



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

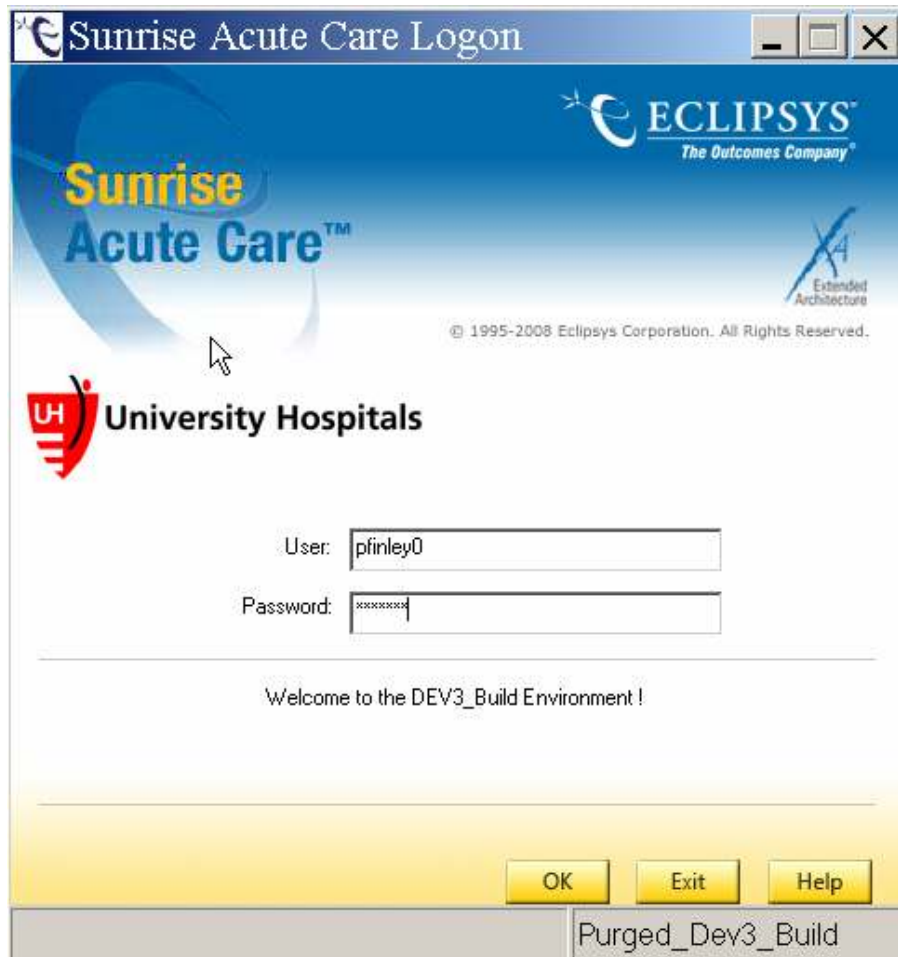
This form is used to request access for multiple users for EMR Access:
 The Requestor will fill out the cells in green.

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

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:



Sunrise Acute Care Logon

ECLIPSYS
The Outcomes Company

Sunrise Acute Care™

Extended Architecture

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University Hospitals

User: pfinley0

Password: [masked]

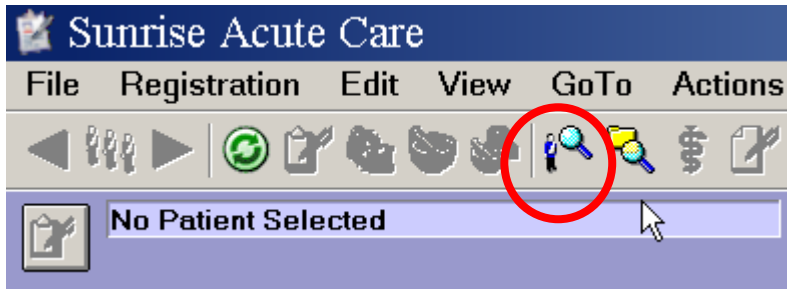
Welcome to the DEV3_Build Environment!

