University Hospitals

Electronic Medical Record

EMR Auditor/Monitor

Access Training Document

EMR Security Team

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Request Network ID

- Follow process for obtaining auditor/monitor UH Network and UHCare IDs and passwords.
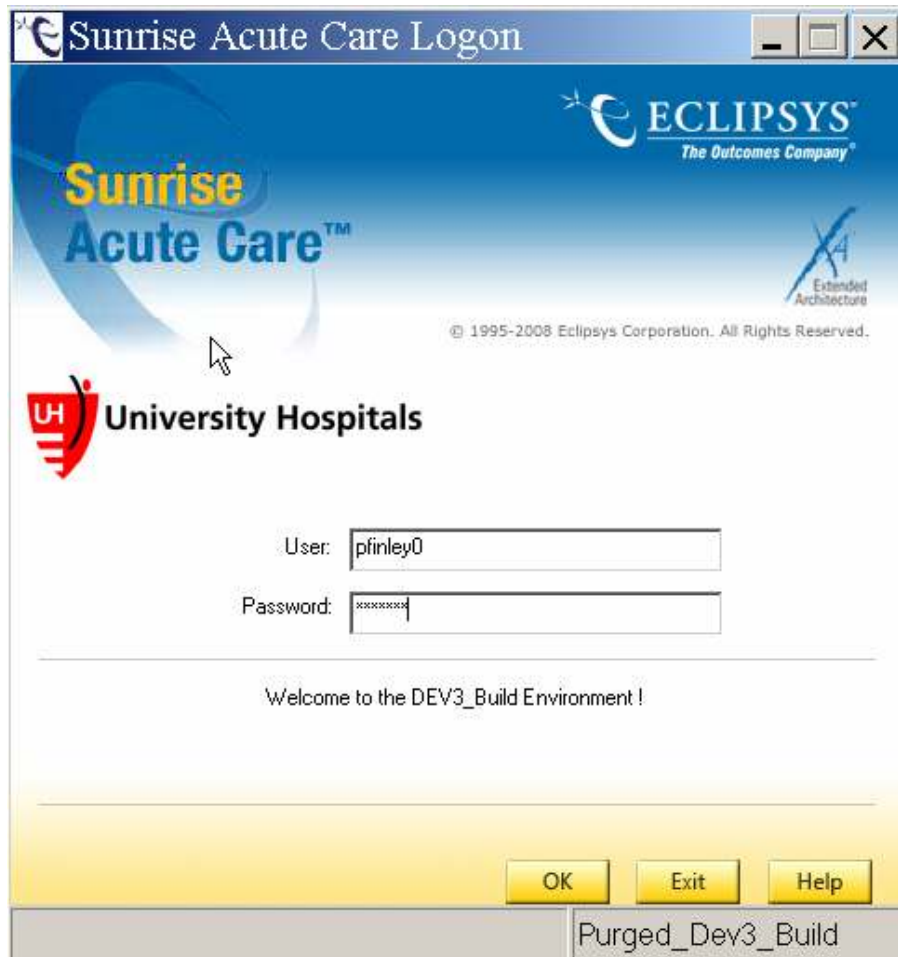
eSecurity Multi-user request form
This form is used to request access for multiple users for EMR Access:
The Requestor will fill out the cells in green.

Date of request:														
Last Name	First Name	Mother's Maiden Name	Fav. Color	Last 4 SSN	Place of Birth	End Date	email address		Audit Company	Network ID:	Password	Initials	EMR ID:	Password	Initials

One Patient – One Record

Research Coordinator Assigns Care Provider of "Auditor"

Follow these steps to assign auditor(s) to patient MRN/visit(s)

