

OSCAR PRO EMR GUIDE FOR HEALTH LIAISONS



OSCAR Pro, an acronym for Open Source Clinical Application Resource, is an EMR best suited for use using Google Chrome. Please ensure that you are browsing the program using the latest version of Chrome in order to optimize the use of all of the program's functions.

<https://icha.kai-oscar.com/oscar>

TABLE OF CONTENTS

SCHEDULES and APPOINTMENT BOOKINGS

PAGE 1 -----

- Creating and editing **Appointments**
- Viewing clinic **Schedules**
- Appointment shortcuts **E | B | M | Rx**
- Updating a patient’s appointment status **“Cancelled, No Show”**

MASTER RECORD and UPDATING PATIENT DEMOGRAPHICS

PAGE 2 -----

- Adding Health Insurance information
- **Edit** and add demographic information (HIN, contacts, spoken language, alerts)
- Updating patient status (active, transferred, deceased)
- Shortcuts in the **Master Record**

SEARCHING for PATIENTS and CREATING CHARTS

PAGE 3 -----

- **Search** for patient’s in ICHA’s OSCAR Pro database

PAGE 4 -----

- **Creating new patient charts**
- Adding initial demographic information

PRINTING LABELS and ASSIGNING a SITE

PAGE 5 -----

- Printing lab specimen **labels**
- Printing patient envelopes
- ICHA Operations and other site assignments

INBOX, MESSENGER and eDocs

PAGE 6 -----

- Receiving documents in your **Inbox** – acknowledge, comment and file.

PAGE 7 -----

- Receiving and sending secure messages with OSCAR Pro **Messenger**

PAGE 8 -----

- Accessing the curated documents in **eDocs** (e.g., fax coversheet)

TABLE OF CONTENTS

UPLOADING and eFAXING DOCUMENTS

PAGE 9 -----

- Using the Master Record to **upload individual documents** to the patient's chart

PAGE 10, 11 -----

- **Uploading multiple documents** through Inbox

PAGE 12 -----

- Using the Inbox to **eFax documents** without a physician fax machine on-site

CASE LOAD, ROSTER STATUS and TICKLERS

PAGE 13 -----

- Reviewing a provider **Caseload**
- Accessing a site line list
- How to assign patients to your caseload and roster site.

PAGE 14 -----

- Creating and viewing **Ticklers**

SCHEDULE TEMPLATES and REPORTS

PAGE 15, 16 -----

- Creating and editing **Schedule Templates**

PAGE 17 -----

- Creating and viewing **Reports** (Health Care Professionals only)

SCHEDULES and APPOINTMENT BOOKING

Create and adjust bookings according with access to physician schedules based on site or collaborative groups

Upon logging into OSCAR Pro, you're welcomed with a schedule – either your most commonly used or recently opened. To open and book on the correct schedule, ensure **date**, **site** and **provider** are selected

BOOKING AN APPOINTMENT

Ensure browser's pop-up blockers are deactivated**

1) Click on a timestamp in your open schedule and an the **EDIT AN APPOINTMENT** window will appear (see image below)

*** It is important that physician schedules are completed accurately reflecting; length of appointments, **No Shows** and **Cancellations**, correct physician, accurate site, linked demographic and in the correct time slot. This is all credible information necessary for ICHA's ongoing data collection submitted to funders and researchers alike.

2) Attach patient (Jane Smith) to appointment using this format: **Smi, Jan** and click **Search** You'll know you've successfully added a person to the appointment when the demographic number appears beside Search and demographic info (tel., alerts, appt. history) appear

- 3) Manually edit duration/date/time as needed
- 4) Ensure site location is accurate (this is a common error)
- 5) Update Status as necessary:
 - ***Non face-to-face*** - for follow up without patient present
 - **Here** - when patient has arrived
 - **Picked** - when patient has been seen but appt has yet to be billed
 - **Safety Concern** - flagging acute safety or behavioural concerns
 - **No Show** - when patient does not show for scheduled appt
 - **Cancelled** - when scheduled appt is cancelled
 - *Never delete appointments, unless truly a mistake.*

If you are unable to find a patient through the appointment window search, refer to the Toolbar **SEARCH (instructions on pg.3)**

6) Update Type as necessary: **Case Conference, Phone Visit, In-Person Visit, New Patient, etc.**

MASTER RECORD and UPDATING PATIENT DEMOGRAPHICS

To view/edit patient information, you are able to access the Master Record through: scheduled appointments, Search or in the eChart. During each appointment, take a look through the existing record and confirm demographic information is current and accurate.

08:00	
08:15	
08:30	
08:45	
09:00	Test,Annett E2 E In B Rx
09:15	
09:30	
09:45	

Patient Search

Name: test, ann Search In

Results based on keyword(s) : test, ann

Demographic No.	Module	Name	Chai No.
52762	E B Rx	Test, Annette	

MRP DR. NEHA BHUPTANI TEST, ANNETTE

Preventions	Social History
Flu ... 08-Feb-2018	
HepA ... 08-Feb-2018	
HIV ... 08-Feb-2018	
MAM ... 08-Feb-2018	
H1N1 ... 05-Jan-2018	
Tickler	Ongoing Conco
Disease Registry	

Master Record

Appointment

Appointment History

Waiting List

Billing

Billing History

Create Invoice

Flu Billing

Hospital Billing

Add Batch

Billing

Add INR

Bill INR

Outside Use

Clinical Modules

Consultations

Prescriptions

E-Chart +

Preventions

Tickler

Send a Message

Add Patient Set

Resources

Documents

Add Document

Current eForms

Add eForm

TEST, ANTON M 4 years Next Appointment:

PATIENT 52762 | ABOUT

Name: Search Inactive All

52762 | EDIT

DEMOGRAPHIC

Last Name: Test
 First Name: Anton
 Preferred Name:
 Title:
 Sex: M
 Age: 4 (DOB: 2017-05-09) (yyyy-mm-dd)
 SIN:
 Language: English
 Patient Discovered Clinic VIA:

OTHER CONTACTS: MANAGE CONTACTS

Relationship Name Preferred Contact

CLINIC STATUS (ENROLLMENT HISTORY)

Enrollment Status:
 Date Enrolled:
 Termination Date:
 Patient Status: AC
 Patient Status Date: 2021-05-11
 Chart Number:
 Cytology #:
 Date Joined: 2021-05-11
 End Date:
 PHU:

PATIENT TYPE

Termination Date:
 Patient Status: AC
 Patient Status Date: 2017-11-29

ALERT

pick up ODSP package!!

