

Advanced EMR Manager Training

Presenter: Carlos Salgado



Continuing Education Disclosures

Commercial Support – None

Speaker or planner conflicts of interest – None

For CME and CNE credit or an Attendance Certificate -

Full session attendance and
completion of an on-line evaluation is required.

Link to the evaluation is on the AllianceChicago Conference App

Thank you!

Today's Training Agenda

Topic	Discussion	Time
Welcome and Introductions	<ul style="list-style-type: none">Welcome to the Session!	8:00 – 8:05 am
EMR Managers Roles & Jobs	<ul style="list-style-type: none">Open discussion about tasks expected from EMR Managers	08:05 – 8:25 am
End User Training	<ul style="list-style-type: none">Review of current training plans for new staff	8:25 – 8:45 am
Administration Module	<ul style="list-style-type: none">Deep Dive Covering Popular Administration Module sections w/ Questions	8:45 – 11:05 am
CPS Tips and Tricks	<ul style="list-style-type: none">EMR Manager related tips and tricks (training + configuration)	11:05 – 11:25 am
How do I...	<ul style="list-style-type: none">Open Topic Q&A	11:25 – 11:55 am
Wrap Up + Survey	<ul style="list-style-type: none">Review of topics, questions, and Survey Completion	11:55 – 12:00 am

Introductions

- Name
- Job Title
- Organization

Polling Question 1

What is your Primary Role?

- A. EHR Support/Troubleshooting
- B. Reporting
- C. Maintenance
- D. EHR Training
- E. IT
- F. Other
- G. I'm just here for the free cookies

Polling Question 2

What is your Secondary Role?

- A. EHR Support/Troubleshooting
- B. Reporting
- C. Maintenance
- D. EHR Training
- E. IT
- F. Other
- G. Sad that there are no cookies

Polling Question 3

What is your Tertiary Role?

- A. EHR Support/Troubleshooting
- B. Reporting
- C. Maintenance
- D. EHR Training
- E. IT
- F. Other
- G. At least we got free water

Polling Results

- <https://events.bizzabo.com/alliancechicago/polls/09909/wall>

EMR Managers Roles & Job Descriptions

EMR Managers Role & Job Descriptions

- Discussion Questions:
 - What are the roles & responsibilities of the EMR Manager at your organization?
 - How is your job description the same or different amongst your organizations?
 - What is the expectation for training staff?
 - Describe your training program
 - Is training a core role for the EMR Manager?
 - What are the gaps in training?
 - What are the biggest challenges you face in your role?

Best Practices: End User Training at the Health Center Level

EMR Managers: Training Day

- What is the goal of training?
 - Teach new users on functionality
 - Teach my Health Center's workflow
 - Get the users comfortable with how to use the EMR
 - Identify a go-to person that users can come to and ask questions.

Training Strategies



Trainings that are provided to staff using EHR system

- Basic functionality
- Provider workflows
- Clinic Managers
- CareCoordination/CareManagement
- Quality Managers
- MA/RN workflows
- Outreach Programs
- Behavioral Staff
- Administrative Trainings
- Interns
- Front Desk Staff
- Dental Staff
- Medical Records
- Referral Coordinators
- X-Ray/Lab Techs
- Refresher Courses

Basic Chart Module - Training checklist

Employee Name: _____

Checklist Completion Date: _____

Trainer(s): _____

(X) when complete	Centricity Function	Trainers Initials
LOG IN		
	Windows	
	Centricity	
CHART MODULE – DESKTOP VIEWS		
	Summary view: <ul style="list-style-type: none"> Find patient button Open chart 	
	Alerts and flags view: <ul style="list-style-type: none"> View other user flags View removed flags 	
	Document view: <ul style="list-style-type: none"> View other user documents Comments 	
PATIENT CHART		
	Find a Patient	
	Patient Banner	
	Chart Summary: <ul style="list-style-type: none"> Problems Medications Allergies Directives Alerts/Flags 	
	Documents	
	Flowsheet	
	Orders	
	Histories	
	Registration	
	Phone note button	
	Renew RX button	
	Print Button	
	New Flag button	
DOCUMENTATION		
	New Document: <ul style="list-style-type: none"> Encounter Types Confidentiality type 	
	Documents: <ul style="list-style-type: none"> Document views Sign, append, route Sorting 	
	View Attachments	
CHART DOCUMENT		
	Forms	
	Add favorite forms	
	End document	
OTHER		

Employee signature: _____ Date: _____

End User Training: Best Practices

- **New Employee**
 - Build into organization orientation
 - Structured training by role
 - Paired with current employee
- **Current Employee**
 - OJT
 - Classroom
 - CBTs
- **Optimization**
 - Department Meetings
 - OJT

End User Training: Best Practices

- Schedule your new users for **Computer Based Training Modules (CBT)**'s
 - AllianceChicago can help you facilitate these
 - These are a good online resource for getting started with Centricity, including for front desk staff, billers, & clinical users (providers/nurses)
- Clinics who excel **utilize their established super-users** to help train in the classroom & do OTJ training with new users
 - Some clinics send new users to established clinics to shadow/learn OTJ
 - A combo of classroom & OTJ is recommended for new users