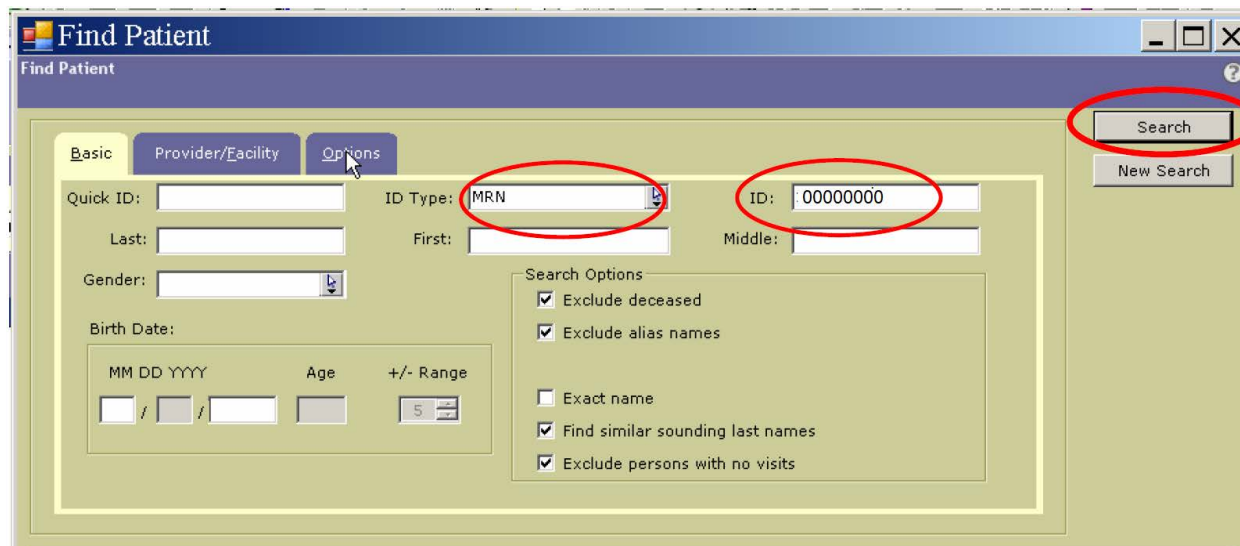- Research Coordinator logs into the EMR using their own login:

One Patient – One Record

- Perform "Find Patient" Function
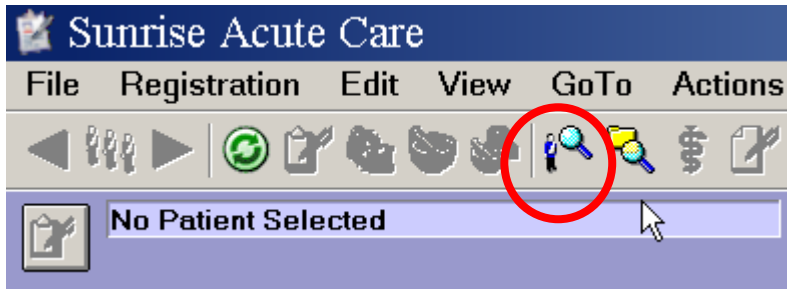
- Search by Last/First Name, MRN # or specific Visit # - click on "Search"

One Patient – One Record

- Search options:
  - MRN Search will only return the specific patient/visits (example below).
  - Searching by last name will return list of patients with same or similar last names. Highlight patient and click on "Show Visits".
  - Searching by specific visit number will only return that particular visit.

One Patient – One Record

• Select the visit that the auditor(s) need access to and click "OK":

• This will bring put the patient/visit selected on a temporary list:

One Patient – One Record

- With the patient highlighted, click on the "Patient Info" tab:

- Under "Data Entry" click on "Care Provider" to add the auditor user as a Care Provider. This will bring up the "Adding New Care Provider Box":

One Patient – One Record

- Add **<u>Expiration Date</u>** to limit the access for the auditor – *CRITICAL STEP*
  - **The expiration date should be no more than 7 days following the scheduled monitor visit.**
- Enter "Auditor" in Type, Role and Last Name of auditor. A list of auditor providers will appear in the window. Select the auditor for the facility/audit company and click "OK". Note that the middle name reflects the name of the audit company.