Rx INTERACTION WARNING LEVEL

PHONE #s: Update this information at EVERY appointment. Can include case mgr, shelter, or alternate contacts.

Phone Comment: A note must be provided if the patient has acknowledged consent re: leaving vm msgs, speaking with relative or sharing information with support workers.

Email: If preferred, upload consent to eChart

Address: Put NFA if no permanent address is available.

Health Ins. #: This will autofill on all of the patient's referrals, requisitions and consultation requests. Include all OHIP/non-Ontario/IFH documentation and scan copies to upload into the patient's Documents.

Alt. Provider 1: dropdown menu to indicate the ICHA clinician or mobile team (most) involved in a patient's care.

Use Enrollment Status: dropdown menu to indicate which ICHA clinic site a patient is (most) associated with.

Adjust Patient Status: from Active (AC) to acknowledge transfers (T) and deaths (D)

Update ALERT to appear in appointment window as needed

Document anyone patient has consented to contact in Other Contacts: through "Manage Contacts".

SHORT CUTS, DOCUMENTS and APPOINTMENT HISTORY

Access patient Documents and upload scanned records

---Add Document +Add Link +Add HTML

Select Type: Add New Enter Title Old Date (yyyy/mm/dd): 2018/05/07

Browser: No file selected.

Report Class: Select Class Report SubClass: Restrict to current program

Add Cancel

Document Description	Content	Type	Creator	Responsible	Date	Reviewer	View Status	Published
test		png photo	OSCARDOC, DOCTOR		2018-01-17			T

View patient's Appointment History

History Results for Demographic: TEST,ANNETTE(52762)

APPT DATE	FROM	TO	Status	Type	REASON	PROVIDER	COMMENTS	Location
2018-03-20	09:00:00	09:14:00	To Do			Test,Ann	To Do	SMHA
2018-02-08	09:00:00	09:14:00	To Do			Zikman,Sharon	To Do	Hope Clinic
2018-01-03	08:00:00	08:14:00	To Do			Ravestein,Alena	To Do	agncourt Community
2018-01-02	10:00:00	10:29:00	To Do			Ravestein,Alena	To Do	East-03
2017-11-20	10:00:00	10:14:00	To Do			Chopra,Sabeena	To Do	Sistering

SEARCHING for EXISTING ICHA PATIENTS

ICHA's EMR database houses the records of 4000+ patients.

Even if it is your first interaction with the client, it is more than likely that a chart already exists within OSCAR Pro. To prevent missing essential information we rely on a thorough search prior to creating a new patient record.

The screenshot shows the top navigation bar with the following items: Schedule, Caseload, Resources, Search, Report, Billing, Inbox*, Msg, Consultations, ConRep. The 'Search' button is highlighted with a green box. A callout box points to the 'Search' button with the text: "Search is found in the top tool bar of OSCAR's main schedule page (the screen that opens upon login)".

Below the navigation bar, there is a search interface with a dropdown menu set to 'Name', a text input field containing 'tes, ann', and buttons for 'Search', 'Inactive', and 'All'. The 'All' button is highlighted with a blue box. To the right, there are links for 'Help' and 'About'.

The search results are displayed as follows:

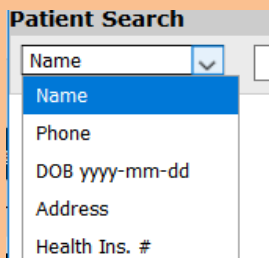
Results based on keyword(s) : tes, ann

Demographic No.	Module	Name	Chart No.	Sex	DOB yyyy-mm-dd	Doctor	Roster Status	Patient Status	Phone	Site
52762	E B Rx	Test, Annette		F	1989-12-13			AC	905-	
982	E B Rx	Test, Annie		F	1990-09-01		RO	AC	905-345-2351	Inner City Family Health Team

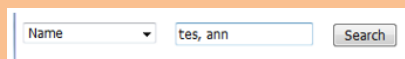
*Sorts by demographic number
¹Sorts by last name

[Create Demographic](#)

- Using the Search dropdown select from an identifier.



- Enter **Name** (las,fir), **DOB**, **OHIP** or **Phone** etc. into corresponding text box depending on the identifier that has been selected.



Click [Search](#)

- Exhaust all identifier options. Still No results? Click [All](#) to include inactive clients.

- If the patient is still not found –



Refer to instructions on **pg. 4** to learn how to enter pertinent demographic information on a new Master Record.

CREATING A PATIENT CHART

If a patient seems unfamiliar or has told you that they have never been to your clinic site before, this may be accurate but ICHA provides servicethroughout the city. It is important to thoroughly *Search* (pg.3) prior to creating new patient records. Please take note of the steps and guidelines below:

Although not necessary to access ICHA's services, ask patient to please provide ID/documents to ensure spelling and insurance details are accurate. Upload these documents to the chart (see pg. 2 and 9-11 for uploading instructions)

DEMOGRAPHIC
 Last Name: Test
 First Name: Anton
 Preferred Name:
 Title:
 Sex: M
 Age: 4 (DOB: 2017-05-09) (yyyy-mm-dd)
 SIN:
 Language: English
 Patient Discovered Clinic VIA:

OTHER CONTACTS: MANAGE CONTACTS
 Relationship Name Preferred Contact Responsibility Notes

CLINIC STATUS (ENROLLMENT HISTORY)
 Enrollment Status:
 Date Enrolled:
 Termination Date:
 Patient Status: SCOUT, ACTIVE
 Patient Status Date: 2021-05-11
 Chart Number:
 Cytology #:
 Date Joined: 2021-05-11
 End Date:
 PHU:

PATIENT TYPE
 Patient Type:
 External ID:

DEMOGRAPHIC GROUP

ALERTS
 Booking Alert: test alert
 Chart Alert: test alerts

MINIMUM REQUIRED INTERACTION WITH PATIENT

PAPER CHART
 Archived:
 Archive Date:
 Program which Archived:

CONTACT INFORMATION
 Phone(H)(History): 905-
 Phone(W)(History):
 Cell Phone(History):
 Phone Comment:
Residential
 Address(History):
 City: Toronto
 Province: ON
 Postal:
 Email:
 Show email on Consults: no
 Newsletter: Unknown

HEALTH INSURANCE
 Health Ins. #:
 Health Card Type: ON
 Effective Date:
 Renew Date:

INTERNAL PROVIDERS
 MRP:
 Alt. Provider 1: SUB HUB, Team
 Alt. Provider 2: SCOUT, ACTIVE

PATIENT CLINIC STATUS
 MRP:
 Alt. Provider 1: SUB HUB, Team
 Alt. Provider 2: SCOUT, ACTIVE
 Alt. Provider 3:
 Referral Doctor:
 Referral Doctor Phone #:
 Referral Doctor Fax #:
 Referral Doctor Private Phone #:
 Referral Doctor Address:

Annotations:

- Add legal name to first/last sections to prevent barriers when accessing OHIP** (points to Demographic fields)
- Communicating via Email will require a signed consent (available in eDocs)** (points to Contact Information)
- Enter insurance information (OHIP, UCI for IFH, out-of-province) and select type.** (points to Health Insurance)
- Enter Expiry and Effective dates for UCI/Refugee Claimant Information. Upload IFH documentation to the chart.** (points to Health Insurance)
- Document key contacts and supports in "Other Contacts:" by clicking "Manage Contacts". A new window will pop up. Click "Add", input relevant info including, importantly, the presence or absence of consent, and "Save".** (points to Manage Contacts window)
- Assign patients to providers and mobile teams by selecting them from the Alt Provider 1: dropdown menu.** (points to Alt. Provider 1 dropdown)
- Add as much information as possible. Things like Spoken Language, Country of Origin etc. can all be used to gather crucial data for improving tools and services available to our partners.** (points to Demographic fields)
- Assign patients to sites by selecting the site from the Enrollment Status: dropdown menu. This provides clarity when searching, performing privacy audits and for caseload reasons.** (points to Enrollment Status dropdown)
- ALERTS**
 Booking Alert: test alert
 Chart Alert: test alerts
- Always ask for up-to-date contact information at every appointment and provide phone comments. Examples: "Ok to leave voicemail", "Give appt info to Mom", "Caseworker: 555-5555"** (points to Contact Information)
- Assign text to appear in the appointment window using the Alert: section of the Master Record to communicate with your team.** (points to Alert field)

ALWAYS ask for up-to-date contact information at every appointment and provide phone comments. Examples:
 "Ok to leave voicemail"
 "Give appt info to Mom"
 "Caseworker: 555-5555"

Assign patients to providers and mobile teams by selecting them from the **Alt Provider 1:** dropdown menu.

Add as much information as possible. Things like **Spoken Language, Country of Origin** etc. can all be used to gather crucial data for improving tools and services available to our partners.

Assign patients to sites by selecting the site from the **Enrollment Status:** dropdown menu. This provides clarity when searching, performing privacy audits and for caseload reasons.

Add text to appear in the appointment window using the **Alert:** section of the **Master Record** to communicate with your team.

Alert: need new phone #

MAKE AN APPOINTMENT (Alena Ravestein)

Date(Mon): 2018-04-09

Start Time: 09:00

Duration: 15

PRINTING LABELS and ASSIGNING a SITE

Also in the Master Record, OSCAR Pro users will need to assign records to the site they are connected with.

There is also a label printing function available that can be used when collecting specimens at your clinic site.

08:00	
08:15	
08:30	
08:45	
09:00	Test,Annett E2 E In B Rx
09:15	
09:30	
09:45	

Patient Search

Name Search

Results based on keyword(s) : test, ann

Demographic No.	Module	Name	Cha No.
5276	E B Rx	Test, Annette	

MRP DR. NEHA BHUPTANI TEST, ANNETTE

Preventions	Social History
Td ... 08-Feb-2018	
HepA ... 08-Feb-2018	
HIV ... 08-Feb-2018	
MAM ... 08-Feb-2018	
H1N1 ... 05-Jan-2018	
Tickler	Ongoing Conco
Disease Registry	

TEST, ANTON M 4 years Next Appointment:

PATIENT SEARCH

ABOUT

Name Search

(217) Exit

<p>DEMOGRAPHIC</p> <p>Last Name: Test First Name: Anton Preferred Name: Title: Sex: M Age: 4 (DOB: 2017-05-09) (yyyy-mm-dd) SII: Language: English Patient Discovered Clinic VIA:</p> <p>OTHER CONTACTS: MANAGE CONTACTS</p> <p>Relationship Name Preferred Contact Responsibility Notes</p> <p>< ></p> <p>CLINIC STATUS (ENROLLMENT HISTORY)</p> <p>Enrollment Status: Date Enrolled: Termination Date: Patient Status: AC Patient Status Date: 2021-05-11 Chart Number: Cytology #: Date Joined: 2021-05-11 End Date: PHU:</p> <p>PATIENT TYPE</p> <p>Patient Type: External Id:</p> <p>DEMOGRAPHIC GROUP</p> <p>ALERTS</p> <p>Booking Alert: test alert Chart Alert: test alerts</p> <p>MINIMUM RX INTERACTION WARNING LEVEL</p> <p>PAPER CHART</p> <p>Archived: Archive Date: Program which Archived:</p> <p>Export this Demographic Exit Master Record</p>	<p>CONTACT INFORMATION</p> <p>Phone(H)(History): 905- Phone(W)(History): Cell Phone(History): Phone Comment: Residential Address(History): City: Toronto Province: ON Postal: Email: Show email on Consults: no Newsletter: Unknown</p> <p>HEALTH INSURANCE</p> <p>Health Ins. #: Health Card Type: ON Effective Date: Renew Date:</p> <p>PATIENT CLINIC STATUS</p> <p>Physician/MRP: Ashton, Ashton Nurse: Midwife: Resident: Referral Doctor: Referral Doctor Phone #: Referral Doctor Fax #: Referral Doctor Private Phone #: Referral Doctor Address: Family Doctor: Family Doctor Phone #: Family Doctor Fax #: Family Doctor #:</p> <p>NOTES</p> <p>SITES ASSIGNED</p> <p>PDF Envelope PDF Label PDF Address Label PDF Chart Label Print Label Client Lab Label</p>
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All patients will need to be assigned to the sites they have visited in the *Sites Assigned*: section. This can be found at the very bottom of the Master Record.

