



EHRflow: Guide for New Users

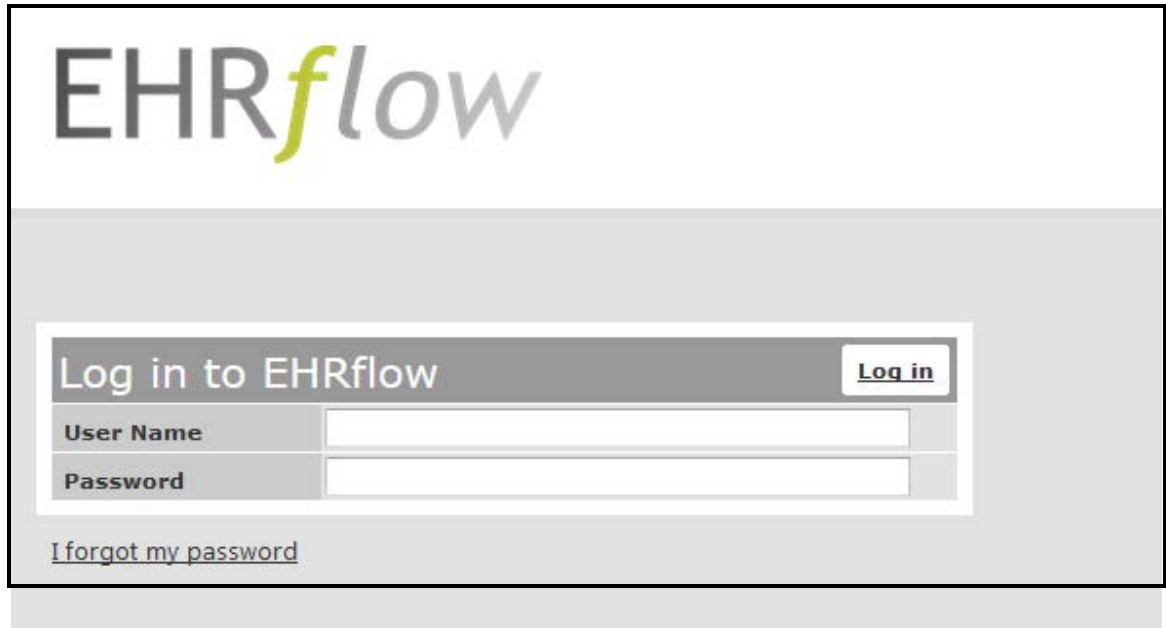
Document Updated: October 16, 2015
Release 14.0

EHRflow Guide for New Users – Table of Contents

1	Logging in for the first time	3
2	Getting started with EHRflow	3
	a. Create Users	3
	b. Confirm new users.....	4
	c. Update your clinic information.....	4
3	Adding Clients	4
4	Using the Calendar	5
5	Additional Resources	7

1. Logging in for the first time

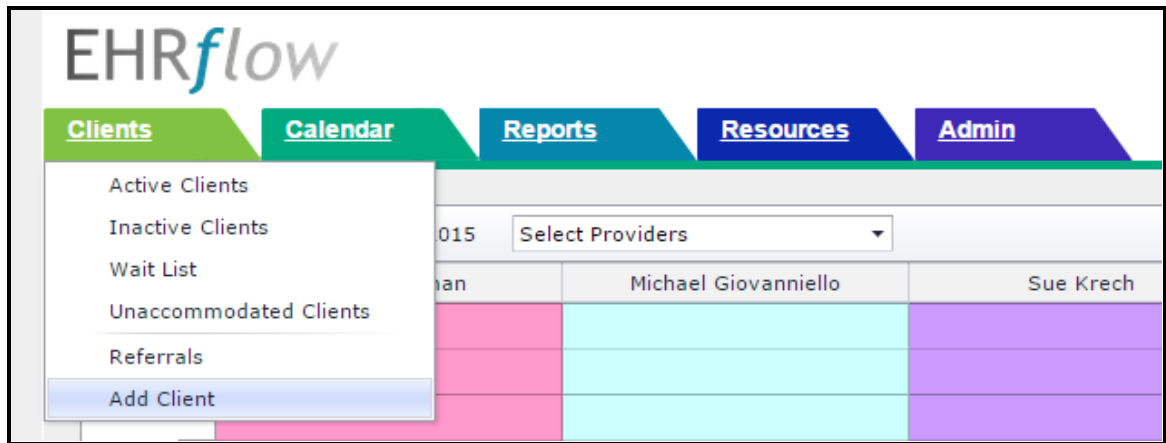
- a) You will get an email from EHRflow
- b) Click on the link in the email message
- c) Enter your temporary password as it is displayed in the email message
- d) Change the temporary password to one that you will more easily remember
- e) Log in with your new password



