emr
Lesotho Upgrade Guidelines

The Global Health Laboratory
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Welcome to the emr^{XL} Upgrade Journey!

We are excited to be working with you as a member of your clinic's local launch team. Your commitment to ensuring a seamless transition is truly commendable, and we are thrilled to support you every step of the way.

Launching a new upgrade can be both exhilarating and, understandably, a bit daunting. We want to assure you that while the process should be taken seriously, there's no need to fear. The emr^{XL} upgrade process has been designed to be relatively simple and straightforward, with the main focus on preparation and staff training.

The heart of this upgrade lies in ensuring that every user, *regardless of their familiarity with the current emr^{X} version*, becomes well-acquainted with the enhanced features of emr^{XL}. Some of these features, designed to elevate efficiency and patient care, can only reach their full potential when embraced by the entire team. Hence, training is paramount.

This guide will help you work through the upgrade process, offering best practices for preparation and launch. Within these pages, you will find detailed recommendations, sample meeting agendas, worksheets, and checklists tailored for each member of the launch team. These are supplemented with materials available in the resource center of of the emr^{XL} support site. Our goal is to make this journey as smooth and enriching as possible for you and your team.

Thank you for your dedication to this upgrade. We are confident that, together, we will unlock the full potential of emr^{XL} in enhancing your clinical operations.

Best regards,

The emr^{XL} Development Team
helpdesk@emrx.org

Contents

Introduction to the emr^{XL} Transition 5
Understanding the Transition Process 5
Planning Your Transition 5
Utilizing Transition Tools 5
Embarking on a Journey to Excellence 5
Forming Your Local Launch Team: Key Members and Their Roles 6
Clinical Team Representative 6
Data Management Specialist 6
Senior I.T. Member 6
Training Coordinator (Optional) 6
Senior Management Member 6
SAMPLE: Local Launch Team First Meeting Agenda 7
SAMPLE: Local Launch Team Progress Meeting Agenda 9
Setting the Stage: Step by Step From Here to Launch 11
The Formation of Your Core Team 11
Preparing for Advanced Stock Management 11
Developing a Structured Training Approach 11
Avoiding Operational Conflicts 11
Picking the Perfect Launch Date 12
Gaining Senior Management's Endorsement 12
Final Steps and Ongoing Support 12
I.T. Infrastructure Requirements for emr^{XL} Launch 13
The Role of I.T. in the Launch Team 13
Understanding the Role of the Virtual Server Environment 13
Server Requirements for emr^{XL} 13
Ensuring Continuity with a 'Sandbox' Server 14
Client Computer Requirements 14
Pharmacy and Prescriber Preparation Work for emr^{XL} Transition 15
Collaborative Categorization of Medications 15
Phase 1: Pharmacy Stock Management System 15
Advancing to Comprehensive Inventory Tracking (after initial emr^{XL} launch) 15
Embracing a Smarter Pharmacy Management Approach 16

The Training Process for emr^{XL}: A Comprehensive Approach 17
Embracing the Importance of Training 17
The Structure of the Training 17
Assessment and Certification 17
Going Beyond Basic Training 18
Managing the Training Process 18
Preparing for Launch 18
List of emr^{XL} Upgrade Training Modules 19
Standard Training for all emr^{XL} Users 19
emrXL New Layout 19
Smart Summary Cards 19
Provider Messaging System 19
Staff Profiles 19
Printable Lab Forms (and other hardcopies) 19
Attaching Images & Documents 20
Quickview 20
Patient & Provider Locator 20
User Profiles & Security 20
Complementary Training for all emr^{XL} Users 21
Hands-On Experience 21
Group Q&A Sessions with emrXL Developers 21
emr^{XL} Assessment Test 21
Additional Lessons (optional but recommended) 21
Add Service Date 21
Removing Erroneous Documentation 21
Sharing Quickviews 21
Updating Patient Alerts 21
Specialized Trainings 22
Pharmacy Stock Management (setting up & using) 22
Mission Control (I.T.) 22
Post-Launch Specialized Trainings 22
Quickreport 22
Data Editor 22

Introduction to the emr^{XL} Transition

Transitioning to emr^{XL} is more than just a system upgrade — it's a step towards further excellence in healthcare management. With careful planning and preparation, we are not just launching a new system; we are embarking on a journey towards improved healthcare delivery and patient care.

