Newfoundland & Labrador
Centre for
Health Information

Training Manual – Med Access EMR Immunizations

October 2020

Newfoundland & Labrador Centre for Health Information

Training Manual – EMR Immunizations

Use Cases & Videos

Click on the use case titles below or right click and select 'Open Hyperlink' to view the videos

(A) Clerk/MOA

1. Registering a Patient with an Existing EMR Chart
2. Registering a Patient with **No** Existing EMR Chart
3. Manually Booking Immunization Appointments in EMR
4. Blocking Out 'Unavailable' Time on the Daysheet

(B) Public Health Nurse/Immunizer

5. Assigning an Immunizer in EMR
6. Submitting the Patient Consent Form and Immunization Form in EMR

(C) Parking lot Attendant

7. Public Health Parking lot Attendant Workflow

(E) Business Continuity Plan

8. Printing the Daysheet in EMR

(D) Occupational Health & Community Nurse Workflow

- Please see use cases & videos 1-6

Project Name:	EMR Immunizations		
Name of Use case:	Registering a Patient with an Existing EMR Chart		
Use Case ID/ No.:	1		
Created By:	Lauren Sinclair	Last Updated By:	Lauren Sinclair
Date Created:	October 1, 2020	Last Revision Date:	October 7, 2020
Description:	This document outlines the workflow for staff who are registering patients for flu clinics using Med Access EMR. This workflow is specific to registering patients who have an existing local EMR chart.		
Actors:	Medical office assistant (MOAs), clerk, or immunizer responsible for registering the patient at the flu clinic; patient		
Precondition:	A patient who has an existing local EMR chart has a flu clinic appointment scheduled in EMR.		
Post-condition:	A patient chart has been created and the patient has been successfully registered in MedAcess EMR for the flu clinic.		
Trigger:	A patient, who has a local EMR chart, presents to registration at a flu clinic.		
Basic Flow:	To register a patient who already has an EMR chart, log in to the EMR and complete the following steps: **Step 1:** If you work at more than 1 location, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. **Step 2:** Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. **Step 3:** Click on the patient's name or the word Restricted in the 'Patient' column of the daysheet. **Please note:** If the 'Client Registry' window appears, click the Accept Selected PCR Data button to continue. **Step 4:** Click the word Restricted at the top of the 'Patient Summary' window to generate a 'Consent Form' window. **Step 5:** Select 2 Years from the 'Duration' drop-down list. **Step 6:** Enter flu in the 'Reason' box, then double click on flu name to display the reason for the consent. **Step 7:** Click the blue arrow to select the appropriate 'Delegate Consent to Group' option. **Step 8:** Click the Generate Consent for Group button to continue. **Step 9:** Click the Demog heading to display the patient's demographic information. **Step 10:** Click the x in the top right corner to close the patient chart. **Step 11:** 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'. **Step 12:** When all work is completed in EMR, click the Logout icon in the top left corner of the screen to exit the system.		
Alternative Flow(s):	n/a		
Exception Flow(s):	n/a		
Use Case Associations:	Use Case 2: Registering a Patient with No Existing EMR Chart		

Project Name:	EMR Immunizations		
Name of Use case:	Registering a Patient with No Existing EMR Chart		
Use Case ID/ No.:	2		
Created By:	Lauren Sinclair	**Last Updated By:**	Lauren Sinclair
Date Created:	October 1, 2020	**Last Revision Date:**	October 7, 2020
Description:	This document outlines the workflow for staff who are registering patients for flu clinics using Med Access EMR. This workflow is specific to registering patients who have **no** pre-existing local EMR chart.		
Actors:	Medical office assistant (MOAs), clerk, and/or immunizer responsible for registering the patient at the flu clinic; patient		
Precondition:	A patient who has no pre-existing local EMR chart has a flu clinic appointment scheduled in EMR.		
Post-condition:	A patient chart has been created and the patient has been successfully registered in Med Access EMR for the flu clinic.		
Trigger:	A patient, who has **no** local EMR chart, presents to registration at a flu clinic.		
Basic Flow:	To register a patient who has no pre-existing EMR chart, log in to EMR and complete the following steps: **Step 1:** If you work at more than 1 location, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. **Step 2:** Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. **Step 3:** Right click on New Immunization Patient in the 'Patient' column of the daysheet and select Edit from the drop-down list. **Step 4:** Note that the patient's name, MCP, gender and DOB will appear in the 'Concern' field. Note the MCP number from the 'Concern' Field. **Step 5:** Click the Change Patient icon in the top right corner of the screen. This will open the 'Appointment' window. **Step 6:** To search for the patient in the local EMR, enter the patient's MCP number in the 'Insurer #' field and click the Search button in the top right corner. **a)** If results are found, select the patient's name, click the Accept Selected PCR Data button (if prompted) and proceed to Step 11. <u>Or</u> **b)** If results are **not** found, proceed to Step 7. **Step 7:** 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, click Import Patient to create the patient chart in the local EMR. Click the Save button to return to the daysheet. *Please note that if the patient is **not** found in the local EMR or Client Registry, see the 'Alternative Flows' section below for further information.* **Step 8:** Left click on the patient's name on the daysheet.		

