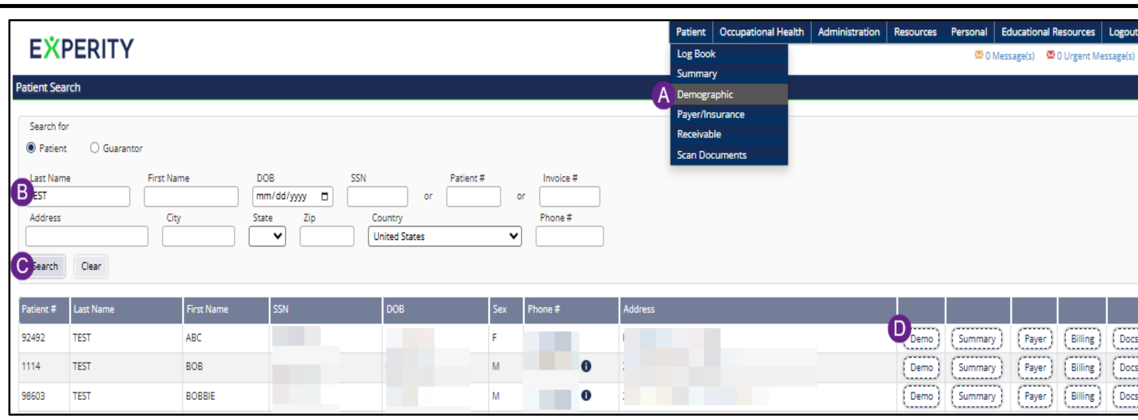
Tip Sheet: Experity EMR Portal Instructions – Multiple Clients

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
1 **Logging In** Please log in using your email or distribution email and password provided to you. ***Note:*** If on a distribution email, please contact owner for any log in issues.	
2 **Patient Search & Demographics** Please use actions below to locate patient: A. In Patient drop-down and select **Demographic**. B. Enter **Patient's Name** C. Then select **Search**. D. Select **Demo** button to access demographics.	

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<tr><th>Steps</th><th>Action</th></tr>
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Printing Demographics

Please follow actions below to print demographics:

A. Click on **Patient** in Menu. Select **Demo** button.

B. **Right click** and select **Print** to make into PDF.

C. Change **Layout** to ***Landscape Mode***.

D. Select **Print**.

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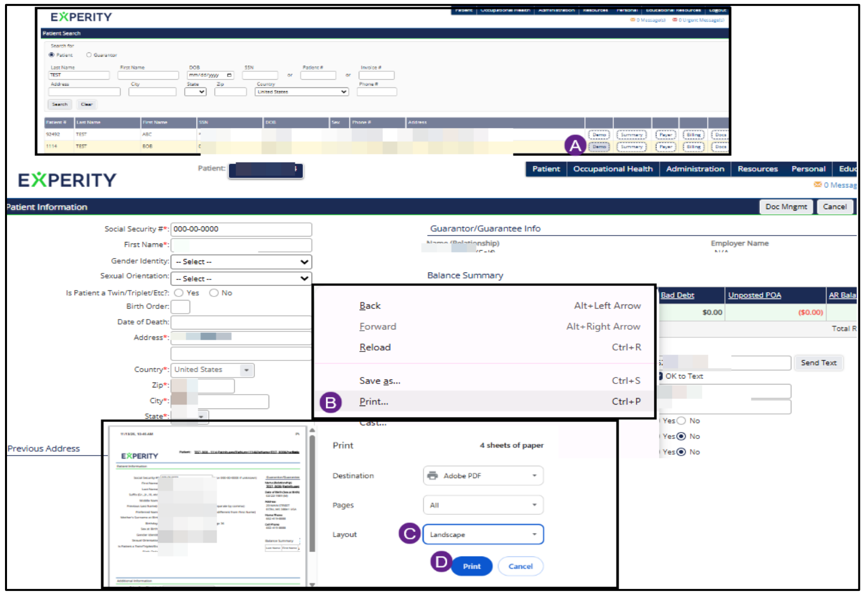

