EPR TIPSHEET for CLINICAL SECRETARIES/ADMIN STAFF

Patient Search

You may search for Patients in EPR through any of the following ways:

- **MRN** (Medical Record Number)
- **Last name *comma* First name**: i.e. Super, Kathy
- **Last name**
- **Ontario Health Card Number** (place the letter "o" before the number): i.e. o1234567890
- **Partial name using the Wild card/hyphen**: i.e. Sup-, K-
- **Visit Number** (place a "v" before the visit number): i.e. v9800813

Best Practice: for most accurate search use the patient's Medical Record Number (MRN), if available or the Ontario Health Card number.

Privacy is Important!

By law, you are prohibited from accessing any patient's information that is not within your circle of care. Unauthorized access is considered a privacy violation and may result in termination of employment, prosecution and fines. Visit the Privacy home page on the Intranet for more info.

System Navigation

How well you experience the EPR is dependent on how well you understand the Transaction Line!

There are three main directional options:

- **Select -** refers to items above the Transaction Line for you to 'select' from
- **Enter -** indicates option to enter and submit text into the Transaction Line
- **Choose -** refers to options below the Transaction Line that you may 'choose' from

Other commonly provided options:

- **OK -** proceed to next step (alternative to hitting the ENTER button on keyboard)
- **Back -** goes back to previous screen. [Not to be used on Registration or Visit Screens as it could take you to right to the beginning of task and wipe out all the entered information].
- **Cancel -** terminates your active task
- **Accept -** saves your entry/information
- **Keep -** advances you directly to the 'Accept' button option
- **Go To -** enables you to go to a specific field

ADT Tab

- **Edit/Activate Visit** – done upon patient arrival
- **Edit Registration – a**llows you to change patient demographics
- **Cancel Visit –** use to cancel visit
- **Change Visit Date/Time –** quick access to change scheduled visit
- **Convert Visit –** use to convert visit to Same Day
- **No Show –** use when patient does not show for visit
- **Visit Reversal –** will reverse cancelled, closed, discharged and no show visits

All clinic visits are automatically discharged 24 hours after the patient chart is activated.

Transcribe Note

1. On Patient Desktop, click the **Transcription** tab
2. Click **Transcribe Note**
3. Choose **Unscheduled Procedures**
4. Select the type of **procedure**
5. Enter the date/time; click **OK**
6. Enter **Dictating Physician**; select from list, click **OK**
7. Enter **Attending/Staff**; select from list, click **OK**
8. Type the document. Close Word when finished.
9. Click **Save**
10. If applicable, enter the Employee ID; click **OK**.

Shortcuts, Acronyms & Statuses

Date and Time:

- **Full Date** = ddmmyy (i.e. 230515 is May 23, 2015)
- **Time** = 24 hour clock (i.e. 1400 is 2:00 p.m)
- **Date + time** = ddmmyy + 24 hour clock (i.e. 230515 *space* 1400 is May 23, 2015 at 2:00 p.m)
- **n** = (Now) current date+time
  E.g. n-5 = 5 minutes ago, n+5 = 5 minutes from now Also, h= hour(s), w=week(s), m=month(s)
- **t** = (Today) current date
  E.g. t-1 = yesterday, t+1 = tomorrow, t+1 0800 = tomorrow at 8 a.m)

Bed Statuses:

VAC = Vacant Bed
HK = Bed Being Cleaned
PT = Pending Transfer
PD = Pending Discharge

Visit Types:

IP = Inpatient
OP = Outpatient
EP = Emergency Patient
SP = Same Day Patient
CP = Clinic Patient
HH = Home Health
RP = Referred Patient

Test Statuses:

- **Scheduled** Test has been ordered
- **Collected** Sample Collected
- **In Progress** Test received by lab
- **Partial** Partial results entered by lab
- **Unverified** Results to be verified
- **Resolved** Test unable to be completed
- **Completed** Test Completed
- **Corrected** Result changed
- **Cancelled** Test Cancelled

Result Status:

- **Underlined** Abnormal
- **Red Text** Critical!