	Step 9: In the 'Care Assignment &Notes' section, select IMM.External from the 'Provider Group' drop-down list. Click the Update button. **Step 10:** Click the x in the top right corner to close the patient's chart. **Step 11:** Click the word Restricted at the top of the 'Patient Summary' window to generate a 'Consent Form' window. **Step 12:** Select 2 Years from the 'Duration' drop-down list. **Step 13:** Enter flu in the 'Reason' box, then double click on flu to display the reason for the consent. **Step 14:** Click the blue arrow to select the appropriate 'Delegate Consent to Group' option. **Step 15:** Click the Generate Consent for Group button to continue. **Step 16:** Click the x in the top right corner to return to the daysheet. **Step 17:** 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'. **Step 18:** When all work is completed in EMR, click the Logout icon in the top left corner of the screen to exit the system.
Alternative Flow(s):	In Step 7c above, 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' down-down list in the 'Patient Summary' window. d) When complete, click the Create Patient button. Click the x in the top right corner to exist 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 Step 17 above to continue with the registration process.
Exception Flow(s):	n/a
Use Case Associations:	Use Case 1: Registering a Patient with an Existing EMR Chart

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Project Name:	EMR Immunizations		
Name of Use case:	Manually Booking Immunization Appointments in EMR		
Use Case ID/ No.:	3		
Created By:	Lauren Sinclair	**Last Updated By:**	Lauren Sinclair
Date Created:	October 1, 2020	**Last Revision Date:**	October 7, 2020
Description:	This document outlines the workflow for staff who are manually booking patients for flu clinics using Med Access EMR.		
Actors:	Medical office assistant (MOAs), clerk, immunizer or other RHA staff member responsible for booking the patient appointment for the flu clinic (i.e., the scheduler); patient		
Precondition:	The patient requires an immunization appointment at the flu clinic and contacts the scheduler to book the appointment.		
Post-condition:	The scheduler has manually booked the patient's immunization appointment in EMR.		
Trigger:	The patient contacts the scheduler to request an immunization appointment.		
Basic Flow:	To manually book a patient immunization appointment in the EMR, log in to the EMR and complete the following steps: **Step 1:** If you work at more than 1 location, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. **Step 2:** Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. **Step 3:** Left click on the Date in the top left corner of the screen above the daysheet to select a date for the appointment. **Step 4:** Identify the desired time for the appointment on the daysheet and right click anywhere in that row to view the drop-drop list. **Step 5:** Hover over New Appt and then select Immunization from the drop-down lists to open the 'Appointment' window. **Step 6:** 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. a) If the patient **has** a local EMR chart, select the correct patient match from the list provided and continue to Step 7. b) If the patient **does not have** a local EMR chart, you will see 'Nothing found to display'. Proceed to create a new patient chart in EMR, 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, review the patient's name and click the Import Patient button to create the patient chart in the local EMR. Continue to Step 7. *Please note that If the patient is **not** found in the local EMR or Client Registry, please see the 'Alternative Flows' section below for further information.*		

	Step 7: Once in the 'Appointment' window, ensure that the correct date/time is selected for the appointment. **Step 8:** When all applicable fields in the 'Appointment' window are complete, click the Save button. **Step 9:** Verify that the patient's immunization appointment appears on the daysheet for the identified date and time slot. **Step 10:** When all work is completed in EMR, click the Logout icon in the top left corner of the screen to exit the system.
Alternative Flow(s):	In Step 6c above, 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' down-down list in the 'Patient Summary' window. d) When complete, click the Create Patient button. Click the x in the top right corner to exist 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 Step 7 above to continue with the booking process.
Exception Flow(s):	n/a
Requirements or Business Rules:	n/a
Use Case Associations:	Use Case 4: Blocking Out 'Unavailable' Time in the Daysheet
Use Case Notes:	Not all patient immunization appointments will be manually booked. Patients may choose to independently book their flu clinic appointments using HealthMyself.