Understanding the Transition Process

The transition to emr^{XL} involves several key stages, each designed to ensure a seamless integration of the new system into your clinic's daily operations. We'll guide you through each of these stages:

- **Local Launch Team Identification:** First, we'll help you determine the roles and responsibilities of your Local Launch Team. This team will be instrumental in coordinating and overseeing the transition process.
- **Technical Requirements:** Next, we'll dive into the Technical Requirements necessary for emr^{XL}. This includes ensuring that your infrastructure is fully equipped and ready to support the new system.
- **Preparation Work:** Preparation is key. We'll focus on critical areas such as Pharmacy and Prescriber Preparation to ensure that medication management integrates seamlessly with emr^{XL}.
- **Staff Update Training:** Training is essential for a smooth transition. Our comprehensive Training Process will equip each team member with the confidence and competence to use emr^{XL} effectively.

Planning Your Transition

Planning is the cornerstone of a successful transition. Our guide provides an overview of how to effectively plan your transition, including choosing the perfect Launch Date. This phase is crucial in setting the stage for a smooth rollout.

Utilizing Transition Tools

The emr^{XL} Support Website contains a variety of tools designed to aid in your planning process. These resources are tailored to optimize each step of your transition, providing support and guidance where it's most needed.

Embarking on a Journey to Excellence

Remember, every great journey begins with a single step. Let's take that step together with the emr^{XL} transition, moving forward into a future of enhanced healthcare possibilities.

Forming Your Local Launch Team: Key Members and Their Roles

For a successful transition to emr^{XL}, it's crucial to assemble an effective Local Launch Team with clearly defined roles. Each member plays a specific part in ensuring the upgrade enhances your clinical operations efficiently and effectively.

Clinical Team Representative

- **Who:** Typically a high-ranking individual, such as the Clinical Director.
- **Role:** Ensuring active staff participation in online trainings, Q&A sessions, and discussions. They act as a bridge between the clinical staff and the new system, guiding through training and implementation.

Data Management Specialist

- **Who:** Often a Medical Informatics Specialist, Statistician, or a Monitoring & Evaluation Manager.
- **Role:** Ensuring emr^{XL} captures essential data and managing data collection processes. They provide comprehensive EMR system knowledge across various service lines and handle data-related inquiries.

Senior I.T. Member

- **Who:** A key figure within the I.T. department.
- **Role:** Collaborating with emr^{XL} developers for system compatibility with the clinic's I.T. infrastructure. They ensure technical readiness and oversee the system's performance during testing and after launch.

Training Coordinator (Optional)

- **Who:** A person from HR or another administrative department who is responsible for staff scheduling.
- **Role:** Managing training schedules and ensuring staff preparation and alignment with the transition. While the emr^{XL} training is designed to be self-paced, some staff may require a fixed schedule for training to assure that they complete the training prior to launch. This team member focuses on effective coordination between the launch team and staff.

Senior Management Member

- **Who:** A top executive, such as the Executive Director or Chief of Operations.
- **Role:** Providing strategic direction and overarching leadership. They demonstrate organizational commitment and energize the team and staff for the emr^{XL} launch.

By defining these roles and their responsibilities, your Local Launch Team will be well-equipped to handle the transition to emr^{XL}, ensuring a smooth and productive upgrade that enhances the capabilities of your clinical operations.

SAMPLE: Local Launch Team First Meeting Agenda

Monday 1st Jan 2024 @ 1500

This agenda is designed to ensure that the Local Launch Team covers essential topics, reviews their roles, provides feedback, gains a comprehensive understanding of the emr^{XL} upgrade, and collaborates on tentative timelines. The emphasis on group viewing of training videos aims to facilitate collective learning and discussion.

