USER GUIDE FOR CSHARE ELECTRONIC HEALTH RECORD SYSTEM

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1. Introduction

Welcome to CShare Electronic Health Records system. This application is designed to help you and your health care office streamline record keeping processes and ease the paper burden. This application accounts for all documentation, test or prescription ordering, and appointment scheduling for the healthcare office. The following user guide will introduce you to the CShare system, including step by step guides for user actions, to help you start using CShare in your office.

2. Users

Credentials

Each user will have their own set of credentials. The user will use their email address as their username within the system. Each username must be unique, ensuring full confidentiality for patient health records.

Adding Users

Due to security issues, there is not a way to add users to the system within the application. In order to add users, contact the site's system administrator to add the user to the system. Please provide the administrator with the new user's first and last name, their email address, and if they are a staff member, a patient, or a provider. Due to the limitations on the system, the user can only have one role within the system. The administrator will contact the user to set up a password for the account and notify the new user when they are able to use the application.

User Roles

CShare provides three different types of users; staff, patients, providers. Each has their own view of the system and different actions that they can perform. Users can have only one role within the system and cannot switch in between roles.

Staff

The staff user is designed for a staff member in the healthcare office that is not a healthcare provider and takes care of the administrative tasks within the office. In CShare, staff members are allowed to see the office schedule for the day, schedule appointments for patients and providers, see information on all patients, and manage the billing of insurance companies.

Patients

The patient user is designed for those that have come to the healthcare office seeking the medical services. In CShare, they have the most limited view of the system. Patients are only allowed to edit their intake information forms and view their test results when they log in.

Providers

The provider user is designed for those that provide the healthcare services to patients; i.e. doctors, dentist, nurse practitioners. Within CShare, providers are allowed to document their visit with the patient, prescribe medications, refer patients to other providers, and order lab tests for the patient. Additionally, providers can view general information on the patient, tests that have been ordered, and see their personal schedule for the day.

3. User Actions

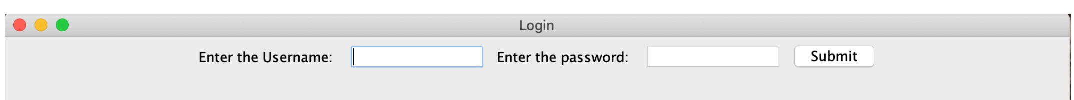
As mentioned previously, each of the user roles has their own actions that they can perform. The following sections provide step by step guides to these processes.

All User Actions

The following three options are available for all three users.

Login

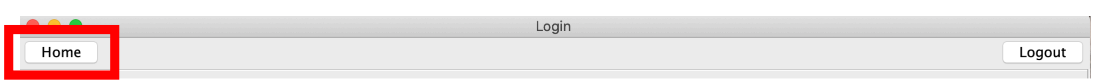
1. Start the application.
2. Enter your username into the username box.
    - This is usually an email address.
3. Enter your password into the password box.
4. Click the submit button.
5. Your application will redirect you to your home screen.



Return to Home

This action allows you to return to user's home screen from any user screen.

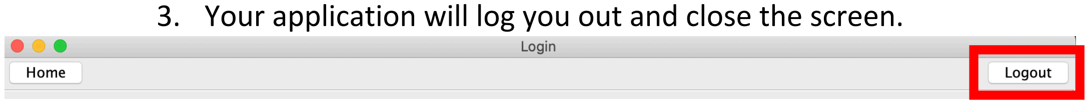
1. Locate the home button in the top right-hand corner of the screen.
2. Click the home button.
3. Your application will be redirected to the user home screen.



Logout

This action allows you to logout of the application from any user screen.

1. Locate the logout button in the top right-hand corner of the screen.
2. Click the logout button.
3. Your application will log you out and close the screen.



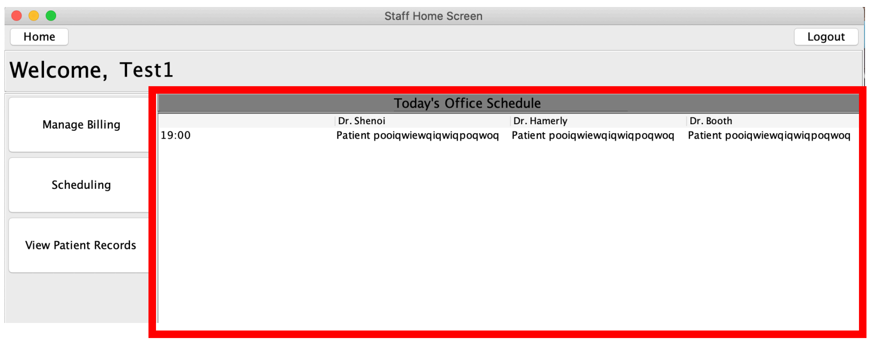
Staff Actions

The following options can only be performed by the staff users.

View All-Office Schedule

This action allows for the staff member to see the office schedule for the day.

