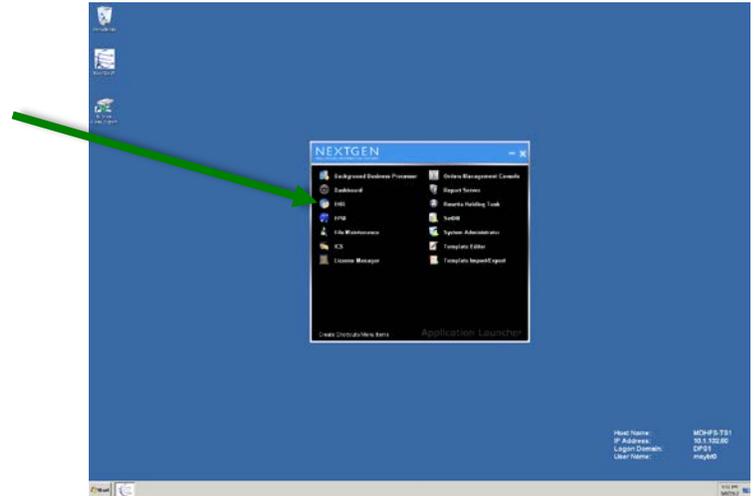This guide will help orientate you to the EHR.

> *Note:* Make sure you have updated your user preferences prior to following this guide.
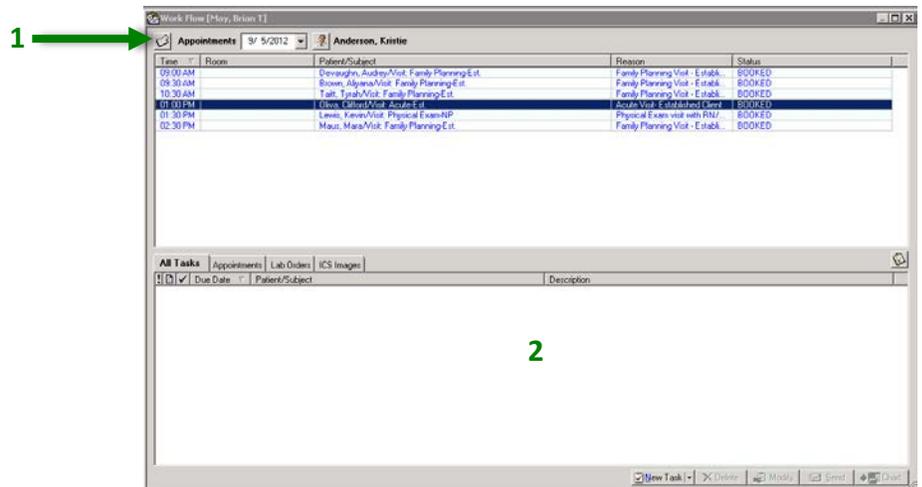> *See EHR How-to Guide 1: Setting up User Preferences.*

I.   Opening the EHR

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

B. **Work Flow**
When you open the EHR, the Work Flow is the first window to open.

1. **Appointments**
You will see the appointments for the date and rendering provider chosen.

> *Note:* If you are not a rendering provider, choose the provider you work with the most or is your supervisor.

2. **Tasks**
Here you will see tasks assigned to *you*, not necessarily the rendering provider whose appointments you've chosen to view.

> *Note:* You will only see EHR tasks here, not EPM tasks. *For more info on tasking, see EHR How-to Guide 6*

C. Toolbar

2

1　　　　　　　**3**　　　　　　**4**　　　**5**　　**6 7**

1. **Patient Lookup**
   Just like the EPM, you will be able to search for patients.

2. **Patient Demographics Bar**
   If you have already selected a patient, his/her name, date of birth, age, gender and Student ID Number will appear here.

3. **Location & Provider Information**
   You will only see encounters for patients of the provider at the location you've selected.
   Example: In this instance you would not see Kristie's encounters at Southwest – only Washburn.

4. **History**
   Click this to see a patient's encounter history.
   Hint: You will use this button a lot.

5. **EPM**
   Click on this to be taken directly to the patient's chart in the EPM.

6. **Close**
   Click on this when you are finished working in a template or module.
   Note: This is **not** the same as closing a patient's chart, or the logout button.

