

EHR Handbook Table of Contents

A. Basic Entry

- 1. Adding a new Client to EHR
- 2. Adding Contact details of a client
- 3. How to Assign Client to Program
- 4. Editing/Updating Existing Client Details
- 5. Opening a chart of an existing client
- 6. How to Upload and Index Scanned Documents into EHR
 - Splitting Documents
 - Merging Documents
 - How to Correct Incorrectly Indexed Documents
- 7. EHR Messaging System
- 8. Quick Guide to EHR
- 9. EHR Quiz

B. Troubleshooting

- 1. Clear Cache in Chrome
- 2. How to Connect to Wi-Fi Hot Spot
- 3. Possible Zoom Issues and How to Troubleshoot
- 4. Recover Auto Saved Notes in EHR
- 5. Edit Desktop Shortcut

C. Insurance - Password Protected

- 1. Adding/Updating Client Insurance
- 2. Promise How to Check Insurance
- 3. Insurances
- 4. Medications Externally transferred to EHR

D. Scheduling

- 1. Telehealth Video Links Procedures
 - a. Audio Only Telehealth Procedures
- 2. Dr. Y Note & SB Process
- 3. Process for MMHT Referrals and Intakes
- 4. Process for MPN & OPC Referrals and Intakes
- 5. Scheduling an Appointment for a Client
- 6. Viewing the Appointment in "Week", "Month" View
- 7. Printing all Appointments for the Day
- 8. Checking In and Out a Client
- 9. Editing an Existing Appointment
- 10. Admission /Intake Packet
- 11. Intake Flow Chart
 - a. OPC b. MPN
- 12. Letter to Client from Mental Health Worker



- 13. Script for Reminder Calls During Medical Emergencies
 - o Pre-Appointment Medical Screening
- 14. Script for scheduling OPC Intakes

Ε.	Checking	Documentation	n
----	----------	----------------------	---

- 1. Timesheet Procedure for Support Staff
- 2. Checking Timesheets

o MPN o MSR o OPC

3. Checklists

o MPN o MSR o OPC

- 4. Correction Slips
- 5. Treatment Plan Tracking Sheet Update
- 6. Treatment Plan Tracking
- 7. Folders for Administrative Support Staff

F. Documentation

- 1. Important Definitions
 - Documents
 Note
 Viewing
 Complete
 Sign Off
 Save as Draft
 Open as New
 Form
 Symbol Key

Previous o Create New Notes Notes

- 2. Modifiers, POS Cheat Sheet
- 3. Creating a New Note
- 4. Creating a Superbill for an Appointment
- 5. Diagnosis
 - a. Adding and Editing Diagnosis and Z-Codes
 - b. Z-Codes
 - c. Adding a New or Different Diagnosis to the Superbill
- 6. Editing a Note in EHR
- 7. Saving a Note in EHR
- 8. Completing a Note in EHR
- 9. Correcting a Note in EHR
- 10. Adding an Organization without a Specific Provider
- 11. Medications
 - Adding New Medications
 Printing Medication List
 - Changing or Editing
 Medications
 Print Summary
 Print Face Sheet
 - o Delete Medications
- 12. Drug Frequency
- 13. How to enter Lab Results Manually
- 14. Timesheet Examples

 \circ MPN \circ OPC \circ MSR



- 15. Procedures for completing Documentation
- 16. Completing Treatment Plan in EHR
 - o MPN

o OPC

- 17. How to Scan ID/Insurance card into EHR
- 18. Discharge Procedures