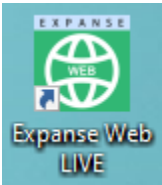# Section 1 - Meditech Expanse ED - Web

The following steps will detail the process by which residents will complete their portion of the report and how their preceptors will see, review, amend, and sign off on those reports. This document is in two parts, the first will cover the resident side of the process and the second will cover the preceptor portion.

You will be using **Meditech Expanse WEB**. This icon will appear on the desktop of any workstation when you log in.

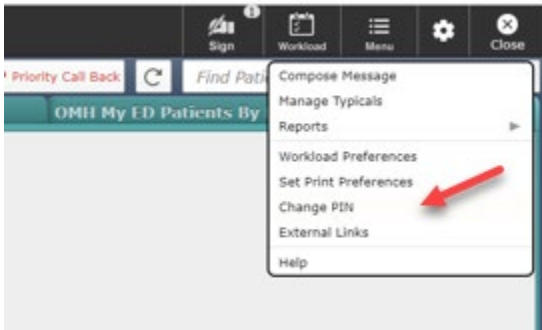You have been set up with a unique job role in order to document.

Double click this icon and choose the appropriate role from the drop-down menu based on your site.

The ED tracker will open. The first thing you are required to do is set up your electronic documentation PIN:
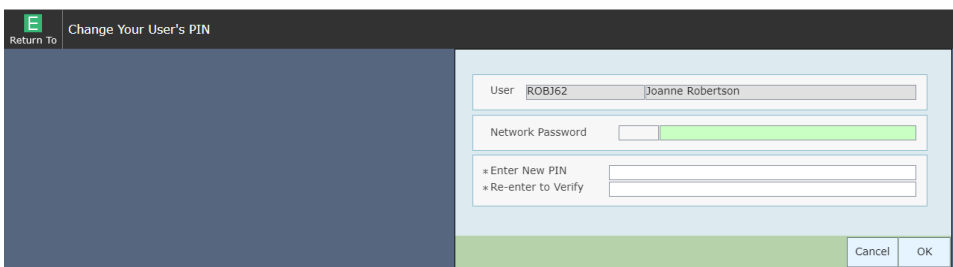
CHANGING PIN

Log into the web, the select the Menu option.
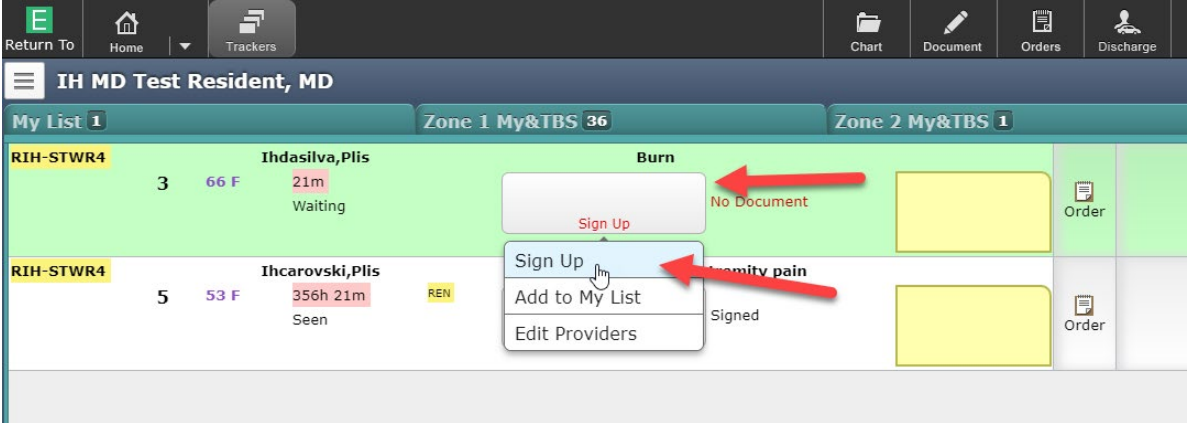
Change PIN will display.

After selecting Change PIN, the following screen will show.

Enter your Network password, and then enter your new PIN in the Enter New PIN and Re-enter to Verify fields. Click OK.

