AcademicEHR
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INSTRUCTOR TRAINING
COMMUNICATION

MODIFIED | 11/30/15

FILENAME | 03_INSTRUCTOR-TRAINING_COMMUNICATION

Communicating With Your Students and Other Faculty

If you have questions regarding a particular clinical record and need to communicate with your students and other faculty, you may do so by creating a help ticket.

Creating a Help Ticket

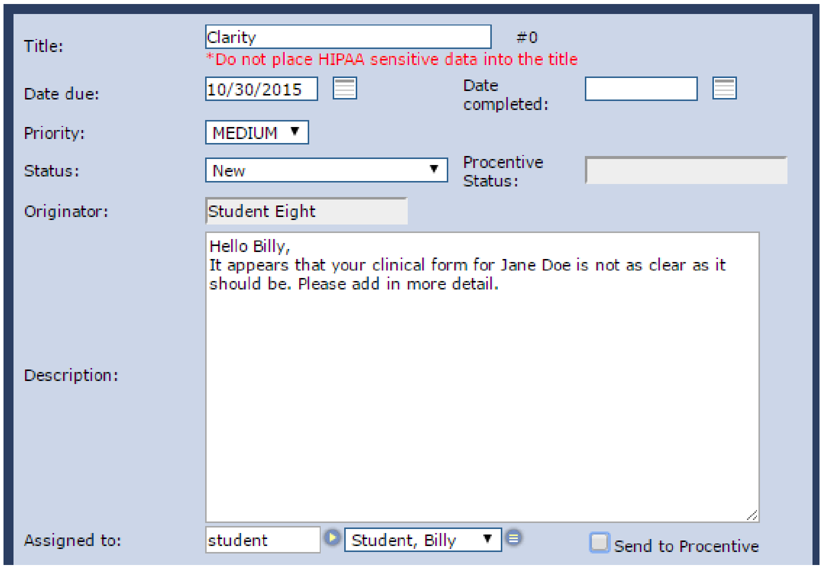
To open the “add ticket” window and create a new ticket, **click the help button** Help. It can be found in the lower right corner of any Clinical Record you have open.

Basics: Enter a Title, Date due, and Priority.

Description: If necessary, fill in the details about the ticket in the Description field.

Assigned to:

- **Student or Other Faculty:** To assign the ticket to another person, type their name in the quick search field. Click the quick search button ▶. The name of the person will appear in the “Assigned to” drop down. You can also select your Instructor from the master list of staff by clicking on the pick list button ☰.
- **Staff associated with Ticket:** To associate additional Students and/or other faculty with a ticket, you can add them by entering their name in the “Add staff to Ticket” quick search field. Click the quick search button ▶. Similar names will appear in the box to the right. Highlight the applicable names and then click “Add” Add. The additional Students and/or other faculty will appear in the box next to “Staff associated with Ticket”. You can also select the person from the master list of staff by clicking on the pick list button ☰. A new window will appear with all of the staff options. Click once to highlight the applicable students and/or faculty and click ok OK. The name will now appear in the box. Highlight the applicable names and click “Add” Add. Repeat this process to add more Students and/or Faculty.



Title: Clarity #0
*Do not place HIPAA sensitive data into the title
Date due: 10/30/2015
Date completed:
Priority: MEDIUM
Status: New
Procentive Status:
Originator: Student Eight
Description: Hello Billy,
It appears that your clinical form for Jane Doe is not as clear as it should be. Please add in more detail.
Assigned to: student ▶ Student, Billy ☰
☐ Send to Procentive

- NOTE: If you choose a specific student under “Assigned to”, you will be added automatically to the ticket under “Staff associated with Ticket”.
- **Self:** To create a reminder or a task for yourself, you may choose “self” from the dropdown.

Save: Click the save button Save in the lower right corner. This will close the window automatically once saved.

Communicating With the EHR Help Desk

If you have technical issues or questions regarding a particular clinical record and need to communicate with the Electronic Health Record’s Help Desk, follow the instructions below:

Creating a Help Ticket

To open the “add ticket” window and create a new ticket, **click the help button** Help. It can be found in the lower right corner of any Clinical record you have open.