Creating a Visit

1. On the Main Desktop, click on the **Reg/ADT** tab and select **Clinic Visit**
2. Enter the **Patient ID**; click **OK**
3. Select the patient; click **OK**
4. Choose **(A) Add A New Visit**
5. On the Vsit screen, fill in all applicable fields
6. Choose **Accept** to save the information
7. The Auto-assigned Visit number will appear; click **OK**
8. At the **Activate Visit?** prompt, choose **No** to leave as a pended visit. [Visits are ONLY activated upon patient's arrival to clinic].
9. Choose either **Yes** or **No** to print the report
10. Choose either **Yes** or **No** to directly access the patient's chart

Activating a Visit

Ontario Health Cards should always be verified and processed upon patient arrival

1. From the Patient Desktop, click the **ADT** tab
2. Under the Admission block, click **Edit/ Activate Visit**
3. To process the Ontario Health Card:
   - Select the **OHIP Verification** field
   - Choose **(Y) Process**
   - Scan the card or click **(M) Manual Override**
   - The Health Card Number will be displayed if previously entered; click **OK**
   - Click **OK** again to return to the Visit screen
4. Select and update any additional fields you may need to edit for the visit; click **OK** and then **Accept** once no further changes are required; click **OK** to proceed
5. Choose **Yes** to activate the visit
6. Choose A**ccept Visit Activation Time**
7. Choose either **Yes** or **No** to print the report

Order Entry

1. From the Patient Desktop, click the **Patient Care** tab; select **Order Entry** under **Patient Processing**
2. Order Information screen:
   - **Order Type:** Select **Written** (Admins are only allowed legally to submit orders on from the Doctor's Order Sheet)
   - **Date/Time:** Date and time will default to current. To modify, click drop down menu
   - **Order Author:** Select prescribing physician from list (or search and select for the appropriate one by typing in *Lastname, Firstname)*; click **OK**
   - Click **OK** again to proceed to next screen
3. On the main Order Entry screen:
   - Always ensure you check the **Order History** tab to avoid duplication of procedures
   - Select the procedure(s) using either the **Order Selection** or **Search** tabs:

   Order Selection tab:
   - Navigate to and click desired folder on left (right side of screen will display its contents)
   - Check off the relevant procedure box and the required **frequency** box; click **Add Order**

   Search tab:
   - Type in the procedure name (can use wildcard here too); click **Search**
   - Select the procedure; click **Add Order**
4. As orders are selected, they will sit in the holding spot at the top of the screen.
5. Once all orders are selected, click **Order Summary** and then **Accept** to submit

Advisories

Advisories display potential conflicts within a Patient's past/current/proposed drug therapy or procedure order. The Advisory screen appears during the order entry process when a user orders a specific procedure that has an adverse reaction or interaction. The two types of advisories are:

- Critical (Mandatory) advisories
- Non-Critical (Non-Mandatory) advisory

Note: Critical advisories must be addressed by the MD in order to complete the order.

Editing Orders

1. Follow steps 1 and 2 from the "Order Entry" section
2. From within the main Order Entry screen, click the **Order History** tab
3. Click once on the order to be changed
4. Choose desired option (Change/Discontinue/ Hold/Unhold)
5. Always leave the default time of "now" on next screen, unless otherwise specified
6. Click on the appropriate field(s) to edit; click **OK** and then **Accept.**
7. Click **OK** to proceed
8. Click **Order Summary** and **Accept Order**

Printing Specimen Labels

1. From **Patient Care** tab, under the **Print Label/ Collect** banner, click on **Specimen Collection**
2. Choose **Print Speciment Labels**
3. Click **OK** to accept the 2 hour default cutoff time or enter a new date/time
4. Select the **specimen(s)**; click **OK**
5. Choose **Accept** to print the label(s)

Reprinting Specimen Labels

1. Under the **Print Label/Collect** banner, choose **Reprint Speciment Labels**
2. Select the specimen; click **OK**
3. Choose **Yes** to reprint the label

We're Here to Help

The **EPR eManual** has been put together by our team to help provide easy step-by-step instructions for EPR users, and is conveniently accessible from within the EPR toolbar.

For computer problems, call Help Desk by dialing (416) 340-4800 x4357 or HELP on your keypad from a UHN phone. The Helpdesk is available 24 hours a day, 7 days a week.