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Accessing Insurance

Please follow actions below to access insurance:

A. In Patient drop-down, select **Payer/Insurance**.

B. If the patient search field displays, select the **Patient** hyperlink.

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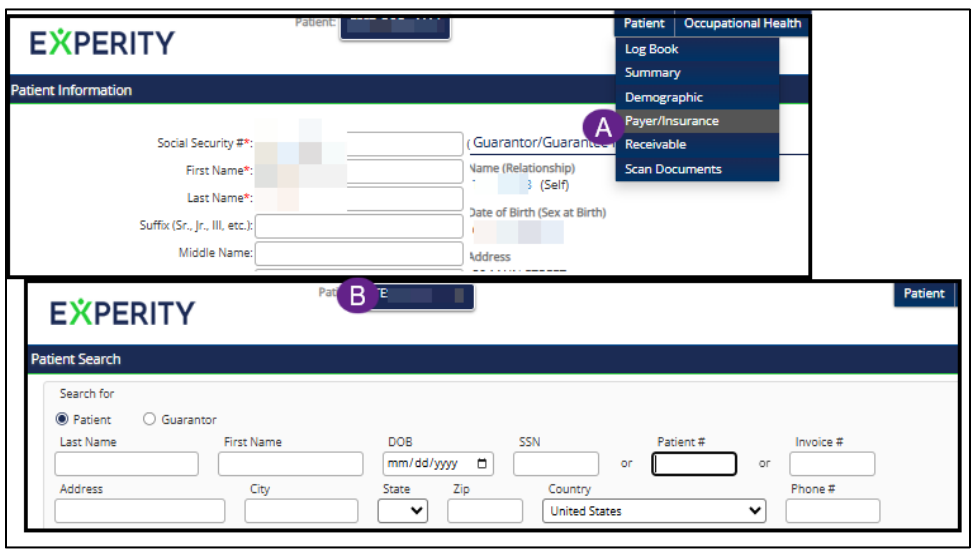