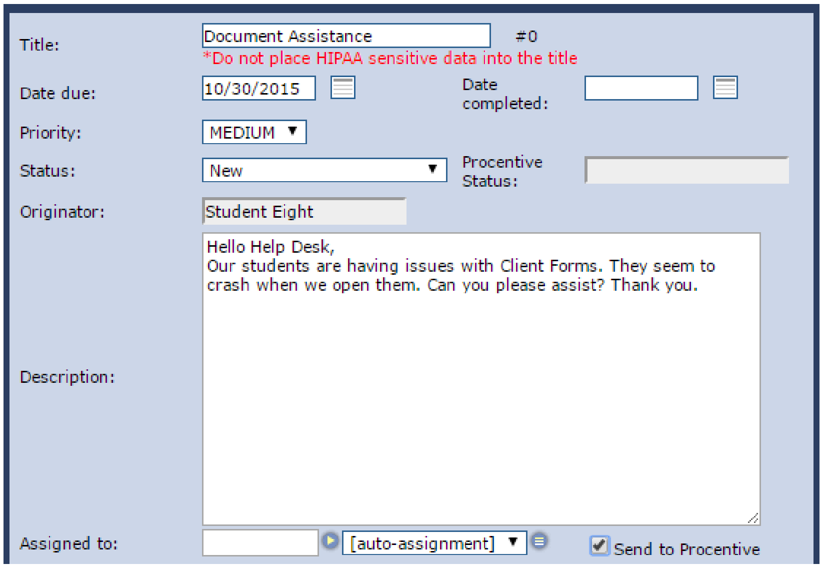
Basics: Enter a Title, Date due, and Priority.

Description: If necessary, fill in the details about the ticket in the Description field.

Assigned to: To create a reminder or a task for yourself, you may choose “self” from the dropdown.

Send to Procentive: Check the “Send to Procentive” checkbox ☑ Send to Procentive. This checkbox is found to the right of the “Assigned to” fields.

Save: Click the save button Save in the lower right corner of the window. This will close the window automatically once saved.



Title: Document Assistance #0
*Do not place HIPAA sensitive data into the title

Date due: 10/30/2015
Date completed:

Priority: MEDIUM

Status: New
Procentive Status:

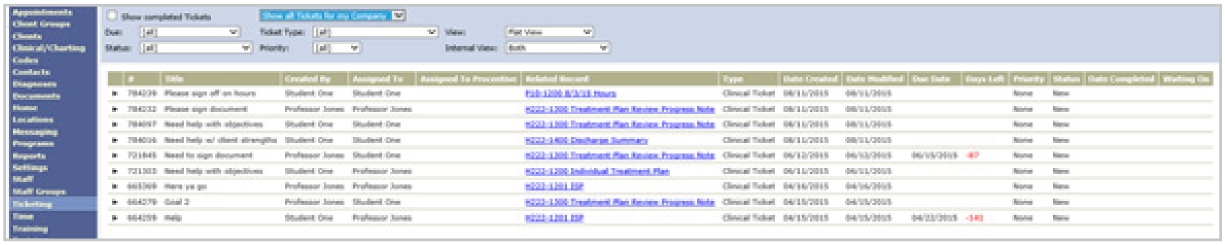
Originator: Student Eight

Description:
Hello Help Desk,
Our students are having issues with Client Forms. They seem to crash when we open them. Can you please assist? Thank you.

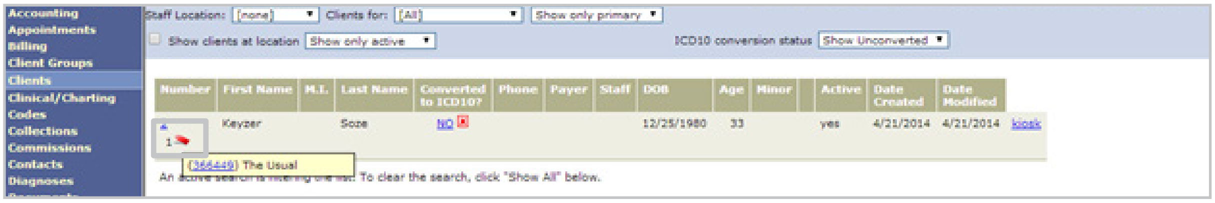
Assigned to: [auto-assignment] ☑ Send to Procentive

Review Your Created Ticket

1. **Click Ticketing** Ticketing to get to the “Ticketing Module”.