Note: The emr^{XL} Development Team is available to join the Local Launch Team for this initial planning meeting as a participant. **The meeting will be lead by the local team.** Please provide the emr^{XL} development team with the scheduled date and time.

ATTENDEES:

Clinical Director
Pharmacist
Data Specialist
I.T. Specialist
Training Coordinator
Senior Executive
emr^{XL} Developer

1. Welcome and Introductions

- Welcome all team members and express gratitude for their commitment.
- Brief introductions to ensure everyone is acquainted.

2. Review of Local Launch Team Roles and Responsibilities

- Provide a detailed overview of each team member's role.
- Discuss how each role contributes to the success of the emr^{XL} upgrade.
- Encourage team members to share any initial thoughts or questions about their responsibilities.

3. Preliminary Feedback on Responsibilities (10 minutes)

- Allow team members to provide feedback on any preliminary work they may have done (if any). Example: The I.T. Specialist may have already reviewed the technical specifications and can confirm if the existing I.T. infrastructure meets these requirements.
- Address any challenges or concerns related to their responsibilities.
- Foster open communication for collaboration.

4. Overview of emr^{XL} Upgrade Features & Functionality (45minutes)

- Watch the general emr^{XL} training videos as a group (30 minutes duration). This is important so that the launch team may collectively learn and discuss.
- At the conclusion of each video, discuss the benefits and improvements the highlighted feature brings to clinical operations.
- Encourage team members to actively participate in the discussion:
    - Share insights on how the new features might integrate into current clinical operations.
    - Discuss potential challenges and opportunities.
- The emr^{XL} Development Team will be on-hand (virtually) to address any initial concerns or questions from the team.

5. Tentative Timelines Discussion

- Review emr^{XL} Recommended Time Requirements
- Create and Discuss tentative timelines for critical tasks at your clinic:
    - Pharmacy Stock Management Organizational Task
    - I.T. Infrastructure Setup and Testing
    - Staff Training for emr^{XL}
    - Staff Q&A Sessions with emr^{XL} Developers (recommend 2 at 60 minutes each)
    - emr^{XL} Launch
- Consider team input on realistic timelines and potential challenges.

6. Additional Tasks and Next Steps

- Invite Local Launch Team to experiment with emr^{XL} on the clinic's test server ("sandbox"). Provide feedback at the next Launch Team meeting.
- Identify additional tasks that need attention before the next meeting.
- Establish action items and assign responsibilities.
- Confirm the date and agenda for the next meeting.

7. Q&A and Closing Remarks

- Open the floor for any final questions or concerns.
- Provide closing remarks and express appreciation for the team's dedication.

SAMPLE: Local Launch Team Progress Meeting Agenda

Monday 8th Jan 2024 @ 1500

This meeting and additional meetings prior to launch are important checkpoints in the emr^{XL} transition, focusing on reviewing progress, addressing challenges, and ensuring alignment with established timelines. Team members provide updates on their roles, and share insights into staff engagement and data-related processes.

Note: The emr^{XL} Development Team is available to join the Local Launch Team for these meetings as a participant. **The meeting will be lead by the local team.** Please provide the emr^{XL} development team with the scheduled date and time.

ATTENDEES:

Clinical Director
Pharmacist
Data Specialist
I.T. Specialist
Training Coordinator
Senior Executive
emr^{XL} Developer

1. **Welcome and Recap**
   - Welcome all team members and briefly recap the purpose of the meeting.
2. **Training Readiness**
   - Confirm the status of staff training for emr^{XL}.
   - Discuss any issues or feedback from staff during the training process.
3. **Clinical Team Update**
   - Provide insights into staff participation in online trainings, Q&A sessions, and discussions (if begun- if not, provide update on plans for each)
   - Address any challenges faced or feedback received from clinical staff.
4. **Data Management Specialist Update**
   - Discuss the progress in ensuring emr^{XL} continues to capture essential data and the management of the data collection processes.
   - Highlight any key developments in emr^{XL} knowledge across various service lines (example: how QuickView may aid in clinical management and research)
5. **Technical Infrastructure Update**
   - Receive an update from the I.T. Specialist on the status of the technical infrastructure setup and testing.
   - Address any technical challenges or concerns.

