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# Table of Contents

Table of Contents ........................................................................................................................................ 1  
Overview of the Course .............................................................................................................................. 3  
Patient Registration and Chart Management ............................................................................................. 4  
  Detailed Registration ............................................................................................................................. 4  
    Mandatory fields when registering a client...................................................................................... 5  
  Socio-demographics............................................................................................................................... 5  
Registration Save Options ........................................................................................................................ 6  
  Exercise 3 – Client Registration.............................................................................................................. 6  
Open a Client Chart ..................................................................................................................................... 7  
  Hot List ................................................................................................................................................... 8  
  Client Card Swiper .................................................................................................................................. 8  
  Edit a Client Chart .................................................................................................................................. 8  
  Exercise 4 – Chart Manipulation .............................................................................................................. 9  
Scheduling and Appointment Management ............................................................................................... 9  
Schedule Navigation Bar ........................................................................................................................... 10  
  Manage Day Notes ............................................................................................................................... 10  
  Booking Appointments – For Existing Patients .................................................................................... 10  
  Exercise 6 – Booking an Appointment ................................................................................................. 11  
  Appointment Management .................................................................................................................... 12  
  Exercise 7 – Schedule Management ..................................................................................................... 13  
  Viewing Schedule Groups ..................................................................................................................... 13  
    To create a Schedule Group ................................................................................................................... 13  
  Exercise 8 – Schedule Groups .............................................................................................................. 14  
Searching the Schedule ............................................................................................................................. 15  
  Patient Appointment Search ................................................................................................................... 15  
  Next Available Appointment Search ................................................................................................... 15  
Schedule Reports ....................................................................................................................................... 16  
  Exercise 9 – Schedule Management .................................................................................................... 17  
Practice Management Tools ..................................................................................................................... 17  
  To Do List.............................................................................................................................................. 18  
    Assigning Tasks to Yourself or Others............................................................................................. 18  
    Recording Completed Tasks ............................................................................................................ 19  
    Outstanding Tasks ........................................................................................................................... 19  
  Exercise 10 –Tasks ................................................................................................................................ 20  
Adding Administrative Phone Calls ......................................................................................................... 21
Overview of the Course

This course covers the basics of the Nightingale on Demand (NOD) software application. This courseware is intended to accompany Nightingale Informatix Corporation, instructor-led training sessions for Practice Management. After attending this session and performing the provided practice exercises, participants will be able to:

- Navigate the Nightingale application
- Customize personal account preferences
- Register patients and manage patient records
- Book and manage patient appointments
- Create and manage individual and group schedules
- Create schedule reports
- Navigate non-clinical chart sections
- Use internal messaging and task management tools
- Advancement Document Management

ROLE – This document is intended for Front Desk Staff, Receptionists, Office Managers, and Administrators who perform related tasks for those positions. Nurses and providers may find this course useful if they are performing any of the basic office tasks but attendance is optional for this group.

SKILL LEVEL – You should have a working knowledge of Windows and Internet Explorer. Also, you should have a working knowledge of practice management.

PRE-REQUISITES – Review the Getting Starting guide before logging into the training site to change necessary Internet Explorer settings and to make sure your Internet Explorer is properly set up.

DELIVERY – This document is intended to accompany Nightingale Informatix Corporation, instructor-led training sessions; It can also be used alone as a supplement or as a review.

About This Course

A high-speed internet connection and specific Internet Explorer settings are required to use NOD. Before logging into the training site, use the Getting Starting Guide to make sure your computer is set up properly.

Throughout this manual, there are several conventions that are used to make the information easier to use and understand.

- Navigation is presented as bold text separated with a vertical line (|) e.g. Patients | Registration | New.
  This means the Module (found to the left of the screen) is clicked. The rest of the menu items are selected by pointing the mouse over the selection (hovering, not clicking) until the final menu item which is clicked.

- Modules and other specific buttons, windows, etc. of NOD are Bold; e.g. Click Save to save changes to a client demographics.
Patient Registration and Chart Management

Each client in your practice will be registered in the system and the process of registration creates a client chart. In this section you will learn how to register clients.

Detailed Registration

To register a new client, go to Patients | Registration | New. The Detailed Registration page displays (as long as you have set detailed registration as the default on your Dashboard settings). The figure below shows the various sections available within the Detailed Registration mode.