In a traditional clinical setting, patient information would be siloed based on the site they are affiliated with. In our case, ICHA patients may transition from one site to another; all depending on where they are staying or accessing services on that particular day. To create seamless access to charts, **Z ICHA Operations** site assignment connects all ICHA patients under one unified site.

Ensure each patient you encounter is attached to the site you're assigned to along with the **Z ICHA Operations** site option.

Laboratory specimen labels are available to OSCAR Pro users in the bottom right corner of a patient's Master Record. They will produce a label with the patient's name, OHIP and contacts all auto-populated. When printing, select your site's label maker from printer options or print as usual and secure to specimen.

TEST,ANNETTE CHART#:
HIN:12345678910 UCI SEX:U DOB:13/12/1989
123 Jane Lane Toronto,ON
HOME: 905-555-5555 CELL: 647-555-5555

<p>MINIMUM RX INTERACTION WARNING LEVEL</p> <p>PAPER CHART</p> <p>Archived: Archive Date: Program which Archived:</p> <p>Export this Demographic Exit Master Record</p>	<p>SITES ASSIGNED</p> <p><input checked="" type="checkbox"/> Eva's Place <input type="checkbox"/> Covenant House <input checked="" type="checkbox"/> Virtual Office <input type="checkbox"/> CMHA <input type="checkbox"/> Journey Home Hospice</p> <p>PDF Envelope PDF Label PDF Address Label PDF Chart Label Print Label Client Lab Label</p>
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USING the OSCAR PRO INBOX

The OSCAR Pro Inbox is where you will be forwarded documents from ICHA Operations pertaining to the care of ICHA patients

Schedule Caseload Resources Search Report Billing Inbox⁷⁹ ConRep

WELL FMR Group Search: [] or Del

Inbox (4)
Documents: 4 Labs: 0 HRMs: 0

Priority	Ack#	HIN	Patient Name	Sex	Result Status	Date of Test	Date Received
			AMANDA TEST	F		2021-11-02	2021-11-02

APPT HISTORY MASTER FILE eCHART RX PREVENTIONS

Provider: [Miles, Lindsay]

[Comment](#) [Message](#) [Task](#) [Print](#)

ACKNOWLEDGE FILE NEXT

Provider Status

Miles, Lindsay	Not Acknowledged	2022-04-25 14:05 PM	No
----------------	------------------	---------------------	----

Callouts:

- Select Inbox in OSCAR Pro top toolbar found above the clinic schedule.
- The Inbox window will then open and you'll be able to view the contents.
- Most items will be attached to patient and their chart. If there is a document marked Not, Assigned – Open the item, enter correct demographic and then click **Save**.
- Once you click on an item in your inbox, it will open the document in a separate window.
- Review linked providers, Flag Provider if you want to add someone to the dialogue.
- Review ongoing dialogue of comments created by linked providers. EXAMPLES: "patient aware", "booked f/u", "updated OHIP", "msg'd caseworker"

Use the shortcuts found near the bottom of the document window to perform the actions listed below:

APPT HISTORY MASTER FILE eCHART RX PREVENTIONS

Provider: [Miles, Lindsay]

[Comment](#) [Message](#) [Task](#) [Print](#)

ACKNOWLEDGE FILE NEXT

- File** – Remove item from your Inbox
- Comment** – Add a comment to document dialogue
- Acknowledge** – Both leave a comment and file
- Message** – Send a message through the patient's eChart
- Print** – Print the document (i.e., an appointment notification)
- Task** – Create a tickler associated with this patient

- eChart** – Open the attached patient's eChart
- Master File** – Open the patient's Master Record
- Appt History** – See which sites/providers they are affiliated with
- Rx** – Open the Medications section of the attached eChart
- Preventions** – Open Preventions in the attached patient's eChart

USING OSCAR PRO MESSENGER

Messenger is a secure, internal IM service that allows ICHA OSCAR Pro users to communicate with each other.

The screenshot shows the top navigation bar with tabs: Schedule, Caseload, Resources, Search, Report, Billing, Inbox, **Msg**, Consultations, and ConRep. Below this is a search bar for "Enter Health Card # or Demographic Name". The Messenger interface includes buttons for "Compose Message", "Manage Folders", and "Exit Messenger". A "SEARCH MESSAGES" button is highlighted. Below that, an "archive" button and "ARCHIVE MESSAGES" text are highlighted. A table of messages is shown with columns: Status, From, Subject, Date, and Patient.

Status	From	Subject	Date	Patient
read	Alena Ravestein	Re:Re:Re:ICHA -ACSA clinic supplies request	2018-04-09 12:57:12	
read	Stefan Baral	Re:Re:Re:Re:CT/Xray?	2018-04-09 11:30:07	
read	Michael Bartucci	Re:Re:Referral to peds hematology	2018-04-09 10:12:30	

ACCESS ARCHIVED and SENT MESSAGES

COMPOSING and SENDING an OSCAR PRO MSG

Click **Compose Message**

- 1 Enter *Subject* and body text
- 2 Select recipients from list of ICHA Sites and OSCAR users. Select site to send to all or individual recipients

The screenshot shows two columns of recipient selection. The left column has checkboxes for "Virtual Office", "Bond, Andrew", "Hill, RPN, Sasha", "Hirsch, Shannon", and "Ravestein, Alena". The right column has a checked "Virtual Office" checkbox and checkboxes for "Bond, Andrew", "Hill, RPN, Sasha", "Hirsch, Shannon", and "Ravestein, Alena".