6. **Pharmacy and Prescriber Preparation (8 minutes)**
   - Confirm that collaborations between the Providers and the Pharmacy team have taken place to determine the new drug categorizations.
   - Confirm that the new categories have been set up in the Pharmacy Stock Management System (or provide an update on the progress).
   - Confirm that the new drug categories have been presented to the full clinical team (prior to launch)
   - Ensure readiness for the integration with emr^{XL}.
7. **Timeline Adjustment**
   - Assess the progress made against the tentative timelines.
   - Discuss any necessary adjustments to the timelines based on the team's feedback.
8. **Q&A Session**
   - Open the floor for questions and concerns.
   - Address any outstanding issues or uncertainties.
9. **Next Steps and Action Items**
   - Identify tasks that need attention before the next and/or final meeting.
   - Establish clear action items for each team member.
   - Confirm the date and agenda for the final meeting.

Setting the Stage: Step by Step From Here to Launch

Transitioning to emr^{XL} marks a pivotal advancement in your healthcare services. It's a process that goes beyond mere technological implementation; it involves a thorough reconfiguration of your clinical operations. Let's delve into a detailed narrative to guide you through each step of this critical transition.

The Formation of Your Core Team

The journey begins with assembling your Local Launch Team, the key players of this transition. At its heart lies the Clinical Director, whose role transcends overseeing clinical practices to ensuring the entire clinical department is adept with emr^{XL}. Accompanying the Clinical Director are the Data Manager, the Training Coordinator, and the Executive Director. Together, they form a synergistic team, each bringing their expertise to facilitate a smooth transition.

Preparing for Advanced Stock Management

A crucial step prior to finalizing the launch is to organize your medication management. This involves the Pharmacy and Clinical Teams collaborating to categorize medications within the Pharmacy Stock Management system of emr^{XL}. This step is foundational, ensuring that your medication management aligns perfectly with the new system.

Developing a Structured Training Approach

Training is not just a formality; it's the backbone of your transition. Developing a detailed training schedule is imperative. Allocate approximately 90 minutes for staff to engage with video tutorials and assessment tests. Remember, it's not just about completing these modules; it's about understanding and absorbing the content. Also, incorporate practical sessions, allowing staff to familiarize themselves with the test system. Group Q&A sessions, hosted by the emr^{XL} developers, are vital to ensure that all departments, from Clinical to Data to Support Staff, are on the same wavelength.

Avoiding Operational Conflicts

As you roll out the training, it's essential to harmonize it with your clinic's operational schedule. The goal is to avoid clashes, particularly for your Local Launch Team. It's a balancing act - ensuring that training progresses smoothly without disrupting the day-to-day functions of your clinic.

Picking the Perfect Launch Date

Strategizing the Transition: Selecting the right launch date is more art than science. It's a decision that requires considering multiple factors:

- Ensure the presence of all Local Launch Team members.
- Aim for a day with standard staffing levels.
- Choose a day with a balanced patient load - avoiding extremes of too busy or too slow. Having a backup date is prudent, safeguarding against any unforeseen challenges.

Gaining Senior Management's Endorsement

Securing the Green Light: Finalizing your plans requires the nod from Senior Management. This stage isn't about delving into the small details with them but rather securing their endorsement. Keep them updated, especially if you encounter significant roadblocks. Their support isn't just procedural; it's a powerful morale booster for the entire team.

Final Steps and Ongoing Support

Reaching Out to emr^{XL} Development Team: With your plan detailed and endorsed, the next step is to present it to the emr^{XL} development team. They are your partners in this journey, ready to assist in actualizing your transition.

Leveraging Available Resources: Don’t forget to utilize the wealth of resources available on the emr^{XL} support website. And if doubts or questions arise, the emr^{XL} helpdesk is just a message away, eager to support and guide you.