The screenshot shows the EHRflow login interface. At the top, the EHRflow logo is displayed. Below the logo is a login form with a dark header that says "Log in to EHRflow" and a "Log in" button. The form contains two input fields: "User Name" and "Password". Below the form is a link that says "I forgot my password".

2. Getting started with EHRflow

- A. **Create users** – these will be other midwives in your clinic as well as any administrative staff you may have in the clinic:
 1. Navigate to the *Admin Tab*
 2. Select *User Profiles*.
 3. Click on the 'Add User' button

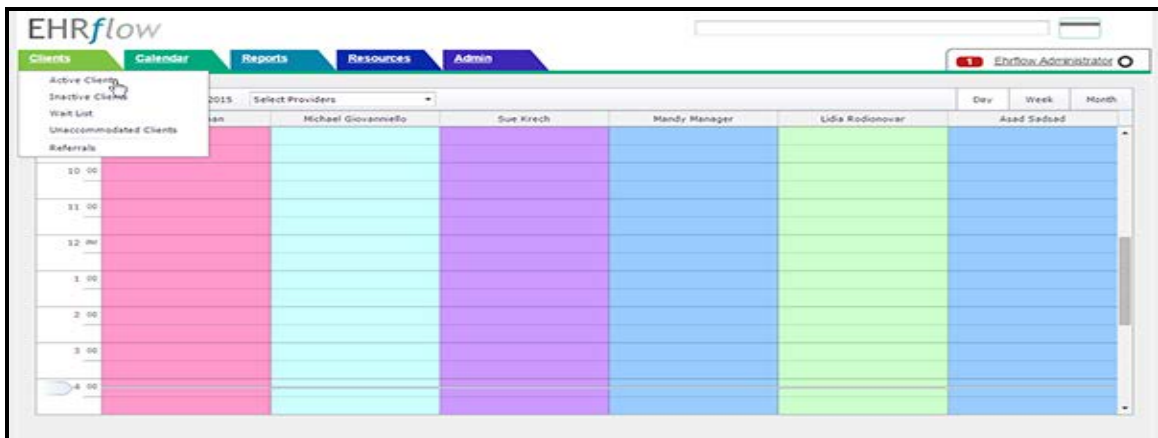


- B. **Confirm new users** - these newly created users will get a welcome email as well. You should make sure they log in and change their passwords. Please take note that temporary passwords expire in 2 days.
- C. **Update Clinic Information :**
 1. Navigate to the *Clinic* page and **check that your clinic information is correct**. We set up your clinic for you with the telephone/address/fax information you provided to us.
 2. If there is any pertinent information missing, you should add it here. If your practice has more than one clinic, **please add the additional clinics here**.

Active Clinics for this Account								Add Clinic
Clinic Name	Address	Phone	Email	City	Province	Country	Postal Code	
Workaround Clinic for Computing	47 International Blvd	(416) 620-0030	info@ehflow.ca	Etobicoke	Ontario	Canada	M9W 6H3	
Workaround SouthWest	179 Lakeshore Road East	(222) 333-4444	WASW@ehflow.ca	Mississauga	Ontario	Canada	L5G 4T9	
WorkAround Costa Rica	332 San Pedro Street	(760) 760-7607	wacostarica@sunshine.com	San Jose	Ontario	Costa Rica	079789	

3. Adding Clients

- a) Mouse over the *Clients* tab and go to the *Active Clients* grid.



- b) Click on the 'Add Client' option. This will take you to the Form where you can add client information. *Client Name, Gender, Date of Birth, Primary Provider, Preferred Phone* and at least one phone number are **required fields**. All other fields are optional.