Sign Up

Click on the button with 'Sign Up' written on it and click 'Sign Up' on the drop-down menu that appears to add yourself as the resident assigned to the patient.
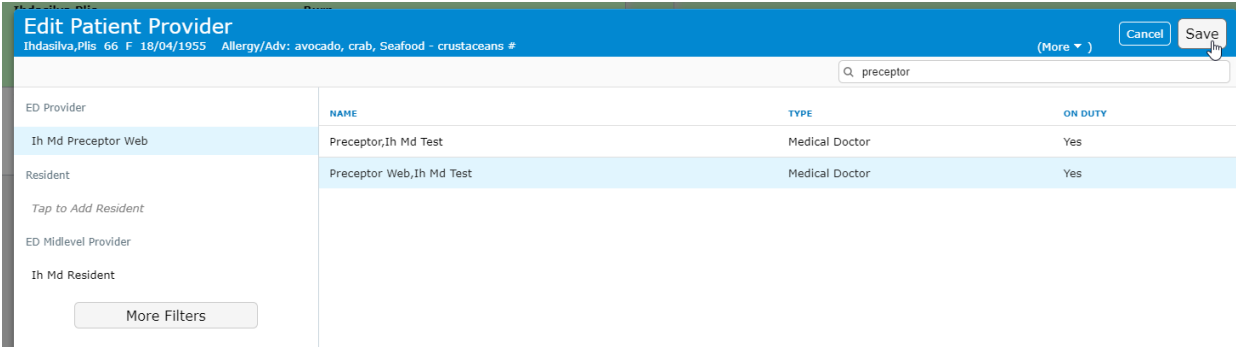

That will add your name in blue at the bottom of the button to differentiate from an ED staff provider.