OK Exit Help

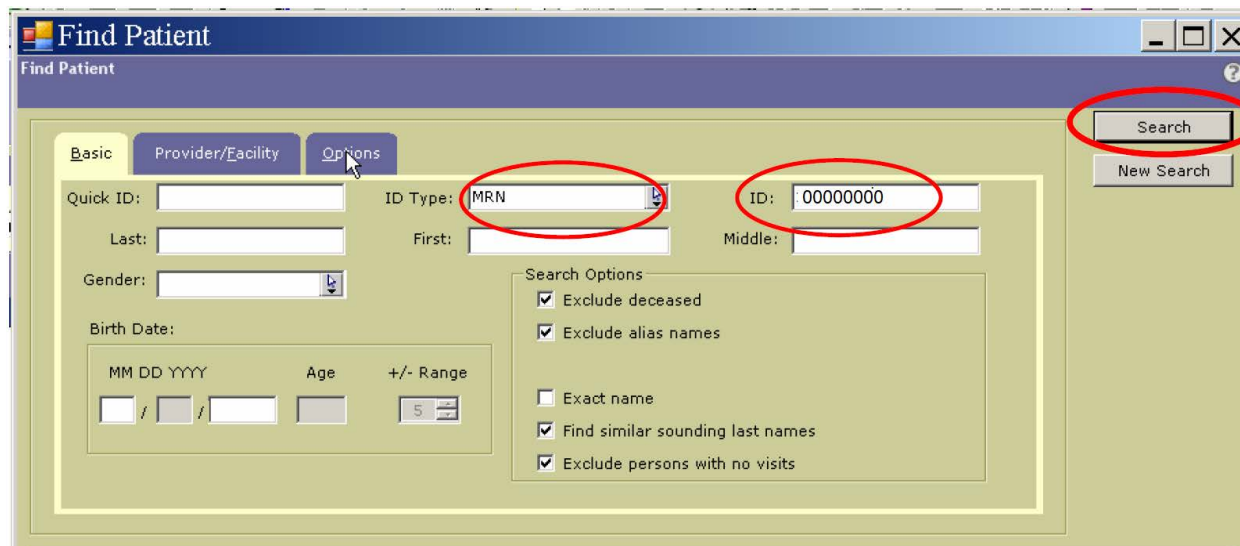
Purged_Dev3_Build

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.

Find Patient

Find Patient

Basic Provider/Facility Options

Quick ID: ID Type: MRN ID: 00000000

Last: First: Middle:

Gender:

Birth Date: MM DD YYYY Age +/- Range

Search Options

- Exclude deceased
- Exclude alias names
- Exact name
- Find similar sounding last names
- Exclude persons with no visits

Name	Gender	Birth Date	Deceased Date	Medical Record Number
EHRTESTBEDFORD, DEBBIE	Female	10-Feb-1960	NA	10015317

Show Visits

Create Visit

One Patient – One Record

- Select the visit that the auditor(s) need access to and click **“OK”**:

Admit...	Visit Type	Care Level	Assigned Location	Visit Status	Visit Patient Name	Visit MRN	Visit
22Feb10	No Encounter	No Encounter	Case - No Encounter	ADM	EHRTESTBEDFORD, DEBBIE	00000000	11111111
22Feb10	Inpatient	Critical Care	Bedford MICU 01	ADM	EHRTESTBEDFORD, DEBBIE	00000000	11111112
17Feb10	Inpatient	Acute Care	Bedford 2C Rm 206 02	ADM	EHRTESTBEDFORD, DEBBIE	00000000	11111113

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

EHRTESTBEDFORD, DEBBIE 00000000 / 11111113
Bedford 2C Rm 206 02 Azem, Haitham M

Allergies: No Known Allergies **Similar Name!**
Last Height: cm () **Last Weight:** kg ()

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

Current List: Temporary List Select All Patients 1 Visit(s) Save Selected Patients...

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

One Patient – One Record

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

The screenshot shows a patient record for DEBBIE EHRTESTBEDFORD. The patient's name is highlighted in a light blue box. Below the name, the location is Bedford 2C Rm 206 02. To the right, the patient ID is 00000000 / 11111113 and the name is Azem, Haitham M. Below this, it says "Allergies: No Known Allergies" and "Last Height: cm () Last Weight: kg ()". A red text label "Similar Name!" is positioned above the "Patient Info" tab. The "Patient Info" tab is circled in red. Below the tabs, there is a "Current List" dropdown set to "Temporary List", a "Select All Patients" button, "1 Visit(s)", and a "Save Selected Patients..." button. At the bottom, a table lists patient information.

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

One Patient – One Record

- 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”:

EHRTESTBEDFORD, DEBBIE
Bedford 2C Rm 206 02

Allergies: No Known Allergies **Similar Name!**
Last Height: cm () **Last Weight:** kg ()

Patient List Orders Results Documents Flowsheets **Patient Info**

Summary Views:

- Alerts
- Allergies/Comments
- Care Providers
- Health Issues
- Significant Events

Addresses/Phones/Contacts
Demographics/Visit Data
Financial/Employer
Visit History

Data Entry:

- Address
- Alias
- Allergy
- Care Provider**
- Comment
- Contacts/Directive
- Patient Demographics
- Discharge
- Employer
- Health Issue
- Height/Weight
- Insurance
- Phone
- Significant Event

Type	Code
Visit Reason	

Care Providers (Adding New) - EHRTESTBEDFORD, ...

