

Cognitive Behavioral Therapy Referral – Tranquility Form in MedAccess

How to Make a Form a Favorite

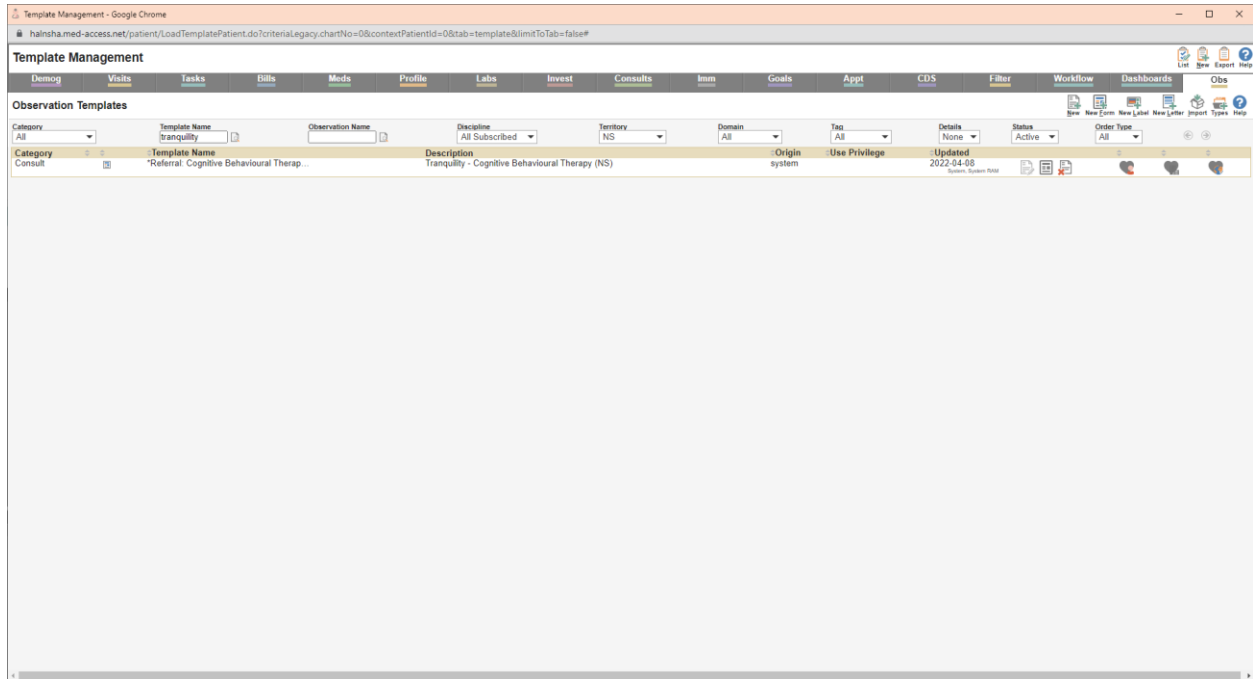
Click on Template upper right-hand corner:

The screenshot displays the MedAccess EMR interface. At the top, there is a navigation bar with various icons and a search bar. Below this is the EMR Messenger window, which shows several notifications, including 'New Templates Available for Nova Scotia - April 2022' and 'Case 0242373: Case Closed & Feedback Request - Web Browser - Supported web bro...'. The main area is the Daysheet for 'Wed Apr 20, 2022 - Dr. Doctor PHCCA'. It features a calendar view on the left and a grid for the day's schedule. The grid columns are: Time, Patient, Primary #, Chart #, Type, Concern, Resource, and Appt Status. On the right side, there is a 'My Tasks Filters' panel with sections for 'Active Tasks (8)' and 'Urgent Tasks (0)'. The Active Tasks section lists several tasks with details like 'Due', 'Patient', 'Description', and 'Reason Recur'.

Click on Obs tab in upper right corner

The screenshot shows the 'Template Management' form in MedAccess. The form is organized into several sections: 'Demographics', 'Address & Phone', and 'Care Assignment & Notes'. The 'Demographics' section includes fields for 'Last Name', 'First Name', 'Middle', 'Prefix', 'Suffix', 'Name Type', 'Chart #', 'DOB', 'Gender', 'Marital Status', 'Primary Identifier Number', 'Primary Identifier Type', 'Primary Identifier Expiry Date', and 'Patient Status'. The 'Address & Phone' section includes fields for 'Address', 'City', 'Province', 'Postal Code', 'Address Type', and 'Phone Type'. The 'Care Assignment & Notes' section includes fields for 'Referring Provider', 'Family Provider', 'Last Appt', 'First Appt', 'Provider Group', 'Effective', 'Consent', and 'Notes'. The form also has a 'Update Template Patient' button at the bottom.

Change Territory to 'NS' and enter 'tranquility' in the template name, then click the find icon beside template name



You will then be presented with the “*Referral: Cognitive Behavioral Therapy – Tranquility (NS)” form entry

On the far right of the form name you will notice 3 hearts. Hover and select the appropriate favorite.