NOTE: The name at left is for example purposes only. You will need to know the first and last name of the auditor being assigned to the visits and search by the auditor's last name.

- Repeat the above process for each patient record that the auditor will need access to.
- Click on "Care Providers" under <u>Summary Views</u> to confirm the addition of the auditor to Care Providers. **Confirm that an expiration date was entered.**

Create Criteria-Based List

- The final step is to login to the EMR, *using the auditor login*, on the computer the auditor will be using and create a criteria-based list using the Auditor Care Provider to generate a list of patients assigned to that user. Patients will only appear until the expiration date that was assigned.

- While on the Patient List tab, click on File > Maintain List > New
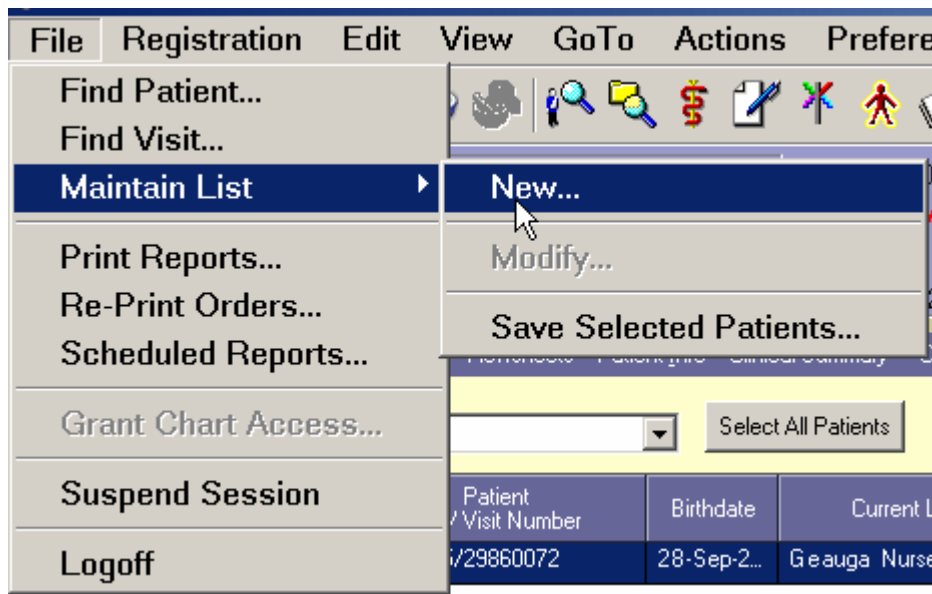
• Click on the "Provider" tab and type the last name of the auditor in the Provider Name field. This will list all of the options for Care Providers with the designated last name. Click on your selection and click "Add". The provider will move to the "Selected Providers" box:
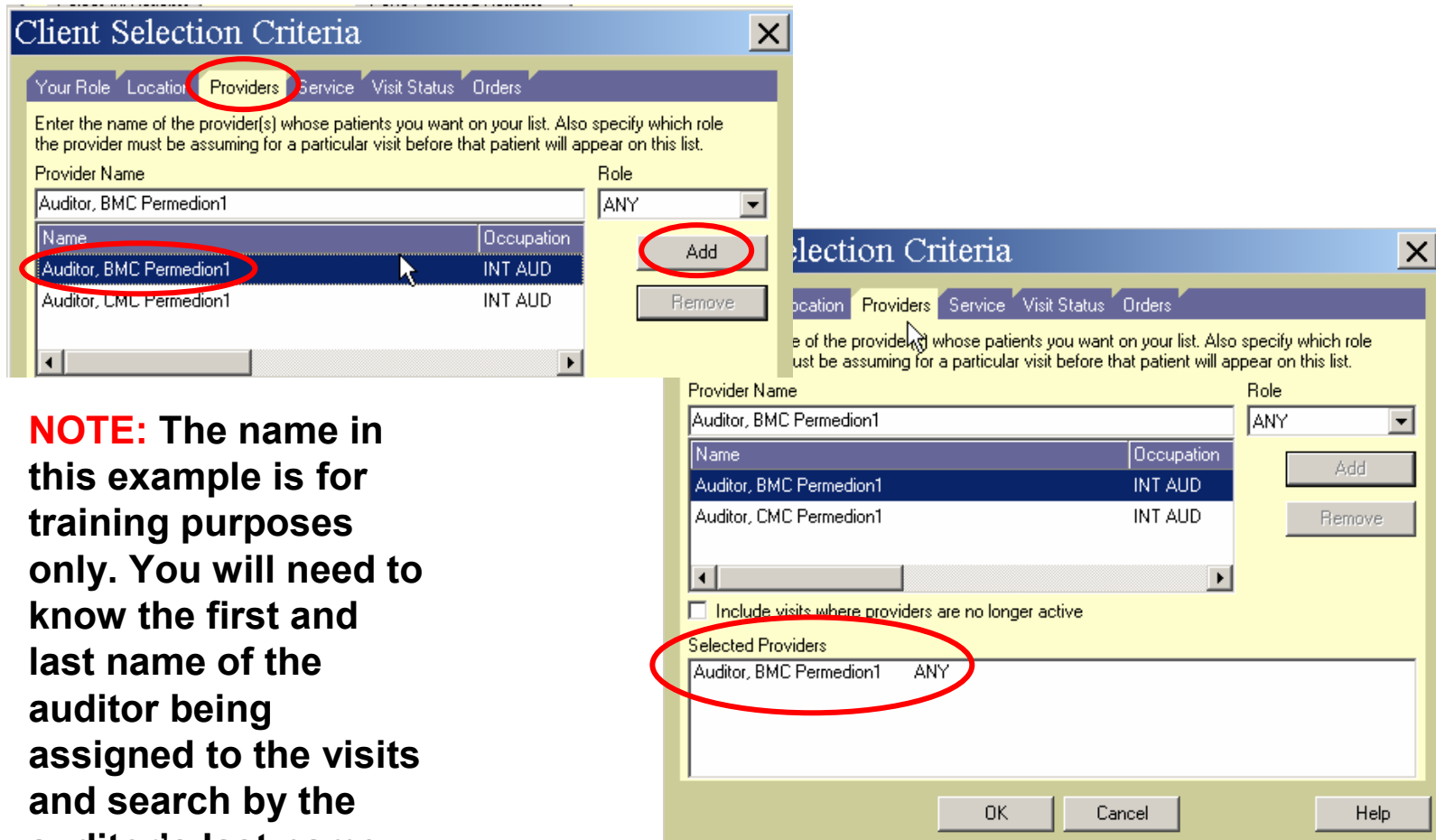
NOTE: The name in this example is for training purposes only. You will need to know the first and last name of the auditor being assigned to the visits and search by the auditor's last name.

One Patient – One Record

- *Before* clicking "OK", click on the "Visit Status" tab and uncheck the "List currently admitted/registered patients" box. **CRITICAL STEP** – closed/cancelled/discharged visits will not appear on the patient list unless this step is completed.

- This generates a patient list including all patient visits where this auditor was added as a Care Provider. You must name the criteria-based list:

- The criteria-based list will look similar to the one below and will include all patients/visits that you added the "Auditor" Care Provider to. Once the expiration date passes, this list should have no patients listed. The auditor will have view only access to all information.

Patient Name	Patient ID / Visit Number	Birthdate	Current Location	Visit Status	Admit Date	Admit Time	Provider
EHRTESTBEDFORD, DE…	00000000 / 11111113	10-Feb-1…	Bedford 2C Rm 206 02	ADM	17-Feb-20…	04:16	Azem, Haitham M

Patient List Orders Results Documents Flowsheets Patient Info Clinical Summary CDV CDV V2 PCOSS Devices

Current List: BMC Permedion Audit 3-2-10   Select All Patients   1 Visit(s)   Save Selected Patients…

One Patient – One Record