Expiration Date: [] Expiration Time: [] Status: Active

Type: [] Add Me

Role: []

Name: []

Name	Occupation	Org Unit

Phone:

Type	Number	Note

Entered: [] Add New

Last Modified: []

OK Cancel Delete Help

One Patient – One Record

- Add **Expiration Date** 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.

Care Providers (Adding New) - EHRTESTBEDFORD, ...

Expiration Date: 25-Feb-2010 Expiration Time: Status: Active

Type: Auditor Add Me

Role: Auditor

Name: Auditor, BMC Permedion1

Name	Occupation	Org Unit
Auditor, BMC Permedion1	INT AUD	Administration
Auditor, CMC Permedion1	INT AUD	Administration

Phone: Type Number Note

Entered: Last Modified: Add New

OK Cancel Delete Help

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 Summary Views to confirm the addition of the auditor to Care Providers. **Confirm that an expiration date was entered.**

Summary Views:

- Alerts
- Allergies/Comments
- Care Providers
- Health Issues
- Significant Events

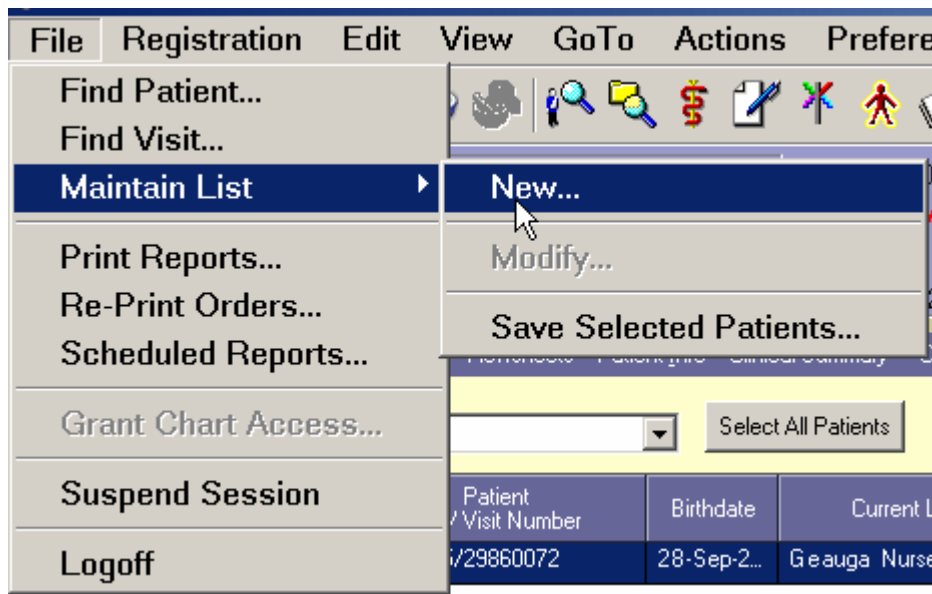
Addresses/Phones/Contacts
Demographics/Visit Data
Financial/Employer
Visit History

Role	Provider	Phone	Status	Effective Date	Expiration Date
Attending	Azem, Haitham M (MD)		Active	17-Feb-2010	
Admitting	Azem, Haitham M (MD)		Active	17-Feb-2010	
Ordered	Goel, Amitabh P (MD)		Active	18-Feb-2010	
Ordered	Testing Physician M (MD)		Active	18-Feb-2010	
Auditor	Auditor, BMC Permedion1 (INT AUD)		Active	23-Feb-2010	25-Feb-2010 23...
Primary	Morgan, Janet Denese (MD)		Active	18-Feb-2010	