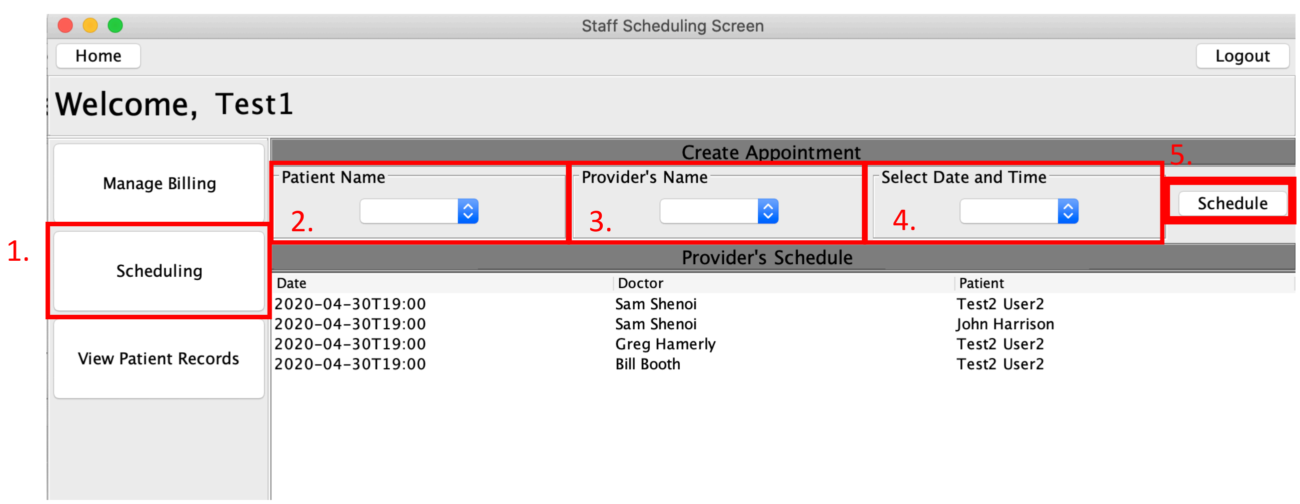
1. Navigate to the home screen by either logging into the system or by clicking the home button in the upper right-hand corner.
2. View the office schedule in the main panel.



Schedule an Appointment

This action allows for the staff member to schedule an appointment between a healthcare provider and a patient.

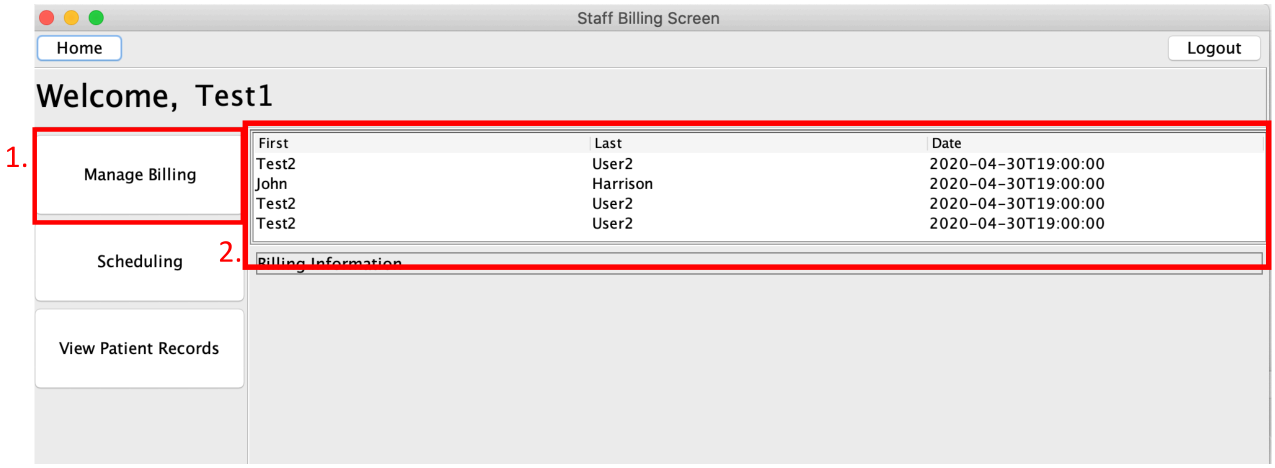
1. Navigate to the schedule screen by selecting the button labeled "Scheduling" on the left-hand side of the screen.
2. Select the patient from the Patient Name drop-down menu.
3. Select the provider from the Provider's Name drop-down menu.
4. Select the date and time for the appointment from the drop-down menu.
5. Click the Schedule button.
6. The appointment will appear in the schedule section.



Manage Billing

This action allows the staff to see when patient bills have been sent.