- 3 If necessary, link message to a patient demographic by entering name (last, first) and clicking *Search Demographic*. This is quite useful because all messages attached to a demographic will appear in their eChart here:

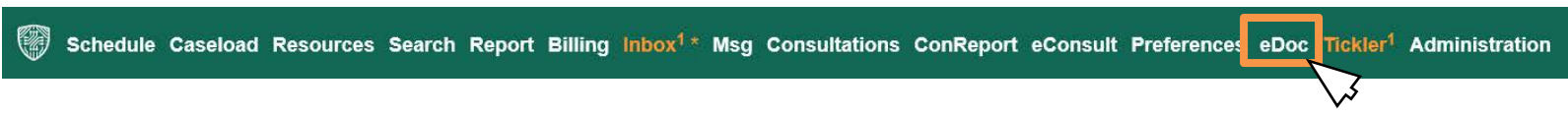
The screenshot shows an eChart with a "Lab result" section and a "Messenger" section. The "Messenger" section shows a message "Re:Test" dated "05-Jul-2019" and another "Test" dated "05-Jul-2019". Below the "Measurements" section, a "Selected Demographic" is listed as "none".

- 4 Click *Send Message* to send message and receive a copy in your inbox or, *Send & Archive* to send and archive the copy.

The screenshot shows the "Create a Message" form. It has a "Back To Inbox", "Clear New Message", and "Exit Messenger" buttons. The "Recipients" section (callout 4) lists various sites and users, with "Virtual Office" selected (callout 2). The "Message" section (callout 1) has a "Subject:" field. The "Link this message to ..." section (callout 3) has a text input field containing "test, annette" and a "Search Demographic" button. Below this, the "Selected Demographic" is "none", with "Clear Selected Demographic" and "Attach Demographic" buttons.

ACCESSING DOCUMENTS in eDocs

eDocs is a curated catalogue of handouts, consent forms, internal referrals and more that have been uploaded by ICHA users.



Your *Private Documents* are only visible to you.

eDocs Documents

+ Add Document + Add Link + Add HTML

-- RAVESTEIN, ALENA's Private Documents							View: All	View Status	Published
Document Description	Content	Type	Creator	Responsible	Date	Reviewer			
eSignature	jpeg	signature	RAVESTEIN, ALENA		2018-03-20	- - -			T

-- Public Documents							View: All	View Status	Published
Document Description	Content	Type	Creator	Responsible	Date	Reviewer			
Sistering Psychiatry Referral	resource	ICHA	RAVESTEIN,		2019-10-30	- - -			T
Application for Accessible Pa Permit	handout				2019-09-11	- - -			T
ICHA Release of Information	forms				2019-07-22	- - -			T
Seaton House LTC Referral F eFillable PDF	others				2019-05-24	- - -			T
HOPE Release of Information	photo				2019-05-21	- - -			T
ICFHT Memory Clinic Referra	signature				2019-05-17	- - -			T
ICHA Referral for Dr. Amand eFillable PDF	Referral form				2019-04-24	- - -			T
FREE Psychotherapy Assessment for Refugees	ICHA Admin	pdf	ALENA		2019-04-22	- - -			T
Referral form - SMH Centre for Diabetes & Endocrinology	ICHA Referrals	pdf	HIRSCH, SHANNON		2019-02-28	- - -			T
The Monthly - Free Period Products					2019-02-22	- - -			T
Tufts University Sleep Hygeine					2019-01-23	- - -			T
ICHA Referral for Dr. Ty Turner - eFillable PDF					2019-01-11	- - -			T
On Board Referral Form - eFillable PDF		Referral form	RAVESTEIN, ALENA						T
Framingham vs Reynolds Risk Calculator (link)		resource	SVOBODA, TOMISLAV						T
Framingham Risk Calculator / Cholesterol Treatment (link)		resource	SVOBODA, TOMISLAV						T
Free and Low Cost Food Options			SVOBODA,						T

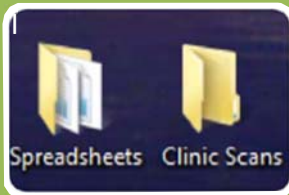
View Dropdown: The **View:** dropdown will allow you to narrow down the catalogue to find what you need. For example, if you're looking for a **Release of Information** or **Consent to use Email Communication** forms, you would select the **Consent Form** category. For ICHA's **Fax Coversheet** or **Incident Reporting Form** you would select **ICHA Admin**.

Document Interaction: Simply by clicking on the document name, you will open the item either in a web browser (html link) or a PDF Viewer (pdf)

Document Actions: The trash can icon will allow you to delete your uploaded document. The pen and paper pad will allow you to make edits (title, type etc.)

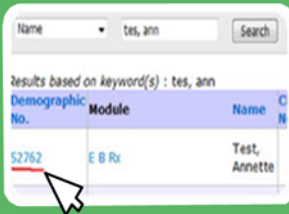
UPLOADING DOCUMENTS via the MASTER RECORD

There are times when an ICHA patient may come to an appointment with documentation (i.e. refugee claimant document, records from previous care etc.) or have documentation created during an appointment with a provider (i.e. requisitions, ODSP forms etc.).



Create a Clinic Scans Folder

- Add a "Clinic Scans" folder to your computer desktop
- Clear folder and empty recycle bin daily



Find Client on OSCAR

- Login to OSCAR and open *Search*
- Open the client's *Master Record* by clicking on the client's *Demographic No.*



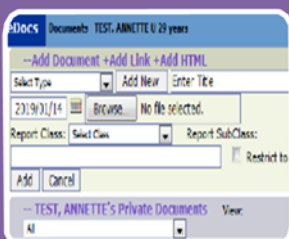
The Master Record

- It is essential to our partnership that the information here is accurate and up to date including;
 - * * Caseworker contacts, phone numbers and OHIP/IFH/UCI information



Add Documents

- Select *Add Documents* from the left-hand side (list of blue shortcuts - under *Resources*)
- Or, *Documents* to view items that have already been uploaded



Upload Document

- Select Type (legal, letter, Patient Info etc.)
- Enter Title (i.e. Letter of Support Signed by Dr. Tam, Refugee Claimant Document etc.)
- Click *Browse*, select file from Clinic Scans folder and click *Add*

All items that have been faxed during on behalf of ICHA clinic activity will need to be uploaded to a patient's chart. Reason being, if there are any discrepancies with the faxed document or transmission issues, ICHA's Operations team will be able to support and rectify as needed. Once a document has been uploaded, you have three options:

- 1) Safely discard into locked, secure shred bin
- 2) Return to patient (if it's part of their personal record, ie. Refugee Claimant Document)
- 3) Provide to patient (printed lab requisition, referral) *Stamp "Patient Copy"

UPLOADING MULTIPLE DOCUMENTS to the INBOX

You can upload multiple documents to be added to patient charts and use the eFax mechanism through the OSCAR Pro Inbox.