<table>
<thead>
<tr>
<th>Section</th>
<th>Identifiers</th>
<th>Residential Address</th>
<th>Mailing Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referring Physicians</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family Members</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The table below outlines the flow of information for some of the important sections in the detailed registration:

<table>
<thead>
<tr>
<th>Section</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>Client’s name, Rostered Status, DOB, Sex, Marital Status, Spoken Language, Religion, Place of Birth, etc.</td>
</tr>
<tr>
<td>Do not enter allergies on the demographics screen; they should be recorded in the CPP.</td>
<td></td>
</tr>
<tr>
<td>Identifiers</td>
<td>Used to capture Canadian Health Card Numbers; Non-Insured Status; and Socio-Demographics.</td>
</tr>
<tr>
<td>Residential Address</td>
<td>Client address and phone numbers</td>
</tr>
<tr>
<td>Employer</td>
<td>Employer information</td>
</tr>
<tr>
<td>Guardian</td>
<td>Guardian contact information entered in this section can be used when generating letters for minors</td>
</tr>
<tr>
<td>Contacts</td>
<td>Able to enter the client’s emergency contact; substitute decision maker; next of kin; as well as an external providers.</td>
</tr>
<tr>
<td>Healthcare Team</td>
<td>Enter the providers that are part of the clients care.</td>
</tr>
<tr>
<td>Referring Provider</td>
<td>Enter who referred client to the center.</td>
</tr>
<tr>
<td>Preferred Pharmacies</td>
<td>Used in prescription refill requests; the Pharmacy list will be populated by each centre.</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Insurance</td>
<td>Insurance companies client uses.</td>
</tr>
<tr>
<td>Drug Plan</td>
<td>Choose the Drug Plan for each client and this will carry forward to the medication screens.</td>
</tr>
<tr>
<td>Family Members</td>
<td>Can associate family members that are currently registered, if one members address is changed you are asked if you would like to change the other family members.</td>
</tr>
</tbody>
</table>

**Mandatory fields when registering a client**

**Rostered:** When registering clients within NOD the **Rostered** check box is used to track all clients that receive ongoing primary care. The rostered field would not be checked off for clients that only come to groups or only see the dietitians/chiropody, etc. Once the rostered check box is selected a rostered date box will appear. You can allow this to default to today’s date.

**Spoken Language/ Official Language:** can choose from a drop down of languages.

**Race/Religion/Ethnicity:** enter information into the appropriate field to document how a client describes themself

**Place of Birth/ Date of Arrival:** enter the country of birth if a client is not born in Canada. Once a different country is entered the **Date of Arrival** field will appear.

**Socio-demographics**

The remaining mandatory required data is captured using **Patient Identifiers**. Within the detailed registration form under the **Identifiers** tab, Socio-demographics are recorded and updated.
Centres are able to add additional identifiers but should not change the ones already established. It is recommended that any additional identifiers are set up at the centre level, not individual level.

Registration Save Options

The list below briefly explains the various save options available once you have completed a patient registration.

<table>
<thead>
<tr>
<th>Save Option Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Saves the patient information and assigns a chart number. Opens a blank registration page to continue registering clients.</td>
</tr>
<tr>
<td>Save &amp; Check In</td>
<td>Saves the client information and opens a popup that enables that client to be checked in to an existing schedule.</td>
</tr>
<tr>
<td>Save &amp; Open Chart</td>
<td>Saves the client information and remains in the Demographics section for the client. The button is only available for a new registration.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Does not save the current client and returns to a blank registration page.</td>
</tr>
</tbody>
</table>

Exercise 3 – Client Registration

1. Register a client with all of the required fields
2. Register a second client who is a family member of the registered client in Step 1
3. Search for a client, edit record by adding a Health Care Team
4. Modify client status to ‘Inactive’
Open a Client Chart

Existing client charts are opened by doing a search from Patients | Registration | Select. The figure below shows the client search page.

Advanced search options are accessed by clicking the Advanced button. The Advanced Search window provides additional criteria for searches such as Health Card Number and date of birth.

Enter the search criteria and click the Search button.
Highlight the client’s name and click the **Details** button (to see detailed information at the bottom of the active window for the selected client) or the **No Details** button (to hide the detailed information for the selected client). Select the correct client and click the [OK] button. The client’s name will appear in the orange bar under the **Menu** items.