Add your preceptor as the ED provider by clicking on the 'Sign Up' button and click on 'Edit Providers' in the drop-down menu.
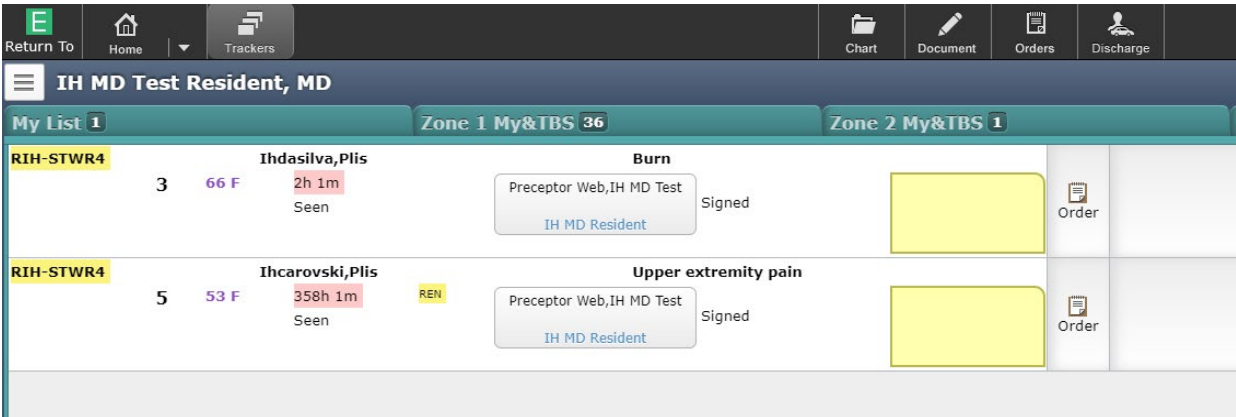
On the overlay that appears, you will search for your preceptor by name using the search box in the top right corner. The list will filter based on your search field. Click on the correct physician from the list to highlight it in blue. You will also see the physician's name appear on the left under ED Provider. Click Save in the top right corner to confirm your choice.
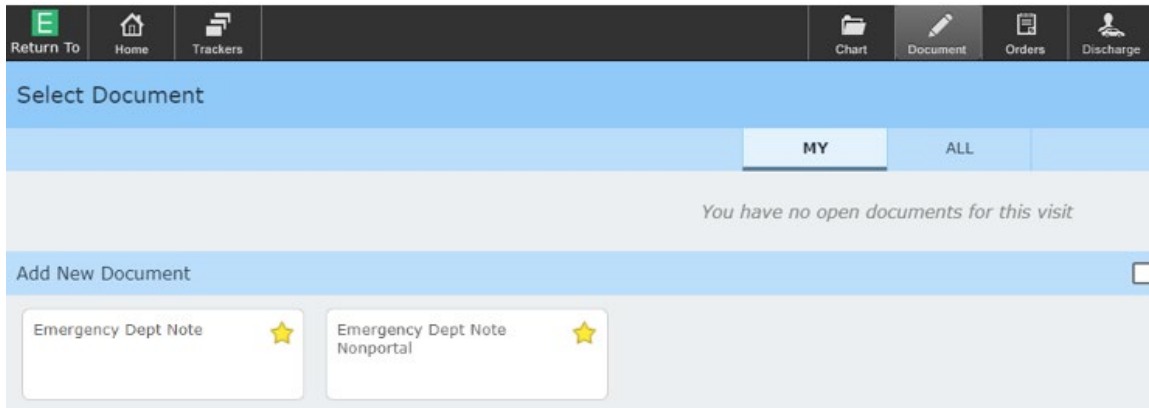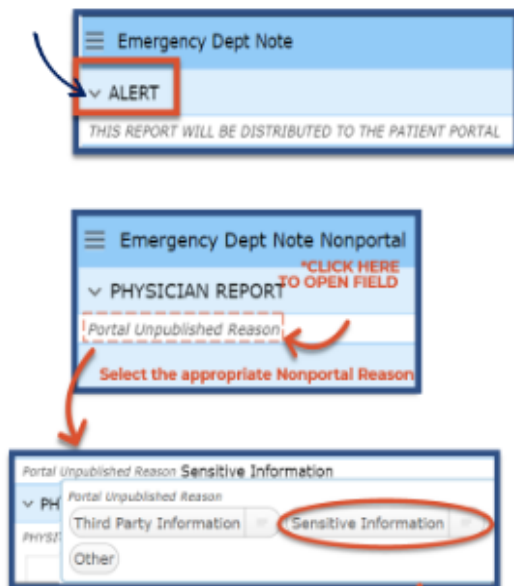

You will return to the tracker where you will see that both the resident and preceptor appear on the 'Sign Up' button.

With the patient highlighted, click the Document button at the top of screen to open the document selection screen. Click on Emergency Department Visit to start your document.

Documentation

An alert advises that the report will be available to the patient in MyHealthPortal.