The screenshot shows the OSCAR Pro Inbox interface. At the top, there is a navigation bar with options: Schedule, Caseload, Resources, Search, Report, Billing, Inbox, and Ms. A callout points to the 'Inbox' link, stating: "Select Inbox in OSCAR top toolbar found above the clinic schedule." Below the navigation bar, there is a search field with the placeholder text "Enter Health Card # or Demographic Name".

The main content area is titled "Inbox (1)" and shows a table with columns: Priority, Ack#, HIN, Patient Name, Sex, Result Status, and D. A callout points to a green button labeled "UPLOAD NEW DOC" in the top right corner, stating: "The Inbox window will then open and you'll be able to view the contents. Click **Upload New Doc** in the top right corner."

Below the inbox table is the "Upload New Document" section. It asks "What type of document you want to upload?" and has three buttons: Documents, Labs, and HRM. A callout points to the "Documents" button, stating: "Select the type of document you want to upload."

Below the "Upload New Document" section is the "Upload Document Files" section. It has a "Destination: Pending Docs" dropdown and a "SUBMIT" button. A callout points to the "Upload Document Files..." link, stating: "Click **Upload Document Files...** and select files from your computer's Clinic Scans folder. A Clinic Scans folder should be created on your desktop to separate document scans containing PHI from other documents on your computer."

Overlaid on the "Upload Document Files" section is a Windows File Upload dialog box. The dialog shows the "Documents" folder with a list of files. The file "ICHA OSCAR Pro (EMR Guide)" is selected. A callout points to the "Open" button, stating: "Once you have selected all of the files you would like to upload, click **Open**".

Below the "Upload Document Files" section is another "Upload Document Files" section. It has three dropdown menus: "Destination: Pending Docs", "Queue: Default", and "Provider: None". A callout points to the "Provider: None" dropdown, stating: "Select your name in the **Provider:** dropdown."

At the bottom of this section is a "SUBMIT" button. A callout points to the "SUBMIT" button, stating: "Click **Submit** to begin upload of the selected scans to your inbox".

Inbox (5)

UPLOAD NEW DOC

Documents: 5 Labs: 0 HRMs: 0

<input type="checkbox"/>	Priority	Ack#	HIN	Patient Name	Sex	Result Status	Date of Test	Report Status
	—	0					2021-11-02	New
	—	0					2021-11-02	New
	—	0					2021-11-02	New
	—	0					2021-11-02	New
	—	0					2021-11-01	New

When upload is complete, reopen your Inbox. You will see all of the documents uploaded as not assigned with orange hazard signs.. Click on your first document.

ROTATE 90° ROTATE 180° SPLIT DELETE COVER

1 of 3



Referrals should be faxed to Streets to Homes: 416-397-5036
ATTENTION: MDOT INTAKE
 For Additional Information about MDOT you may contact 647-777-0130

MDOT Program Overview

The Multi-Disciplinary Outreach Team (MDOT) is a program funded through the City of Toronto Streets to Homes and works in partnership with: Toronto North Support Services, Fred Victor, CAMH.

Title: Test 1 Type: abnormal result

Observation Date: 2021-11-02 Flag as Abnormal

A1, TEST | Remove

Date	Start Time	Provider	Comments
2021-02-25	10:15 AM	I2, test	
2021-02-24	11:30 AM	I2, test	Notes
2021-02-24	9:10 AM	I1, test	

APPT. HISTORY MASTER FILE ECHART RX PREVENTIONS

Provider:

1017, alena

Comment Message Task Print

ACKNOWLEDGE

FILE

NEXT

Assign the uploaded document to a patient's chart by completing the following fields:

Document Type: Select from dropdown. (i.e. lab, prescription, referral, requisition etc.)

Document Description: Enter descriptive title. (i.e. Release of Information FAXED to CAMH, Lab Requisition FAXED to SMH, Completed ODSP)

Observation Date: Change if necessary.

Demographic: Enter in patient's last, first. Attach correctly** use DOB as confirmation.

Flag Provider: This will forward document to provider's inbox. Use as needed.

Click **File or Next** to move on to the next not assigned document in your **Inbox**. **This will only appear once you've attached a demographic.

Inbox (4)

UPLOAD NEW DOC

Documents: 4 Labs: 0 HRMs: 0

<input type="checkbox"/>	Priority	Ack#	HIN	Patient Name	Sex	Result Status	Date of Test	Date Received	Req. Physician	Discipline	Report Status
<input type="checkbox"/>	—	0		AMANDA TEST	F		2021-11-02	2021-11-02		abnormal r...	New
<input type="checkbox"/>	—	0		DEMO AUG	F		2021-11-02	2021-11-02		consult	New
<input type="checkbox"/>	—	0	9089642222	BETTY	F		2021-11-02	2021-11-02		MRI	New

After assigning all documents to their corresponding demographic, refresh/reopen your inbox. They have now been successfully attached to a patient's chart.

eFAXING DOCUMENTS via INBOX

You are able to fax documents using ICHA's efax system through the OSCAR Pro Inbox.

WFI | FMR Group

Search: Enter Health Card # or De

Select **Inbox** in OSCAR top toolbar found above the clinic schedule.

Inbox (4)

UPLOAD NEW DOC

Documents: 4 Labs: 0 HRMs: 0

<input type="checkbox"/>	Priority	Ack#	HIN	Patient Name	Sex	Result Status	Date of Test	Date Received	Req. Physician	Discipline	Report Status
<input type="checkbox"/>	—	0		AMANDA TEST	F		2021-11-02	2021-11-02		abnormal r...	New
<input type="checkbox"/>	—						2	2021-11-02		consult	New
<input type="checkbox"/>	—	0	9089642222	BETTY	F		2021-11-02	2021-11-02		MRI	New

Click on the document in your **Inbox** you're wanting to fax.