2. **Double-click** on the ticket line, **anywhere that isn’t a blue link**. If you are on a tablet, click once on the data so that it becomes highlighted, and then click the “Change” button in the upper right corner of the page. A new window will open and you can begin adding/editing the information.
    - If you created the ticket in connection to a certain record in Procentive (eg. a client record, clinical note, etc), you will see a red Ticketing icon in that record line. The ticketing icon will remain visible as long as a ticket is open. As soon as you complete it, it will disappear. You can click on the icon, and the system will show you the Ticket Number and Title. If you click on the Ticket Number, it will open the ticket and allow you to add additional comments.
    - Double-clicking on the individual ticket will open the ticket in the “Ticketing Window”.



Staff Location: (none) Clients for: (All) Show only primary
☐ Show clients at location Show only active ICD10 conversion status Show Unconverted

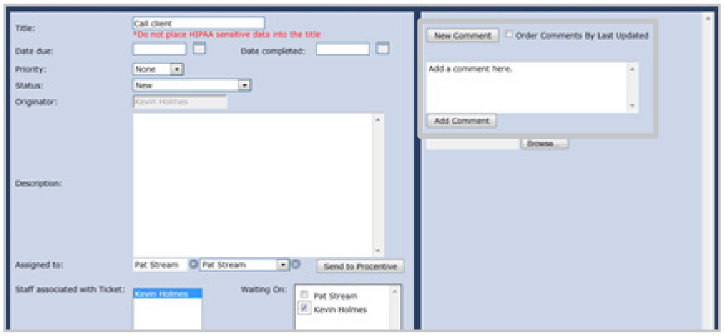
Number	First Name	M.I.	Last Name	Converted to ICD10?	Phone	Payer	Staff	DOB	Age	Minor		Active	Date Created	Date Modified	
1	Keyzer		Soze	NO				12/25/1980	33			yes	4/21/2014	4/21/2014	kiosk

(366449) The Usual

An active search is filtering the list. To clear the search, click "Show All" below.

Add Comments and Update Existing Tickets

1. **Open the ticket** by double-clicking.



Title: Call client
*Do not place HIPAA sensitive data into the title
Date due:
Date completed:
Priority: None
Status: New
Originator: Kevin Holmes
Description:
Assigned to: Pat Stream Pat Stream
Staff associated with Ticket: Kevin Holmes
Waiting On: ☐ Pat Stream ☑ Kevin Holmes

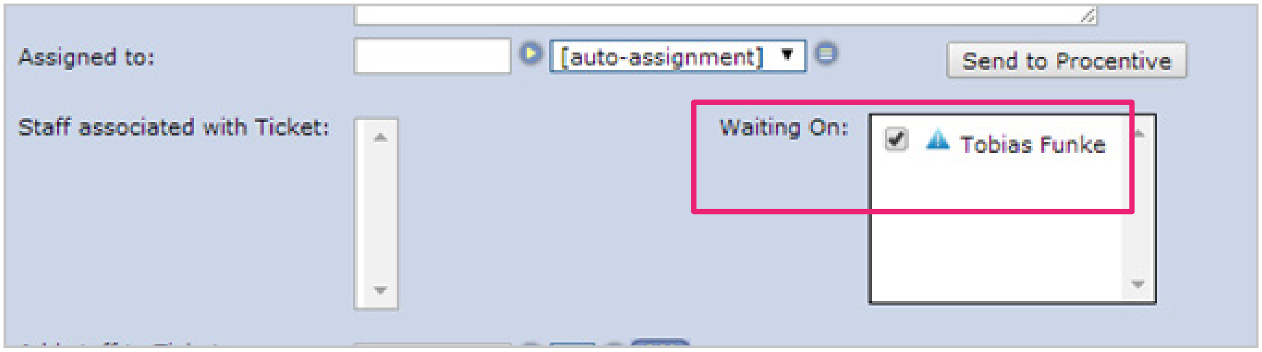
2. **New Comment: Click the New Comment button** New Comment . A text window will appear. **Enter your comment** and then **click “Add Comment”** Add Comment . You do not need to click save after you do this.
3. The screen will update with the comment and a time stamp showing who commented and when.
4. **Status:** All new tickets default to “New” for a status. But as you update the ticket and work it to

completion, you should **change the status to match its current state of progress**.

