EHR Staff Training
Day 1.

How to Login into EHR

Use Google Chrome - https://web.ehryourway.com Username ________________ Password ____________________

What you will see.

Right hand corner – you will see your name.

Change Password & Icon Help File

Lock Out versus Log Out

Lock Out – Use if documenting notes and need to step away before saving it.

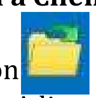
Icon Help File

Add New Item	Zoom in and Make Bigger Font
Add Free Text	Zoom out
Edit and make Changes	Detail View
Delete Selected Item or Row / Clear	Brief View
Refresh	Customize Content
Sign off Documents or Notes	Expand from Left to Right
More Options for Selected Row	Collapse from Left to Right
Print	Expand from Top to Bottom
Fax	Collapse from Top to Bottom
Add Comment Free Text	To Open Popup Window
Upload to Portal	To View the Window

New Note

Previous Note

How to open a chart of a Client

Left hand corner, click on  It will open a new box with the "Search Last Name" highlighted in green. Type in the last name and hit the big blue "Go" button. A list of clients matching your search will appear. You have two options from here.

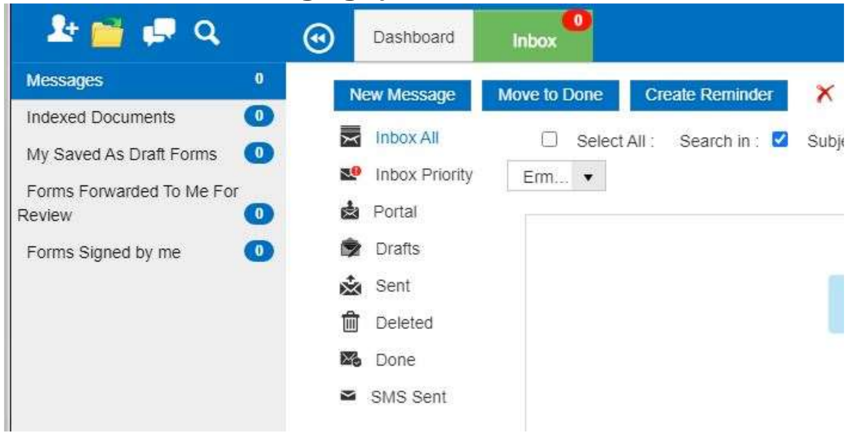
1. Double Click on the client you want.
2. Click once on the client you would like and then select from the options at the bottom of the screen.

If you double click or use the "Open Chart" Option, you may have an option to select the discipline or it will take you directly to the "Patient Summary" if there is only one discipline.

Client's Chart Overview or Top Ribbon.

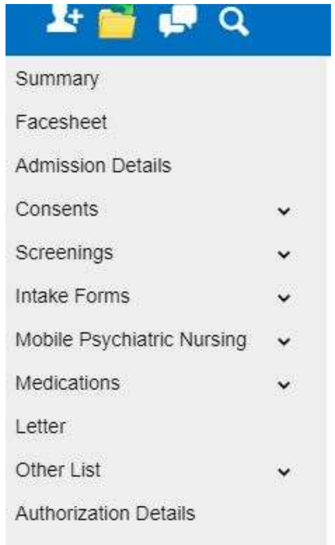
Appt – Allows you to see appointments for Client
Notes – To see all the Notes documented for this client.
Documents – This is the list of uploaded documents linked to this client.
Face Sheet – Exactly what it says it is.
Demographics – This is another way to update Client's demographics.
Problem List – List of problems
Sticky Notes – Aren't using this right now
Program : - To switch between programs if applicable.

Introduction to Messaging System

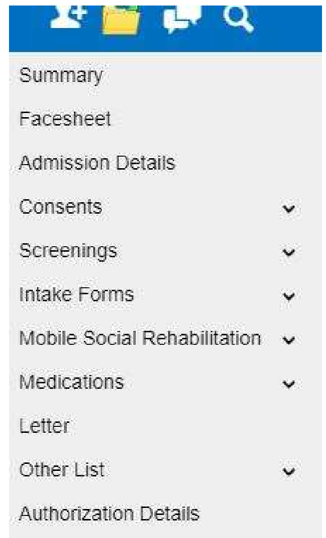


Open Chart
Go to Left side

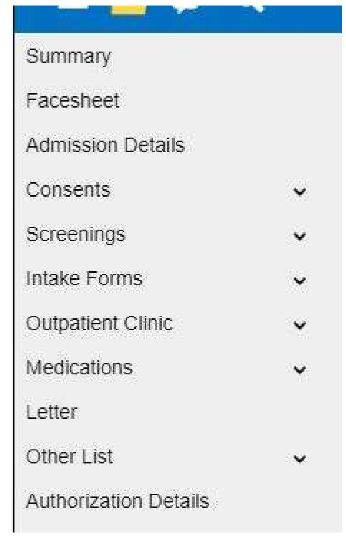
MPN



MSR



OPC



Log out before closing browser.
Please take some time to look around in EHR.