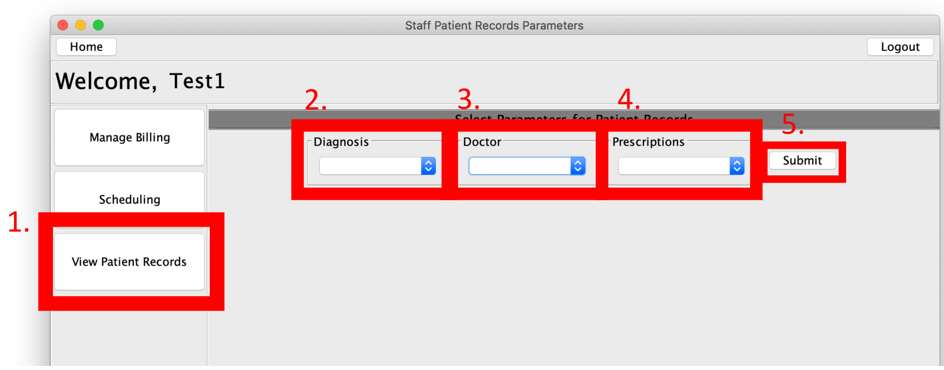
1. Navigate to the Billing page by selecting the button labeled "Managed Billing" on the left-hand side of the screen.
2. Patient's name and the date of the bill that was sent will be presented in the main panel.



View All Records

This action allows staff to filter patients based on three different criteria's; diagnosis, provider's name, and prescriptions. The page will filter the patients based on the given parameters.

1. Navigate to and select the View Patient Records button.
2. Determine what diagnosis you would like to filter based on, if any.
3. Determine what provider you would like to filter based on, if any.
4. Determine what prescriptions you would like to filer based on, if any.
5. After determining the proper filters, click the submit button

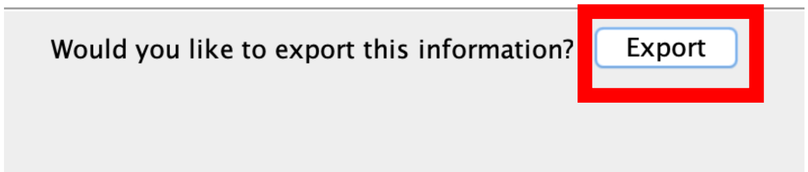


6. The application will generate a screen that shows all of the patients for the given criteria.
   - If there are no patients shown, then there were no patients that fit the given criteria.

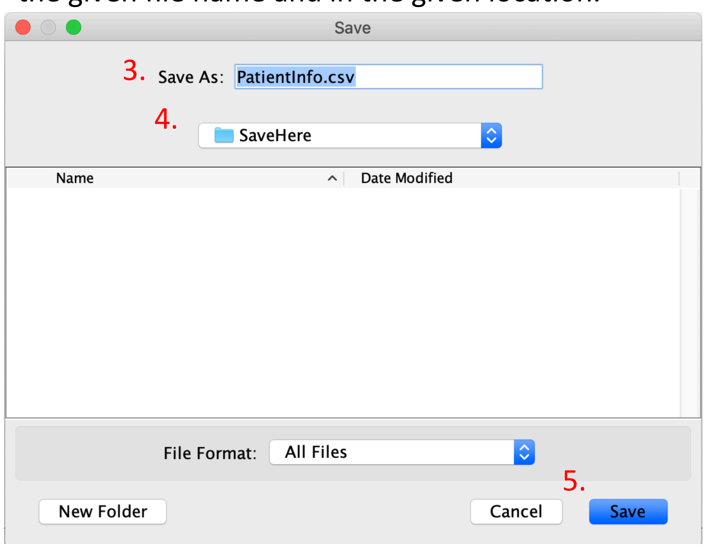
Export Patient Information

This action must be performed after filtering the patients based on diagnosis, provider, or medication.

1. Navigate to the bottom of the results page.
2. Select the export button.



3. In the pop-up field, enter the name of the file that you would like to create.
    - It is recommended that the file extension would be .csv to reflect how the information will be stored.
4. Select the location to store the file.
5. Select Save in the bottom of the screen
6. The application will generate a CSV file with the filtered information to the given file name and in the given location.



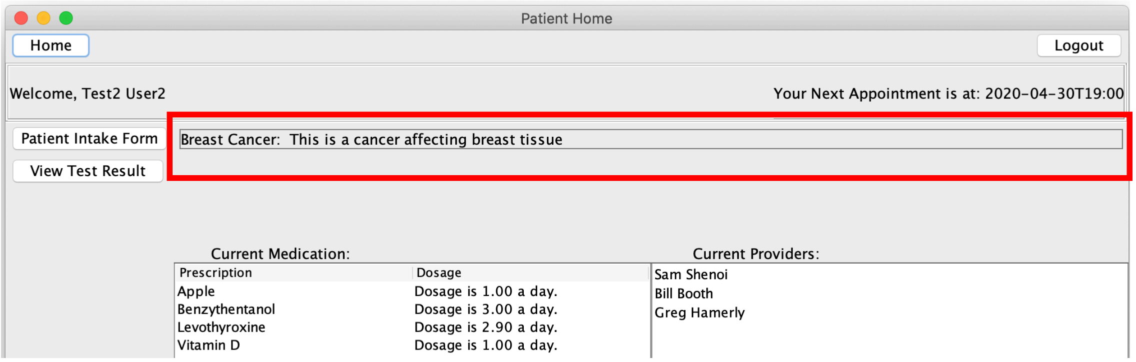
Patient Actions

The following actions can only be performed by the patient users.

View Current Diagnosis

This action will allow the patient to view their current diagnoses.

