

## MEETING MINUTES

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Meeting date [08/18/2021]      Time [2:00 EST]

Client Name      His Vision Eye Care  
Note Taker      Shannon Chaney

Attendees: Dr. Groves and Scott, possible other staff

### AGENDA TOPICS: EMR SESSION 1

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#### Discussion:

- Review Logging In
- Basic Navigation: Workflow, Notifications, Opening Summary Page, Opening IntellectPRO
  - Patient's information can be accessed from the workflow by clicking on their name
  - Notification box can be populated based on role in practice- both user specific and practice specific
  - Dependent on your PM system, checking in the patient on the PM system can automatically put them into the Waiting box, and checking out the patient on the PM system will automatically put them in the Exit box (if they have been placed in the check-out) **\*\*PM system specific, otherwise staff will manually move the patients**
- Reviewed the summary page and tabs along the top including:
  - Patient>Demographics- Adding referring physicians (selecting whether they are referring or primary)
  - Procedures (how they populate moving forward, how past ones will not pull into IntellectPRO)
  - Shared Care (only between IntellectPRO users, it's a 2-way street!)
  - Rx (access ocular meds for e-prescribing, print/access refractions)
  - Communications (Difference between Patient and Internal)
- Where to look for follow up information for scheduling
- Remember for all Doe charts we are practicing in, encounter type should be "prepped chart" and always lock chart (settings wheel) before saving/close.

#### Reminders/Action Items:

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Session 2, we will start on the Glaucoma Flowsheet then dive right into the clinical chart.

#### Review these webinars:

<https://nextechsupport.force.com/nextech/s/topic/0TO33000000LptvGAC/intellechartpro-step-2-getting-started>

Remember to use the Community Portal as your resource for educational webinars and helpful how-to's if you have questions in between phone sessions!

Login here: <http://www.nextech.com/client-support>