

CHR (Input Health) EMR Training Plan

This is one module from the complete [MOA Training Guide](#) >

This training plan is designed to be self guided. Please watch the training videos and read the help files linked in each section based on your role.

To access the EMR, your clinic EMR administrator will provide you with your login credentials. If you are creating a mock patient to play with the system, please ask your EMR administrator for any specific requirements, such as using the last name TEST.

If you have any questions, reach out to any member of the team.

Estimated time to complete: 14-15 hours

Training Focus	For Whom	Topics - <i>help file links are underlined</i>	Video Links (duration)
General EMR functionality	All Staff	• Basic System Navigation • Managing Patients and Recording Data ◦ Summary View and Dashboard View • Scheduling ◦ Navigating the schedule ◦ Booking Appointments for existing patients ◦ Booking appointments for New Patients ◦ Booking referral appointments • Patient Portal	https://drive.google.com/file/d/1diOwAbbClvGN5LQkgHJT4WHN79UUWJY/view?usp=sharing (2 hours)
Encounters	All staff/Providers	• Starting encounters from the schedule or from the chart • Conducting virtual visits • Recording patient history • Recording encounter notes • Creating prescriptions • Using requisitions and forms • Creating letters and info on features related to referring patients to specialists/consultants • Billing from encounters	https://drive.google.com/file/d/1FXL1HZJyVrW0bHKocWq_S-G3M9OdpXd/view?usp=sharing (2 hours)

Specific Workflow Functionality	All Staff	• Managing Outgoing Referrals • Managing Incoming Documents • Reviewing and Responding to labs and reports • Managing Your Inbox and Sending Messages • Instant messaging (chat)	https://drive.google.com/file/d/1gdF6tKYG4FZLaNuhSICnZonAeogOE4S-/view?usp=sharing (2 hours)
Billing	All Staff/Billing Users	• Billing patients and third parties for services • Reconciling private bills • Ministry billing • Billing WCB/ICBC	https://drive.google.com/file/d/190duxZkJCAF9G1ZSvwriXTKTot3gZJ4L/view?usp=sharing (2 hours)
Configuration Part 1	Clinic Administrator/ Patient Services Coordinator/MOA	• Managing Users • Configuring appointments and notifications • Configuring schedules • Configuring billing (third party or private) • Other site administration tasks (appointment tags, patient tags, patient file tags, formulary, injections, prescriptions) • Managing facilities and contacts • Configuring Referrals • eBooking or Patient Portal	https://drive.google.com/file/d/1Sxovj5IncceaelcS0v5H8cO2Zpc3BAAs/view?usp=sharing (1.5 hours)
Configuration Part 2	Clinic Administrator/ Patient Services Coordinator/MOA	• Templates ○ Encounters ○ Messages ○ Letters ○ Forms • Building and modifying Qnaires • Customization of Notifications ○ Appointment notifications ○ Referral notifications	https://drive.google.com/file/d/1oXlnR0zN9banR3QPyDrftS5gHgsjoxj/view?usp=sharing (<1.5 hours - recording started late)