Nonportal Reasons

Sensitive Information
Concern for patient's safety and well-being. Assess if there is a potential for risk of physical harm to the patient, staff or others. Examples: Sensitive reports may include information regarding sexual, domestic; elder; and/or child abuse, or psychiatric conditions.
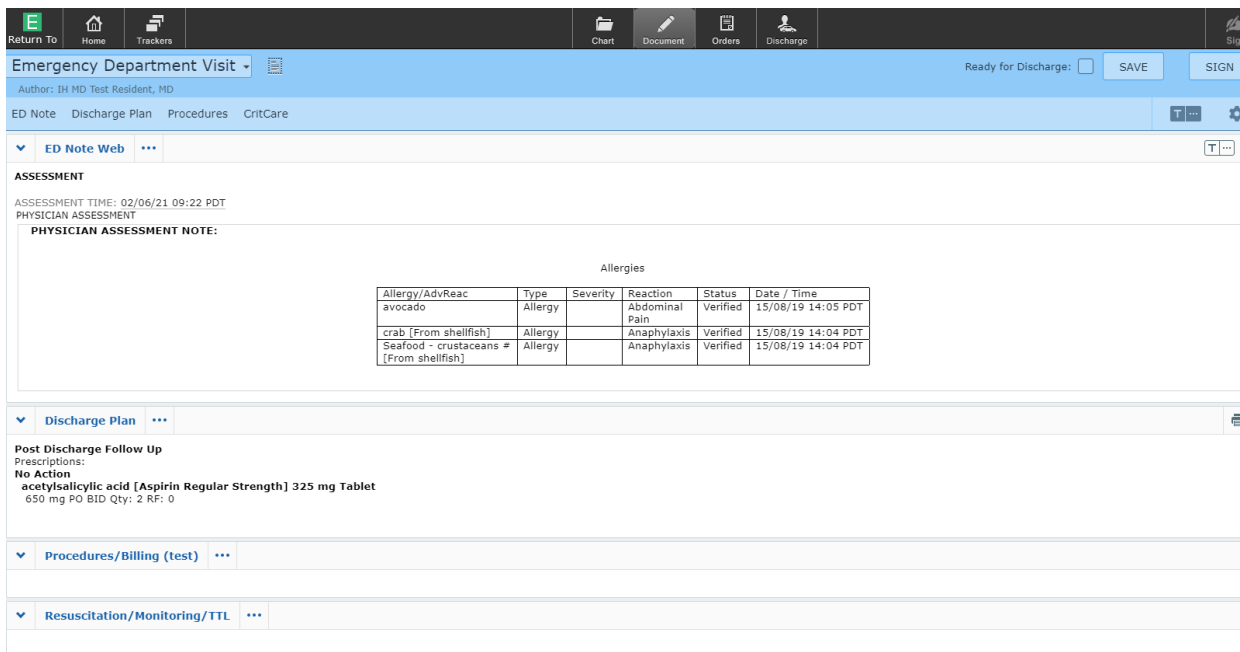
Third Party
Avoid including information provided by a third party. Example: Information disclosed in confidence from a relative of a patient, without the patient's knowledge.

Other
Example: Direct request from the patient to prevent the release of the document to MyHealthPortal.

NOTE: The patient has the right to request copies of their nonportal reports through Health Records Departments as per the Freedom of Information and Protection of Privacy Act.

This is the standard ED report that you will fill out as normal. Add in your assessment notes in the assessment box.

When you have finished your report, you will need to fill out the Disposition on the Discharge Plan by clicking on the Discharge Plan button in the blue bar.
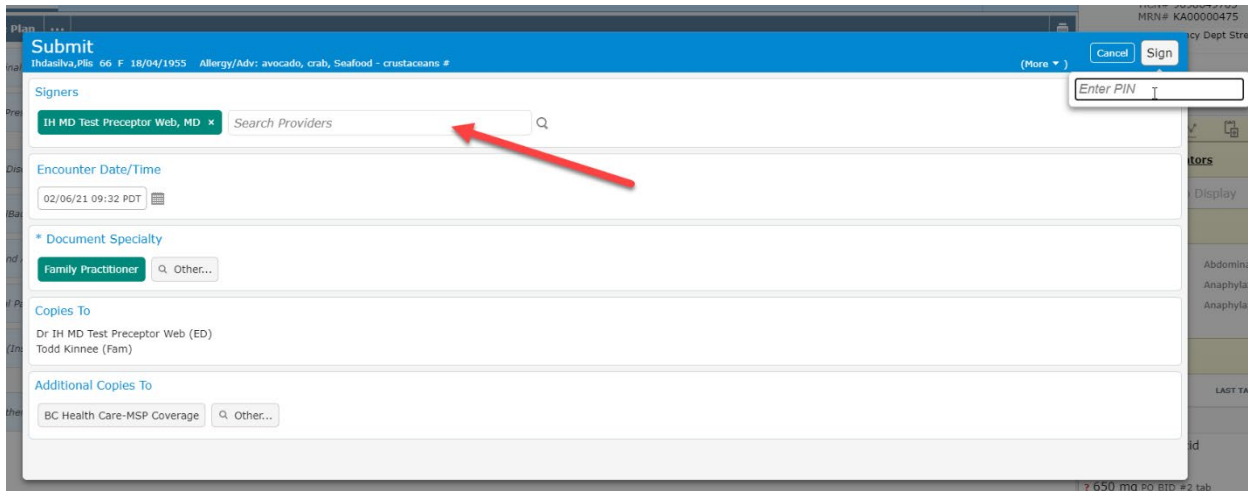
When documentation is complete, open the Sign overlay by clicking on the Sign button in the top right corner.

