

User Guide

Med Access EMR: Patient Registration for Immunization Appointments

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



Small, Deanne	
Immunizer	
Provider, Immunizer	
Room	
E.Bonavista Lions Club-ROOM	
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Register a Patient with an Existing EMR Chart

If a patient name or 'Restricted' is seen in the 'Patient' column of the daysheet, this means the patient has an existing EMR chart. You are able to import the EMR chart and register the patient, as follows:

- 1. Click on the patient's name or the word Restricted in the 'Patient' column of the daysheet. Please note that if the 'Client Registry' window appears, click the Accept Selected PCR Data button to continue.
- 2. If prompted, click the word Restricted at the top of the 'Patient Summary' window to generate a 'Consent Form' window.
- 3. Select 2 Years from the 'Duration' drop-down list.
- 4. Enter flu in the 'Reason' box. Double click on flu to display the reason for consent.
- 5. Click the blue arrow to select the appropriate 'Delegate Consent to Group' option.
- 6. Click the Generate Consent for Group button.

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💍 Consent Form	1 - Google Chrome				- 0	×
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SEYMOUR_	TPCHI HALL	66 years (709) 759-545	<u>i1</u>			
Consent Fo	orm					
Duration 2 Years Consent Type Provider Cons	✓	Reason flu				
Delegate Consen E.Bonavista L Generate Con	t to Group ions C	Show form?				



- 7. Click the **Demog** heading to display the patient's demographic information.
- 8. 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.

🖇 Patient Summary - Google C	hrome						I 🕻 🛛
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Register a Patient with **no** Existing EMR Chart

If 'New Immunization Patient' is seen in the 'Patient' column of the daysheet, this means the patient **does not** have an existing EMR chart. You will need to search, add and register the new patient to EMR, as follows:

- Right click on New Immunization 1. 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.

09:10	New Immunization Patient 01-Jan-1920 (100) U	-	Immunization

🖹 Edit	
📑 New Appt	>
💾 Print	>
Edit Demographics	
腔 Open Bookings	
🔊 Find Available	

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

Booked online - Flu Immunization Appointment

- 3. Click the Change Patient icon in the top right corner of the screen. This will open the 'Appointment' window.
- = Demographics Summary Change Patient Menu



- 4. Search for the patient in the local EMR, as follows:
 - a) Enter 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.

	Search
First Name	Phone #
Insurer # 1234567890	

Back to Search



- 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.
 - 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 Step 7 below.
 <u>Or</u> If the patient is not found, you will see 'EHR Warn: po

will see 'EHR Warn: no candidates found'. To create a new patient chart, proceed to step 6 below.

- 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.



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_	EHR	Warn:	: no candidates found.	
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you cannot find an exact match in this	list, please search again with more information such	as birth date or phone number.
Back to Search	Create New Patient	Cancel Search

Create Patient - Google Chrome			– 🗆 ×
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Care Assignment & Notes		
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Referring Provider 💥	Family Provider 💥	Effective
<u></u>		dd-MMM-yyyy
First Appt dd-MMM-yyyy	Last Appt dd-MMM-yyyy	
Create Patient		

ou cannot find an exact match in th	s list, please search again with more information such	as birth date or phone number.
Back to Search	Create New Patient	Cancel Search



- 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 '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.
- 10. If prompted, click the word **Restricted** at the top of the 'Patient Summary' window to generate a 'Consent Form' window.
- 11. Select 2 Years from the 'Duration' drop-down list.
- 12. Enter flu in the 'Reason' box. Double click on flu to display the reason for consent.
- 13. Click the **blue arrow** to select the appropriate 'Delegate Consent to Group' option.
- 14. Click the Generate Consent for Group button.
- 15. 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

- 1. 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'.
- 2. 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.

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Care Assignment & Not	es	
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