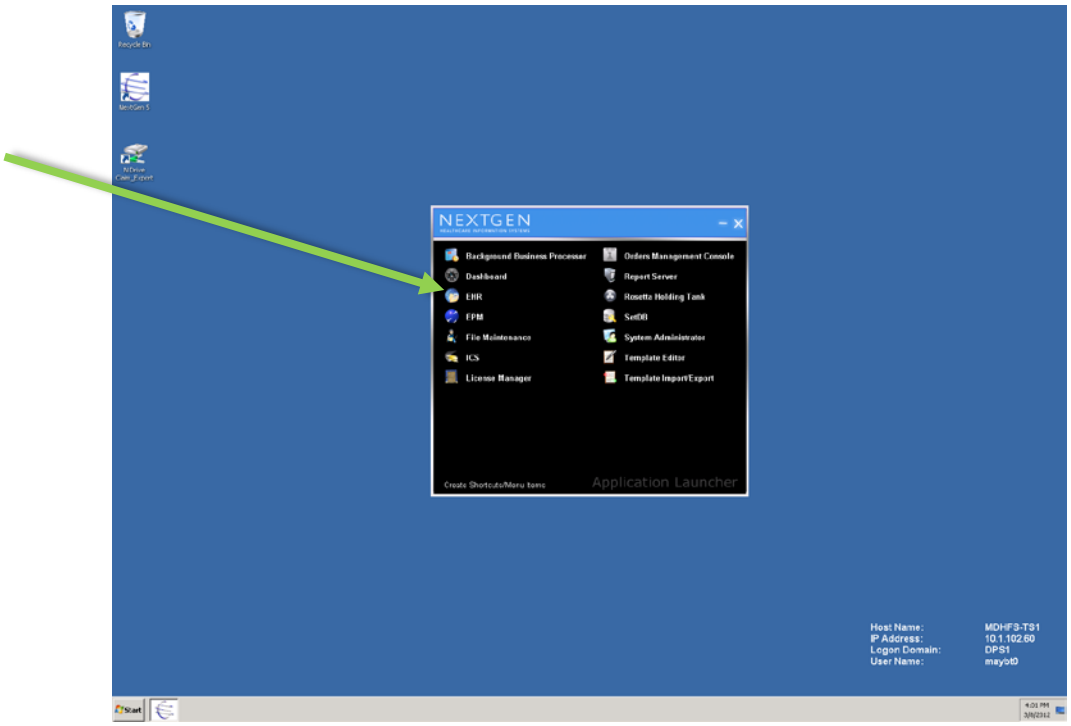
This guide will help you setup your initial user preferences in the EHR. To setup access to NextGen, printers and EPM settings, please see the *NextGen Setup Guide First-time Workstation Setup & Logging In Guide*

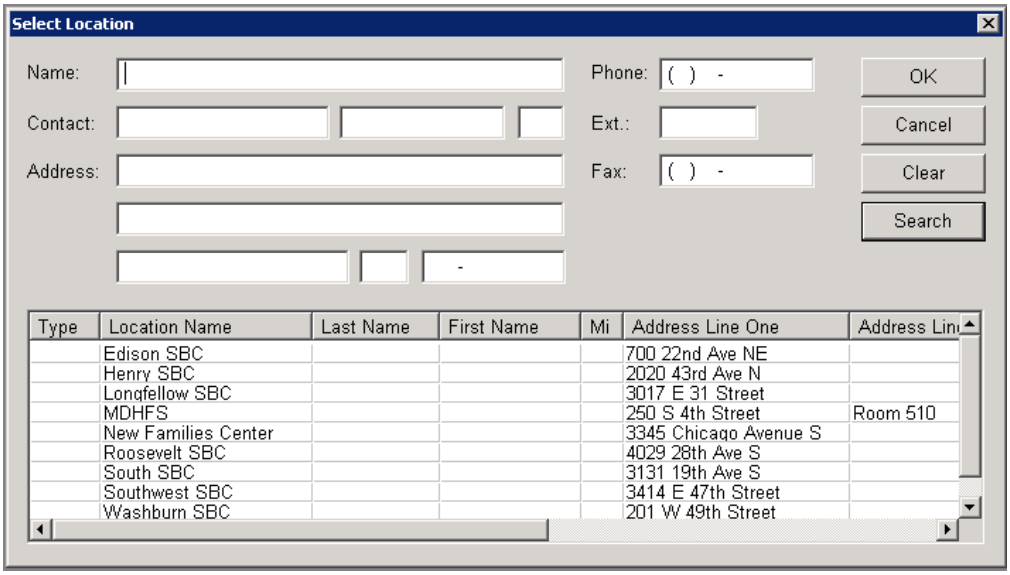
Note: Make sure you follow the steps below for both TEST and PROD.

