

# Tip Sheet: Experity EMR Portal

## Instructions – Multiple Clients


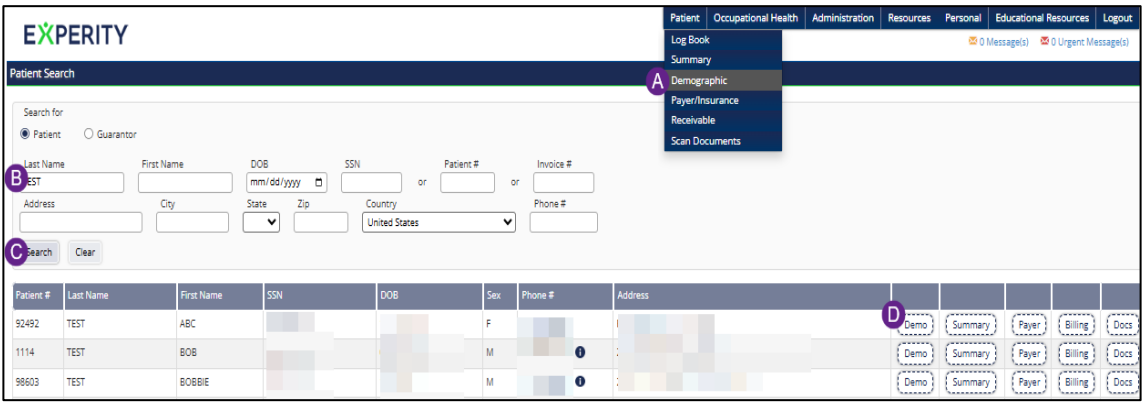


This tip sheet is designed to support team members in accessing Ignite portal for Charge Entry, demographics, insurance cards, medical records, etc. for Hometown, RedMed, and PUC.

**Steps 1-8 – for medical record retrieval such as demographics, insurance lookups, and soap notes in Experity EMR.**

**No Charge Entry processing is done within the Experity EMR portal. Charges are uploaded into Box.**

**Time of Service (TOS) collections made at clinic are not loaded in Experity EMR. Those are scanned directly into Box as Pt Payments taken in Office.**

Steps	Action																																																				
<p><b>1</b></p> <p><b>Logging In</b></p> <p>Please log in using your email or distribution email and password provided to you.</p> <p><u><b>Note:</b></u></p> <p>If on a distribution email, please contact owner for any log in issues.</p>																																																					
<p><b>2</b></p> <p><b>Patient Search &amp; Demographics</b></p> <p>Please use actions below to locate patient:</p> <p>A. In Patient drop-down and select <b>Demographic</b>.</p> <p>B. Enter <b>Patient's Name</b></p> <p>C. Then select <b>Search</b>.</p> <p>D. Select <b>Demo</b> button to access demographics.</p>	 <table><tr><th>Patient #</th><th>Last Name</th><th>First Name</th><th>SSN</th><th>DOB</th><th>Sex</th><th>Phone #</th><th>Address</th><th>Demo</th><th>Summary</th><th>Payer</th><th>Billing</th><th>Docs</th></tr><tr><td>92492</td><td>TEST</td><td>ABC</td><td></td><td></td><td>F</td><td></td><td></td><td>Demo</td><td>Summary</td><td>Payer</td><td>Billing</td><td>Docs</td></tr><tr><td>1114</td><td>TEST</td><td>BOB</td><td></td><td></td><td>M</td><td></td><td></td><td>Demo</td><td>Summary</td><td>Payer</td><td>Billing</td><td>Docs</td></tr><tr><td>98603</td><td>TEST</td><td>BOBBIE</td><td></td><td></td><td>M</td><td></td><td></td><td>Demo</td><td>Summary</td><td>Payer</td><td>Billing</td><td>Docs</td></tr></table>	Patient #	Last Name	First Name	SSN	DOB	Sex	Phone #	Address	Demo	Summary	Payer	Billing	Docs	92492	TEST	ABC			F			Demo	Summary	Payer	Billing	Docs	1114	TEST	BOB			M			Demo	Summary	Payer	Billing	Docs	98603	TEST	BOBBIE			M			Demo	Summary	Payer	Billing	Docs
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<p><b>3</b></p> <p><b>Printing Demographics</b></p> <p>Please follow actions below to print demographics:</p> <ol style="list-style-type: none"> <li>Click on <b>Patient</b> in Menu. Select <b>Demo</b> button.</li> <li><b>Right click</b> and select <b>Print</b> to make into PDF.</li> <li>Change <b>Layout</b> to <b>Landscape Mode</b>.</li> <li>Select <b>Print</b>.</li> </ol>	
<p><b>4</b></p> <p><b>Accessing Insurance</b></p> <p>Please follow actions below to access insurance:</p> <ol style="list-style-type: none"> <li>In Patient drop-down, select <b>Payer/Insurance</b>.</li> <li>If the patient search field displays, select the <b>Patient</b> hyperlink.</li> </ol>	