CBT Trainings

- CBTs should be used to *support* the health center hands-on user training on CPS 12. They can be used for both new hires and current employees
 - NOTE: GE CBTs are specific to standard GE modules. The CBTs do NOT provide training on health center specific workflows or Alliance content
- Alliance Suggestions:
 - CBTs can be part of the health center onboarding process for new hires
 - Provide a pre-requisite work for new hires before they receive their health center training
 - Highlight a specific CBT in a provider training/meeting or EMR team meeting
 - Use CBTs as refresher training for current users

Optimization Training

- Optimization training is key for:
 - Established users to continue to improve with their skills and documentation
 - Sites to control consistency in skills and documentation amongst users
 - Providing continued education to users which shows the importance of such continued training opportunities at your organization
 - Providing a venue for your established super-users to train others in their specialty group

Optimization Training

- Optimization training:
 - Is recommended on a consistent basis, such as at provider meetings, team meetings, all staff meetings, etc.
 - Topics can be gathered from resources from AOC and our supporting vendors (i.e. Ignis, Visualutions, etc.)
 - Time allotted depends on category to be trained around
 - Quick tips could be a ½ hour at every provider meeting
 - Internal improvement projects could be an hour at every all staff meeting, i.e. improved documentation of smoking status

Audits & Training Report Cards

- Reports & Chart Audits
- Optimization Checklist & Shadowing
- Report Card

QUALITY MEASURES (MU, PCMH, CDC, UDS, QI) (1 pt each)			40 Points	
55				
56	Vital signs (2 pt each)			
57	BMI Documented (Goal 80%) (QI/UDS/MU)		0	
58	Weight Management Checkbox (QI/MU)		0	
59	BP Documented (Goal 80%) (UDS/MU)		0	
60	Initial Intake			
61	Medications Reviewed (Goal 80%) (MU)		0	
62	Allergies Reviewed (Goal 80%) (MU)		0	
63	No Known Allergies documented (MU)		0	
64	Depression Screening			
65	PHQ-9 documented (QI)		0	
66	PHQ-2 documented (QI)		0	
67	Smoking Status			
68	Smoking Status documented (Goal 50%) (MU)		0	
69	Tobacco use documented (MU)		0	
70	Patient advised to quit (MU)		0	
71	Alcohol & Drug			
72	Alcohol recorded (Goal 50%) (MU)		0	
73	Drug documented (Goal 50%) (MU)		0	
74	MU Checklist			
75	Problems Reviewed (Goal 80%) (MU)		0	
76	RX sent electronically (Goal 40%) (MU)		0	
77	Clinic Visit Summary Printed (Goal 50%) (MU)		0	
78	Cancer Screening			
79	Mammogram documented (QI/MU)		0	
80	Pap Documented (UDS)		0	
81	Colonoscopy documented (UDS/MU)		0	
82	PSA Documented		0	
83	Diabetes (PCMH)			
84	Use of Diabetes Management form		0	
85	Document HBA1C (QI)		0	
86	Document Eye Exam		0	
87	CAD (PCMH)			
88	Use of Cardiovascular Disease Management form		0	
89	Medication Prescribed (MU)		0	
90	Asthma (QI)			
91	Use of Asthma Management form (QI)		0	
92	Appropriate DX code used (QI)		0	
93	Medications prescribed (QI)		0	
94	Immunizations (QI)			
95	Pneumococcal Documented (QI)		0	
96	Adult Influenza (QI)		0	
97	Childhood Immunizations (QI)		0	
98	Education			
99	Use of Adult HM & Ed form		0	
100	Use of Bright Futures form		0	
101	Use of Women's Health Education form		0	
102	Medicare Encounters			
103	Use of Medicare forms		0	
104	Use of Medicare Orders custom list		0	
105	Total		0	0%
106	OTHER: _____			
107	_____			
108			Pts	%
109	80-100%	Expert (no further training required)	59	73.75%
110	60-79%	Intermediate (quarterly optimization)		
111	40-59%	Basic (1hr training & one month optimization)		
112	0-39%	Poor (4hr training & one month optimization)		



Care Alerts & Pop Ups		
	Set future care alerts	
	Set pop up alerts and expiration dates.	
QUALITY MEASURES (MU, PCMH, CDC, UDS, QI)		
Vital signs		
	BMI Documented (Goal 80%) (QI/UDS/MU)	
	Weight Management Checkbox (QI/MU)	
	BP Documented (Goal 80%) (UDS/MU)	
Initial Intake		
	Medications Reviewed (Goal 80%) (MU)	
	Allergies Reviewed (Goal 80%) (MU)	
	No Known Allergies documented (MU)	
Depression (PCMH)		
	PHQ-9 documented (QI)	
	PHQ-2 documented (QI)	
Smoking Status		
	Smoking Status documented (Goal 50%) (MU)	
	Tobacco use documented (MU)	
	Patient advised to quit (MU)	
Alcohol & Drug		
	Alcohol recorded (Goal 50%) (MU)	
	Drug documented (Goal 50%) (MU)	
MU Checklist		
	Problems Reviewed (Goal 80%) (MU)	
	RX sent electronically (Goal 40%) (MU)	
	Clinic Visit Summary Printed (Goal 50%) (MU)	
Cancer Screening		
	Mammogram documented (QI/MU)	
	Pap Documented (UDS)	
	Colonoscopy documented (UDS/MU)	
	PSA Documented	
Diabetes (PCMH)		
	Use of Diabetes Management form	
	Document HBA1C (QI)	
	Document Eye Exam	
CAD (PCMH)		
	Use of Cardiovascular Disease Management form	
	Medication Prescribed (MU)	
Asthma (QI)		
	Use of Asthma Management form (QI)	
	Appropriate DX code used (QI)	
	Medications prescribed (QI)	
Immunizations (QI)		
	Pneumococcal Documented (QI)	
	Adult Influenza (QI)	
	Childhood Immunizations (QI)	
Education		
	Use of Adult HM & Ed form	
	Use of Bright Futures form	
	Use of Women's Health Education form	
Medicare Encounters		
	Use of Medicare forms	
	Use of Medicare Orders custom list	