7. **Logout**
   Click this when you are ready to log out of the EPM.
   Note: This is **not** the same as closing a patient's chart, or the close or exit buttons.

II. Selecting a Patient & Encounter

A. If a patient is not yet selected, either double-click on the appointment in the Work Flow window or click on the *Patient Search* button on the EHR toolbar and enter the patient's SIN.

B. The History Window should automatically open. If not, click on the button in the toolbar.

C. Patient History Tab

   1. Encounter Folder
Each folder is an encounter booked from the EPM.
The date and time of the appointment, remarks, provider
and location of appointment are all listed.

   2. Encounter Elements
Inside the folder you will find chart templates and
documents that have already been created.

   3. Task Bar
Commonly used buttons appear here.

      a. Templates
Select the template you want to use to chart

      b. Problem Lists
View or add to a patient's problem list

      c. Allergies
View or add a patient's allergies

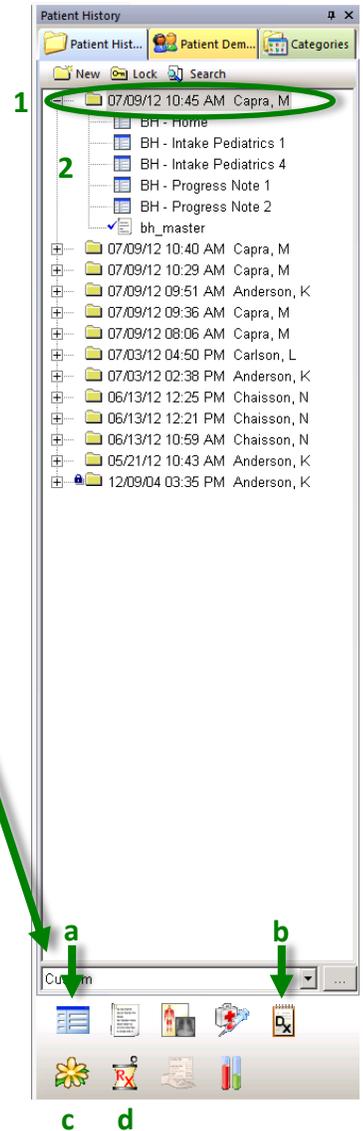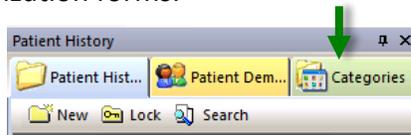   **d. Medications**
View or add a patient's medications

D. Patient Demographics
On the same window, click this tab to view a patient's information.

E. Categories
On the same window, click this tab to view scanned documents
and images for the patient's chart such as signed consent, privacy & sports physical forms and
PHI authorization forms.

III. 6 -point Check

Before starting to chart on a patient's encounter, it is very important to follow these 6 checks to ensure you are doing correctly.

A. Patient Name & Student ID Number

Ensure the correct patient is listed on the menu bar
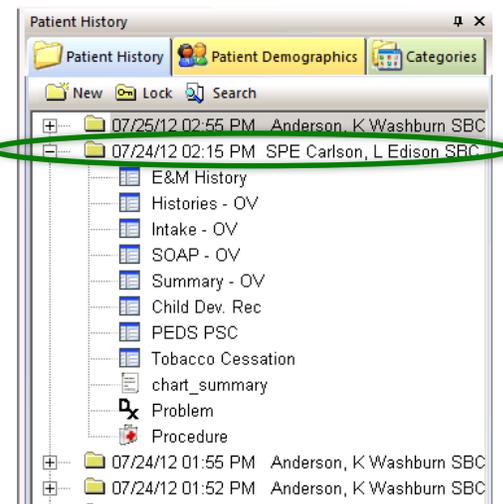

B. Location & Provider

Ensure you are working in the correct location with the correct rendering provider

C. Date & Time of Encounter

Ensure you are working on the correct encounter. Patient's may have multiple encounters for the same time, so **note the appointment time**

D. Remarks

This field will tell you the type of visit. In this example, *SPE* is Sports Physical Exam.

E. Provider Name

Ensure the provider name listed is correct. Patients may see multiple providers in the same day.

F. Location of Encounter

Ensure the location on the encounter matches the location on the toolbar.

Once you have verified these elements, you are ready to start charting on a patient's encounter!

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