**You MUST add your preceptor as a Signer so that they can be notified to review report and complete the additional Discharge fields.

When you type their name into the search bar, a drop-down menu will appear, and you can select the appropriate person from that menu. Once you do, the name will appear in a green box. In the image below, you can see that I have added our test preceptor already as my co-signer. After that, you can click Sign in the top right corner, type in your e-Sign PIN, and press Enter.

The system will return you to the tracker and the document will display in I-Signed status in the patient's EMR. In the resident section of the report, the ED Provider and the ED resident are displayed:
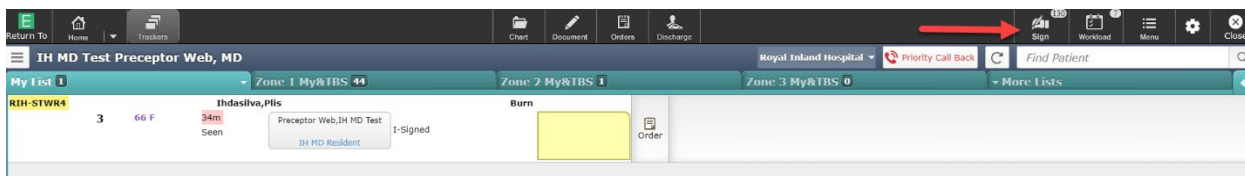
Providers
ED Provider: Preceptor Web,IH MD Test

ED Resident: Resident,IH MD Test

The Preceptor is notified in their Sign queue to complete their portion of the ED document.
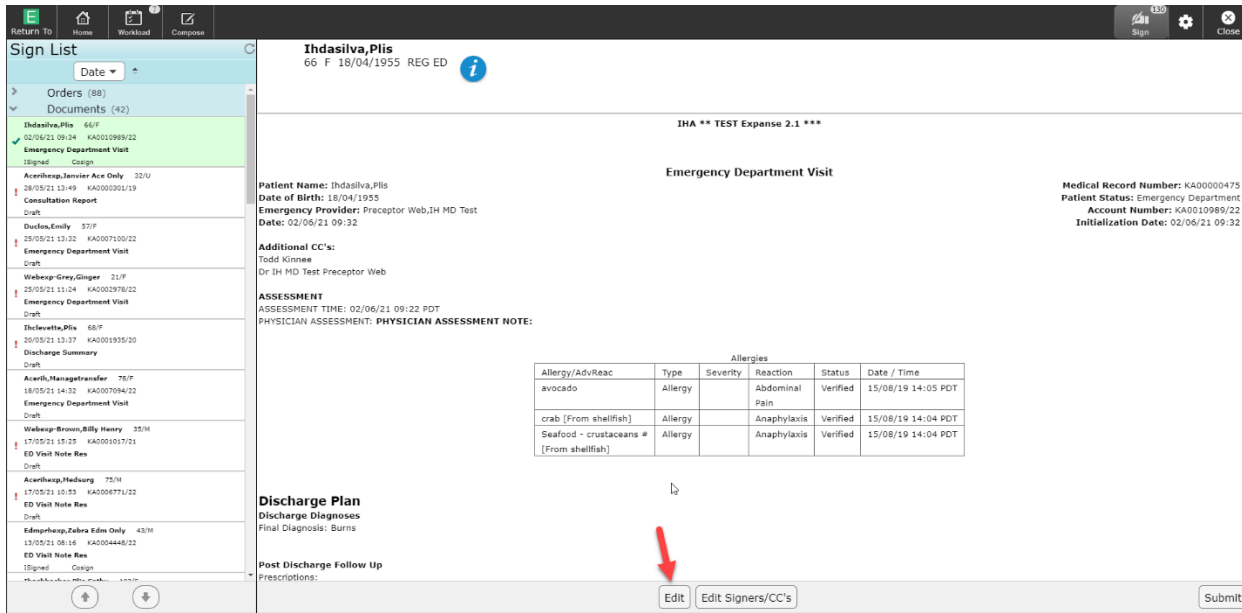
Preceptor

From your tracker you will now see the patient that your resident assigned to you. **To review and sign the document, you must click on the Sign button in the top right corner.** Do not access through the Document panel.