EHR Staff Training
Day 2.

Filling out any document on EHR

1. Open the client chart of Frank R. Testerson
2. Open Progress Note
3. Click on “Create New Notes”
4. All of Frank’s demographics have been auto populated.
5. Begin to fill it out.
    a. Take your time and read each category.
    b. Open means that you have further options.

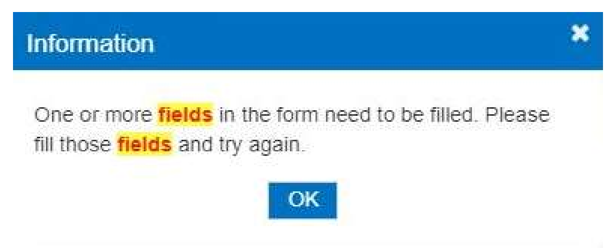
To see previous documents.

Use “Collapse” icon or “Side by Side” icon.
It will automatically show you the most recent document completed on EHR and the one you are working on.

Left side is the previous. Right side is the current.

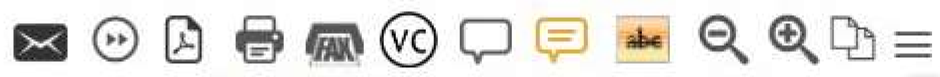
Save As Draft & Close
If you aren’t finished with the document and would like to return later to complete it.

To submit document



1. Make sure that information has been documented.
2. Click on the blue “Completed” button at the top of the document.
    a. A warning will appear if you try to submit without all of the information.
3. This document will be forwarded to support staff for review.

Corrections to document
If a document needs a correction it will show in your inbox under "Forms Forwarded To Me For Review"



View Comment – Once corrected, click "Complete"

Intake Process

Scheduling of first encounter — MPN & MSR - Director will assign through EHR. To occur after Initial Nursing Assessment.
OPC – Support staff will schedule through EHR. To occur after Biopsychosocial.

Initial Intake

Checklist per discipline

1. COVID-19 Screening must be completed before taking client back to Intake Office.
2. Submit documents through EHR as explained above.
3. Submit checklist and all other documentation, not completed in EHR, in with your timesheet.

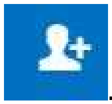
Subsequent Appointments

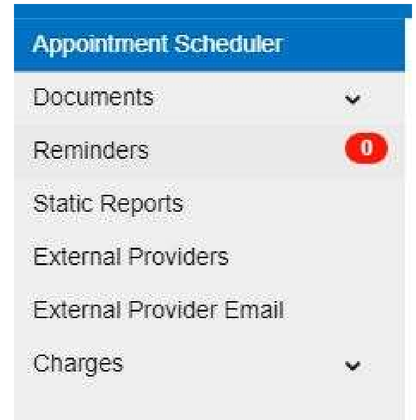
Documents — Complete Progress Note and Superbill with each appointment.
Complete necessary documents as needed.

Timesheets
Timesheets will continue to be done as they have always been, with only one modification. If document is a hard copy, it will go with the timesheet. If it is in the ERH, it will not. If a document is not with the timesheet, Support Staff will assume it is in the EHR. If there is a mistake you will receive your timesheet back.

EHR Support Staff Training
Day 1

How to add new client

Click on . Enter all information asked in each sub section.
Verify insurance before moving forward with all demographics.



Schedule an Appointment for a Client

Go to Appointment Scheduler on the right side of your dashboard.

1. Click on time slot and then the drop down for "New Appointment Patient /Client.
2. Type in last name of client and select Go.
3. Highlight the client you wish and then click "Next"
4. Select the Program / Therapy Information and then OK.
5. Then fill out appointment questions and select save.

Edit existing appointment

Recurring Appointment – Used for those appointments that must happen regularly. Such as injections.
You may also schedule multiple appointments through this.