By moving through these steps with care and attention, you will set a solid foundation for your transition to emr^{XL}, paving the way for enhanced healthcare delivery and streamlined clinical operations. Remember, each step you take is a stride towards a future where technology and healthcare converge to offer better patient care.

I.T. Infrastructure Requirements for emr^{XL} Launch

The successful launch of emr^{XL} hinges on a robust I.T. infrastructure. This document provides a detailed breakdown of the technical requirements necessary to power the emr^{XL} system effectively in your healthcare setting.

The Role of I.T. in the Launch Team

Ensuring Technical Readiness:

- While the Clinical Manager and other Local Launch Team members focus on training and preparation, the I.T. department's role is to ensure that the technical infrastructure is ready and optimized for emr^{XL}.
- Collaboration with the emr^{XL} development team is key to a smooth transition, highlighting the importance of I.T. as an integral part of the launch process.

Understanding the Role of the Virtual Server Environment

Why Choose a Virtual Server?

- **Versatility, Efficiency, and Recovery:** Virtual servers like Microsoft Hyper-V host offer versatility in running multiple operating systems on a single physical machine, optimizing hardware utilization.
- **emr^{XL} Virtual Machine:** It contains all necessary subsystems for EMRXL, including the interface, database, executables, and support systems. This setup is vital for ensuring operational continuity, especially in the event of hardware failures, offering faster recovery and reduced downtime.

Server Requirements for emr^{XL}

Optimizing Performance:

- **RAM Allocation:** For moderate-sized clinics, a minimum of 12 gigabytes of RAM is required for the emr^{XL} Virtual Machine. For smaller clinics, 8 gigabytes may be sufficient, but please confirm this for your specific clinic. Note that the *total* RAM for the host server must exceed this in order to support the host operating system and the virtual machine. This allocation ensures swift access and processing of patient data, crucial for real-time patient care.
- **Disk Requirements:** A minimum of 256 gigabytes on an NVME m2 solid-state drive is required for the emr^{XL} virtual machine. NVME m2 drives offer ultra-fast data transfer speeds, necessary for handling high-speed read-write operations with large volumes of patient data and multiple concurrent users.
- **Internet Connectivity for Support and Maintenance:** Stable internet connectivity is vital for remote support. Ensure provisions for remote access using VPN, RDC, or applications like

AnyDesk or TeamViewer. This connectivity facilitates external expert assistance by the emr^{XL} developers as needed.

Ensuring Continuity with a 'Sandbox' Server

Backup for Uninterrupted Service:

- The 'sandbox' server, a backup system that can also be used for EMR user training, *should match the main server in specifications*. This setup ensures continuity of operations, allowing the 'sandbox' to function as a backup during any faults with the main server.

Client Computer Requirements

Ensuring Compatibility and Efficiency:

- **Browser Requirements:** Client computers should use Google Chrome or Microsoft Edge as default browsers. This choice is based on their compatibility with web applications and commitment to user security.
- **Monitor Specifications:** Client monitors should have a minimum resolution of 1600 by 900 without scaling. This resolution ensures optimal display of the emr^{XL} interface, allowing clinical staff to view patient details efficiently without excessive scrolling.

By meeting these I.T. infrastructure requirements, your clinic will be well-prepared for a successful transition to emr^{XL}, ensuring that the technical foundation is solid for this significant upgrade in your clinical operations.

Pharmacy and Prescriber Preparation Work for emr^{XL} Transition

The successful integration of the upgraded emr^{XL} system in your clinic relies on efficient pharmacy stock management. This preparation work is a foundational step toward revolutionizing how your clinic handles medications.

Collaborative Categorization of Medications

Setting the Stage for Efficiency:

- **Team Effort:** It is crucial for the pharmacy and clinical teams to collaborate in re-evaluating and categorizing the medication inventory. This joint effort lays the groundwork for an organized and user-friendly stock management system within emr^{XL}.
- **Customizable Groupings:** The categorizations are tailored to your clinic's needs and determined by your clinical staff. For example, grouping all antibiotics under 'Antibiotics' or HIV medications under 'ART Drugs.' This customization allows for easy navigation and efficiency in locating medications within the system.

