# SIMPLICITY™ CONCISE
# STAFF MANUAL

*"If you can fax,*

*you can use Simplicity™"*

ENT RESOURCES, INC.

ENTRI

A FOR-PROFIT SUBSIDIARY OF THE AAO-HNS

Joint marketing

Simplicity™

**Simplicity ™ Staff Manual**

**Turn computer on**

**Click on Simplicity**

**Log in**

1. type in user name
2. type in password
3. submit

## A) Adding a new patient

1. click on patient check in icon
2. type in patients information: first and last name, DOB and/or SSN
3. click submit
4. scan in the 4 required documents: ROS, demographics, insurance card, HIPAA (scan the four pages in the order of the list on the screen, press green scan button)
5. attach the 4 documents:
    a. click browse next to the ROS form
    b. right click to preview the form to make sure it is correct and straight
    c. double click on ROS and the form will now attach
    d. repeat for other forms
6. fill in whatever information you have: i.e., address, sex, telephone, medications, allergies to medications, insurance, etc; (whatever information you don't have, leave blank)
7. click submit
8. can now add patient to Queue if being seen
9. to edit information: such as adding referring doctor, fax, email, etc.; click on the "i" to the left of the patient's name
10. click "edit patient information (new)"
11. the categories available: files, upload, patient, physician, other contact info, pharmacy, medical and insurance

12. under upload: you could scan in new ROS, demographics, insurance information and/or HIPAA form
13. click upload
14. under patient: you can update any of the demographics for the patient (change of address, email, etc.)
15. click update patient
16. under physician: you can add/edit referring physician name, address, fax, email, etc
17. click update physician
18. under other contact information: you can add information
19. click on upload other info for someone other than the referring doctor or the patient
20. under pharmacy: you can add the patient's pharmacy.
    a. if this information is already in your EMR system: you can choose chain and pick the name of the chain (such as CVS) then choose town and then when you click pharmacy it will give you the list of all the pharmacies under that chain in that town from which you may choose. Then click update pharmacy.
    b. if the pharmacy you need is not available: click on add new pharmacy. Fill in the demographics for that pharmacy (fax and phone numbers must be put in, in a specific manner, i.e., phone (203)555-1212 and fax 12035551212 or this will not work). Then click submit
21. under medical: you can add or delete any allergies to medications the patient has and any medication the patient is on.
22. under insurance: you can add/change insurance information, copays, etc.
23. when completed: you can either add patient to queue if not already added or click on welcome to bring you back to the welcome page

**B) Put patients in Queue**

1. type in the patients name in patient search (use last name with first initial or by DOB to find)
2. click search
3. look at patients name and DOB to make sure correct person
4. click on BLUE ‘i’ (to the left of the file folder by patients name)
5. check when patient last filled out updated paperwork
6. greater than 1 year: re-update form/paperwork
7. click ‘edit patient information’ (old)
8. scroll down to the insurance information: type in ‘needs update’ into the name of insurance section
9. click ‘Save and Add to Queue’
10. choose: the doctor, date of visit or appt, add room section, add appt time, check in time
11. click ‘submit’

**C) Patient Queue**

Click patient Queue on the day of the visit and indicate which doctor and morning or afternoon

**D) How to handle message from patients**

1. go to ‘patient search’
2. type in patients name
3. click on the picture of the ‘2 people’ next to the patients name
4. choose the doctor
5. choose the day
6. under the category ‘room section’- type in the word ‘Message’
7. under ‘appt time and check in time’- type in the time of the message
8. choose ‘submit’
9. go to ‘patient queue’

10. choose the doctor
11. click on file folder
12. click on the word ‘type’, then type in the message and the phone numbers, etc.
13. click ‘save progress notes’
14. after the doctor replies to the message, repeat the above steps (9-13)
15. after typing in the actions taken from the doctors reply; click ‘save progress note’
16. click finalize

**E) Test Tracking**

1. go to patient check in section
2. click on ‘test tracking’
3. choose doctor and the list of the patients and type of tests listed there
4. evaluate the start and end dates
5. *usually the tests are in that original list*

**Edit Test**

1. go to edit (next to patients name)
2. fill in the sections:
    a. set up date
    b. test date
    c. test site name
    d. estimated result date
3. click ‘update test’

**After test completed and results back to office**

1. go to edit test
2. fill in the sections:
    a. test done date
    b. result date
3. click ‘update test’

**Scan in test results**

1. go to ‘attach’ (the section has a GREEN DOT next to the test that the patient went for- double check)
2. click on the date the test was performed
3. scan the test results
4. click browse and attach the number of pages
5. click upload

**Doctor fills in:**

1. ordering doctor read
2. patient notified
3. final disposition
4. then click on ‘update test’

**F) Fax prescription the Pharmacy**

1. go to welcome page
2. go to check out
3. select the doctors name
4. the list of the patients come up
5. click on the prescription bottle
6. select ‘chain’ (or if no chain pharmacy- leave blank)
7. select the town
8. click on the pharmacy and check for correct address
9. click on send fax
10. click on send prescription
11. a Green Message comes up and says ‘the prescriptions were sent successfully’

**G) Attach documents**

1. go to patient search
2. type in: last name, first initial or by DOB
3. click patient search, check that DOB is correct
4. click attach
5. select the category (i.e. HT/ABR/HAE/CT scan…)
6. select the date of service
7. name the file
8. scan in the document(s)
9. click browse
10. find the file and double click on it
11. click upload

**H) To scan a "message" into the progress note page**

1. patient search
2. type in: last name, first initial or by DOB
3. click patient search, check that DOB is correct
4. click add progress note
5. when add progress note window opens: click on visit date, type in date of message and select name of doctor
6. scan in "message"
7. click browse
8. double click on the message

10. click submit

**I) How to send a digital letter**

*This can only be done if you have used the digital progress notes.*

1. at the top of the digital progress note: click on patient, doctor and/or other (whoever you wish to receive letter)

2. click save after you have finished your digital progress note.
3. go to welcome page
4. click "view entire queue."
5. under electronic letters: click on the NAME of the patient you wish to receive a letter.
6. window comes up saying "send template report."
    a. sent options are available: for email, fax and print.
    b. email address and fax number of the referring physician to whom you are sending the letter needs to be filled in on the patient information page.

*If they are not, you cannot email or fax the letter to the referring doctor.*

7. there is a preview option so you may preview the letter prior to sending
8. click send letter.
    a. under send option: you can only choose one option per section at a time, i.e., if you want to send a letter to a doctor and also email it to him, you can only do one of these options at a time.
    b. you can, however, choose to send a letter to a doctor and a patient at the same time.

**J) To find a digital letter previously sent**

1. go to check out page
2. select doctor and date of visit on calendar that letter was sent
3. click on send template report page (location: to the far right of the name of the patient you will see a yellow sheet of paper- that is the send template report page from that visit)
4. click on preview: to preview whatever letter was dictated on that date

**K) To put in return appointment**

1. welcome page
2. click checkout

3. select the doctor
4. click on file folder next to correct patient
5. scroll down to next appointment
6. fill in next appointment date and time
7. click update next appointment
8. a blue ‘update successful’ bar will show up once completed

For information call

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