How to check in and check out client

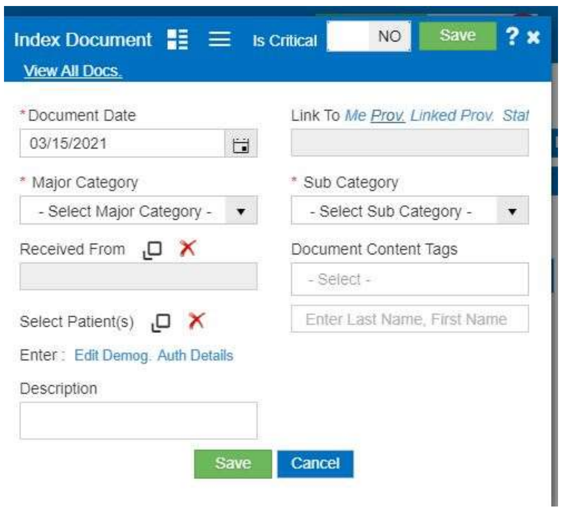
Under the "Appointment Scheduler" it will state "Pending". You can click on the hyperlink and change the status to Check-In, Missed, Cancelled, reschedule or Delete.

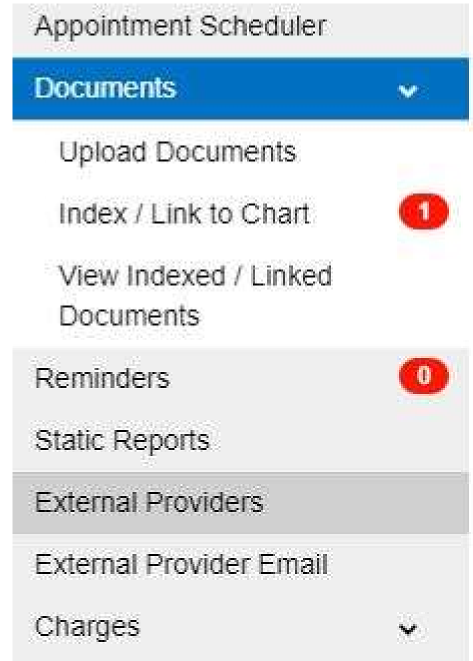
How to upload scanned Documents into EHR

Click Documents tab – follow directions Upload Documents.

Index/ Link scanned documents to the Client's chart.

1. Click on Index/Link to Chat Tab.
2. Click on Document you would like to link
3. Then click on "Index Doc."
4. Fill in information as needed.





EHR Support Staff Training
Day 2

Timesheets
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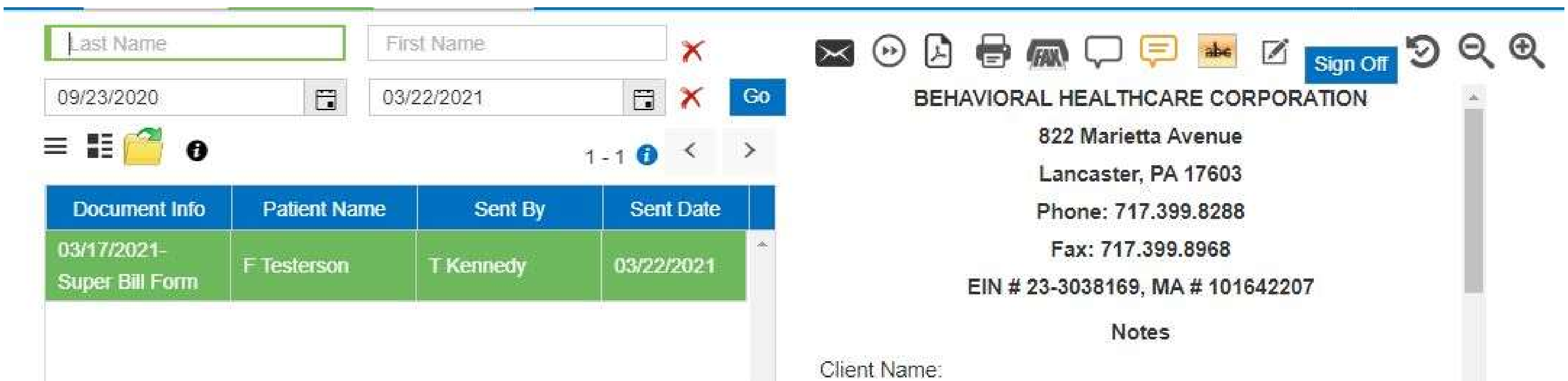
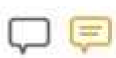
Corrections to document
View "Forms Forwarded To Me For Review". All Support Staff will have access to the documents awaiting approval. Please check the documentation as you normally would.



If there are issues…



To send back

No issues

Intake Process - Please refer to Initial Intake Process.
MSR/MPN - Put Director in as Provider
Intake Checklist – Please refer to your discipline's checklist.
Printing Documents