**Hot List**

Previously opened charts can be quickly reopened by using the Hot List icon in the client search screen. The Hot List will display a drop down of clients who you have previously searched for. The number of entries in the Hot List is based on your **Dashboard** settings.

**Client Card Swiper**

Another way to register a new client or update a client’s health card number, version code, expiry date and date of birth; is by swiping a client’s health card. When you swipe a health card the client’s name is changed or updated to match exactly as it is written on the health card.

To swipe a health card it does not matter which module you are in and you do not need the specific client’s chart open you just click on the Card Swipe icon located in the bottom left corner.

**Edit a Client Chart**

Find a client’s chart using the following steps **Patients** | **Registration** | **Select**. Within the detailed registration form make any necessary changes. Each time you open a client’s registration form it is ready to be updated or changed, click the Save button after any changes are made.

There is a status drop down for each client that defaults to **Active**; you can change this status to mark they are no longer a client of the centre. If you mark a client as **Inactive** you will not be able to find their name on any active search windows, you will need to use the advanced search function to find their chart.
Exercise 4 – Chart Manipulation

1. Lesson 1:
   i) Close current client chart
   ii) Find one of your clients using the hotlist search
   iii) Change the phone number and annual income

2. Lesson 2:
   i) Find another client using the Advanced Search
   ii) Modify the client status to ‘Inactive’ including the step that they need to be ‘Unrostered’

3. Lesson 3:
   iii) Open a client registration and add a ‘Preferred Pharmacy’

Scheduling and Appointment Management

The Scheduler allows you to manage simple or multiple schedules with ease, connects client data to each appointment, and enables quick access to client information.

1. Grayed out time slots represent blocked time (No appointments can be scheduled).
2. To unblock/block time slots, check the box to the left of the time and click the Block or Unblock activity buttons.
Schedule Navigation Bar

The Schedule Navigation bar allows you to browse from one day to another and view the schedule in multiple ways:

- Click the arrows to display a schedule in daily, weekly and monthly view.
- Use the arrows beside the 1, 7, or 31 to go ahead or back by 1, 7, or 31 days.
- Click the Today button to return to today’s date and refresh the schedule.

Manage Day Notes

Day notes enable you to document information for a particular day. These notes display on top of the schedule for the day they were entered as shown:

Day notes can be edited or added to by clicking the Day Notes hyperlink and then click Save.

Booking Appointments – For Existing Patients

There are two easy ways of booking appointments for existing clients (clients that are registered).

- By clicking the blue time hyperlink
- OR
- By clicking the empty area associated with each time slot.
After using either method, the **New Appointment** page displays and you can search for the client you are booking the appointment for.

Fill in the Appointment Details.

- **Select from the Appointment Type** drop down; this appointment type list is created and maintained by your centre. You will only see appointment types that are associated to that particular schedule.
- **You can change the Appt. End Time** to change the duration of the appointment.
- **Mandatory - Appointment Priority** is where you select the Mode of Contact e.g.: walk in, scheduled/crisis/emergency, urgent/same day etc.
- **If the appointment is recurring check the box to the left of Recurring appointment.**
  An example of a recurring pattern: four appointments every three days.
- **Reason for visit** is a text field where you can type why the client is coming in. This does not flow into an encounter it is just text that appears on the schedule.
- **Comments** is a text box for additional comments regarding the appointment that will appear on the schedule.
- **Click the Schedule Patient button when you have completed the appointment details.**

**Exercise 6 – Booking an Appointment**

1. Book 3 appointments for 3 different clients, one later today, one tomorrow and one next week. 
   Make sure you put in the Appointment Type and the Priority fields.
**Appointment Management**

In this section we look at the various tools available for managing existing appointments. The figure below shows an appointment scheduled at 2:00pm for client Michael Abraham.