Project Name:	EMR Immunizations		
Name of Use case:	Blocking Out 'Unavailable' Time on the Daysheet		
Use Case ID/ No.:	4		
Created By:	Lauren Sinclair	Last Updated By:	Lauren Sinclair
Date Created:	October 1, 2020	Last Revision Date:	October 7, 2020
Description:	This document outlines the workflow for staff who manage the flu clinic schedule and wish to block out timeslots when patient appointments are not available during the clinic day. Staff may want to block out unavailable timeslots if there is a staff meeting scheduled or maintenance/construction being completed in the clinic space, among other examples.		
Actors:	Medical office assistant (MOAs), clerk, immunizer or other RHA staff member responsible for managing the flu clinic schedule (i.e., the scheduler)		
Precondition:	The flu clinic schedule shows available timeslots for patient immunization appointments during a time which the clinic space and/or staff are not available.		
Post-condition:	The scheduler has manually blocked off the unavailable time in the clinic schedule so that no patient immunization appointments can be booked in that time period.		
Trigger:	The scheduler identifies a timeframe that the flu clinic and/or staff are not available for patient appointments.		
Basic Flow:	To block out 'unavailable' time on the daysheet in EMR, log in to the EMR and complete the following steps: **Step 1:** If you work at more than 1 location, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. **Step 2:** Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. **Step 3:** Left click on the Date in the top left corner of the screen above the daysheet to select a date for the block out. **Step 4:** Identify the desired time to block out on the daysheet and right click anywhere in that row to view the drop-drop list. **Step 5:** Select New Blocked Time from the drop-down list to open the 'Appointment' window. **Step 6:** Enter the reason that the clinic is unavailable in the 'Description' field (e.g., 'Clinic space unavailable due to maintenance'). **Step 7:** Specify the start time and end time of the block out in the appropriate fields. **Step 8:** Click the Save button. **Step 9:** Verify that the blocked time appears as unavailable on the daysheet for the identified date and time slot. **Step 10:** When all work is completed in EMR, click the Logout icon in the top left corner of the screen to exit the system.		

Project Name:	EMR Immunizations		
Name of Use case:	Assigning an Immunizer in EMR		
Use Case ID/ No.:	5		
Created By:	Lauren Sinclair	Last Updated By:	Lauren Sinclair
Date Created:	October 1, 2020	Last Revision Date:	October 7, 2020
Description:	This document outlines the workflow for staff who are immunizing patients at the flu clinics. A provider is required to be assigned to the immunization appointment prior to submission of the patient consent form and immunization form in Med Access EMR.		
Actors:	Provider responsible for immunizing patients; patient		
Precondition:	The patient has been registered in EMR and status has been updated to 'Booked' on the daysheet.		
Post-condition:	The patient has been assigned an immunizer and the provider's name appears on the daysheet. The provider can proceed to complete the patient consent form and immunization form.		
Trigger:	A patient presents to the provider for immunization at a flu clinic.		
Basic Flow:	To assign a provider/immunizer to the patient chart in EMR, log in to the EMR and complete the following steps: **Step 1:** If you work at more than 1 location, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. **Step 2:** Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. **Step 3:** Identify the patient's name on the daysheet and click on the Checked In status in the 'Appt Status' column to open the 'Appointment' window. **Step 4:** Select the appropriate provider or immunizer from the 'Provider' drop-down list and click the Save button. The immunizer's name will now appear in the on the daysheet.		
Alternative Flow(s):	n/a		
Exception Flow(s):	n/a		
Requirements or Business Rules:	n/a		
Use Case Associations:	Use Case 6: Submitting the Patient Consent Form and Immunization Form in EMR		
Use Case Notes:	n/a		

Project Name:	EMR Immunizations		
Name of Use case:	Completing the Patient Consent Form and Immunization Form in EMR		
Use Case ID/ No.:	6		
Created By:	Lauren Sinclair	Last Updated By:	Lauren Sinclair
Date Created:	October 1, 2020	Last Revision Date:	October 7, 2020
Description:	This document outlines the workflow for staff who are immunizing patients at the flu clinics. After a provider is assigned as the patient's immunizer, they are responsible for the submission of the patient consent form and immunization form in the EMR.		
Actors:	Provider responsible for immunizing patients; patient		
Precondition:	The patient has been registered in EMR and status has been updated to 'Booked' on the daysheet. The patient has been assigned a provider/immunizer and the provider's name appears in the 'Comments' field on the daysheet.		
Post-condition:	The provider has successfully submitted the patient consent form and immunization form.		
Trigger:	A patient presents to the provider for immunization at a flu clinic.		
Basic Flow:	To submit the necessary patient consent and immunization forms in EMR, log in to the Med Access EMR and complete the following steps: **Step 1:** If you work at more than 1 location, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. **Step 2:** Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. **Step 3:** Identify the patient's name on the daysheet and click on the green arrow in the 'Appt Status' column to advance the status from 'Checked In' to 'Seeing Doctor'. **Step 4:** Click the consent paper icon on the daysheet to open the 'Consent Task' window. **Step 5:** Maximize the window or scroll to optimize the window view. **Step 6:** Complete the applicable fields of the form using the drop-down options and free text, as required. When filling out the form, double click on the text in the text boxes to pull information from the patient chart or type the information in the free text space, as needed. **Step 7:** Scroll down and tick The patient indicates consent to the above checkbox. **Step 8:** When complete, click the Save button to return to the daysheet. **Step 9:** Identify the patient's name on the daysheet and click the needle icon to open the 'Task Management' window. **Step 10:** Maximize the window or scroll to ensure that you are able to view the entire task bar. **Step 11:** Click the Template icon in the top right corner to open a drop-down list and select the applicable template associated with the immunization from the drop-down list. **Step 12:** Complete the applicable fields of the form using the drop-down options and free text, as required. **Step 13:** Click the Save button to return to the daysheet.		