The screenshot shows a web form titled 'Client' with a green header. In the top right corner of the header are buttons for 'Swipe Health Card', 'Back', and 'Save'. The form is organized into several sections:

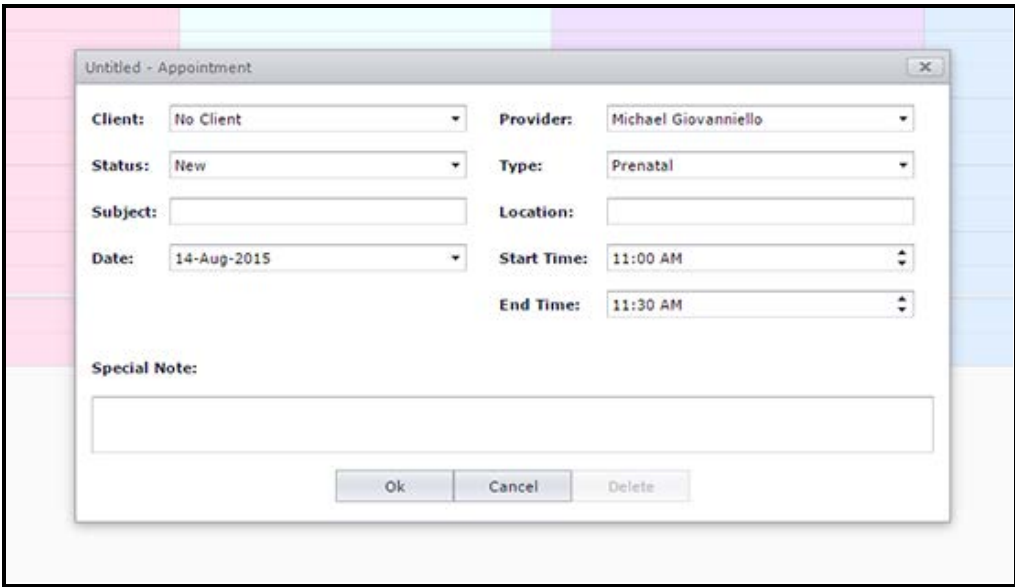
- Client Information:** Contains fields for 'Chart No', 'Prefix' (dropdown with 'Ms'), 'Name*' (split into 'First' and 'Last' with red error icons), 'Suffix', 'Gender*' (dropdown with '0' and a red error icon), 'Date of Birth*' (with a red error icon), and 'Country of Origin' (dropdown with 'Canada').
- Address:** Contains fields for 'Street Address', 'City', 'Postal Code', 'Province*' (dropdown with 'Quebec'), 'Country*' (dropdown with 'Canada'), and 'Address Type' (dropdown with 'Residence').
- Clinic Enrolment:** Contains 'Enrolment Status*' (dropdown with 'Waiting List') and 'Primary Provider' (dropdown).
- Health Card:** Contains 'Number' (with 'Number' and 'Version' sub-fields), 'Expiry Date', and 'Province' (dropdown).
- Contact:** Contains 'Home', 'Mobile', 'Work', 'Preferred Phone*' (dropdown with a red error icon), and 'Email Address'.
- Photo:** Contains an 'Upload Photo' field with a 'Browse...' button.

A note at the bottom of the form reads: '*Note: Chart Number will auto generate if left blank.*'

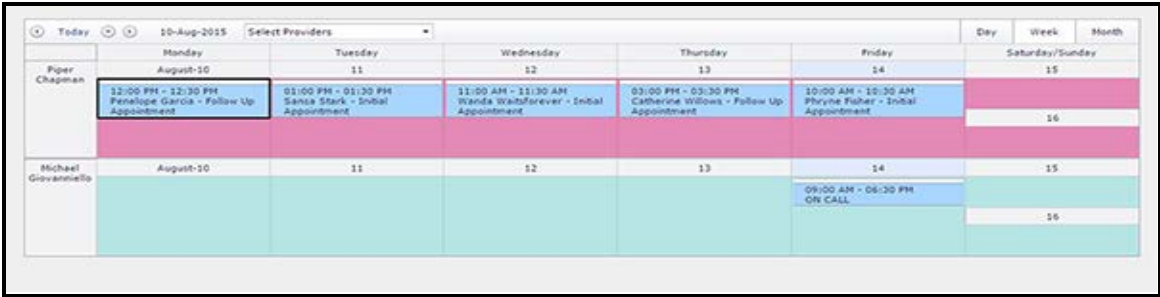
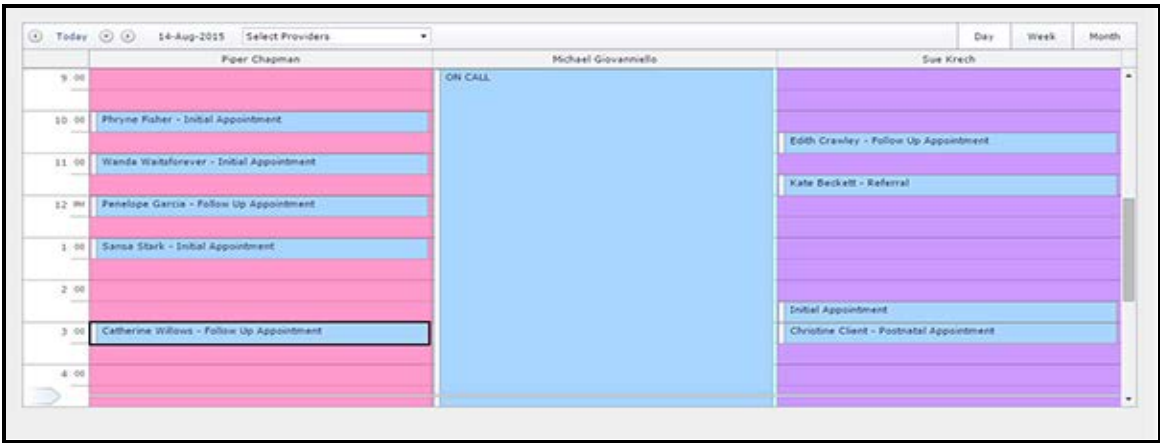
- c) If you already have a significant number of client records in electronic format, we may be able to assist you in importing them into EHRflow, so that you do not have to enter each client manually.

4. Using the Calendar

- a) You can start adding appointments to your calendar right away. Simply double-click on the time slot you want and fill out the client and the subject. You don't have to select a client in all circumstances. You can also book time off for lunch or staff meetings, or even a custom EHRflow demo!



b) You can easily view all your appointments on the calendar, using the day, week, and month views.



Today	09-Aug-2015							Select Providers	Day	Week	Month
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				
Piper Chapman	August-09	10	11	12	13	14	15				
		12:00 PM - 12:30 PM Penelope Garcia - Follow Up Appointment	01:00 PM - 01:30 PM Sanka Stark - Initial Appointment	11:00 AM - 11:30 AM Wanda WaitForever - Initial Appointment	03:00 PM - 03:30 PM Catherine Willows - Follow Up Appointment	10:00 AM - 10:30 AM Phryne Fisher - Initial Appointment					
	16	17	18	19	20	21	22				
		09:00 AM - 09:30 AM ON CALL	09:00 AM - 09:30 AM ON CALL	09:00 AM - 09:30 AM ON CALL	09:00 AM - 09:30 AM ON CALL	09:00 AM - 09:30 AM ON CALL					
	23	24	25	26	27	28	29				
		10:30 AM - 11:00 AM Edith Crawley - Follow Up Appointment	03:00 PM - 03:30 PM Christine Client - Postnatal Appointment	02:00 PM - 03:00 PM Initial Appointment		11:30 AM - 12:00 PM Kate Beckett - Referral					
	30	31	September-01	2	3	4	5				
	6	7	8	9	10	11	12				

5. Further Information

There are more User Guides and Instructions located under the Resources Tab of your EHRflow application, as well as on our website.

Resources				Add Resource	
Name	Description	Last Modified By	Modified On	Edit	Delete
User handout	Just testing	Ehrflow Administrator	25-Aug-2015 02:43 PM	Edit	Delete
Bug Report	Found a Bug in EHRflow? Report it here.	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
Forms FAQ	Instructions and information on working with PDF forms in EHRflow	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
Signing PDFs	Instructions for creating a PDF signature	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
College of Midwives of British Columbia	CMBC website	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
Midwives Association of British Columbia	BC midwives website	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
College of Midwives of Ontario	CMO website	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
Association of Ontario Midwives	AMO website	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
ICD-10 Code Lookup		Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
ICD-9 Code Lookup		Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
PDF Expert	Download PDF Expert For Your iPad or iPhone	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete
Office 365 Webmail	Ask Us How	Ehrflow Administrator	25-Aug-2015 01:29 PM	Edit	Delete