



EMR PANEL SUBMISSION GUIDE

QHR – ACCURO

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DISCLAIMER

This document is a general guide only and is not intended to replace EMR vendor set up and training.

This guide was created with the support of the EMR vendor. It was developed by staff at the Doctors Technology Office (DTO), Practice Support Program (PSP) and Doctors of BC Billing Support Team, and therefore does not form part of the EMR vendor’s official documentation.

Overview

DTO, PSP and Doctors of BC Billing Support Team in collaboration with QHR Accuro have developed this EMR orientation guide that outlines how to create the Panel Report using a step-by-step approach with your EMR. Screenshots have been included to demonstrate how to use the EMR to complete each step.

Key Steps / Key Tips

- **For assistance or inquiries** about the Facility Number, contact HIBC support: Practitioner Account Service at **604-456-6950** (Vancouver) or **1-866-456-6950** (elsewhere in BC) **option 3** then **option 2**.
- For your **first-time submitting** records to MSP/Teleplan, it is recommended to only submit a few records to check that they are accepted and not rejected.
- **Rejection codes** and explanations can be found [here](#). For further questions regarding rejections contact HIBC support (on the number above).

Section 1 – Preparing for the Panel Report

NOTE: You must have completed the steps to clean up your panel and develop your list of empaneled patients. The following guide and video outline how to prepare your list of empaneled patients so that it is accurate and up to date.

- Access the Accuro Empanelment How-to Guide [here](#).
- Watch the Accuro Empanelment Video [here](#).

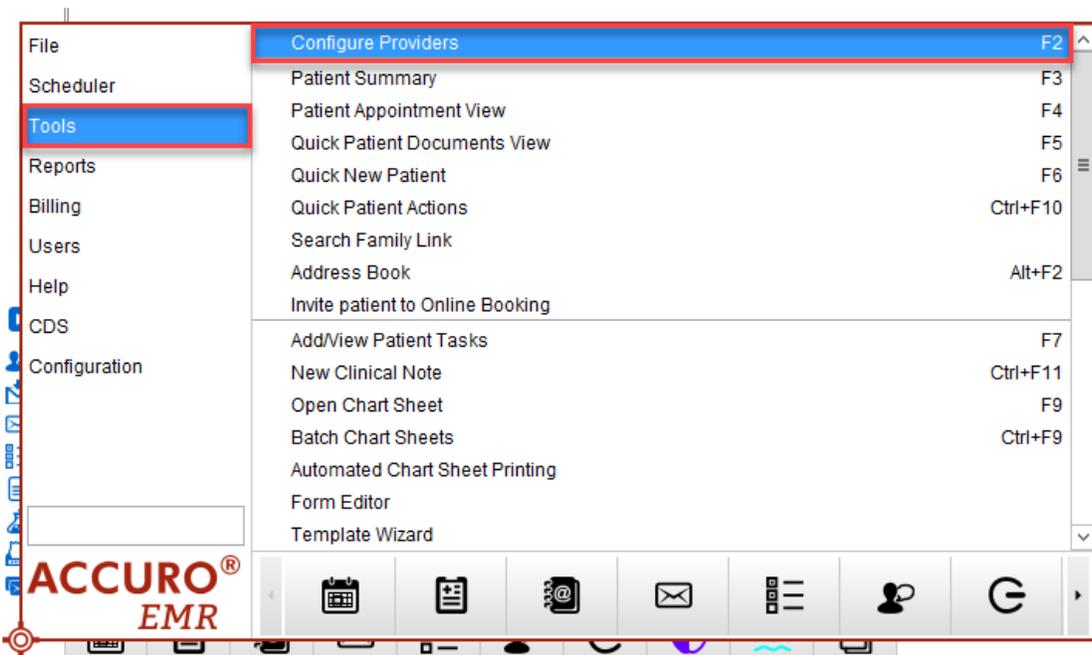
NOTE: A Facility Number is required when submitting your panel. A provider can obtain the Facility Number from the provider responsible for administration of the clinic.

For any questions on the Facility Number, you can contact Teleplan support at 1-866-456-6950.

