

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.
- 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.
- 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 |
| Bonivista Lion's Club |

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.

| Date 08-Oct-2 | 2020 📋 [AMIPM] | eDOCSNL NL CDM:Diabetes |
|------------------|-----------------------|---------------------------------|
| Memo | 6 | Immunization |
| | Primary # | Injection |
| Time | Chart # Patient | MyQ Test Appointment - 15 mins |
| 08:00 | | Newborn |
| 08:05 | | Post Natal Checkup |
| 08:10 | | Prenatal Appointment |
| 08:15 | | Prescription Request - No Visit |
| 08:20 | | Becheck/Follow-up |
| 08:25 | | Deutice (Decules |
| 08:30 | New Appt > | Routine/Regular |
| 08:35 | New Blocked Time | Telephone Consult |
| 08:40 | New Template > | test appt my Q 10 |
| 08:45 | 🐁 New Multi-Patient 🔷 | 🚔 TEST TEST |
| 08:50 | Paste All | Urgent/Fit-In |
| 4 | | Vaccine Appointment |



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.
- 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.
 - 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.





| | | | | | | \sim |
|---|---------------|-------------|---------------|---------|--------------|-----------------------------|
| | Basic Patie | nt Search 😭 | | | Advanced Pat | Basic Patien Filte New Help |
| | Last: | sunday | First: | sadie | SW | Sector 1 |
| | Chart #: | | Ins #: | | | |
| | Phone #: | | DOB: A | II – II | | |
| | Status: | Exclude D 🔻 | MedAccess Id: | | ~ | |
| 1 | Nothing found | to display | | | | |

| rimary PHN*: | | | Type: 1 | NL PHN | - | | | | |
|--------------|-----------------|--------------|------------|---------------|--------------|-------------------|----------------|--------|---|
| Loot Namo*: | 0 | | | | | First Namo*: | 0 - 11- | | _ |
| Last Name . | Sunday | | 1 | | | First Name | Sadie | | J |
| Aiddle Name: | | | | | | Birth Date: | 13-Oct-1978 | 12 | |
| Gender: | Female V | · | _ | | | | | | |
| A va | lid search must | contain eith | er the PHN | or the Las | t Name, Firs | t Name, and (Date | of Birth or Ge | nder). | |
| | | 1 | O see b O | least Dealate | 010 | a sask | | | |

| Back to Search | Import Patient |
|----------------|----------------|
| | |



- 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.



| 💈 Create Patient - Google Chrome | | | - D X |
|--|---|--|--------------------------------------|
| il ninatest.med-access.net/pati | ient/DisplayInsertPatientPopup.do?patientD | ta.chartTypeString=REG8tcreatePatientFromSearchCriteria=true8tlabLastName=Test8tlabFirstName=Barterianteri | onny&labMiddleName=&labPHN=&lab |
| Create Patient | | | E Provinsid Import Emport Consel Mon |
| | | | |
| Last Norre" Teal Tool Chast # | First Name* Bonny DDB*_Nextorn Colonitions | tedele Peritx Sottix None Ype ↓ Legal ↓ ↓ ↓ Vicksaara ↓ ↓ Gender Hentis Sohn ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ | |
| Address & Phone | Primary Meetifier Type Terrop" | Depary Date Perfert Solar. 0540006-yyyy Pli | |
| Address | BCI PHN MB BIRN MB PHN MB PHN NB PHN NB PHN ND PHN CN PHN PAPRN CY PHN CY PHN | Attractive Generation and U an | |
| Prefix First Name | VT PHN | Relationship Role Phone Address | |





| nichitest.me | d-access.net/patient | DisplayPPHISearch.do?action loCall=inser | rtForAppointment&criteria.patientId.valu |
|-----------------------------|----------------------|--|---|
| Primary PHN*: | | Type: NL PHN - | |
| Last Name*: Middle Name: | tiger | | First Name*: tim Birth Date: dd-MMM-yyyy 🔡 |
| Gender: | Male 🗸 | | |



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.
- 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.

'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.
- 5. Select 2 Years from the 'Duration' drop-down list.
- 6. 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.
- 8. Click the Generate Consent for Group button.
- 9. Click the **Demog** heading to display the patient's demographic information.
- 10. Click the x in the top right corner to close the patient chart.

| | Sadie Sur 41 years 13-0 | nday _{Ict-1978} Female | | | | Address: NL | | | |
|---------|---|------------------------------------|------------|-----------|--------------|--------------------------------------|---------------------|-------------|-----|
| | Appointme | nt | | | | | | | |
| | Type Immunization Date 08-Oct-2020 Immenization Time Time 08-15 AM L (08-20 AM) 5 minutes | | Concern | | | | | | |
| | | | Notes | lotes | | | | | |
| | | | | | | | | | |
| | | | Provider | | Fai R | cility onivista Lion's Club 🛛 🕮 🕊 | Room E Bonavieta | Lione Ch 🗙 | |
| | Status | | Current St | ep | | | C.DVIIaviota | Liona Cit - | |
| | Booked | | FFC app | t options | | | | | |
| | Save 🗋 🌶 | ¢ | | | | | | | |
| | | | | | | | | | I |
| Date | | Davi | | Da | ys | Provider or Resource 🍭 | 2 | | ~ |
| 08-061- | 2020 III (AM | PMJ | | ← 1 | → | E.Bonavista Lion | - | | |
| Memo | 6 | | | | | <u></u> | | | |
| Time | Primary # Chart # | Patient | | | Туре | Concern Resource | | Appt Sta | tus |
| 08:00 | | | | | | | | | |
| 08:05 | | | | | | | | | |
| 08:10 | | | | | | | | | |
| 08:15 | | Sadie Sunday | | n » | Immunization | | | Booked | |





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