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<p><b>5</b></p> <p><b>Printing Insurance</b></p> <p>Please follow actions below to print insurance:</p> <p>A. If older DOS, <b>uncheck Active Only</b> to show all insurances in patient's chart.</p> <p>B. If patient has an insurance card scanned in, <i>the card will show</i> prior to payer information.</p> <p>C. <b>Right click</b> and select <b>Print</b> to make into PDF (<i>the same way as Step 3.</i>)</p>	
<p><b>6</b></p> <p><b>Accessing SOAP/Provider Notes – Part 1</b></p> <p>Please follow actions below to access SOAP/Provider notes:</p> <p>A. In Patient drop-down, select <b>Receivable</b>.</p> <p>B. If the patient search field displays, select the <b>Patient</b> hyperlink.</p>	

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<p><b>7</b></p> <p><b>Accessing SOAP/Provider Notes – Part 2</b></p> <p>Please follow actions below to access SOAP/Provider notes:</p> <p>A. Select <b>Invoice</b> hyperlink.</p> <p>B. Select <b>Medical Record</b> button.</p>	<p>The screenshot shows the Experity EMR portal interface. At the top, there's a header with 'EXPERITY' and 'Patient: TEST'. Below this, a section titled 'Receivables for TEST, BOB (1114)' contains a table with columns: Action Date, Invoice, Date, Clinic, Visit Type, Patient Name, and Payer. A red dashed line with a purple circle 'A' points to the 'Invoice' link in the first row of the table. Below the table, there's another section titled 'Receivables' with a sub-header 'Receivables for 1'. This section contains patient information and a table with columns: Type, Payer, EMC PID, h, Total Charges, and Tot. A red dashed line with a purple circle 'B' points to the 'Medical Record' button in the top right corner of this section.</p>
<p><b>8</b></p> <p><b>Printing Notes</b></p> <p>Please follow actions below to print SOAP/Provider notes:</p> <p>A. Once the note opens, in the top right-hand corner, select <b>Print</b> button.</p> <p>B. A pop-up will display. Ensure in <b>PDF</b>.</p> <p>C. Layout needs to be in <b>Portrait mode</b>.</p> <p>D. Select <b>Print</b>.</p>	<p>The screenshot shows the RedMed Urgent Clinic portal interface. At the top, there's a header with 'RedMed Urgent Clinic' and 'RedMed, LLC'. Below this, a section titled 'Transcription' contains patient information and a table with columns: Type, Payer, EMC PID, h, Total Charges, and Tot. A red dashed line with a purple circle 'A' points to the 'Print' button in the top right corner of the page. Below the table, there's a 'Print' pop-up with a 'Destination' dropdown menu showing 'Adobe PDF' (marked with a purple circle 'B'). The 'Layout' dropdown menu shows 'Portrait' (marked with a purple circle 'C'). At the bottom of the pop-up, there's a 'Print' button (marked with a purple circle 'D') and a 'Cancel' button.</p>