If your clinic does not have a facility number - apply for one [here](#).

Verify the Facility Code has been updated

1. Select **Tools**, then select **Configure Providers (F2)**



2. Click on the **Configure** button at the bottom left of your screen.

Provider Management
Office and Personal demographics for providers who are not part of your clinic. Forms, Letters, Labels and other features and demographics are for reference and can be viewed here any time.

Search

Last Name First Name Pract #

Show Inactive Providers

Search Results
Zeeben Judy 1234

Title Last Name Middle Name
First Name Active

Office Demographics **Provider Demographics**

Office Name: Phone:
Address: Alternate:
City: Fax:
Postal Code: Long Distance

Email:

Provider Note

Last Updated: 2023-Apr-24 1

Configure Set Signature Update Provider Delete Provider Lookup Providers

3. Ensure both the **New Appt Facility** field and **New Bill Facility** fields are filled out. Select **Next**, and then **Finish** to complete the process.

Provider Wizard

Steps

1. Provider Details
- 2. Billing Details**
3. Edit Headers

Billing Details

Configuration

Pract Number: 1234 Charge Gst/Hst Opted In

Data Centre: T0000

Payee Number: ...

Unincorporated Payee Number:

SCC: [00] None

Procedure Code Filter: --All--

Defaults

Diagnostic Code: 0 ... Patient's Last Diagnostic Code

Procedure Code: 0 ... New Bill Start Time: ...

New Bill Location: I Hospital - Inpatient

New Appt. Location: --None--

New Appt. Facility: AB123 New Bill Facility: AB123

Billing Provider: -- None --

Patient's Referring Physician Set new claims to No Charge

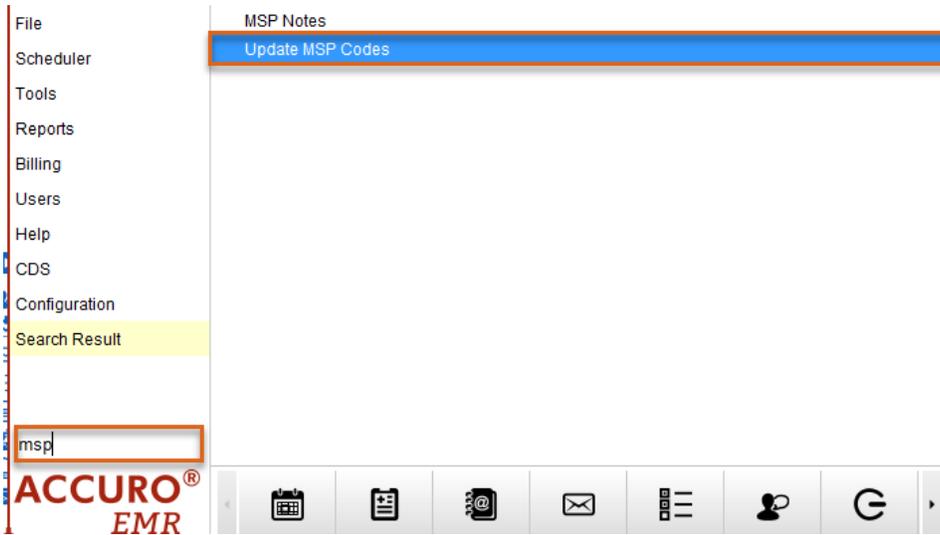
Facility Exceptions

<input type="text"/>	Remove Exception
Procedure Code: <input type="text"/> ...	
Facility Code: <input type="text"/>	Add Exception

< Prev Next > Finish Cancel

Run MSP update

1. Click on Accuro Icon in bottom left corner of Accuro screen and type in **MSP** and click on **Update MSP Codes** to ensure the procedure code **98990** and the diagnostic code **L23** are updated in the database. (for LFP physicians only)



Setting up the Office Provider

In Accuro EMR Primary Provider can be set under Office Provider.



1. Click the **Patients** button on the Accuro Navigation bar.
2. To search for your patient, click on your F1 key to clear the screen and type in **Last Name** or **Health Number** in the related search field across the top.