I. Accessing the EHR

A. On the Application Launcher, click on EHR and login.

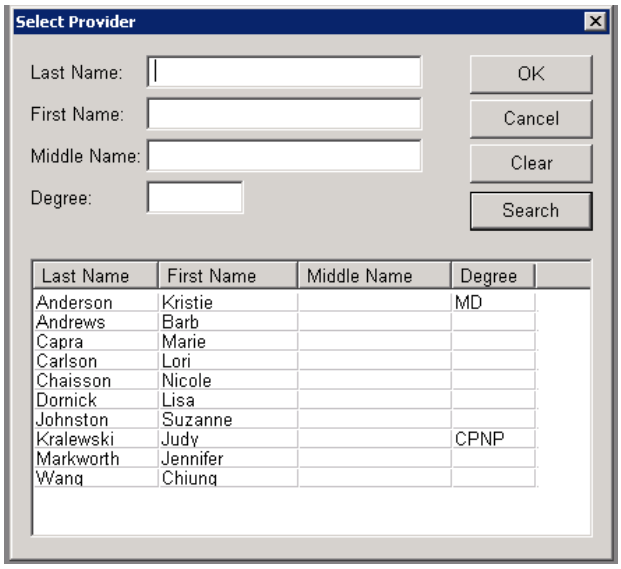


B. Select the location you work at most often by double-clicking on it.



Note: This is only for initial setup. You will be able to switch locations later as needed.

C. Select the Rendering Provider you work with the most or is your supervisor by double-clicking on her name.



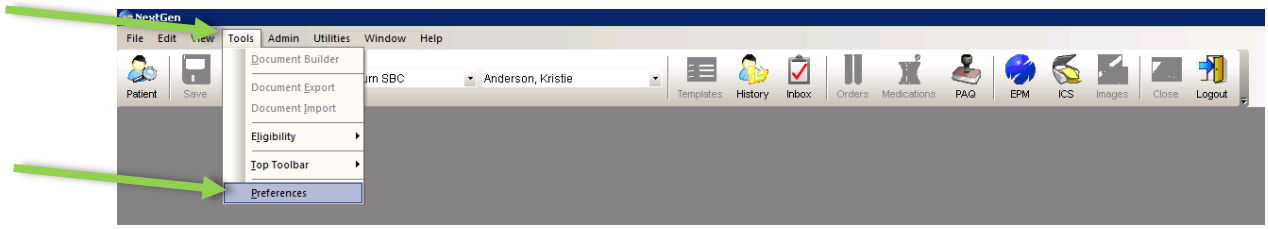
Note: This is only for initial setup. You will be able to switch providers later as needed.