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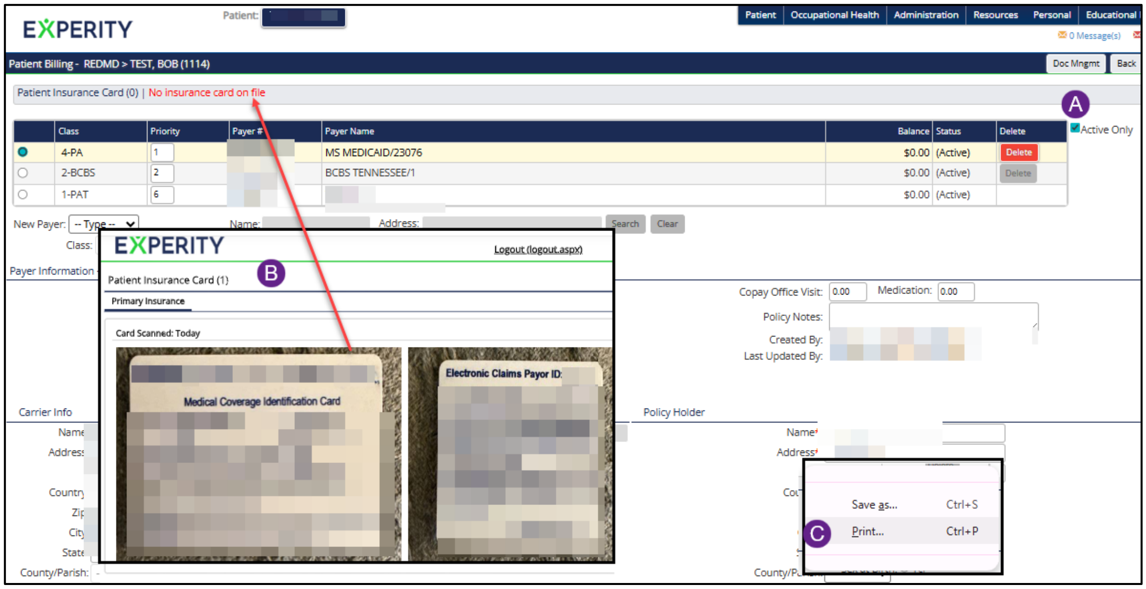
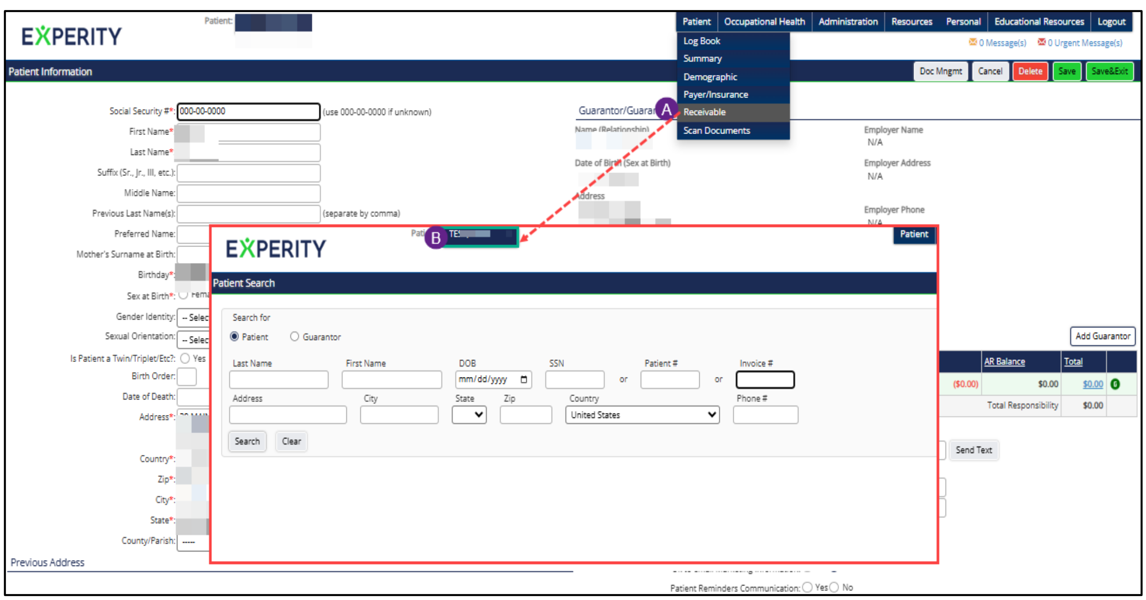
Steps	Action
5 **Printing Insurance** Please follow actions below to print insurance: A. If older DOS, **uncheck Active Only** to show all insurances in patient's chart. B. If patient has an insurance card scanned in, *the card will show* prior to payer information. **C. Right click** and select **Print**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

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Accessing SOAP/Provider Notes – Part 2

Please follow actions below to access SOAP/Provider notes:

A. Select **Invoice hyperlink.**

B. Select **Medical Record** button.

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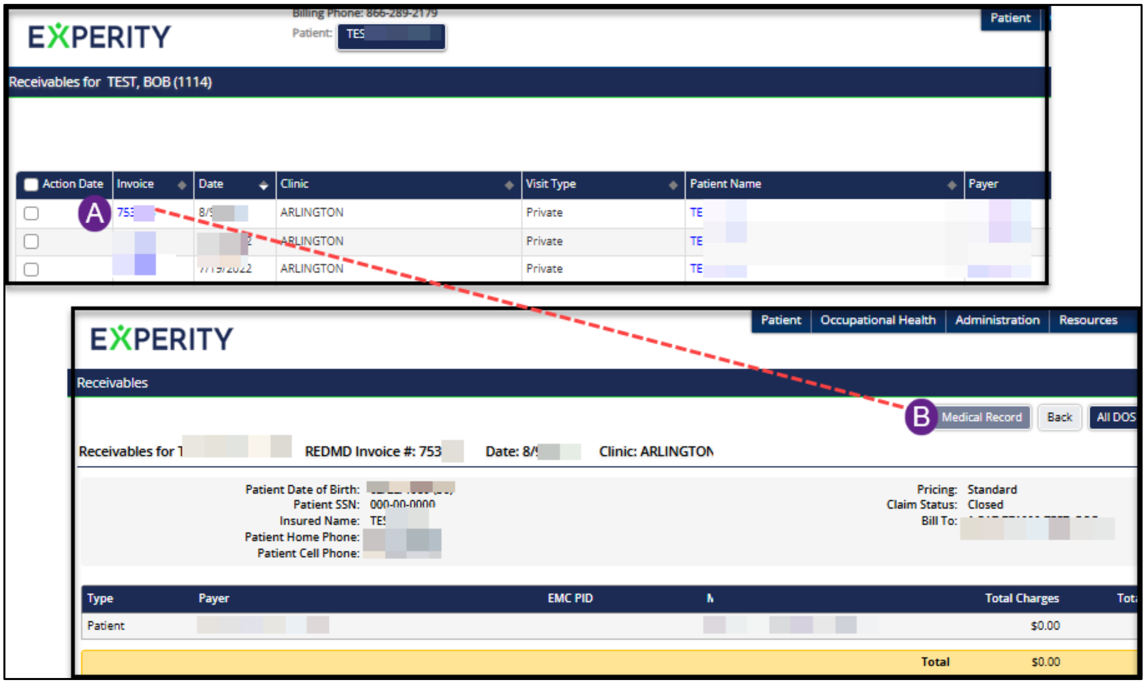

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Printing Notes

Please follow actions below to print SOAP/Provider notes:

A. Once the note opens, in the top right-hand corner, select **Print** button.

B. A pop-up will display. Ensure in **PDF**.

C. Layout needs to be in **Portrait mode**.

D. Select **Print**.

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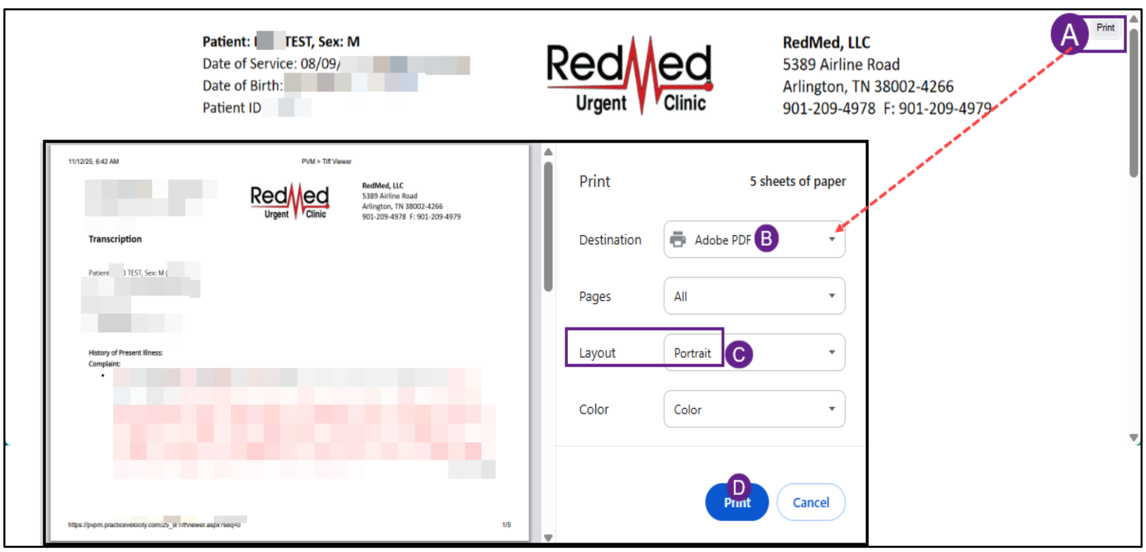

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