Last Name: Health #:
 First Name: Identifier:
 Middle Name: Birthdate:

Title: Mr. Suffix: Patient Status: Active Office Provider: --None--

Demographics | WCB | Other | Relationships | Notes | Status History | Private Billing | Insurer Rules | Providers

Health #: BC, Canada Expiry: Infant: File Number:

Alias
 Birthdate: n/a Gender: M Deceased:
 Family Phys: --None-- Referring Phys: --None--

Address: Note:
 City: BC, Canada Postal/Zip: Type:

Phone #: Home: (000) ___-___-___ Work: (000) ___-___-___ Cell: (000) ___-___-___ Fax: (000) ___-___-___ Preferred Contact Method:

Email Address:

Pharmacy Contact: --None--

Default Insurer: MSP

Global Message: Your Message:
 Last Updated: Never

Custom Fields
 Last Updated:

3. Highlight the patient result from the results list on the top right of the window.

atient: Sunflower, Sandy DOB: 2001-Apr-17 (22 Yr, male) PHN: 8989 898 98 H: (000) ___-___-___ C: (000) ___-___-___
 eReferring Dr.: , () Family Dr.: , () Pharmacy: (fax:) Email: sunridergerobert627@gmail.com

Last Name: Sunflower Health #:
 First Name: Sandy Identifier:
 Middle Name: Birthdate:

Title: Mr. Suffix: Patient Status: Active Office Provider: --None--

Demographics | WCB | Other | Relationships | Notes | Status History | Private Billing | Insurer Rules | Providers

Health #: 8989 898 98 BC, Canada Expiry: Infant: File Number:

Alias
 Birthdate: 04/17/2001 22 Yr Gender: M Deceased:
 Family Phys: --None-- Referring Phys: --None--

Address: Note:
 City: BC, Canada Postal/Zip: Type:

Phone #: Home: (000) ___-___-___ Work: (000) ___-___-___ Cell: (000) ___-___-___ Fax: (000) ___-___-___ Preferred Contact Method:

Email Address: sunridergerobert627@gmail.com

Pharmacy Contact: --None--

Default Insurer: MSP

Global Message: Your Message:
 Last Updated: Never

Custom Fields
 Last Updated:

Sunflower Elderly 5656565656 1953-Apr-01

Sunflower Sandy 898989898 2001-Apr-17

2023-Apr-04 by Dr. Irfu Zaheer / Zaheer Marfatia

4. Beside the **Office Provider** field, click the **Ellipses** button .



5. Providers that exist in your clinic are displayed in the search results by default. To select one, click the provider's name and click **Select**.
6. Click **Update Patient**.

Please Note: Office Provider filtered patient Searches must be enabled before it can be used. Your system administrator will set this up for your clinic.