Employee signature: _____

Date: _____

10 Minute Break!

Administration Module Deep Dive

CPS Administration Module

- The engine of the CPS application
- Set Up Components for:
 - End User Access
 - Practice Management Functionality
 - Chart Functionality
 - Permissions/Securities
 - Interface setup

Administration Module Overview: EMR

Areas of the Administration module that should be Mastered

- **Charts**
 - Electronic Prescriptions
- **Charts > Chart**
 - Administered Medication Custom Lists
 - Flowsheet Views
 - History Views
 - Patient banner
 - Quick Text
- **Chart > Chart Documents Folder's**
 - Document Template
 - Encounter Types
- **Chart > Handout's**
- **Codes > Charts > Orders Custom Lists**
 - Best practices on how to set it up orders
 - Highlight on how a site optimized their referral set up
- **Codes > Codes and Categories**
- **System > User and Resource Management > User > Security**
 - Please reference Securities & Permissions excel spreadsheet for CPS 12

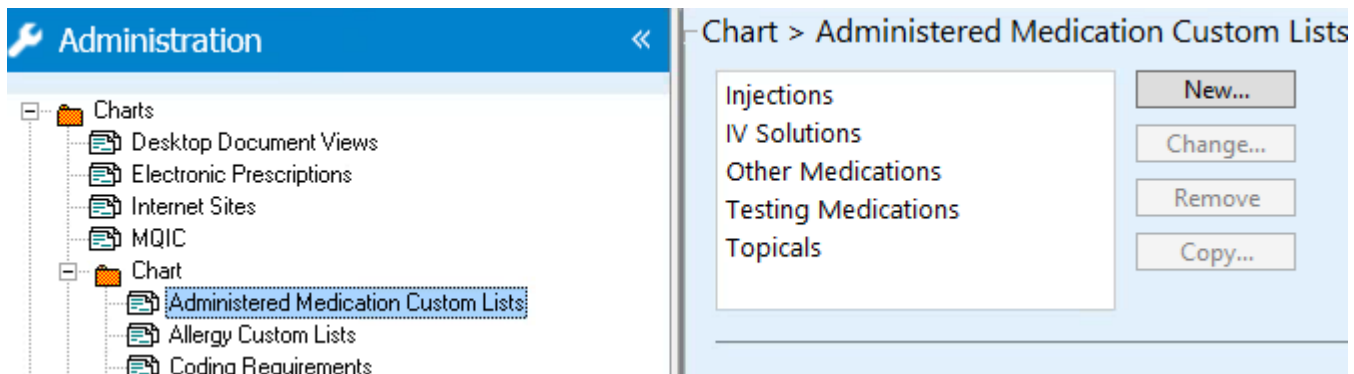
Administered Medication Custom List

ALLIANCE TIPS/RECOMMENDATIONS

- Med Admin form must be built out with a clinical eye on it to look at sites, manufacturers, name of medication and so on.
- **Special Characters are NOT recommended** ANYWHERE in the med admin form. Periods are ok, NO “/” including in the name of the list. This can cause major issues even processing the medication. Ex: mg/ml.
- **Doses**: keep that just numeric.
- Build the form from scratch – that would be the recommendation. Do not work off the GE lists
- **Each medication has at least one manufacturer** – if no manufacturer, you can’t put in the lot number.
- **Recommendation to put in each medication (See Comments) as the form requires a manufacturer. That way, when the nurse / med assistant is putting in a medication and they don’t see the manufacturer, they can choose “see comments” and then the manufacturer can go in the comments.**
- **Reminder**: You have to go into a test patient to put the lot #s in based on that manufacturer.
- **Have the “Auto Generate Orders” button checked. ALL people must have this checked.**
- Do not delete out the ***medication administration list***, because this is what makes the form work. One list is in the medication admin section, another one is in the services.
- **NDC Codes**: if you are OK with the default NDC that comes from the GE reference list, when we call that into the form – that is defaulted. Otherwise, add all NDC known NDC codes to the list

Medication Administration - Location

- Find the Med Admin Section
 - Administration Module → Charts → Chart → Administered Medication Custom Lists