The table below describes the icons, symbols and menus that are displayed on the Schedule with each appointment:

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Client Name" /></td>
<td>• A red exclamation mark before a client’s name indicates they have an alert. Click the exclamation mark to see the alert.</td>
</tr>
<tr>
<td><img src="image" alt="Recurrence Pattern" /></td>
<td>• This symbol indicates the appointment is part of a recurrence pattern. Click the appointment time (for example, <strong>2:00 pm</strong>) to view or edit the recurrence pattern.</td>
</tr>
<tr>
<td><img src="image" alt="Appointment Status" /></td>
<td>• Appointment status. All appointments are defaulted to To Be Confirmed (TBC). Change the appointment status by selecting from the drop down. L/M – left message; OK – confirmed; IN; OUT; NS – No show. Appointment statuses can be added at each centre.</td>
</tr>
<tr>
<td><img src="image" alt="Reschedule" /></td>
<td>• To reschedule an appointment, click the scissors icon, then click the time hyperlink to indicate where you wish to reschedule this appointment.</td>
</tr>
<tr>
<td><img src="image" alt="Copy" /></td>
<td>• To copy an appointment, click copy icon, then click the time hyperlink to indicate where you wish to make a copy of this appointment.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>• The print icon can be used to print labels, consent forms, patient handouts and general letters.</td>
</tr>
<tr>
<td><img src="image" alt="Edit" /></td>
<td>• To edit appointment details, click the time hyperlink.</td>
</tr>
<tr>
<td><img src="image" alt="Cancel" /></td>
<td>• To cancel an appointment, click the check box next to the time, then click the <strong>Cancel</strong> button. You must select or type in a cancellation reason to complete this action.</td>
</tr>
</tbody>
</table>
**Exercise 7 – Schedule Management**

1. Book a regular appointment for one of your clients later today, make sure you put in the Appointment Type and the Priority fields
2. Reschedule this appointment for tomorrow
3. Cancel the appointment

**Viewing Schedule Groups**

Schedule groups can be used to view more than one schedule at the same time on the same page as shown below.

To create a Schedule Group

Group schedules are user dependent. If you create a group schedule, it will only appear for your login.

1. Go to **Schedule | Setup | Groups | Schedule** to display the Manage Schedule Groups page. If there are any, saved Schedule Groups display and can be edited by clicking the Schedule Group Name link (for example, **All Providers**).

2. To create a new Schedule Group, click the **New** button.
3. Type a name in the Group Name text box.

4. Highlight the desired schedule(s) from the list in the Schedules window and click the Add --> button. The order in which you add the schedules will reflect the order of the schedules within the group from left to right.

5. Check box beside the Display group of schedules in condensed view if you want to view the group schedules on one page.

6. When all schedules you desire are listed in the Selected Schedules window, click the Save button.

To view a Group Schedule, select the group from the Schedule drop down menu on the Appointments page as shown below.

**Exercise 8 – Schedule Groups**

1. Create two schedule groups that you would use at your centre.
Searching the Schedule

NOD facilitates two different types of searches on one or more schedules, Patient Appointment search and the Next Available Appointment search. This section describes these search types.

**Patient Appointment Search**

Patient Appointment Search allows you to search for any previous, current, and future appointments for any client. A search can be performed by going to the Schedule | Search Schedule | Patient Appt. Search.

From the Patient Appointment Search page you can search on a specific provider’s schedule or all schedules.

**Appointment Type**: You can narrow your search by choosing to search for a particular appointment type or leave the default Any.

**Appointment date**: You can search on future or past appointments. If Appointment Date field is set to Any date, the system returns the complete scheduling history for the client.

**Appointment Status**: You can be specific and search for a client’s list of no shows or the last cancelled appointment or all appointments by selecting NS, Cancelled or All from the drop down.

Enter the client’s last name and first name and click on the Search button, you will be provided with a list of appointments. Appointment details can be seen by clicking any of the appointment dates; e.g. who scheduled or cancelled an appointment and why did they cancel the appointment.

**Next Available Appointment Search**

This feature allows for the searching of available slots by provider, day of week, and time of day. The definition of time of day is as follows:
• Morning: 6:00am – 11:55am
• Afternoon: 12:00pm – 5:55pm
• Evening: 6:00pm – 11:55pm
• Night: 12:00am – 5:55am

Best use of this is if the client is indicating they are only available at specific times. If searching for next available appointment for a provider, it may be better to scroll week by week.

Schedule Reports

One of the most useful reports from the schedule is the Schedule Report (Day Sheet).

Schedule Reports are a great tool for printing single or multiple schedules for the current day, a specific date or for a date range. Once a report is created, you may generate results from it as often as you wish. To run a Schedule report go to the Schedule | Generate Reports | Schedule Reports; click on the report name, change the date for the results and click the Run or Print button.

Your clinic super users can create and maintain day sheets.