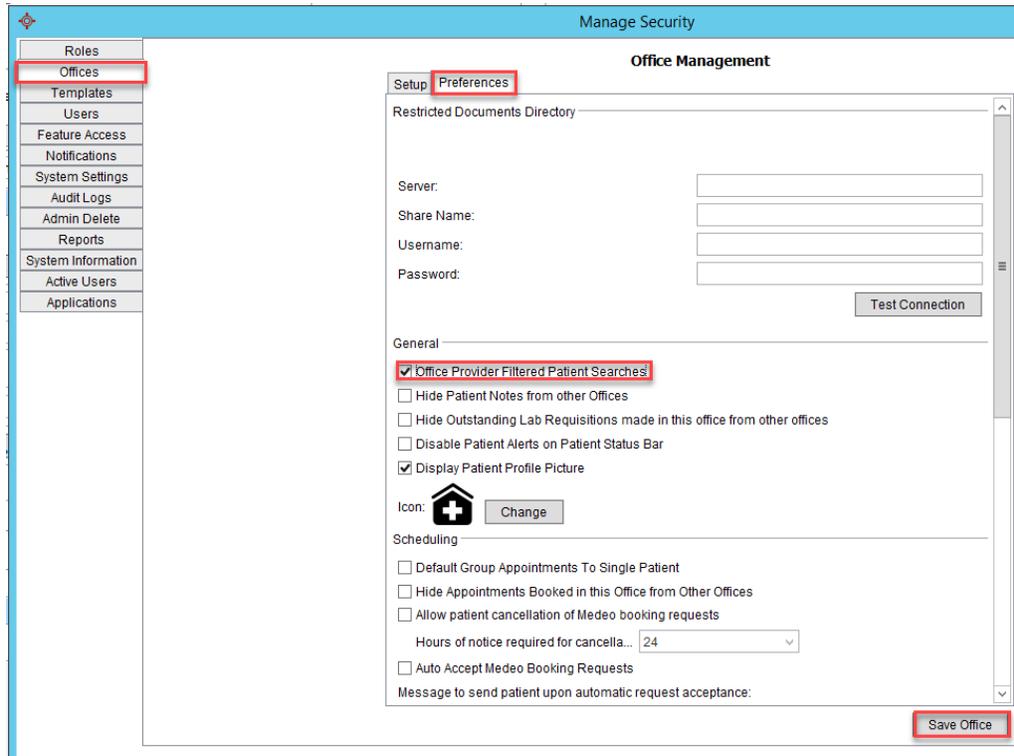
Non-Provider Users: this search includes only patients where the office provider for the patient is one that the user (performing the search) has patient permissions to, in that office.

Provider Users: this search includes patients where the office provider for the patient being displayed is the provider of that user.

A checkbox at the bottom of the Results window allows the Patient Search to be re-run without the provider filter. If the search is re-run it returns all matching patients. The checkbox is not displayed if the Office Provider Filtered Patient Searches is not enabled.

Enable Office Provider Patient Searches

1. Press and release the **Alt** button on the keyboard, click **Users** and select **Manage Security** from the list displayed.



2. Click the **Offices** tab on the left-hand side of the window.
3. Click the **Preferences** tab at the top.
4. In the General section click the **Office Provider Filtered Patient Searches** checkbox.
5. Click **Save Office** to save your changes.

How to set a Patient's Status

In Accuro EMR, patient status can be created/updated at the discretion of the Provider. You can remove a patient's name that should not be on your list of patients by changing patient status from Active to Inactive, Deceased, Moved, Duplicate etc. as appropriate.

1. To change a patient's Status or Office Provider open their chart and click on the **Patients** tab.

2. Select a different status from the **Patient Status** drop-down menu, for example Inactive, Moved, or Deceased.
3. To be reportable, **Patient Status** must be "Active", and **Office Provider** must not be blank.
4. Select **Update Patient** to update the patient record.

Accuro EMR 2017.722 - BC GP Client Services - 1.866.729.8899

Patient: Peony, Patti DOB: 2015-Sep-17 (7 Yr, male) PHN: 4545 435 H. (000) ___-___ C. (000) ___-___
Referring Dr.: () Family Dr.: () Pharmacy: (fax:) Email: sunridgerobert627@gmail.com

Last Name: Peony Health # Search Only Peony Patti 4545435 2015-Sep-17
First Name: Patti Identifier Search Only
Middle Name: Birthdate MM/DD/YYYY

Title: Mr. Suffix: Patient Status: Active Office Provider: Zeeben, Judy (1234)

Demographics WCB Other Relationships Notes Status History Private Billing Insurer Rules Providers

Health # 4545 435 BC, Canada Expiry MM/DD/YYYY Infant File Number

Alias Birthdate 09/17/2015 7 Yr Gender M Deceased MM/DD/YYYY

Family Phys --None-- Referring Phys --None--

Address Note
City BC, Canada Postal/Zip Type

Phone #: Home (000) Work (000) Cell (000) Fax (000) Preferred Contact Method

Email Address: sunridgerobert627@gmail.com Check for Duplicates

Pharmacy Contact --None--

Default Insurer MSP

Global Message Your Message
Last Updated: Never Last Updated: Never

Custom Fields
Last Updated: 2023-Jun-05 by Dr. Judy Zeeben (British Columbia Office)

