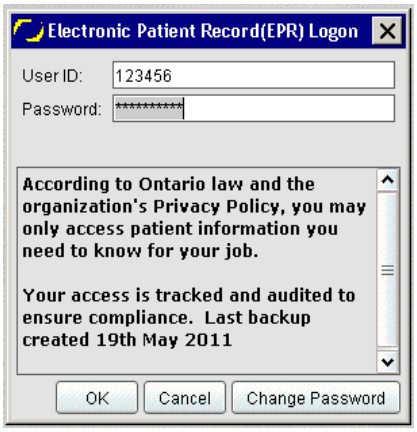
Toronto General
Toronto Western
Princess Margaret
Toronto Rehab
Michener Institute

FINANCE - TIP SHEET

- **Need Help?** For assistance with computer issues, Contact **HelpDesk, ext. 4357 (HELP)** or Email: **Help@uhn.ca**
- **Account Access:** Your personal EPR account will be available within 48hrs following training. Contact Helpdesk, ext. 4357, prompt 1 for Clinical Systems, prompt 1 for EPR Support

LOGGING IN TO THE EPR

1. Double-click on EPR Icon
2. Enter ID and password
3. Click the "*OK*" button to proceed



READING THE TRANSACTION LINE

Select – anytime the transaction line says to "***Select***" it is telling you to select from above

Enter – anytime the transaction line says to "***Enter***" it is telling you to type in your text or accept default

Choose – anytime the transaction line says to "***Choose***" it is telling you to select from below

PATIENT SEARCH OPTIONS

- Last name, First name → **Super, Cilia**
- Last name → **Rehab**
- MRN → **2003085**
- OHIP → **o987654339**
- Visit → **v40734000004**
- Wildcard (use the dash "-") → **Re-, J-**

CHART REVIEW

Use **Chart Review** to find **patient ADT information**. Remember that **Chart Review is a read only** section of the system and therefore **NO editing** can be done here.

Users can view admissions, transfers, discharges and discharge reversals

INSURANCE VERIFICATION

Insurance Verification from Main Desktop:

- From the **Main Desktop**, click the **Insurance Verification** tab
- Select each location to look for patients lists, names that require insurance verification
- Choose **Process** and select the patient, then select **Record Verification**
- If required, choose **Edit Visit** to make changes to the **Accommodation** or **Financial** info
- Under Management Queue, select **Queue Comment Only**, type in a brief comment
- Click **OK** until you see the Accept button and click **Accept** to save your work

REPORTS

- Login to EPR
- From the **Print Functions** tab click on the report that you want to generate *(e.g., Alpha Census)* and fill in the report parameters *(e.g., Visit Type, Start Date, etc.)*
- Click **OK** for a hard copy of the report

- If you wish to **email** the report, you will need to change **Print Queue field** from your default printer to '**Electronic Mail**'
- Click on the **Print Queue** field
- Type in '**M**' and hit Enter, or click on '**Mail'**
- Hit Enter and click on **Accept**
- Click on the **Mail** icon at the top-right of your EPR Desktop.
- Highlight the report that you generated *(hint: it should be at the top of your list)*
- Click the **'Report'** button at the bottom of the screen

**** NOTE:** Reports may take several minutes or hours to generate and appear in your EPR Mail Account ******

EDIT PATIENT REGISTRATION AND VISIT SCREENS

- From the **Patient Desktop** under **Visit Processing,** select **Edit Insurance Information**
- Edit the appropriate **Field,** click **OK** and **Accept** to save changes

View Merged MRNs

- Patient Desktop under Visit Processing, select Patient Registration/Demographics
  Select Additional Information screen to view merged MRNs

Notes

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