Phase 1: Pharmacy Stock Management System

Real-Time Stock Management:

- **Pharmacy Stock Management System:** Once medications are categorized, the pharmacy team can effectively set up and maintain the Pharmacy Stock Management System in emr^{XL}. This system allows prescribers to view real-time stock levels, eliminating the issue of prescribing unavailable medications.
- **Phase 1 - Basic Inventory Reporting:** The initial phase provides basic inventory reports, including current stock levels and dispensed quantities. This phase is crucial for getting a clear picture of the pharmacy's stock situation.

Advancing to Comprehensive Inventory Tracking (after initial emr^{XL} launch)

Phase 2 and Beyond:

- **Phase 2 - Full Inventory Tracking:** This phase involves a detailed log of stock movements, including incoming stock, repackaging processes, and dispensing. The introduction of a barcode system enhances accuracy in tracking medication from bulk receipt to individual dispensing.
- **Phase 3 - Electronic Storage Management:** This advanced phase involves creating a digital map of physical stock storage. It guides the pharmacy team in locating specific stocks and managing batches efficiently, whether using chaotic, fixed, or a hybrid storage model.

Embracing a Smarter Pharmacy Management Approach

Transformative Preparation Work:

- This preparation work for the Pharmacy Stock Management is not merely about adopting a new system; it's about pioneering a smarter, faster, and more efficient approach to managing medication stock.
- **Initial Step:** The first step involves the collective effort of the pharmacy and clinical teams in categorizing medications, a process that can be completed in as little as one week, depending on the collaboration between these teams.

By undertaking this preparation work, your clinic is not just transitioning to an updated EMR system that includes stock management, but is taking a significant step towards optimizing its pharmacy operations, enhancing the overall efficiency and effectiveness of patient care.

The Training Process for emr^{XL}: A Comprehensive Approach

Transitioning to emr^{XL} is not just a simple update; it's a transformative upgrade that adds additional functionality that works best when everyone is aware of and using the new features.

The heart of this transformation lies in the training process, designed to ensure that every staff member is not only familiar with the system but also proficient at utilizing its full potential.

Embracing the Importance of Training

Why Training Matters: Even if you're familiar with the previous version, emr^{XL} comes with new, advanced features that can significantly enhance productivity and patient care. While the system is user-friendly, its true potential lies in these advanced features, which might remain underutilized without proper awareness and training.

The Structure of the Training

Duration and Methodology:

- **Self-Paced Tutorials:** The training consists of self-paced tutorials, including videos, slides, and interactive assessments. The total duration for most staff is approximately 90 minutes. The training can be done in one or more long sessions, or can be broken up and completed as time permits.
- **Video Tutorials:** The training site hosts a series of concise videos, each ranging from 3 to 8 minutes, totaling about 30 minutes of viewing time. These can be watched at your convenience, allowing for a balance between learning and practical application on the test system.
- **Interactive Practice:** After each video, staff are encouraged to practice the new features on the emr^{XL} test system, ensuring a hands-on learning experience.

Assessment and Certification

Testing Knowledge and Skills:

- **Assessment Test:** Following the training, staff will take a 30-minute assessment test, consisting of multiple-choice and true-false questions.
- **Passing Criteria:** A score of 75% or above is required to pass and gain access to the live system.
- **Feedback and Certification:** The assessment test provides feedback for incorrect answers. Successful completion earns a certificate with a unique code to activate the user's emr^{XL} account.

Going Beyond Basic Training

Extra Resources for Advanced Learning:

- **Additional Materials:** For those aspiring to become emr "X"-perts, there are extra videos and materials that delve deeper into specific functions.
- **Specialized Trainings:** Roles such as data personnel, pharmacy teams, and IT staff have specialized training modules on specialized features that are relevant to their roles, such as "QuickReport" for data personnel, "Pharmacy Stock Management" for pharmacy teams, "Data Editor" for researchers and data specialists, and "Mission Control" for the I.T. team.