Manage Cohorts Delete Patient Patient Relationships... Merge Update Patient

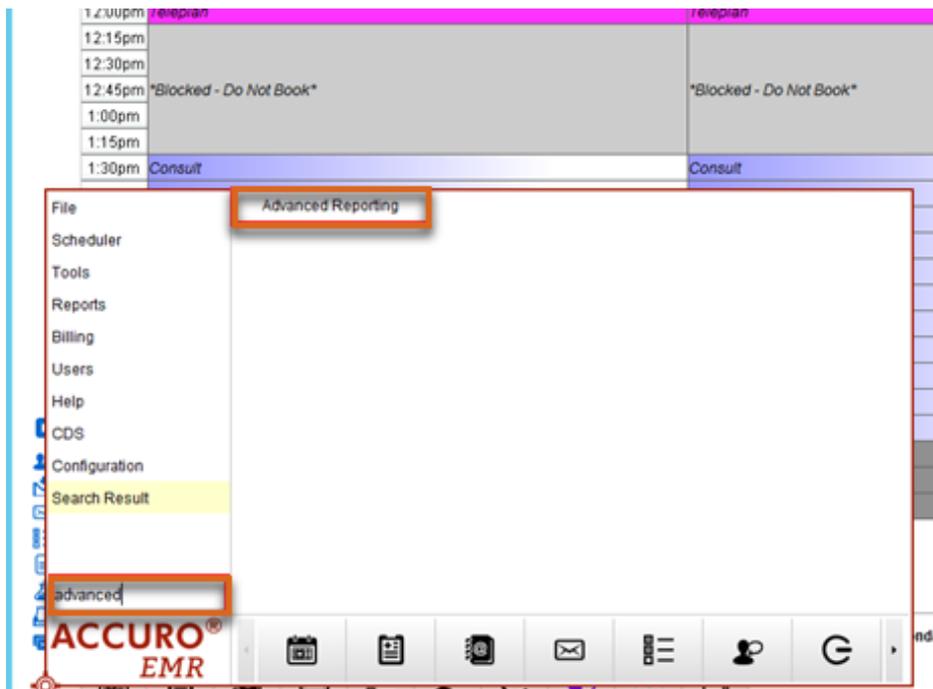
Section 2 – Submitting the Panel Report

Note: There are 2 ways to create the Panel Report in Accuro depending on what version of Accuro you are using.

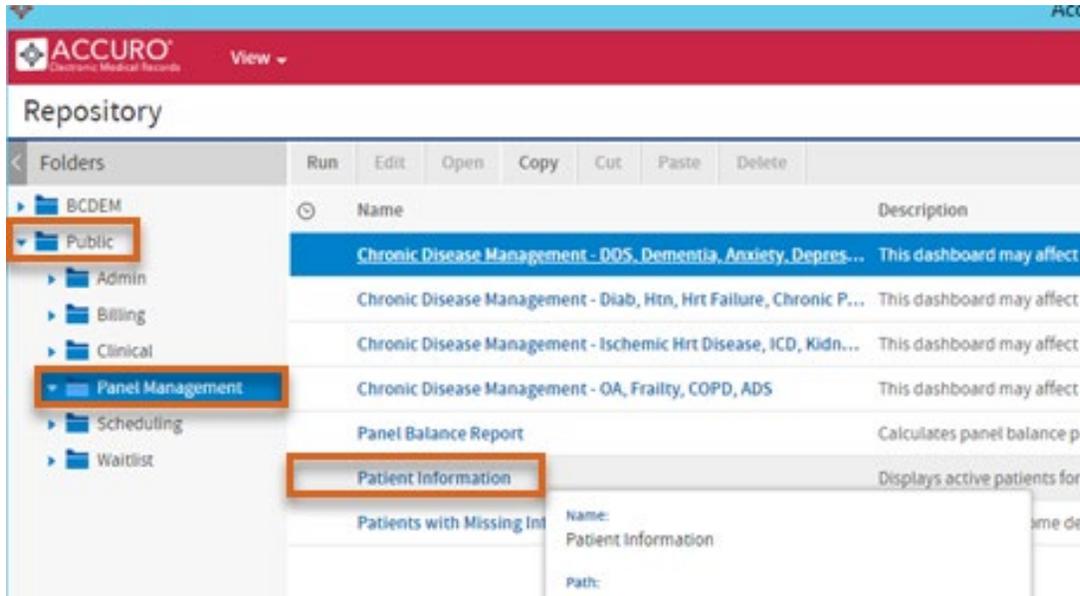
You can use the [advanced reporting](#) option or the [query builder](#) tool.