Faxing

Specialist:

Fax No: Enter Fax No. and hit Enter

FAX

Scroll to the bottom of the document

Faxing

Smith, Tracey 416-333-5555

Smith, Andrew 905-444-2222

Smith, Mark 905-222-1111

Smith, Mary 905-555-2222

Smith, Paul 416-222-5555

Smith, Frank 416-222-3333

Smith, Mary 416-333-2222

Select from **Specialist:** dropdown

- OR -

Faxing

Specialist:

Fax No: Enter Fax No. and hit Enter

FAX

Enter fax number manually into the **Fax No.** field and press Enter.

Faxing

Specialist:

Fax No: Enter Fax No. and hit Enter

Smith, Mary 905-555-2222 x

Joe, Heart 905-555-1234 x

Test, CorCare (4162223 x

FAX

Review fax numbers added (recipients of your document) and remove any should not be receiving this document.

Click **Fax** when ready to send.

CASELOAD and ENROLLMENT STATUS

Caseload allows you to view your patient and site line lists along with pertinent details like recent vitals and upcoming appts.

Schedule **Caseload** Resources Search Report Billing **Inbox³*** Msg Consultations ConReport eConsult Preferences eDoc **Tickler¹** Administration

Schedule Caseload Resources Search Report Billing **Inbox³*** Msg Consultations ConReport eConsult Preferences eDoc **Tickler¹** Administration Help | Log Out

WELL EMR Group Search: Enter Health Card # or Demographic Name

Notes: Search **Program:** All Programs **Provider:** All Providers **Rostered:** TEST **DxReg:** Search

Demographic Δ		Age	Sex	Last Appt	Next Appt	APPTS LYTD	Lab	Doc	Tickler	Msg	BMI	BP	WT	SMK	A1C	ACR	LD
[REDACTED]	E In B BHx M Rx T Msg	[REDACTED]	M	2020-04-22		4						125/89					
[REDACTED]	E In B BHx M Rx T Msg	[REDACTED]	F	2020-04-22		4											
[REDACTED]	E In B BHx M Rx T Msg	[REDACTED]	M	2020-04-25		4											
[REDACTED]	E In B BHx M Rx T Msg	[REDACTED]	M	2020-04-22		1											

Select from the dropdowns a combination of an individual provider with no roster site (view your own caseload) or all providers and an individual roster site (view a site's line list)

Example:
Provider: All Providers
Rostered: TEST
 Caseload view = all patients currently receiving care at TEST site.

Use the shortcuts to access areas of the patient's chart (Master Record, eChart and Msg)

To have a patient appear in a site caseload, they will need to be appropriately rostered/enrolled by editing their Master Record.

Enrollment Physician: Same as MRP

Enrollment Status: Add New

Date Enrolled: yyyy-mm-dd

To have a patient appear in your provider caseload (selecting your name in the **Provider:** dropdown). You will need to assign yourself as MRP or Alt Provider 1 in the patient's Master Record.

Health Card Type: ON-Ontario

Country Of Origin: -Not Set-

SIN:

Physician/MRP: Ashton,Ashton

Patient Status: AC - Active Add New

Midwife:

Referral Doctor: Search Name

Family Doctor: Search Name

Enrollment Physician: Same as MRP

Enrollment Status: Add New

Renew Date: yyyy-mm-dd

Cytology #:

Nurse:

Patient Status Date: 2021-05-11

Resident:

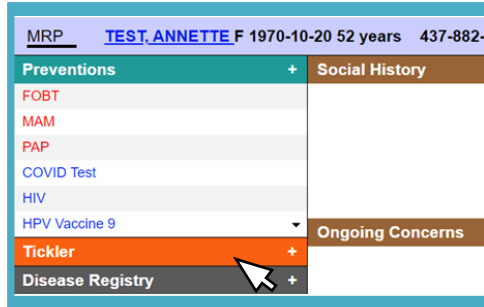
Referral Doctor #: Search #

Family Doctor #: Search #

Date Enrolled: yyyy-mm-dd

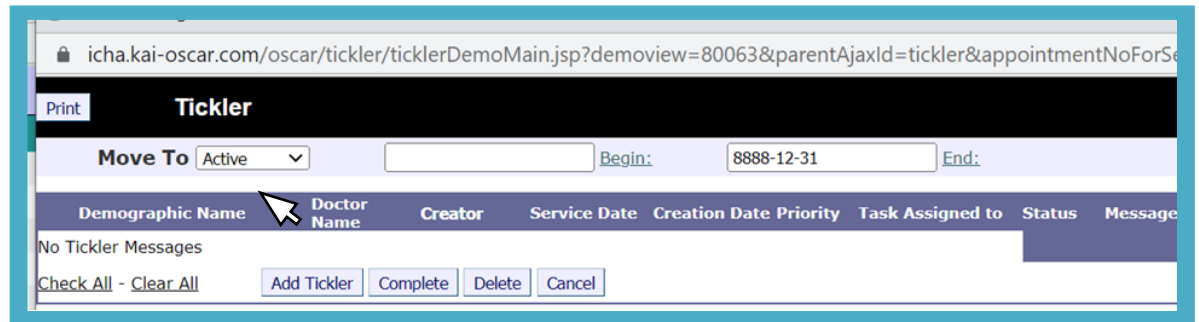
TICKLERS

The Tickler feature of the eChart will allow you to create "ticklers" or timed reminders for yourself or another OSCAR Pro user.

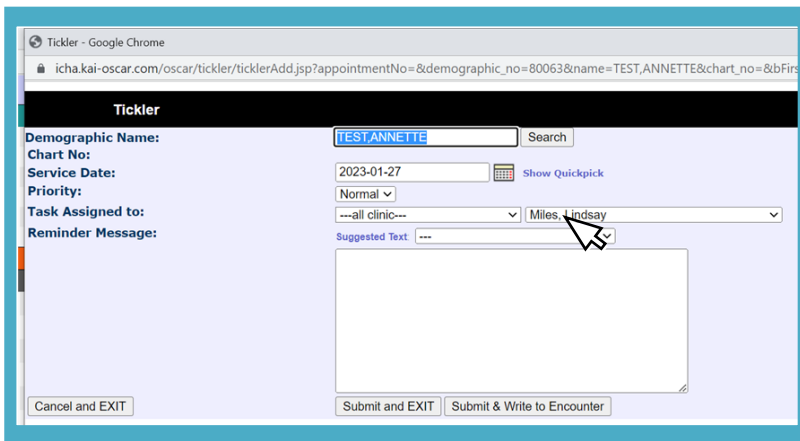


Click **Tickler** to open the module for a list of past and current ticklers associated with this eChart or + to create a new tickler associated with this eChart.