Managing the Training Process

Individual and Group Learning:

- **Individual Study:** It's recommended that each staff member undergoes individual study to fully grasp the material at their own pace. This also allows easy access to try the system hands-on after completing each video module.
- **Group Sessions:** These should supplement individual learning, fostering a sense of accountability and mutual encouragement.
- **Leaderboard:** A simple leaderboard tracks progress, encouraging healthy competition and collective progress towards completing the training.
- **Group Q&A Sessions:** Conducted by emr^{XL} experts, these sessions allow staff to raise queries and learn from others' questions.

Preparing for Launch

Final Steps Before Launch:

- **Completion of Training:** Before the launch, the majority of the staff should have completed the training and practiced on the test system.
- **Assessment Results:** The results of the test are a crucial indicator of whether your clinic is ready for the launch.
- **Certification Requirement:** Each user must complete the training, practice on the test system, and pass the assessment test to access the new emr^{XL} system by launch day.

The transition to emr^{XL} is a collaborative effort, necessitating that everyone is well-equipped and prepared to harness its full capabilities. This comprehensive training process is designed to ensure that your clinic's transition is not just about adopting a new technical system, but about elevating the overall standard of care and efficiency in your operations.

List of emr^{XL} Upgrade Training Modules

Standard Training for all emr^{XL} Users

emrXL New Layout (8 min self-paced video lesson)

While the emr^{XL} layout is similar to emr^{X}, adjustments have been made to optimize screen space and boost productivity.

Smart Summary Cards (6 min self-paced video lesson)

Smart Summary Cards in emr^{XL} introduce advanced features that significantly enhance the way healthcare providers interact with patient data. These cards offer an interactive experience, allowing users to delve deeper into patient information with ease directly from the summary card. The integration of data validation warnings is a standout feature, highlighting potential concerns or inaccuracies and ensuring the reliability of patient information. These smart functionalities greatly improve the efficiency and accuracy of patient care management, making emr^{XL}'s Smart Summary Cards a substantial improvement over the previous emr^{X} summary cards.

Provider Messaging System (5 min self-paced video lesson)

The Provider Messaging System in EMRXL introduces a functional enhancement for internal communication among healthcare providers. It allows for secure messaging, with the capability to link messages to specific patient charts, providing context and aiding in efficient information sharing. This feature aids in keeping healthcare teams informed and coordinated, particularly useful for updates such as lab results. The system simplifies the communication process within the clinic, facilitating more streamlined and organized patient care.

Staff Profiles (3 min self-paced video lesson)

EMRXL introduces "Staff Profiles," a feature that provides a centralized hub for accessing team members' information in the clinic. This tool allows users to quickly view essential details such as names, last activity times, and direct contact information, organized by department. It also integrates with the Provider Messaging System for convenient, direct communication, streamlining interactions within the clinic.

Printable Lab Forms (and other hardcopies)

Clinicians (2 min self-paced video lesson)

I.T. and Clinic Operations (45 min. presentation + hands-on + Q&A)

Lab Forms and other paper documents may now be digitized to streamlines the lab request process for external labs. Clinics can now scan and upload their paper lab request forms into the system, allowing clinicians to order tests electronically. When a test is ordered, the system automatically fills out these forms with the necessary details, including an option for the doctor’s scanned signature.

This feature not only eliminates the need for manually completing paper forms but also ensures accuracy and efficiency by directly linking the electronic orders with their corresponding printable forms. The integration of this feature into emr^{XL} paves the way for future adaptations, like printing other regularly used medical documents with pre-filled details (examples include: second line requests, ART regimen cards, school paperwork, specialist referrals, etc).