	Step 14: Identify the patient's name on the daysheet and click the green arrow in the 'Appt Status' column to advance status from 'Seeing Doctor' to 'Done'. **Step 15:** When all work is complete in EMR, click the Logout button in the top left corner of the screen to exit EMR.
Alternative Flow(s):	n/a
Exception Flow(s):	n/a
Requirements or Business Rules:	n/a
Use Case Associations:	Use Case 5: Assigning an Immunizer in EMR
Use Case Notes:	n/a

Project Name:	EMR Immunizations		
Name of Use case:	Public Health Parking lot Attendant Workflow		
Use Case ID/ No.:	7		
Created By:	Lauren Sinclair	Last Updated By:	Lauren Sinclair
Date Created:	October 1, 2020	Last Revision Date:	October 7, 2020
Description:	This document outlines the workflow for the parking lot attendant staff who are responsible for validating patient appointments in the EMR flu clinic daysheet and providing direction to patients regarding when to enter the clinic space.		
Actors:	Parking lot attendant; patient		
Precondition:	There are patient immunization appointments scheduled in the EMR which can be viewed on the daysheet for each applicable site.		
Post-condition:	The flu clinic daysheet has been successfully accessed and viewed by the parking lot attendant.		
Trigger:	The patient presents to the parking lot and indicates that they have an immunization appointment scheduled at the flu clinic.		
Basic Flow:	To access and view the daysheet for the applicable flu clinic, the parking lot attendant will log in to the EMR and complete the following steps: Step 1: If you have access to more than 1 location in EMR, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. Step 2: Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. Step 3: Ensure that the Date in the top left corner of the daysheet is the correct clinic date. Step 4: Identify the patient's name on the daysheet and/or identify the time of the appointment to validate the appointment. Step 5: When all work is completed in EMR, click the Logout icon in the top left corner of the screen to exit the system.		
Alternative Flow(s):	n/a		
Exception Flow(s):	n/a		
Requirements or Business Rules:	n/a		
Use Case Associations:	n/a		
Use Case Notes:	n/a		

Project Name:	EMR Immunizations		
Name of Use case:	Printing the Daysheet (Business Continuity Plan)		
Use Case ID/ No.:	8		
Created By:	Lauren Sinclair	Last Updated By:	Lauren Sinclair
Date Created:	October 1, 2020	Last Revision Date:	October 7, 2020
Description:	This document outlines the workflow for staff who are responsible for printing the daysheet as part of the EMR Immunization business continuity plan. The flu clinic schedule is required to be printed at the beginning of each clinic day so that patient appointments can continue in the event that the EMR system becomes unavailable during the clinic day.		
Actors:	Medical office assistant (MOAs), clerk, immunizer or other RHA staff member responsible for printing the daysheet for a specific site		
Precondition:	There are patient immunization appointments scheduled in the EMR which can be viewed on the daysheet for each applicable site.		
Post-condition:	The flu clinic daysheet has been successfully printed for the site.		
Trigger:	The staff member responsible for printing the daysheet logs into EMR and notes that there are patient immunization appointments scheduled for that clinic day.		
Basic Flow:	To print the daysheet at the beginning of each clinic day, the identified staff member will log in to Med Access EMR and complete the following steps: **Step 1:** If you have access to more than 1 location in EMR, right click on the site name in the top left corner of the screen to display a drop-down list. Select the location you wish to view. **Step 2:** Select the correct room from the Provider or Resource drop-down list to view the appropriate daysheet. **Step 3:** Ensure that the Date in the top left corner of the daysheet is the clinic date you wish to view and print. **Step 4:** Click the Print icon located above the daysheet. **Step 5:** Select Chronological Daysheet from the drop-down list. **Step 6:** Click the Print icon in the top right corner of the 'Print Preview Appointments' window. **Step 7:** Adjust printer settings, as needed, and then click the Print button. **Step 8:** When all work is completed in EMR, click the Logout icon in the top left corner of the screen to exit the system.		
Alternative Flow(s):	n/a		
Exception Flow(s):	n/a		
Requirements or Business Rules:	n/a		
Use Case Associations:	n/a		
Use Case Notes:	n/a		