D. The location and rendering provider you selected now appear in the EHR toolbar.

II. User Preferences

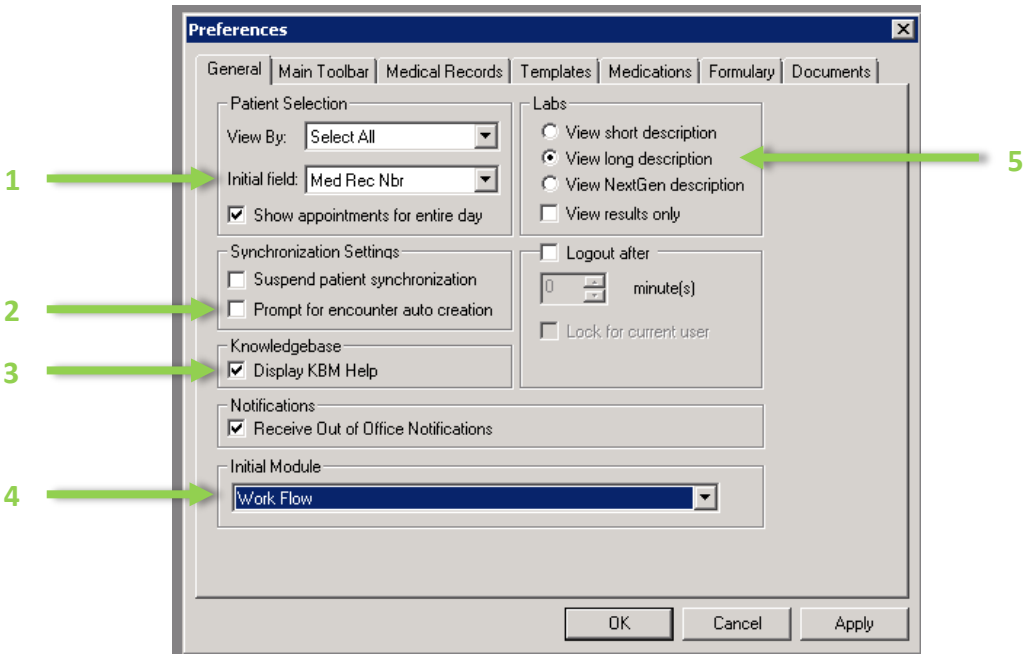
A. Accessing User Preferences

1. On the menu bar, click on *Tools* and select *Preferences*.



B. General Tab

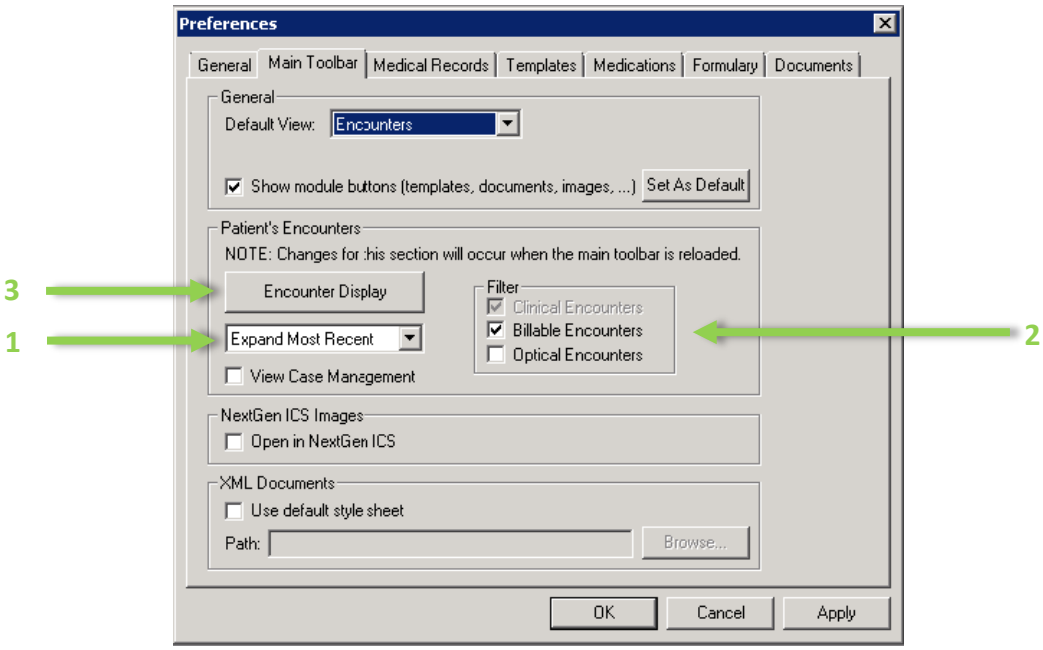
Verify the following has been completed in your *General* Tab:



1. In the *Initial Field*, verify *Med Rec Number* is selected. This way you will be able to enter a patient's Student ID Number when you look up the patient in EHR.
2. The *Prompt for encounter auto creation* should not be checked.
3. *Display KBM Help* should be checked
4. In the *Initial Module* field*, Work Flow* should be selected.
5. Under *Labs*, *View long description* should be selected

C. Main Toolbar

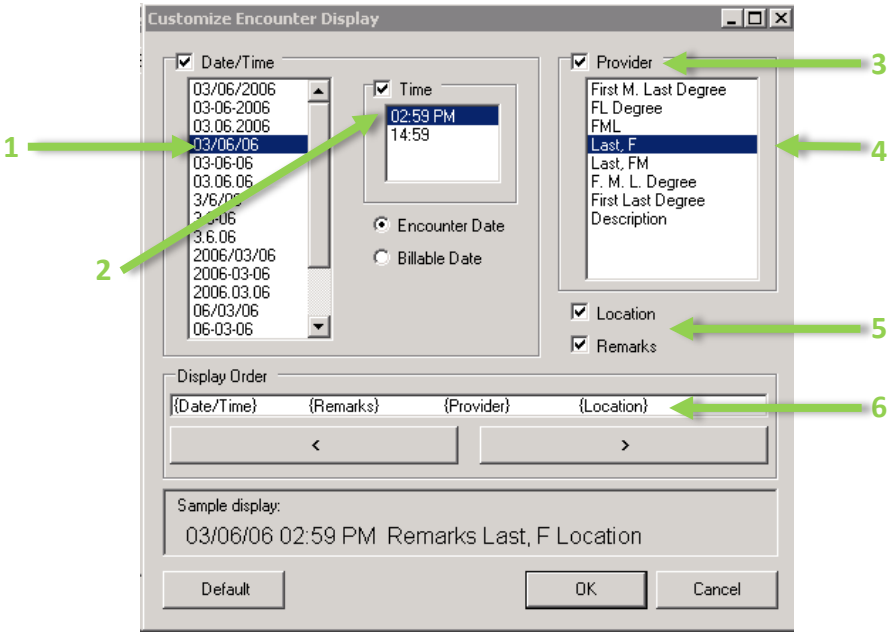
Verify the following has been completed in your *Main Toolbar* Tab:



1. Make Most Recent should appear in the dropdown men.
2. Under *Filter*, *Billable Encounters* should be checked.
3. Click on the *Encounter Display* button.

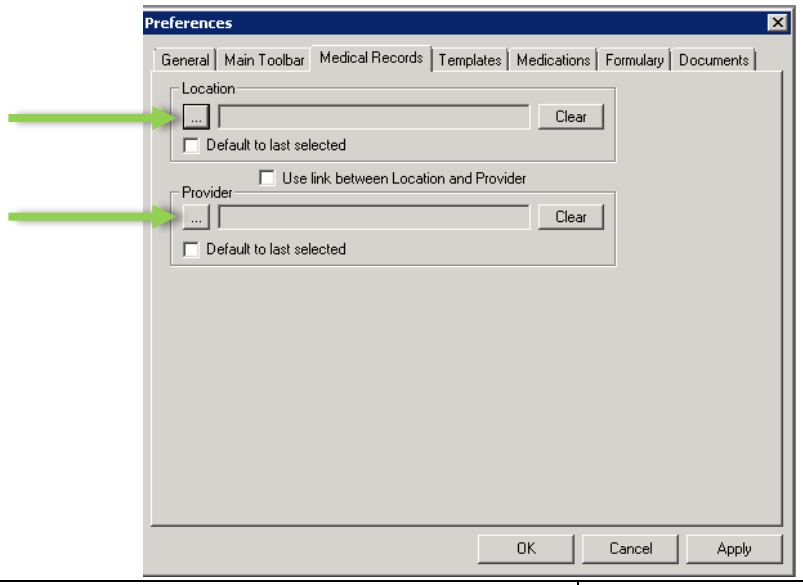
D. Encounter Display Button

Verify the following has been completed in the *Encounter Display* Button:



1. *03/06/06* as the date format
2. *02:59 PM* as the time format
3. *Provider* is checked
4. *Last, F* as the Provider name format
5. The *Location & Remarks* have been checked
6. The Display Order is this:
   {Date/Time} {Remarks} {Provider} {Location}
7. Click *OK*