Attaching Images & Documents (8 min self-paced video lesson)

Supplemental images and documents, such as progressive photographs of a patient's condition, paper lab results, radiologic images, records from outside providers, and other relevant documents, can be digitally attached directly to a patient's chart. Whether it's capturing a patient's progress over time or providing immediate access to urgent lab results, this feature enhances the comprehensiveness of patient records.

Images and paper documents can be attached using the cameras on authorized smartphones or tablet computers, making this feature easy to implement and cost effective by not requiring specialized equipment.

Quickview (6 min self-paced video lesson)

QuickView allows healthcare providers to rapidly access key patient data from multiple areas of the patient's medical record in a single customizable window. By consolidating essential information like recent lab results, medication history, vital signs, or data from any section of the EMR, QuickView streamlines the review process, enabling faster and more informed clinical decisions. This tool is especially beneficial for specialists who need to quickly reference specific data sets, enhancing the efficiency of patient consultations and care planning.

Patient & Provider Locator (3 min self-paced video lesson)

The Patient & Provider Locator is a practical feature designed to enhance clinic workflow by accurately tracking the locations of both patients and providers within the facility. This tool provides real-time updates on room occupancy, such as identifying which exam room a particular doctor is in or where a patient is located at any given moment. This functionality is essential for clinics with multiple shared spaces, ensuring efficient coordination and communication among staff.

By simplifying the process of locating patients and providers, this feature eliminates unnecessary delays, thereby improving the overall efficiency of patient care and clinic operations.

User Profiles & Security (2 min self-paced video lesson)

Users are now more empowered by having direct control over their user account details within emr^{XL}. The system allows healthcare professionals to manage their own staff profiles, ensuring that contact details, job titles, and other pertinent information are up-to-date and accurately reflect their current role and responsibilities. This feature also provides users with the autonomy to update their security settings, including changing passwords, enhancing personal account security. By enabling staff to independently manage their profiles and security settings, administrative processes are streamlined, contributing to the overall efficiency and security of the clinic's operations.

Complementary Training for all emr^{XL} Users

Hands-On Experience (self paced during training period, prior to launch)

To effectively master the new features in emr^{XL}, hands-on experience is essential. When training begins, users will have access to a full featured test system (the "sandbox"). This testing environment allows staff to apply what they have learned from the training videos, giving them the opportunity to experiment with and understand the system's functionalities. Direct engagement fosters a deeper comprehension and confidence in using emr^{XL}, bridging the gap between theoretical knowledge and actual application.

The hands-on experience enhances the effectiveness of the Q&A sessions by enabling staff to ask more informed, practical questions based on their direct interaction with the system.

Group Q&A Sessions with emrXL Developers 60 minute Q&A session (x 2)

Group Q&A Sessions in the emr^{XL} training process are complements to both individual and group learning. These sessions provide a collaborative environment for staff to deepen their understanding of the system. Conducted by the emr^{XL} development team, these sessions offer a platform for staff to raise specific queries, clarifying doubts and exploring nuances of the system that might not be immediately apparent from the training materials. These interactions not only enhance knowledge but also promote collective problem-solving and learning, as staff benefit from the insights and experiences shared by their peers.

emr^{XL} Assessment Test (~30 minutes, 25 questions)

Additional Lessons (optional but recommended)

Add Service Date (4 min self-paced video lesson)

Removing Erroneous Documentation (3 min self-paced video lesson)

Sharing Quickviews (5 min self-paced video lesson)

Updating Patient Alerts (3 min self-paced video lesson)

Specialized Trainings

Roles such as data personnel, pharmacy teams, and IT staff have specialized training modules on specialized features that are relevant to their roles.

Pharmacy Stock Management (setting up & using)

Pharmacy Staff	(Phase 1: 60 min presentation + Q&A + follow-up)
Pharmacy + Clinicians	*Collaboration Session(s) on categorization as needed*
Clinicians	(~30 min. presentation by Pharmacy Staff)
Mission Control (I.T.)	(90 min. presentation + Q&A)

Post-Launch Specialized Trainings

Quickreport (M&E, Data)	(60 min. presentation + practical + Q&A)
Data Editor	T.B.D.