



# Alliance for Healthier Communities

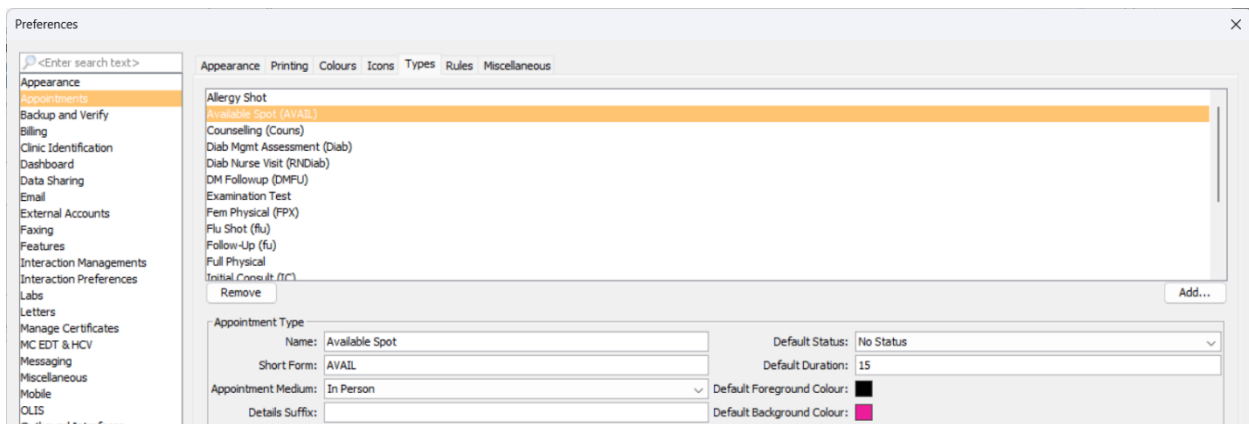
## Alliance pour des communautés en santé

*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.

Templates - Edit Template | Ocean

ocean.cognisantmd.com/ocean/portal.html#/templates/49ceed05-8729-4847-9ab1-16e0520aedeb/edit

Settings Tour Alerts Christine Randle Alliance for Healthier Communities

Patience can choose to respond with a file attachment.  
No

Notify the sender when the patient has acknowledged the secure message  
No

eForms

Include eForms  
 No eForms  
 Add eForms

+ Add EForm

↑ Alliance - Health Equity Questionnaire Preview Remove

Notify sender when patient has completed their forms  
Yes

Advanced  
Edit Advanced Settings

Save Save & Make Site Default Cancel Delete Template

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

Patient Reminders - Edit Remin | Ocean

ocean.cognisantmd.com/ocean/portal.html#/reminders/settings/rules/080f740e-7eb6-4ccc-b59d-665e864e562f/edit

Settings Tour Alerts Christine Randle Alliance for Healthier Communities

Edit Christine's reminder Disabled

Rule Name  
The rule name won't be visible to patients  
Christine's reminder

Reminder Options  
Note: Text Message Reminders can only be sent before appointments.  
When should the reminder be sent?  
Send 4 day(s) before the appointment.  
How should the reminder be sent?  
Email  
 Include iCal calendar event file in email reminder

Appointment Confirmation  
Allow patients to confirm their upcoming appointments from reminders  
Disabled

Messaging Template  
Includes email, secure message and eForm settings that will be used for this reminder

Messaging Template Preview  
Note: Please use the Template Manager to edit your templates.  
Email Preview  
Subject: Message from Alliance for Healthier Communities  
Dear @ptPreferredOrFirstName,  
Your healthcare provider would like you to complete a secure online questionnaire related to your health. Please click on the following link to complete it.  
@apptDate at @apptTime with @providerName  
[weblink]  
Note: This is an outgoing email only. Please do not reply to this email. If you have any questions or concerns, please contact the office in the usual manner.

Secure Content Settings  
Secure content is accessed via the [weblink] in the email template.  
The patient must enter their birth date to view secure messages and forms.  
Link will expire after 100 days.

Save Save & Test Rule Save & Enable Rule Cancel Delete Rule



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

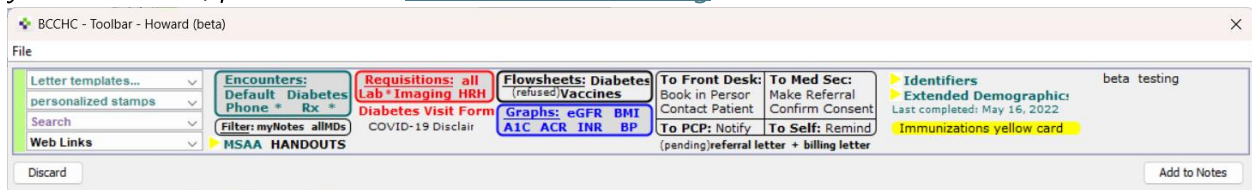
Most centres will have 10 or more different Encounter Detail Form Generators with appropriate Issues Addressed and Service Provided Favorites. Update your Encounter Details Form regularly, as the favourite Issues Addressed used by providers will change over time. Update these regularly to reduce the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

Issues Addressed		
<input type="checkbox"/>	Visit for Prescription Renewal	<input type="checkbox"/>
<input type="checkbox"/>	Visit for Lab Test	<input type="checkbox"/>
<input type="checkbox"/>	Request for Referral	<input type="checkbox"/>
<input type="checkbox"/>	COPD	<input type="checkbox"/>
<input type="checkbox"/>	Depression	<input type="checkbox"/>
<input type="checkbox"/>	Asthma	<input type="checkbox"/>
<input type="checkbox"/>	ADHD	<input type="checkbox"/>
<input type="checkbox"/>	Hypertension	<input type="checkbox"/>
<input type="checkbox"/>	Diabetes Mellitus Type 2	<input type="checkbox"/>
<input type="checkbox"/>	Family Discord	<input type="checkbox"/>
<input type="checkbox"/>	Narcotic Dependence	<input type="checkbox"/>
<input type="checkbox"/>	Bronchitis	<input type="checkbox"/>
<input type="checkbox"/>	Otitis Media	<input type="checkbox"/>
<input type="checkbox"/>	Failure to thrive	<input type="checkbox"/>
<input type="checkbox"/>	Visit for Blood Pressure E	<input type="checkbox"/>
<input type="checkbox"/>	Issue Addressed 2	<input type="checkbox"/>
<input type="checkbox"/>	Issue Addressed 3	<input type="checkbox"/>
		<a href="#">click to select</a>
		<a href="#">click to select</a>
		<a href="#">click to select</a>
		<a href="#">click to select</a>

### 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.](#) You 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](mailto: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.