Day Notes will not print out on day sheets for multiple provides, they will however print out on an individual schedule day sheet.
Exercise 9 – Schedule Management

1. Create a Schedule Group with 3 or more providers.
2. Search for the client’s appointment using the Patient Appointment Search
3. Book a physical for one of your clients next week with two different providers using the Next Available Appointment Search
4. Add a Day Note to your provider’s schedule
5. Display a Day Sheet for 1 provider
6. Display a Day Sheet for multiple providers

Practice Management Tools

NOD has the functionality for staff members to communicate with each other regarding a client and have that communication tracked within the chart. There are both messages and tasks (also called To Do lists). When to use a message and when to send a task depends on the type of communication. If the communication is more of a general discussion between two people then a message would suffice as it works similar to email. If the communication is more of an action required and could be sent to a group of people e.g.: reception then a task is better.
**To Do List**

You can assign tasks to other clinic members, yourself, or to a role within the clinic (for example, Front Office). A task can be associated to a client’s chart or separate from any client chart. Tasks are managed from the TO DO list.

To see your current list of To Do items go to **Office Actions | Actions | To Do List** or access them from the notifications area on the Dashboard:

You can sort the Task List by status so that critical actions can be placed at the top of the list. To sort by status, click the column with the exclamation point (!). To sort again from least important to most important actions, click the exclamation point again.

**Assigning Tasks to Yourself or Others**

1. Navigate to **Office Actions | Actions |To Do List** or access Tasks from the notification area on the Dashboard

2. Click **New**.

3. If the task is concerning a client and you want it documenting in the client record, select the appropriate client’s chart. Tasks do not need to be associated with a client.
4. Select an action from the drop-down box, this list of actions is customizable and shared by the clinic.

5. Assign a priority from the drop-down list (Low, Normal, or Urgent).

6. Assign the task to a staff member or a user role from the drop-down box.

7. Select the Start and Due Dates.

8. To add further comments, type in the Comments section.

9. Click Save to complete assigning the task.

Actions regarding a client can be viewed in the client’s chart under Patients | Details | Summary, here you will find any tasks that have not been completed as well as any messages that have not been deleted. Once a task is completed or a message deleted you will find them on the Details – Summary page by clicking on Options in the top right corner.

**Recording Completed Tasks**

1. Navigate to Office Actions | Actions | To Do List, or click To Do from the Reminders area on the Dashboard.

2. Select the task that you have completed by checking the check box next to the task.

3. Click Complete. A Completion Note dialog box displays.

4. Type in your notes regarding the task.

5. Click OK to complete the task.

**Outstanding Tasks**

When you assign tasks to a staff member, a list is created so you can track the activity. To access the outstanding tasks list go to Office Actions | Actions | Outstanding Tasks.

Tasks that are created by you and assigned to others, can be completed, deleted or re-assigned from the Outstanding Tasks page.
Exercise 10 – Tasks

1. Create a task for a client and assign it to another person in the class.
2. Create a task for yourself that is not linked to a client.
3. Review your list of tasks and sort them in different ways.
4. Record that the task that you created for yourself is complete (Note: the other users cannot see progress on tasks that are assigned to a role such as reception; e.g., if one user in reception is working on the task, there is no notation about that.)

If a task is not completed and needs re-assigning, click the Re-assign button to re-assign that task.
**Adding Administrative Phone Calls**

Documenting a client phone call using the Record Phone Call icon is only done if the call is administrative in nature i.e. leaving a message about a rebooking. This feature cannot be used if a service is provided over the phone; providers need to record these conversations as an encounter.

1. Click the phone icon from the main menu icons. The Record Phone Call To Patient page displays.
2. Search for and select the client.
3. Select the Call Action from the drop-down field (this list will be populated by your centre).
4. Select the provider that made the call (if appropriate).
5. Record a Call Summary in the text area.
6. Click Record Call to save the record.

**Exercise 11 –Phone Actions**

1. Add an administrative message into a client’s chart using a phone action
Messages

NOD Messages allow two way discussion between staff and can be linked to a client chart or not. To view your Inbox for messages received from staff, go to the Office Actions | Messages | Staff | Messages or access your messages from the Reminders area on the Dashboard:

- Click the message link to see details about the messages. Priority messages are marked with a red exclamation mark.
- Messages can be sorted by clicking on the column links.
- Use the Options menu to access Deleted, Sent and Draft message folders.