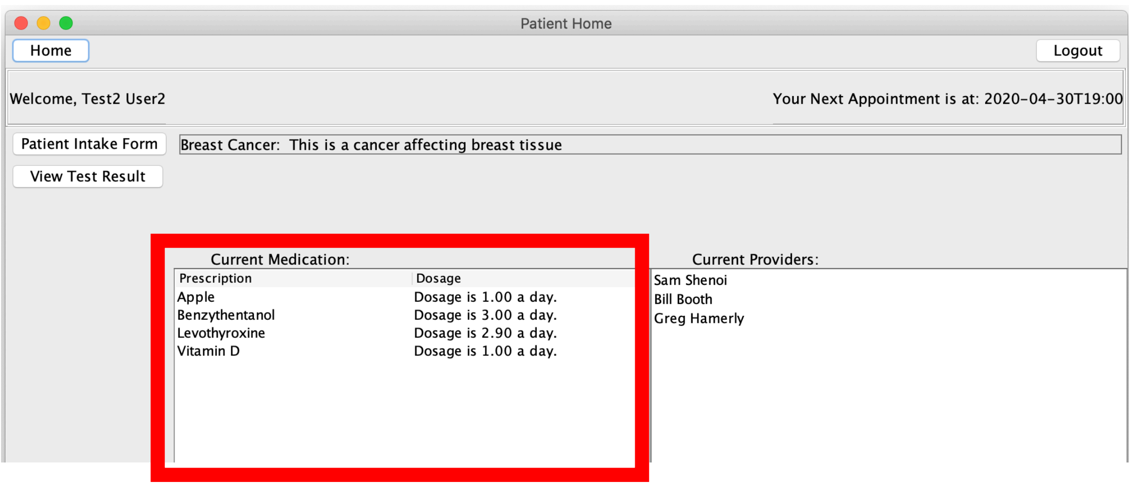
1. Navigate to the home screen by either logging into the system or by clicking the home button in the upper right-hand corner.
2. View current diagnoses within the top panel of the home screen.



View Current Medications

This action will allow the patient to view their currently prescribed medications.

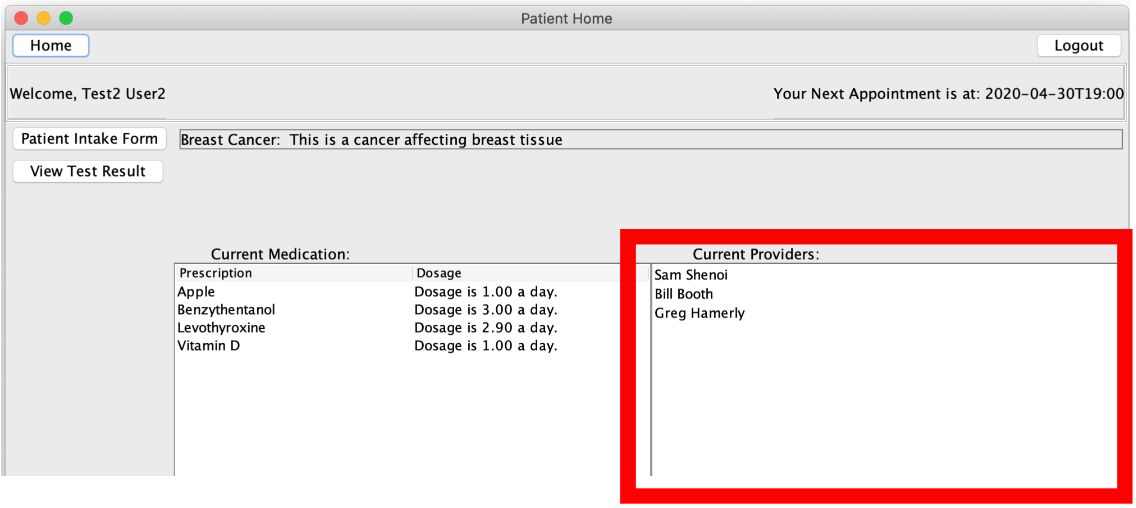
3. Navigate to the home screen by either logging into the system or by clicking the home button in the upper right-hand corner.
4. View your current medications in the lower left-hand corner of the main panel.



View Current Providers

This action will allow the patient to view their currently healthcare providers medications.