Medication Administration – How to

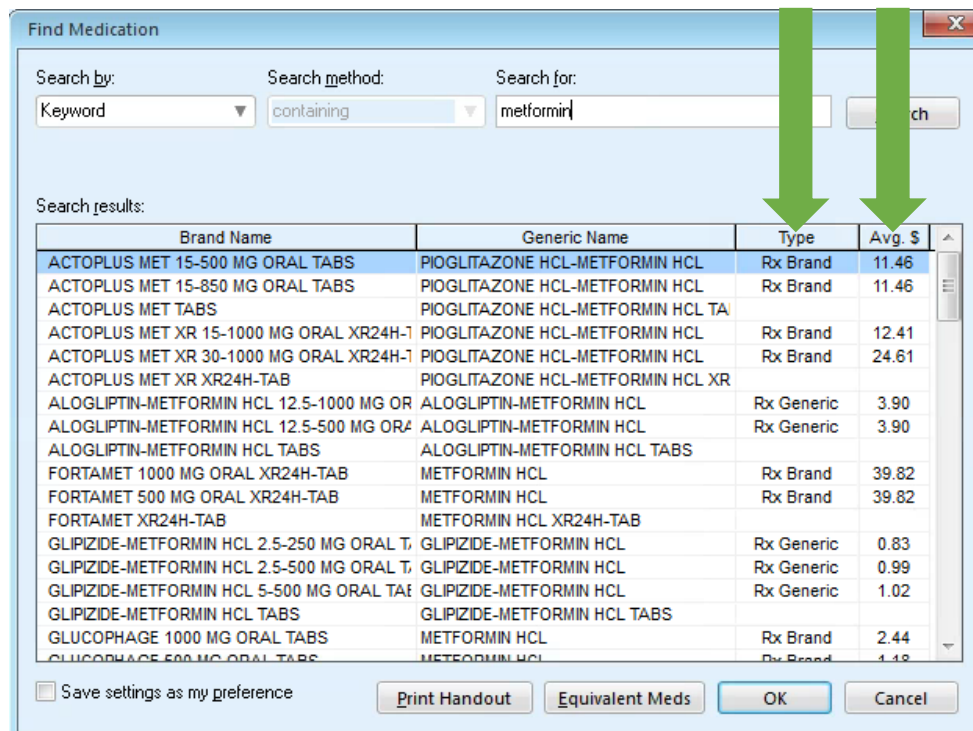
- Select a custom list you will be adding the medication to and click “Add New Medication”

The screenshot displays the 'Administration' window with a tree view on the left and a main content area on the right. The tree view includes categories like 'Charts', 'Allergy Custom Lists', and 'Medication Custom Lists'. The main content area shows 'Chart > Administered Medication Custom Lists' with a list of categories: 'Injections', 'IV Solutions', 'Other Medications', 'Testing Medications', and 'Topicals'. Below this is a list of 'Injections' with columns for 'Change' and 'Remove'. A green arrow points to the 'Add New Medication' button at the bottom of the list.

Medication	Change	Remove
<input type="radio"/> Demerol 25 mg/ml Inj Soln	Change	Remove
<input type="radio"/> Demerol 50 mg/ml Inj Soln	Change	Remove
<input type="radio"/> Demerol 75 mg/ml Inj Soln	Change	Remove
<input type="radio"/> Demerol 100 mg/2ml Inj Soln	Change	Remove
<input type="radio"/> Phenergan 25 mg/ml Inj Soln	Change	Remove
<input type="radio"/> Phenergan 50 mg/ml Inj Soln	Change	Remove
<input type="radio"/> Rocephin 500 mg Inj Solr	Change	Remove
<input type="radio"/> Rocephin 1gm Inj Solr	Change	Remove
<input type="radio"/> Ketorolac Tromethamine 15 mg/ml Soln	Change	Remove
<input type="radio"/> Ketorolac Tromethamine 30 mg/ml Soln	Change	Remove
<input type="radio"/> Ketorolac Tromethamine 60 mg/ml Soln	Change	Remove

Medication Administration – How To Continued

- You will then see the medications reference list appear. Search the medication you would like to add and select OK.



The screenshot shows a 'Find Medication' dialog box with the following fields and results:

Search by: Keyword | Search method: containing | Search for: metformin

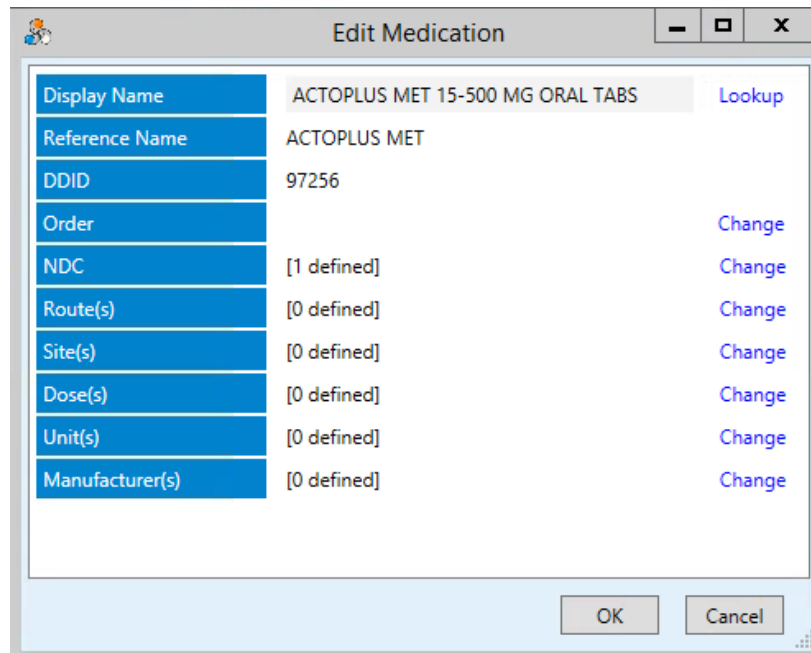
Search results:

Brand Name	Generic Name	Type	Avg. \$
ACTOPLUS MET 15-500 MG ORAL TABS	PIOGLITAZONE HCL-METFORMIN HCL	Rx Brand	11.46
ACTOPLUS MET 15-850 MG ORAL TABS	PIOGLITAZONE HCL-METFORMIN HCL	Rx Brand	11.46
ACTOPLUS MET TABS	PIOGLITAZONE HCL-METFORMIN HCL TA		
ACTOPLUS MET XR 15-1000 MG ORAL XR24H-T	PIOGLITAZONE HCL-METFORMIN HCL	Rx Brand	12.41
ACTOPLUS MET XR 30-1000 MG ORAL XR24H-T	PIOGLITAZONE HCL-METFORMIN HCL	Rx Brand	24.61
ACTOPLUS MET XR XR24H-TAB	PIOGLITAZONE HCL-METFORMIN HCL XR		
ALOGLIPTIN-METFORMIN HCL 12.5-1000 MG OR	ALOGLIPTIN-METFORMIN HCL	Rx Generic	3.90
ALOGLIPTIN-METFORMIN HCL 12.5-500 MG OR	ALOGLIPTIN-METFORMIN HCL	Rx Generic	3.90
ALOGLIPTIN-METFORMIN HCL TABS	ALOGLIPTIN-METFORMIN HCL TABS		
FORTAMET 1000 MG ORAL XR24H-TAB	METFORMIN HCL	Rx Brand	39.82
FORTAMET 500 MG ORAL XR24H-TAB	METFORMIN HCL	Rx Brand	39.82
FORTAMET XR24H-TAB	METFORMIN HCL XR24H-TAB		
GLIPIZIDE-METFORMIN HCL 2.5-250 MG ORAL T	GLIPIZIDE-METFORMIN HCL	Rx Generic	0.83
GLIPIZIDE-METFORMIN HCL 2.5-500 MG ORAL T	GLIPIZIDE-METFORMIN HCL	Rx Generic	0.99
GLIPIZIDE-METFORMIN HCL 5-500 MG ORAL TA	GLIPIZIDE-METFORMIN HCL	Rx Generic	1.02
GLIPIZIDE-METFORMIN HCL TABS	GLIPIZIDE-METFORMIN HCL TABS		
GLUCOPHAGE 1000 MG ORAL TABS	METFORMIN HCL	Rx Brand	2.44
GLUCOPHAGE 500 MG ORAL TABS	METFORMIN HCL	Rx Brand	1.18

Buttons: Save settings as my preference, Print Handout, Equivalent Meds, OK, Cancel

Medication Administration

Once the medication is selected, you are able to change the display name. Do not include “/” or “\” in the names of the medications. An example of this is using “mg/ml”, instead write “mg per ml”, or “mg ml”.



The screenshot shows a dialog box titled "Edit Medication" with the following fields and values:

Field	Value	Action
Display Name	ACTOPLUS MET 15-500 MG ORAL TABS	Lookup
Reference Name	ACTOPLUS MET	
DDID	97256	
Order		Change
NDC	[1 defined]	Change
Route(s)	[0 defined]	Change
Site(s)	[0 defined]	Change
Dose(s)	[0 defined]	Change
Unit(s)	[0 defined]	Change
Manufacturer(s)	[0 defined]	Change

Buttons: OK, Cancel

Medication Administration Setup

The image shows two software windows side-by-side. The left window is titled 'Edit Medication' and contains a table of medication details. A red arrow points to the 'Order' field, and several green arrows point to the 'NDC', 'Route(s)', 'Site(s)', 'Dose(s)', 'Unit(s)', and 'Manufacturer(s)' fields. Below the table, the text 'Lot Number???' is displayed in green. The right window is titled 'NDC List' and shows a single NDC entry '64764015560' with 'Change' and 'Remove' links. A large green arrow points down to an 'Add New NDC' button. At the bottom of the 'NDC List' window, there is a 'Default item' radio button and a 'Close' button.

Field	Value	Action
Display Name	ACTOPLUS MET 15-500 MG ORAL TABS	Lookup
Reference Name	ACTOPLUS MET	
DDID	97256	
Order		Change
NDC	[1 defined]	Change
Route(s)	[0 defined]	Change
Site(s)	[0 defined]	Change
Dose(s)	[0 defined]	Change
Unit(s)	[0 defined]	Change
Manufacturer(s)	[0 defined]	Change

Lot Number???