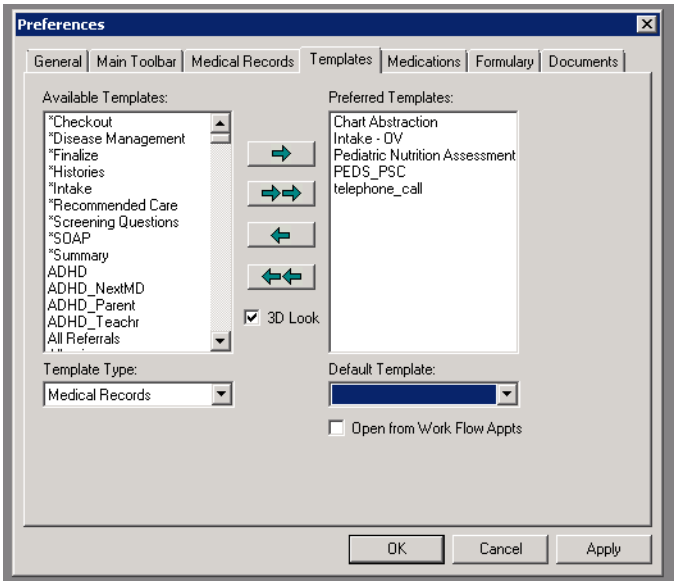
E. Medical Records Tab



1. Select the location you work at the most and check the *Default to last selected* box
2. Select the Rendering Provider you work with the most or is your supervisor and check the *Default to last selected* box

F. Templates Tab

You will be selecting the templates you can easily access based on your specialty.



1. Using the chart below, find the first template for your specialty under *Available Templates*.
2. Double-click on the template to move it over to your *Preferred Templates* list.

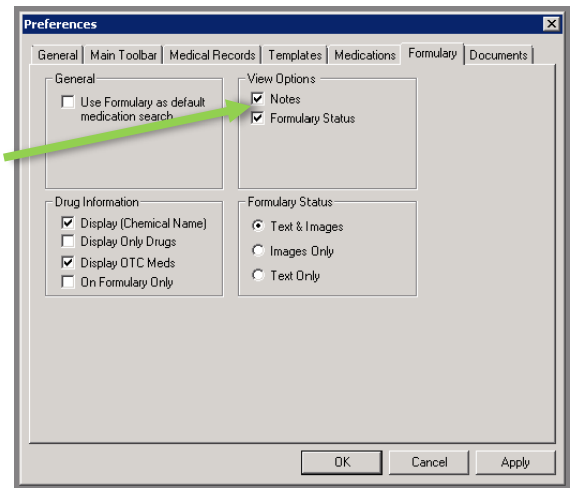
Clinical & Health Education	Mental Health	Nutrition
• Chart Abstraction • Intake – OV • SBC PSC • Social History Peds • Telephone_call	• SBC BH – Home • SBC PSC • Telephone_call • BH Transfer/Discharge 1	• Chart Abstraction • Intake – OV • Nutrition Assessment • Telephone_call

3. Click *Apply* when finished.

G. Formulary Tab

If you are a MA/OSS, No or RN, verify the following has been completed in the *Formulary* Tab:

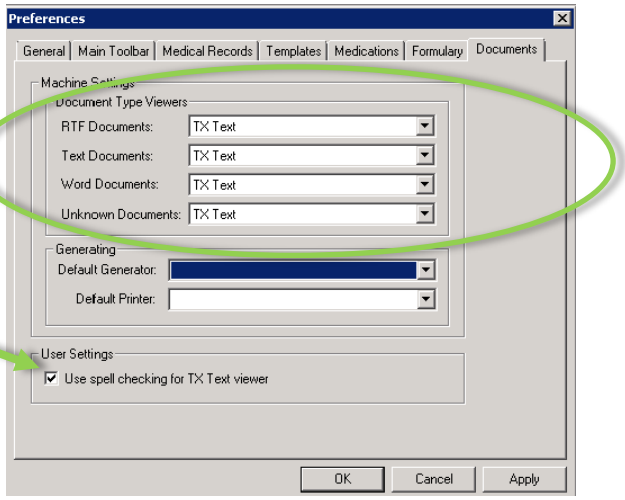
1. *Notes* and *Formulary Status* under *View Options* should be checked.
2. *Display (Chemical Name)* and *Display OTC Meds under Drug Information* should be checked.