5. **When a ticket is resolved, change the status to complete.** The system will automatically enter today's date in the "Date completed" field when you do this.
    - NOTE: If you change the status (or any data on the left side of the ticket window) you will need to click save.
6. **Assigned to:** To assign the ticket to a new person, type their name in the quick search field for the "Assigned to" field. Click the quick search button . The name of the given person will appear in the "Assigned to" drop down menu. You can also select a staff from the master list of staff by clicking on the list button.
7. **Add staff to Ticket:** To add additional staff to a ticket, type their name in the corresponding quick search field. Click the quick search button . You can also select a staff from the master list of staff by clicking on the list button . The name of the given staff will appear. Click on the name (or hold the CTRL key to select multiple names). A name is selected when it is highlighted in blue. Once the correct name is selected, click the Add button .
8. **Save:** If you make any changes to the left side of the ticket, **you must click save.**

Additional Fields and Features of a Ticket

- **Waiting on:** If the ticket is waiting for a specific staff person to act, enter a check in the corresponding field. To see tickets that are currently waiting on you, go to the Ticketing Module and select "Show Tickets Waiting on me" from the filters along the top.



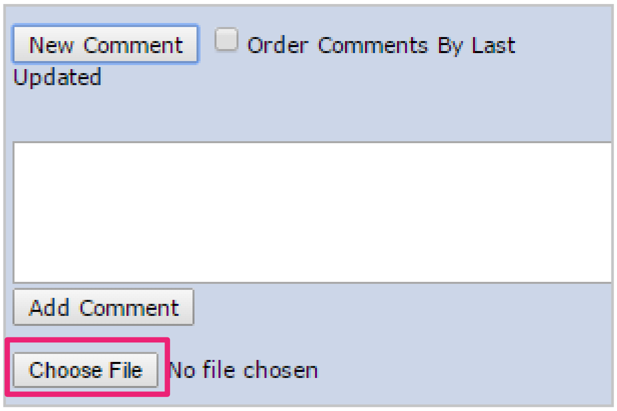
Assigned to: [auto-assignment]

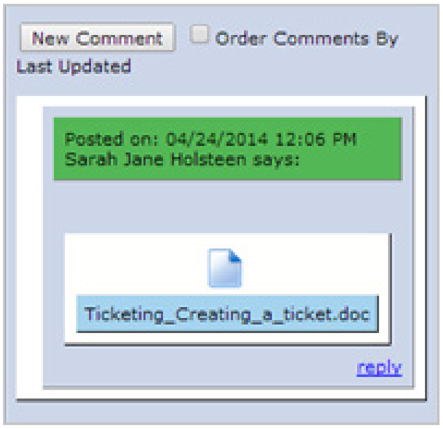
Staff associated with Ticket:

Waiting On: ☑ Tobias Funke

- **Attaching Documents to a ticket:** Once you have created a ticket, you may open it up again and upload an attachment as part of a New Comment. Click the New Comment and you will see a "Choose File" button appear below the text box. Click on this and it will allow you to select a file from your computer. Click "Open" and the title of the uploaded file will appear above the "Choose File" button. (You will not be asked to upload.) You may add additional attachments by clicking the Choose File again and repeating the process.

- Once you have selected all the files you'd like uploaded to the ticket, click "Add Comment" and the attachment will appear in the comment.
- Be sure to **click Save before closing the ticket.**


New Comment
☐ Order Comments By Last Updated
Add Comment
Choose File
No file chosen


New Comment
☐ Order Comments By Last Updated
Ticketing_Creating_a_ticket.doc
reply

Posted on: 04/24/2014 12:06 PM
Sarah Jane Holsteen says: