![Alliance for Healthier Communities / Alliance pour des communautés en santé]

*Tips and tricks:*

# Using your EMR to its fullest to increase access to primary health care

## 1. Appointment Schedule

Colour code cancelled appointment spots so booking staff can easily see them.  Create a new Appointment Type (in Preferences) with a bright colour.  When a client cancels an appointment, replace it with a blank appointment with this type.  This will make it easy for people to quickly see available spots.
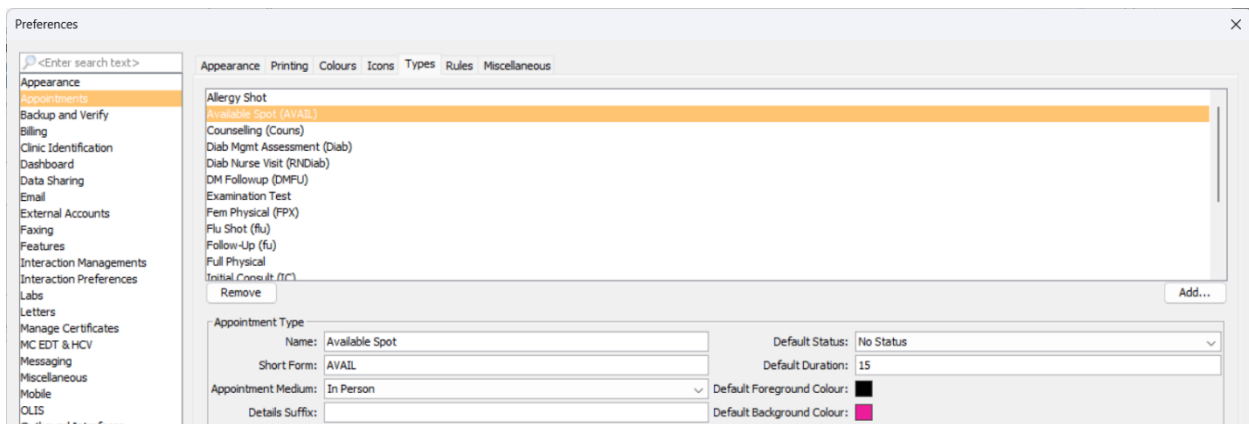
## 2. Send forms to clients in advance.

If you are using Ocean, it's possible to use Reminders in advance of an appointment. Send clients any forms before an appointment to maximize time.  In Ocean create a Template for the advance 'reminder' and attach any required forms.



Create the reminder and set it to be sent the required number of days before the appointment.

## 3. Ensure that each provider type has the most appropriate encounter form.

Most centres will have 10 or more different Encounter Detail Form Generators with appropriate Issues Addressed and Service Provided Favorites. Update your Encounter Details Form regularly, as the favourite Issues Addressed used by providers will change over time. Update these regularly to reduce the number of clicks required by the provider, which will save time charting.



## 4. Create and use toolbars effectively.

Toolbars allow providers to find things quicker which means that they need less time to chart.  Dr Howard To hosted a webinar showing how he uses toolbars to their fullest. The webinar recording and Dr. To's toolbars are posted on the DMC Sharepoint site. Your don't have to be as complex as his, but it's important to make good use of them.

*NOTE: The access to the DMC Sharepoint site requires a user name and password. If you need one, please email BIRT@AllianceON.org.*
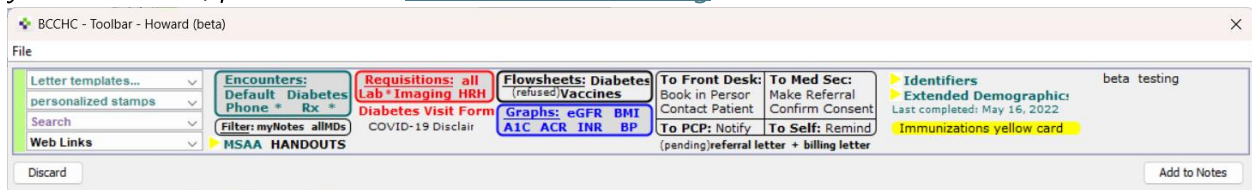


## 5. Make use of Reminders and Reminder Reports

PS Suite allows users to create reminders in a client's chart that can be used to ensure that a provider addresses all upcoming items during one appointment which may save the need for a future appointment.  Reminder reports can also be generated by an admin person to contact clients so that providers can proactively address issues.