H. Documents Tab

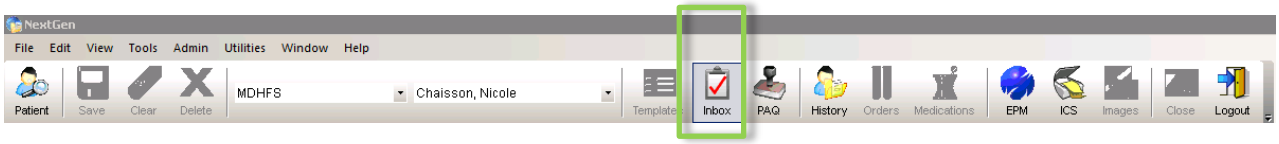
Verify the following has been completed in the *Documents* Tab:

1. *TX Text* should be selected for all Document Type Viewers
2. Under *User Settings*, make sure *Use spell checking for TX Text viewer* box is checked
3. Click OK

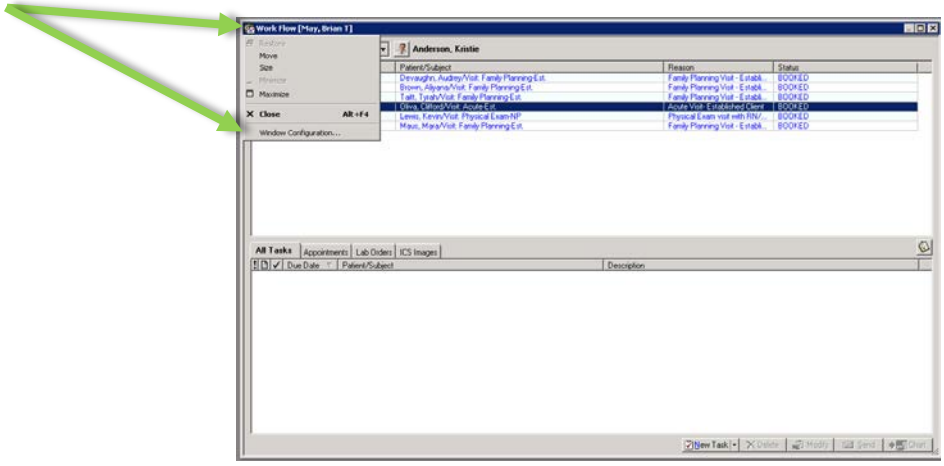


III. Work Flow Setup

A. Click on the *Inbox* button on the EHR toolbar.

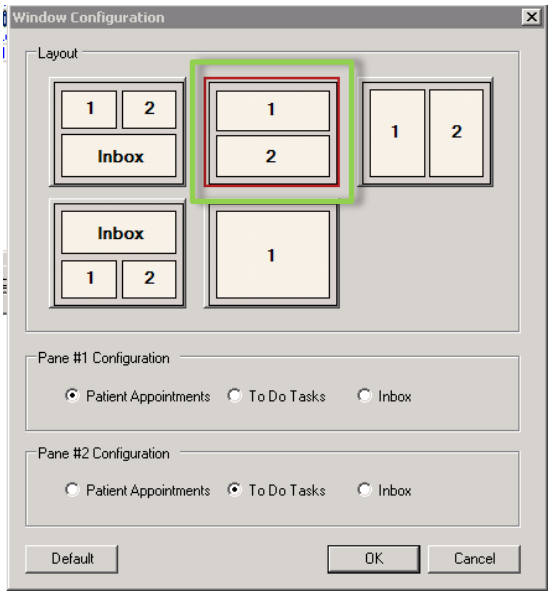


B. Click on the *Work Flow Manager* button and select Window Configuration.



C. Choose this setup.

D. Click *OK*.



Congrats! You are done with this How-to Guide.