Reports to be signed will appear in your sign queue: your draft reports, as well as I-Signed resident reports.

Clicking on the report will display a preview in the panel to the right. **Click on the Edit button** at the bottom of the page to enter the documentation screen.

The documentation screen will show you everything that your resident created. You cannot modify the notes that the resident entered during their portion of the document. To add notes of your own you will need to click on button on the white banner that says ED Note Web. The notes you add will appear separately and beneath the resident's documentation in a brown-bordered box.
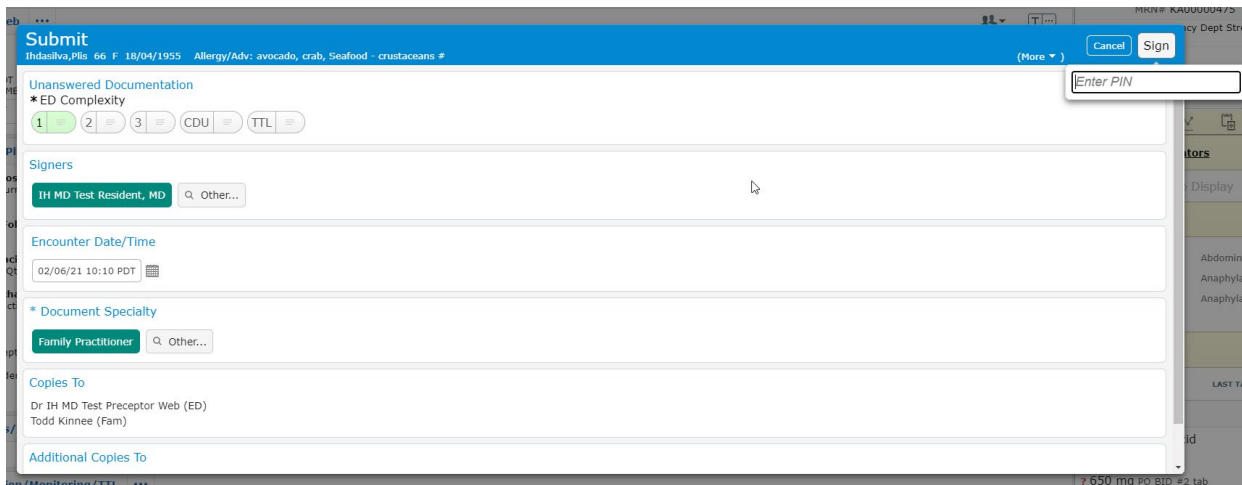

On the Discharge Plan, enter Final Diagnosis (Required), and review Disposition (entered by resident) for accuracy.

When you are finished then you can click on the Sign button in the top right corner as you would for your usual reports. You will be prompted here to enter the ED Complexity and then sign your report using the button in the top corner as per usual.

In the preceptor section of the report, the ED Provider and the ED Resident are again displayed:

Providers
ED Provider: Preceptor Web,IH MD Test

ED Resident: Resident,IH MD Test

IMPORTANT!

If you discover you have created documentation in error (incorrect patient/account/template):

- Immediately create an addendum stating **"This report has been created on the wrong patient/account/template and will be cancelled. Please ensure your records are updated accordingly."**
- Create the document on the correct patient/account/template
- Email DocumentationSupport@interiorhealth.ca with patient and report demographics so that we can remove the report from the patient's EMR.

If you discover a typo/text error in your document:

- Create an addendum to correct or clarify the text error.
- If the error cannot be clarified in an addendum, email DocumentationSupport@interiorhealth.ca with report details and we will assist in correction.

Support Information (All)

Our Medical Documentation team regularly audits Resident documentation. We will contact you if your documentation requires attention.

For Documentation questions, quality issues or corrections, email DocumentationSupport@interiorhealth.ca
For technical support please contact IMIT SERVICE DESK: 1-855-242-1300 or servicedesk@interiorhealth.ca