Creating a New Message

Within the messages window click on New in the top left corner to create a new message. Messages do not have to be about a client, they can be a way to communicate between staff within the centre.

If the message is concerning a client, locate the client’s name by doing a search. (This is not mandatory to create and send a message, if you do not associate a client to a message it will not be stored in that client’s chart).

1. You can send a message to a maximum of 2 people.
   - Recipient: Select the recipient from the drop-down list. Use the Advanced link to send a message to a person at another location within the same enterprise (a satellite center), and select the location from the drop-down list.
• Copy To: To copy the message to another staff member.

2. Assign a priority from the drop-down list, that is, Low, Normal, or Urgent.

3. Enter a subject in the Subject box,

4. Type the message in the Message box

5. Click the Send button.

**Exercise 12 – Messaging**

1. *Send a message attached to a client’s chart to another person in the training session*
2. *Send a message to yourself that is not attached to a client’s chart*
3. *Manage messages that you have received*

**Chart Overview**

**Details Menu**

**Summary**

The Summary page, displays current and future appointments, recalls or follow-ups, active tasks or messages, and health maintenance alerts for a particular client.
Patient Contact Summary

NOD enables you to track all administrative communication that the clinic has had with a client. This can include phone calls, e-mail or faxes.

Viewing the Patient Contact Summary

The Patient Contact Summary is accessed from Patients | Details | Patient Contact. The Patient Contact Summary page displays.

Client Scheduling History

A client’s scheduling history is accessed from Patients | Details | History.
Client Chart History
A client’s chart history is accessed from Patients | Details | History | Chart History.

You can search the chart for specific things by selecting from the Events drop down. For example if you needed to reprint a client’s lab requisition change the event drop down to Lab requisition and click the Search button.

CPP/Encounters/Lab Results
While in a client’s chart you can create a split screen of their chart and see select sections of their chart on the left hand side in read only. Click on the folder icon in the orange bar at the top of the client’s chart and choose from the drop down; CPP, Encounter, Lab Reports, DI Reports.

Referral Management
Once a referral letter is signed and printed by a provider a copy of that letter is available and can bee managed from Dashboard | Outstanding Consultations. A shortcut on the dashboard can take you to Office Actions | Administrator | Outstanding Consultations.

All referral letters initial status is Pending. Once the referral is successfully sent change the status to Sent. Change referral status to Booked once you receive the appointment date and time.
Your centre’s workflow will direct when to check the box to the left of the letter and click Received. This will remove the letter from the list. The letter can always be accessed from the client’s chart at any time.

If there is a need to print the referral letter click on the client’s name to see the letter and click Print.

**Exercise 14 – Referral Management**

1. Select Outstanding Reports for a particular provider
2. Find a referral that has the status of ‘Pending’
3. Print the referral letter and change to status to ‘Sent’
4. Mark another referral as ‘Booked’
5. Review in the client’s chart where you would see this information

**Creating Refill Requests**

The Refill Management screen allows office staff to create prescription refill requests for the provider to review for approval. It also gives the provider an area to review all outstanding refill requests to take the appropriate action for each request.

1. In the Office Actions module, click Refills and select Refill Management.
2. In the Pending Refills for Approval By field, select the provider who will approve the refill.
3. Click the **New** button.

4. Search for the client you are requesting the refill for.

5. In the **Patient** field, select the client’s name.

   In the Pharmacies Attached to Patient section, select the pharmacy where the client will have the prescription filled.

Pharmacy list needs to be created by the Clinic prior to requesting a medication refill.
6. Click **Next**.

Any pending refills for the client display so you do not create a duplicate refill request.

7. If the medication is not in the pending refills list, click the **New** button.

The client’s Active Medications screen display.

8. Select the checkbox beside the medication to be refilled and click **Add & Finish**.

The medication is added to the Pending Medications screen for that patient.

Once you select the required medication and input the instructions of the refill click the **Add and Finish** or **Add and Continue**.

**Using the Print Manager**

The Print Manager can be used to print client charts and can be accessed by going to the **System Setup | Reports | Print Manager**.
Securing Data

Client data in NOD can be masked so specific details about a client are hidden from one or more users. Only users that have masking privileges can mask client data. The image below is what a CPP would look like with masked data. For further information on how to mask or unmask, please see your clinic super user.
Advanced Document Management

(see ADM manual)