64764015560 Change Remove

Add New NDC

Default item Close

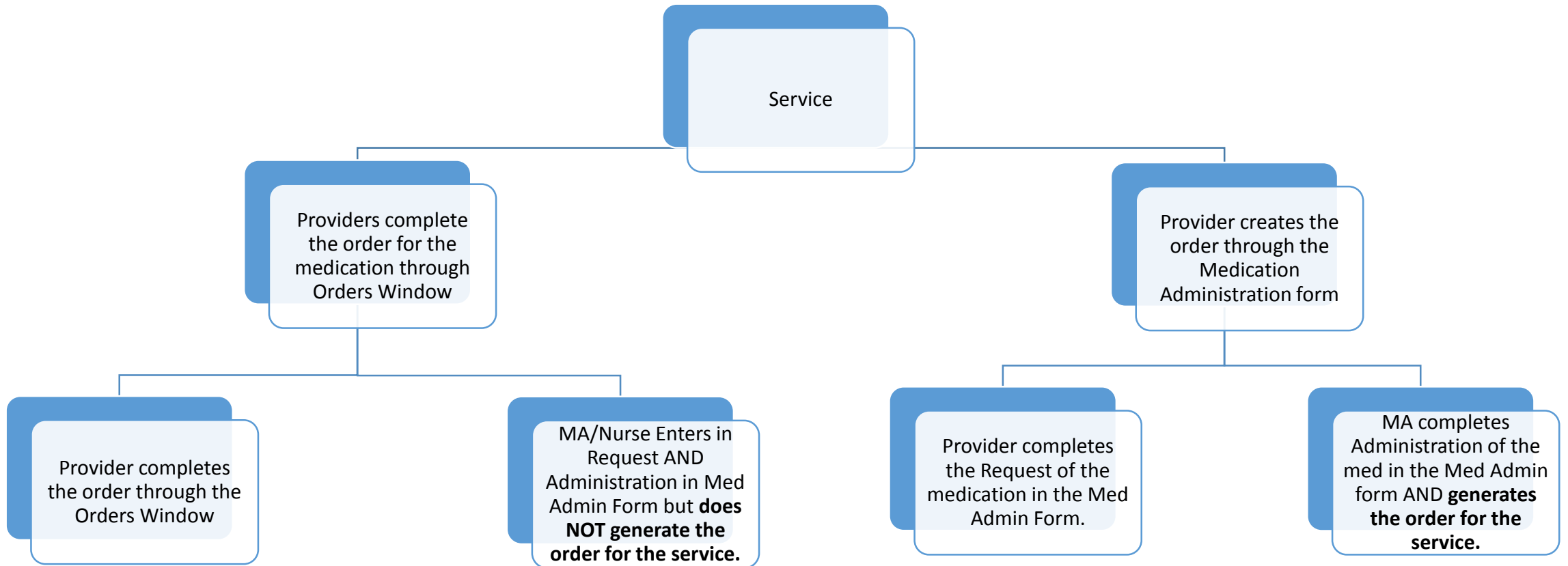
Medication Administration Setup Cont.

- Enter options for
 - NDC
 - Route(s)
 - Site(s)
 - Dose(s)
 - Unit(s)
 - Manufacturer(s)

REMEMBER!

- Leave the “Order” blank if your providers will be ordering the medication from the orders module. This “Order” section is meant to generate the order automatically for providers ordering from the HTML Form.
- Talk with your Clinical Staff on the specific Routes, Sites, and Doses to only include options that will actually be used per medication.

Medication Administration Workflow(s)

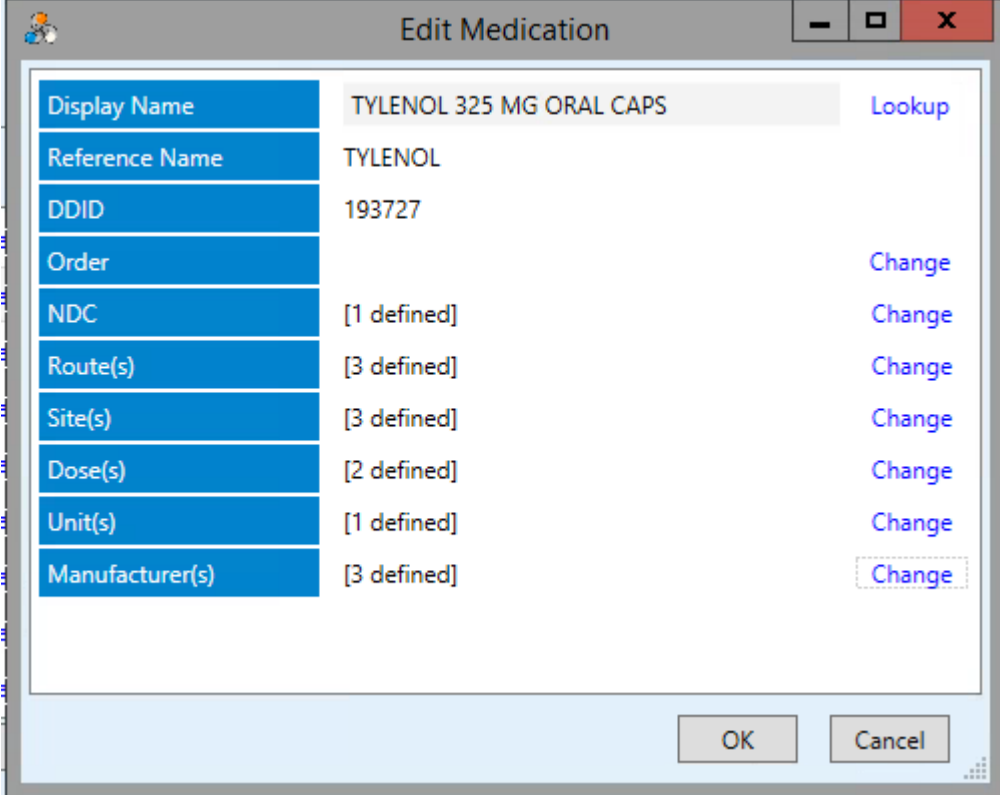


Provider uses Orders Window

The “Order” portion in “Edit Medication” remains empty.