Click **Edit** beside a specific tickler to revise or update a tickler. Click on the *little notebook and pencil* to add a note. You can also add, complete, delete or cancel a tickler from this window.



View all ticklers associated with this eChart or filter by time frame or status (*Active, Completed or Deleted*).



Select the *service date, priority status* and *who the task is assigned to*.

Type a **Reminder Message**. Feel free to select from the drop down menu of Suggested Text.

Submit and EXIT to save the tickler or **Submit & Write to Encounter** to save the tickler and stamp in a new encounter note.

CREATING a SCHEDULE TEMPLATE

Here is how to create a schedule template on OSCAR Pro.

1 **Click Administration**

Schedule Caseload Resources Search Report Billing Inb³* Msg Consultations ConReport eConsult Preferences eDoc Tickler¹ Administration

WELL EMR Group Search: [Enter Health Card # or Demographic Name] GO

APPS HELP PORTAL

Thu, 2021-11-04 Calendar | Schedule | Today | HELLO ALENA 1017

Month HCV Enter Lastnan GO

W DS S 1017, alena(1)*
Click to add note

8:00
8:15
8:30

Administration Panel

Schedule Management >

2 **Select Schedule Setting from the Schedule Management menu**

Schedule Setting

Search/Edit/Delete Groups

Select a provider:

---None---

Or do:

Holiday Setting

Template Code Setting

Template Setting for Bond, Andrew

3 **Choose provider from dropdown and click Template Setting**

Provider: Redditt, Vanessa

TO EDIT: Choose existing template from dropdown and click Edit

FCJ | Redditt | Edit

4 **Or, start fresh by entering Template Name**

Add A Template

Template Name: V. Reddit Sisting (<20 chars)

Summary: [] Template Code

00:00					01:00					02:00					03:00				
04:00					05:00					06:00					07:00				
08:00					09:00					10:00					11:00				
12:00					13:00			K		14:00	K		K		15:00	K		K	
16:00	K		K		17:00					18:00					19:00				
20:00					21:00					22:00					23:00				

5 **Using the codes found in Template Code enter codes according to the physician's preferences and click Save**

Select a provider:

---None---

Or do:

Holiday Setting

Template Code Setting

Template Setting for Bond, Andrew

6

Return to *Schedule Setting* screen and *Select a provider*: from dropdown. The screen will automatically refresh to the next window.

SCHEDULE TEMPLATE SETTING

1. Use the current R Schedule or select a different one from the select field.

2. Type in the start date and end date for this R Schedule.

3. Check the day of week which is AVAILABLE.

4. Click the 'Next' button.

* Select R Schedule from the drop down list. Don't change the start date to update the R Sch.

Bond, Andrew

Delete

Date from: 2019 - 04 - 23 (yyyy-mm-dd) to: 2020 - 04 - 23

is available EVERY (Day of Week): Alternating Week Setting

<input type="checkbox"/>	Sun	NONE	<<
<input checked="" type="checkbox"/>	Mon	P:60 Queen AM Inner City Family Health Team	<<
<input type="checkbox"/>	Tue	NONE	<<
<input type="checkbox"/>	Wed	NONE	<<
<input type="checkbox"/>	Thu	NONE	<<
<input type="checkbox"/>	Fri	NONE	<<
<input type="checkbox"/>	Sat	NONE	<<

7

Enter begin/end dates in *Date from*; select schedule template, check day of week, select site and click << to copy template to selected day.

8

The schedule template you've selected will display on the right. A good tool to ensure you've selected the correct template. Once confirmed click *Next*

Next

SCHEDULE SETTING

1. Select the right month.

2. Click the date you want to specify.

3. Type in the schedule of that day in the pop-up window.

4. Repeat 1-4 until ...

5. Click the 'Next' button.

Bond, Andrew

effective (2019-04-23 - 2020-04-23)

last month 2019-4 next month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 P:60 Queen AM	2	3	4	5	6
7	8 P:60 Queen AM	9	10	11	12	13
14	15 P:60 Queen AM	16	17	18	19	20
21	22 P:60 Queen AM	23	24	25	26	27
28	29 P:60 Queen AM	30				

9

Confirm template has been attached to correct dates. Click on individual dates to open edit window. Once corrected/approved, click *Next*.

SCHEDULE SETTING - Mozilla Firefox

https://ficha.oscargco.com/oscar/sched

Date: 2019-04-01

Available: Yes No

Template: P: |

Location: Agincourt Community Services Association

CREATING a REPORT

Here is how to create a report in OSCAR Pro.

Report	Report By Template
Download From K2A	Report By Template Select a template:
Add Template	1. Appointment Report For Certain Patients Appointment Report For Certain Patients
Select a template:	2. Average Appointment Duration per Provider Returns a list Providers and their average appointment duration
Main Page	3. Average Appointment Duration per Site Returns a list sites and the average appointment duration
1. Appointment Report For Certain Patients	4. Billing OHIP File For All Providers Search by start date, end date
2. Average Appointment Duration per Provider	5. CDM Snapshot Snapshot by doctor for a time period
3. Average Appointment Duration per Site	6. CH-Report No. of appointments by date, provider CH-Report number of appointments by date, provider
4. Billing OHIP File For All Providers	7. CH-Report No. of cancelled appointments by date, provider CH-Report No. of cancelled appointments by date, provider
5. CDM Snapshot	8. CH-Report No. of male/female by site, date, provider CH-Report number of male/female by siteId, date, providers
6. CH-Report No. of appointments by date, provider	9. CH-Report No. of patients by date, provider and date of birth CH-Report No. of patients by date, provider and date of birth
7. CH-Report No. of cancelled appointments by date, provider	
8. CH-Report No. of male/female by site, date, provider	
9. CH-Report No. of patients by date, provider and date of birth	

4 Scroll down to view the full list of existing report templates and click on the title of the desired template to open. **To edit a template or create a new one, contact ICHA Operations.**

5 Complete steps according to the data you wish to collect (site, date range, etc.) and click **Run Query**. **Export to CSV** for the raw data and **Export to XLS** for a Microsoft Excel file.