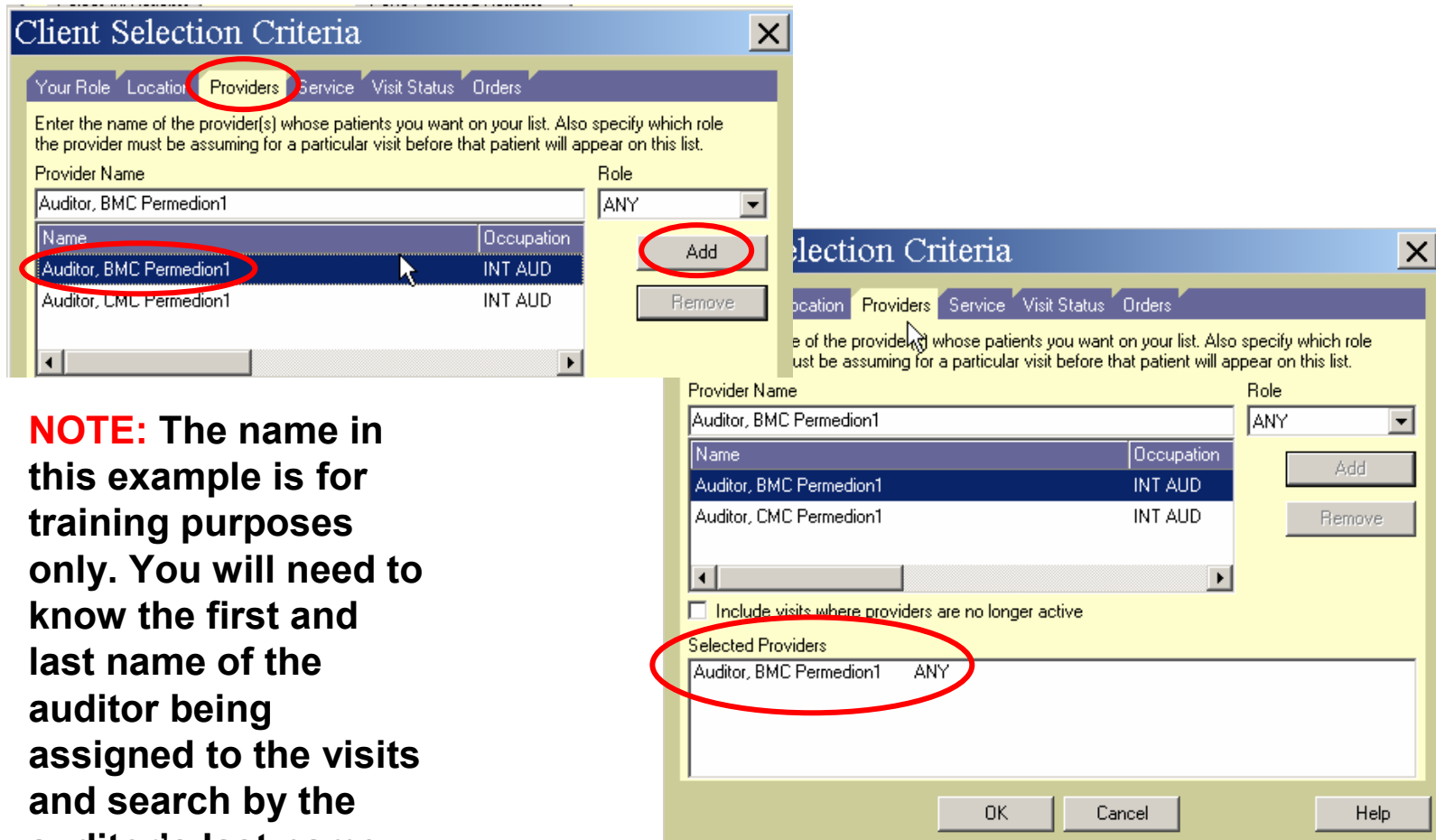
One Patient – One Record

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.

The screenshot shows a dialog box titled "Client Selection Criteria" with a close button (X) in the top right corner. The dialog has several tabs: "Your Role", "Location", "Providers", "Service", "Visit Status", and "Orders". The "Visit Status" tab is selected and circled in red. Below the tabs, there are several checkboxes and a date range selection section. The checkbox "List currently admitted/registered patients" is circled in red and is currently unchecked. Below it is another unchecked checkbox "List patients with the specified event on the date or date range." followed by a dropdown menu. Below that is a date range selection section with radio buttons for "Today", "Yesterday", "Tomorrow", and "Date Range", and a checkbox for "Use Actual Dates". Below the radio buttons are two rows of date pickers: "From:" and "To:", each with a text input field, a "Days" dropdown, and a "Ago" or "From Now" dropdown. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

- 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 screenshot shows a software interface for 'Client Selection Criteria'. The main window has tabs for 'Your Role', 'Location', 'Providers', 'Service', 'Visit Status', and 'Orders'. The 'Providers' tab is active. Below the tabs, there is a text instruction: 'Enter the name of the provider(s) whose patients you want on your list. Also specify which role the provider must be assuming for a particular visit before that patient will appear on this list.' There are two input fields: 'Provider Name' and 'Role'. The 'Provider Name' field contains 'Auditor, BMC Perm'. A sub-dialog box titled 'Name' is open over the main window, asking 'What name do you want to give to your new list?'. The 'List Name' field in this sub-dialog contains 'BMC Permedion Audit 3-2-10' and is circled in red. The sub-dialog has 'OK', 'Cancel', and 'Help' buttons. The main window also has 'OK', 'Cancel', and 'Help' buttons at the bottom.

- 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 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...					
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		

One Patient – One Record