Why?

- Because the provider is ordering the administration of this medication via the orders window.
- We don't want duplicate orders being created.



The screenshot shows a software window titled "Edit Medication" with a standard Windows-style title bar (minimize, maximize, close buttons). The window contains a list of medication attributes, each with a value and a corresponding action button. The "Order" field is currently empty.

Field	Value	Action
Display Name	TYLENOL 325 MG ORAL CAPS	Lookup
Reference Name	TYLENOL	
DDID	193727	
Order		Change
NDC	[1 defined]	Change
Route(s)	[3 defined]	Change
Site(s)	[3 defined]	Change
Dose(s)	[2 defined]	Change
Unit(s)	[1 defined]	Change
Manufacturer(s)	[3 defined]	Change

At the bottom of the window, there are "OK" and "Cancel" buttons.

Want to have Autogenerated orders?

- Having autogenerated orders will work best if your providers are NOT using the orders module and instead are using the HTML forms. Once the Administration of the medication is completed, the orders will be generated.
- The next steps will show:
 - Selecting your Service order
 - Selecting the correct medication item
 - Location of where your Service orders are being pulled from in Centricity.

Alternative: Provider orders from Med Admin Form

The image shows three overlapping windows from a medical administration system:

- Edit Medication:** A window with a table of medication details. The 'Order' field is highlighted with a green arrow pointing to a 'Change' button.
- Add New Order:** A window with a form for creating a new order. The 'Order Type' is set to 'Services'. The 'Order Category' dropdown is highlighted with a green arrow pointing to a 'Lookup' button.
- Select Category:** A window showing a list of categories for selection. A green arrow points from the 'Add New Order' window to this window.

Field	Value	Action
Display Name	TYLENOL 325 MG ORAL CAPS	Lookup
Reference Name	TYLENOL	
DDID	193727	
Order		Change
NDC	[1 defined]	Change
Route(s)	[0 defined]	Change
Site(s)	[0 defined]	Change
Dose(s)	[0 defined]	Change
Unit(s)	[0 defined]	Change
Manufacturer(s)	[0 defined]	Change

Field	Value	Action
Order Type	Services	
Order Category		Lookup
Order Description		Lookup
Order Priority		
Diagnosis Code(s)		Lookup
Diagnosis Description(s)		
Comment		
Modifier(s)		
Units		

- Dental
- E&M Services
- Enabling Services
- GEImmunizations
- IV Solutions
- Immunization Administration
- Immunizations
- Injections
- Medicare eRx Incentive
- Medication Administration
- Office Services

Alternative: Provider orders from Med Admin Form

The image shows two overlapping software windows. The left window, titled "Add New Order", has a sidebar with blue buttons for "Order Type", "Order Category", "Order Description", "Order Priority", "Diagnosis Code(s)", "Diagnosis Description(s)", "Comment", "Modifier(s)", and "Units". The "Order Type" dropdown is set to "Services". The "Order Category" is "Other Medications". The "Order Description" field has a green arrow pointing to a "Lookup" link. The "Diagnosis Code(s)" field also has a "Lookup" link. The right window, titled "Select Code", displays a list of medication codes: "Bicillin", "Ibuprofen 200 mg", "Ibuprofen 80 mg/0.8 ml", "NTG 0.4 mg", "Rocephin 500 mg", "Tylenol 160 mg", "Tylenol 320 mg", "Tylenol 500 mg", "Tylenol 80 mg", and "Tylenol 80 mg/0.8 ml". Both windows have "OK" and "Cancel" buttons at the bottom.

Field	Value	Action
Order Type	Services	
Order Category	Other Medications	Lookup
Order Description		Lookup
Order Priority		
Diagnosis Code(s)		Lookup
Diagnosis Description(s)		
Comment		
Modifier(s)		
Units		

Code
Bicillin
Ibuprofen 200 mg
Ibuprofen 80 mg/0.8 ml
NTG 0.4 mg
Rocephin 500 mg
Tylenol 160 mg
Tylenol 320 mg
Tylenol 500 mg
Tylenol 80 mg
Tylenol 80 mg/0.8 ml

Location of Order for Medication Administration

Codes → Charts → Codes and Categories → Services

The screenshot shows a software interface with a navigation pane on the left and a main content area on the right. The navigation pane is titled 'Administration' and contains a tree view with folders like 'Charts', 'Schedule', 'Registration', 'Financial', 'Claims', 'Reports', 'Codes', 'Billing System', 'Charts', 'Clinical Modifiers', 'Orders Custom Lists', 'Order Sets', 'Service Providers', 'Order Defaults', 'Codes and Categories', 'Referrals', 'Services', 'Tests and Procedures', 'Settings', and 'System'. The 'Codes and Categories' folder is expanded, showing 'Referrals', 'Services', and 'Tests and Procedures'. The 'Services' folder is selected, and the main content area displays the breadcrumb 'Orders > Codes And Categories > Services'. Below the breadcrumb is a list of services: 'Enabling Services', 'GE Immunizations', 'IV Solutions', 'Immunization Administration', 'Immunizations', 'Injections', 'Medicare eRx Incentive', 'Medication Administration', 'Office Services', 'Office Supplies', and 'Other Medications'. The 'Other Medications' service is selected. To the right of this list are buttons for 'New...', 'Change...', and 'Remove'. Below the service list is a section titled 'Associated Orders:' with a checkbox for 'Show active orders only' which is checked. This section contains a table with two columns: 'Description' and 'Code'. The table lists various medications and their codes. To the right of the table are buttons for 'New...', 'Change...', 'Make Obsolete', and 'Remove'.

Description	Code
Bicillin	CPT-J0561
Ibuprofen 200 mg	CPT-99070
Ibuprofen 80 mg/0.8 ml	CPT-99070
NTG 0.4 mg	CPT-99070
Rocephin 500 mg	0000
Tylenol 160 mg	CPT-99070
Tylenol 320 mg	CPT-99070
Tylenol 500 mg	CPT-99070
Tylenol 80 mg	CPT-99070
Tylenol 80 mg/0.8 ml	CPT-99070

Medication Administration Setup

Questions?



CPS Tips & Tricks // EMR Manager Tips & Tricks

Easy Wins

- What are Easy Wins? (As defined by Carlos)
- Items that can be created a single time and used by all staff in that department, role, or facility.
- Examples:
 - Document Views
 - Quick texts
 - Reports

Document Views *LIVE DEMO*

To set up chart document views

- 1 In **Administration**, select **Charts > Chart > Document Views**.
- 2 For **Show Document Views for**, select **Global List** or an individual user.
- 3 Select from the following:
 - **New** - Create a new document view.
 - **Change or Copy** - Change a selected view or use it as a template.
 - **Remove** - Delete an existing document view from the database.
- 4 On the **New / Change or Copy Document View** window, select an individual user or **Global List** to make the view available to all users.
- 5 Enter a unique **View Name** that describes the view documents. For example, *Lab Reports* or *Transcription*.
This name appears as a folder in the view panel of the Chart Documents list; it contains the document types you select in the next step.

Note. To replace an existing view with your changes, enter the name of that view.

- 6 To customize the view, check the **Document Types**, **Locations**, **Confidentiality Types**, and **Document Status** you want to include.

Note. All users can view documents with a Normal confidentiality type. Only users with the relevant confidential documents privileges can view other types.

- 7 Click **OK**.

Quick Text

- EMR Managers/Techs don't use quick text. Why focus on it?
- Learning Quick text is the foundation of using other sections of Centricity Effectively.
- What is a quick text? You type in a series of characters and it gets replaced by up to **256 Characters**.
- Example of a common/basic quick text:

.CP = Patient presents with History of Chest Pain. Pain is sharp and lasts X minutes and is relieved with X

Quick Text from EMR Managers

- Example of a slightly more complex Quick text that EMR Managers should be able to do:

`.wcc` = -Appropriate G & D

- Age is `{PATIENT.FORMATTEDAGE}`

- Weight today is `{LASTOBSVALUE("WEIGHT")}` lbs., BMI is `{LASTOBSVALUE("BMI")}`, which is `{LASTOBSVALUE("BMI%ILE")}`% for age.

- Vaccines given:

- Lab orders:

- Hemoglobin result is `{LASTOBSVALUE("HGB")}` on `{LASTOBSDATE("HGB")}`.

Lead result is `{LASTOBSVALUE("LEAD,BLOOD")}` on `{LASTOBSDATE("LEAD,BLOOD")}`.

-School Physical Given

- PPD Placement

- Anticipatory guidance provided

`.ChickenHx` = {If OBSANY("HX CHICK POX") = "1999" Then "Vaccinated" Else "Not Vaccinated" Endif}

Quick Text Continued

So now what?

- The reason why the first step is learning quick text is due to the how you can apply this knowledge to building letters and history views.
- For example, there was a health center that built out a History view for items providers would like to see in a single page (lab results, vitals, histories).
- This will make your staff HAPPIER.

BREAK: 10 Minutes

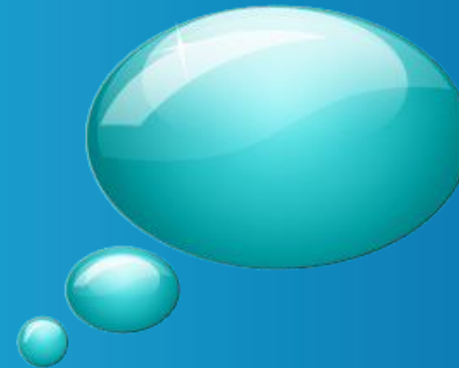
“How Do I

Q&A Administration

Administration Module Overview: EMR

- **Charts**
 - Electronic Prescriptions
- **Charts > Chart**
 - Administered Medication Custom Lists
 - Flowsheet Views
 - History Views
 - Patient banner
 - Quick Text
- **Chart > Chart Documents Folder's**
 - Document Template
 - Encounter Types
- **Chart > Handout's**
- **Codes > Charts > Orders Custom Lists**
 - Best practices on how to set it up orders
 - Highlight on how a site optimized their referral set up
- **Codes > Codes and Categories**
- **System > Auditing (Clinical)**
- **System > User and Resource Management > User > Security**
 - Please reference Securities & Permissions excel spreadsheet for CPS 12

Thank You Questions & Thoughts?



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