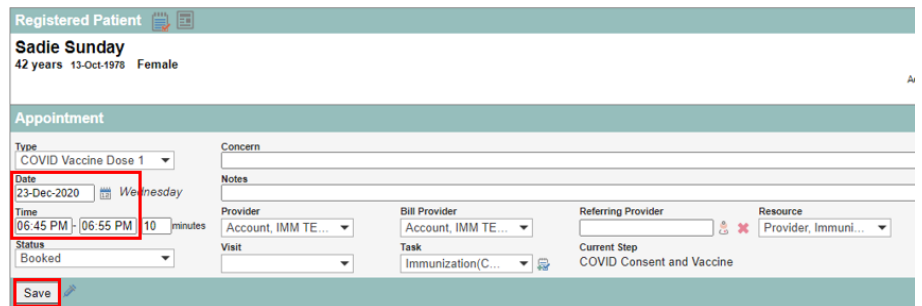
4. Click on the word "Restricted."

5. Select **2 Years** from the 'Duration' drop-down list.

6. Enter **covid** in the 'Reason' box.

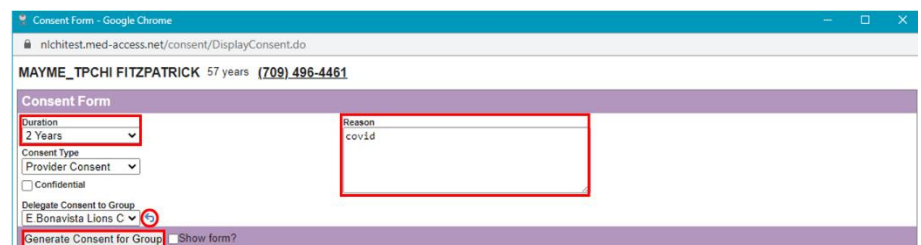
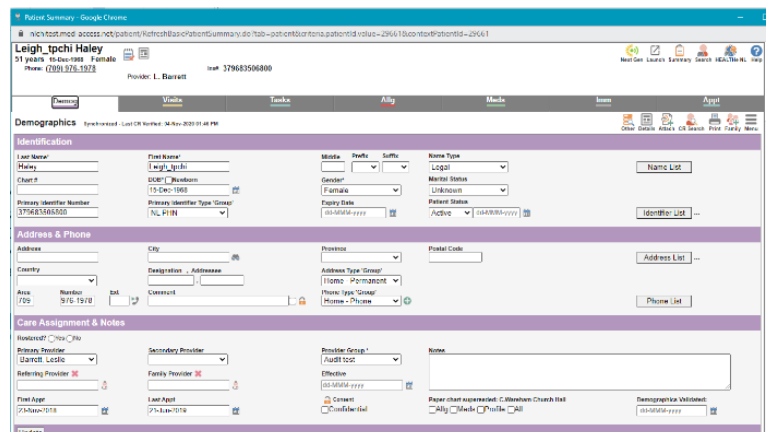
7. Click the **blue arrow** to select the appropriate 'Delegate Consent to Group' option.

8. Click the [Generate Consent for Group](#) button.



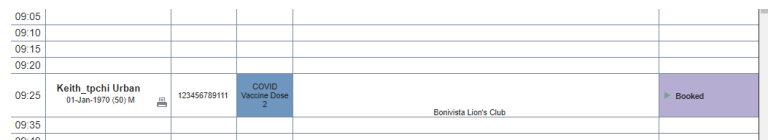
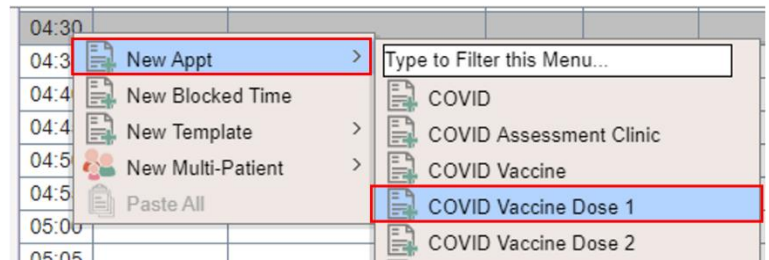
09:10	
09:15	Restricted
09:25	

9. You will then see the patient summary opened on the Demographics tab. Please note: DO NOT change the provider group in an existing chart. Click the x in the top right corner to close the patient chart.

Booking Appointment for COVID Dose 2

1. Left click on the **Date** in the top left corner of the screen above the daysheet to select a date that is **three weeks** after Dose 1.
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 **COVID Dose 2** from the drop-down list to open the 'Appointment' window.
4. Proceed to search for patient chart using the insurer number. Select the correct patient name, from the list provided and proceed to the '**Book the Appointment.**' Ensuring the **Type COVID Dose 2** is selected and ensure that the correct date and time are selected for the appointment, click on **Save**.
5. Verify that the patient appointment is found on the daysheet.



Booking Multiple Appointments in Med Access for the Same Time Slot

1. Right click on the time on the daysheet for which you wish to book.
2. Search for patient and book appointment using the same steps as above.
3. **NOTE:** Ensure the correct **Room** is showing on the Registered Patient task window.
 - a. If it is not visible, click on the chevron button on the far right just above the fields.
 - b. In the "Room" field, ensure it is showing the correct room, and not the provider name (the first appointment will come in correctly, but the other appointments scheduled for that time will have to be changed to the correct room.