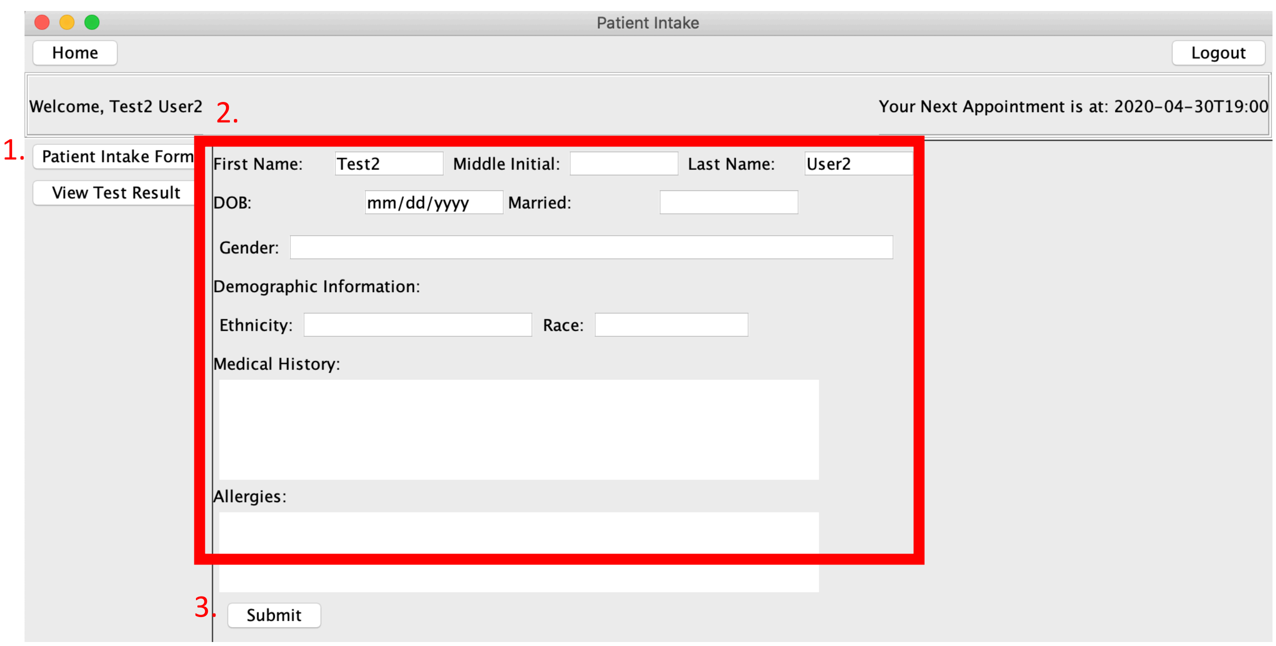
1. Navigate to the home screen by either logging into the system or by clicking the home button in the upper right-hand corner.
2. View your current medications in the lower right-hand corner of the main panel.



Fill Out Patient Intake Form

This action will allow the patient to fill out their basic intake information within the application.

1. Select the Patient Intake Form button on the left-hand side of the screen.
2. Fill out the text areas that are prompted for.
    a. If the Date of Birth field is not filled out and the submit button is selected, the text field will display as red.
3. Select the submit button when the form has been completely filled out.

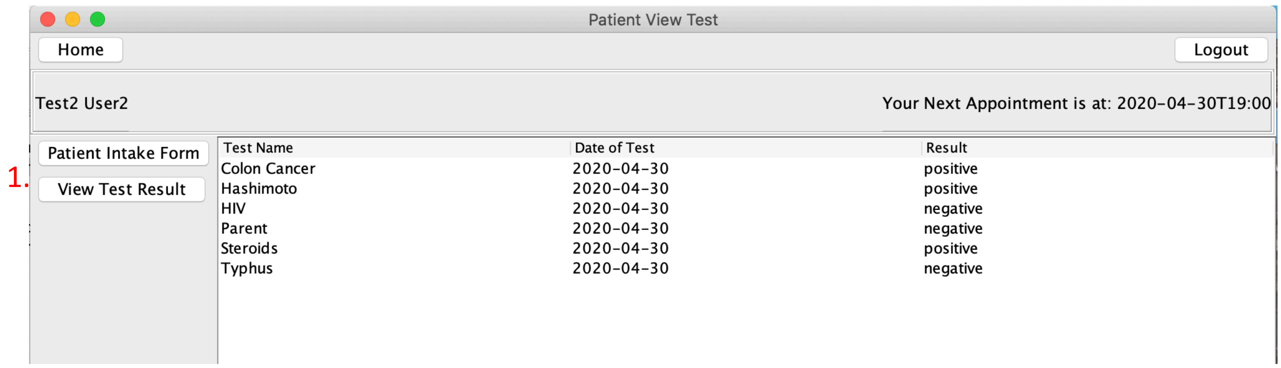


View Test Results

This action will allow the patient to view the results of the test that have been previously ordered.

1. Select the View Test Results button on the left-hand side of the screen.

2. The application will present all of the tests that have been requested and have results back.



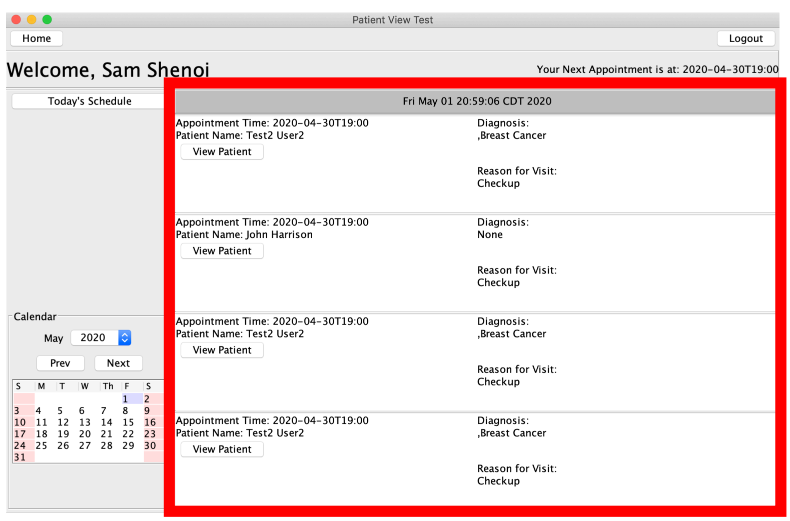
Provider Actions

The following actions can only be performed by the provider users.

View Schedule

This action will allow the provider to view their schedule for the day.

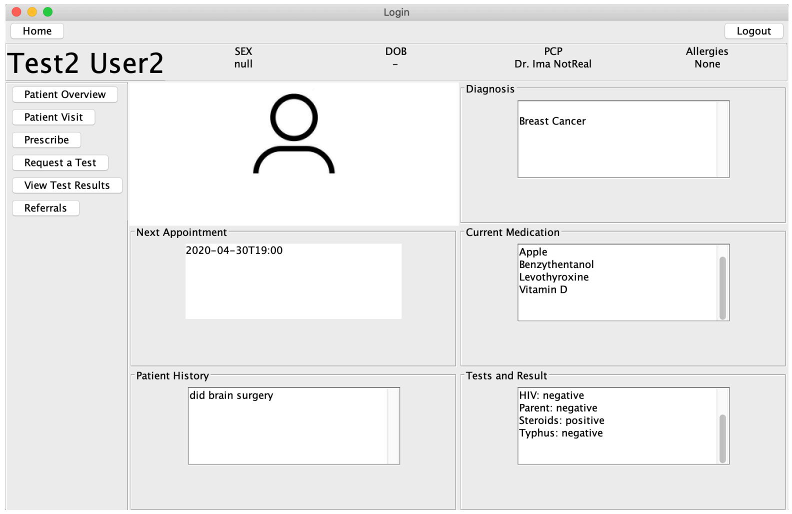
1. Navigate to the home screen by either logging into the system or by clicking the home button in the upper right-hand corner.
2. View the schedule for the day in the middle



View Patient Information

This action will allow the provider to the individual patient information.

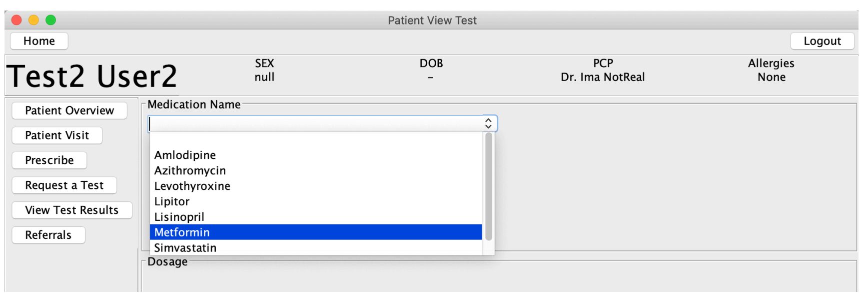
1. Navigate to the desired patient, either through the Schedule view, through patient look up, or through selecting the Patient Overview button.
2. Select the “View Patient” button.
3. The system will then move you to the patient overview screen.



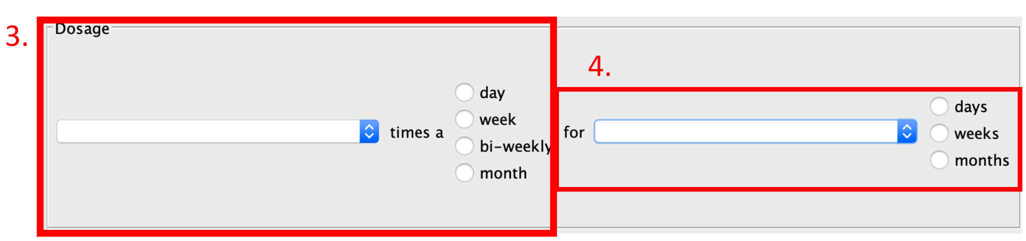
Prescribe

This action will allow the Provider to prescribe medication to the user.

1. Navigate to the Prescribe button on the left-hand side of the screen.
2. Select the medication to prescribe from the drop-down menu on the top panel.
    - This drop-down menu allows you to search all possible medication.



3. Determine the frequency of dosage by selecting the number of times for the medication to be taken and the time frame for the number of times.
4. Determine the length of the dosage by selecting the number and the time frame of the dosage.

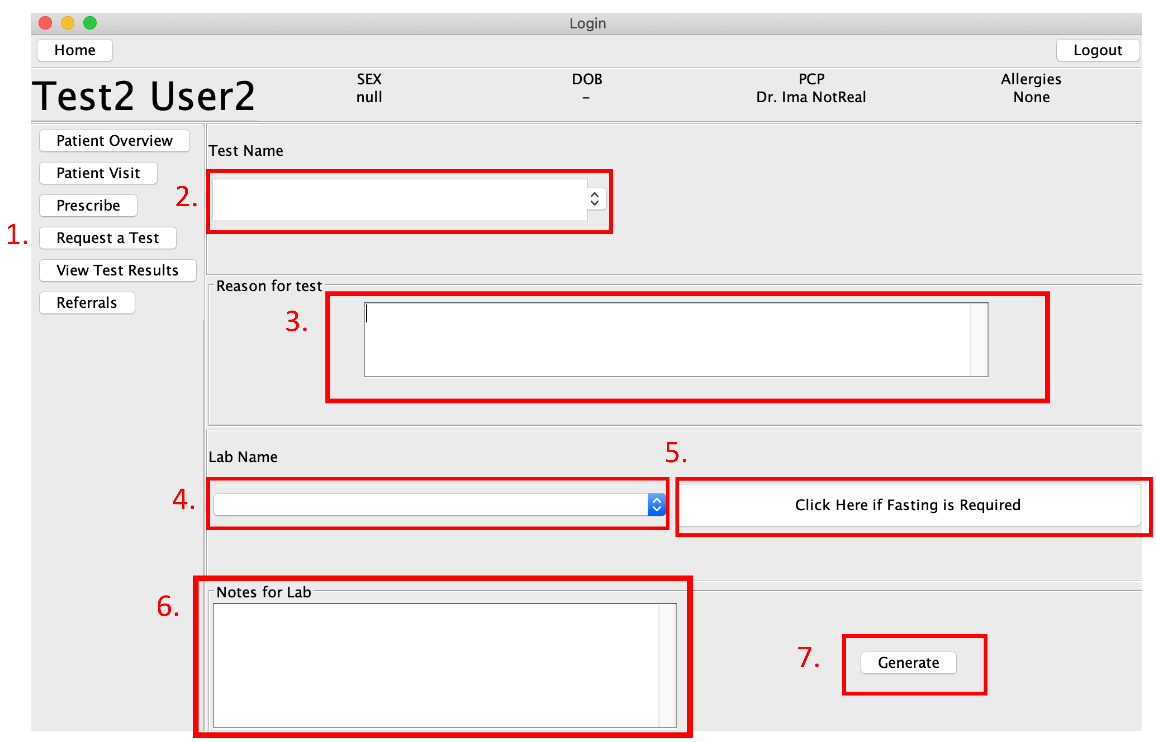


5. Providers can also add notes to the pharmacists to be included in the prescription.
6. Click the Print Prescription button to send the prescription to the pharmacy.
    - When the prescription is properly submitted, there will be a "Success" message shown.

Order a Lab Test

This action will allow providers to order lab tests for their patients.

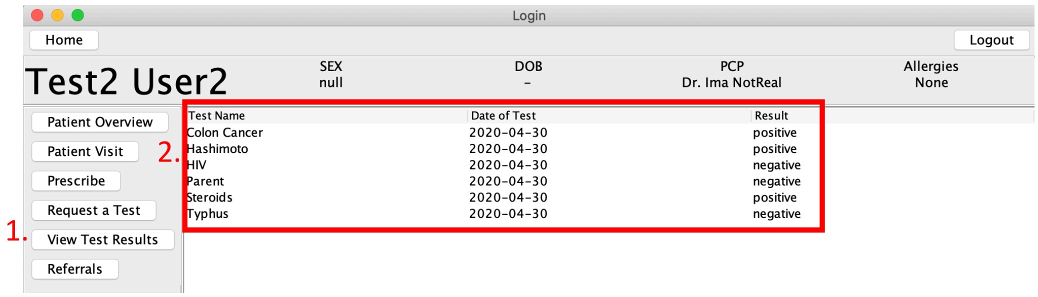
1. Navigate to the Request a Test button on the left-hand side of the screen.
2. Search for the test to be ordered in the test name box
3. List the reason for the test in the "Reason for Test" Box.
4. Select the name of the lab to send the request to.
5. Click the button if fasting is required for the test.
6. Add notes to the order if there is anything that the lab needs to know.
7. Select the "Generate" button to send it to the lab.



View Test Results

This action will allow providers to view the test results of the patient.

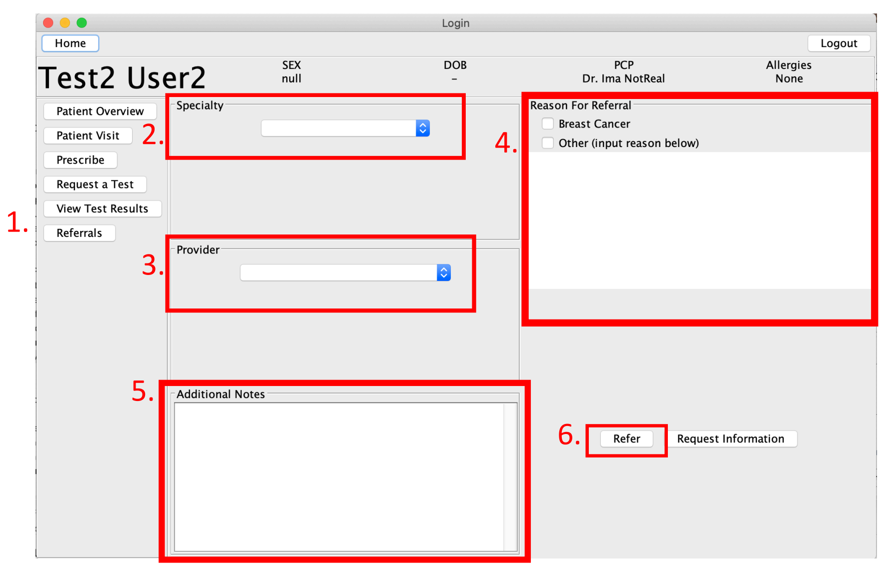
1. Navigate to and select the View Test Results button on the left-hand side panel.
2. View the test, date of test, and the result of the test in the main panel



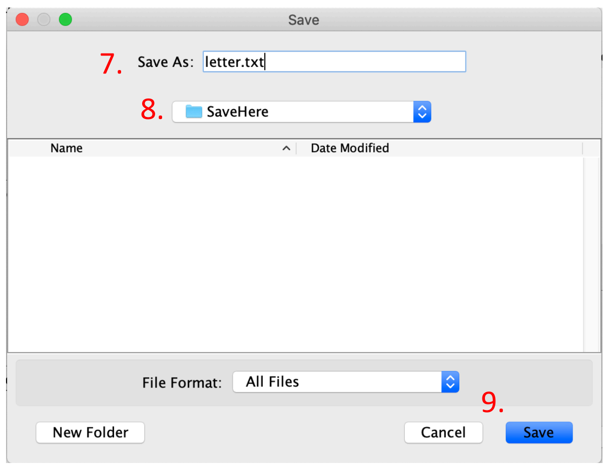
Create a Referral Letter

This action will allow providers to generate a referral letter for their patient to another doctor.

1. Navigate to and select the Referrals button on the left-hand side panel.
2. Select the specialty to refer to.
3. Select the Provider to refer to.
4. Select the reason for referral.
   - All of the previous diagnoses that the patient has will be listed.
   - There will also be an “other” option to add a referral option that is not listed.
5. Add any additional notes to the other provider in the additional notes section.
6. When the information is complete, navigate to and select the refer button.



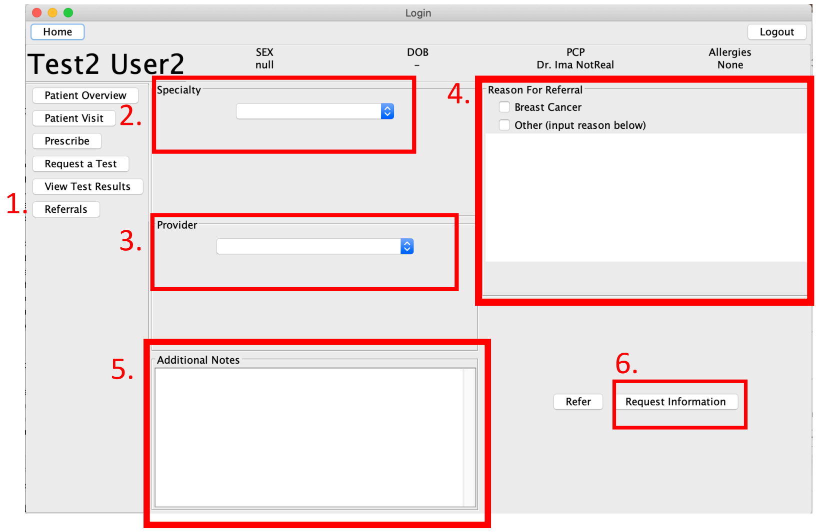
7. In the pop-up field, enter the name of the file that you would like to create.
    - It is recommended that the file extension would be .txt file to reflect the nature of the file.
8. Select the location to store the file.
9. Select Save in the bottom of the screen
10. The application will generate a text file with the referral letter and the imputed information.



Create a Request Letter

This action will allow providers to generate a request letter to another provider for them to send information on the patient to.

1. Navigate to and select the Referrals button on the left-hand side panel.
2. Select the specialty to request from.
3. Select the Provider to request from.
4. Select the reason for the request.
    - All of the previous diagnoses that the patient has will be listed.
    - There will also be an “other” option to add a option that is not listed.
5. Add any additional notes to the other provider in the additional notes section.
6. When the information is complete, navigate to and select the request information button.



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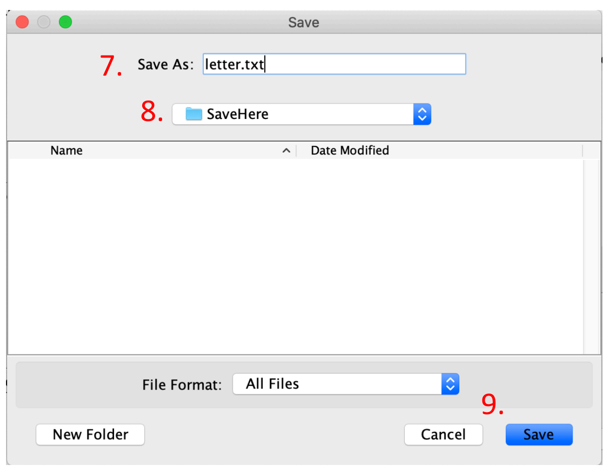

4. Conclusion

We hope that you found this user guide helpful. If you have any more questions about the application, please visit our website: https://shenoisam.github.io/Software1/