Using the Advanced Reporting option to build your Panel Report

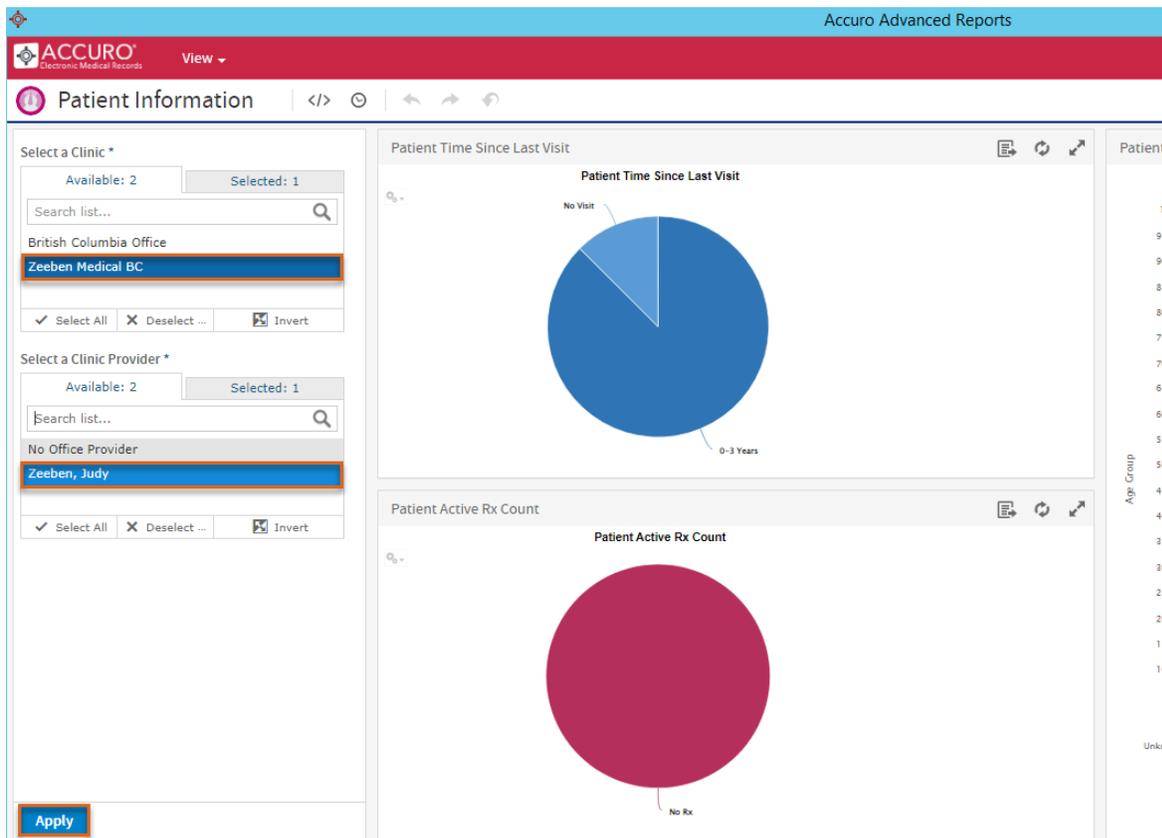
1. Click on Accuro Icon in bottom left corner of Accuro screen and type in **Advanced** and click on **Advanced Reporting**.



2. In top left corner of this window click on **Public**, then **Panel Management**, then **Patient Information**.



3. Make your **Office** and **Provider** selections from the left side of the screen and click on **Apply**.

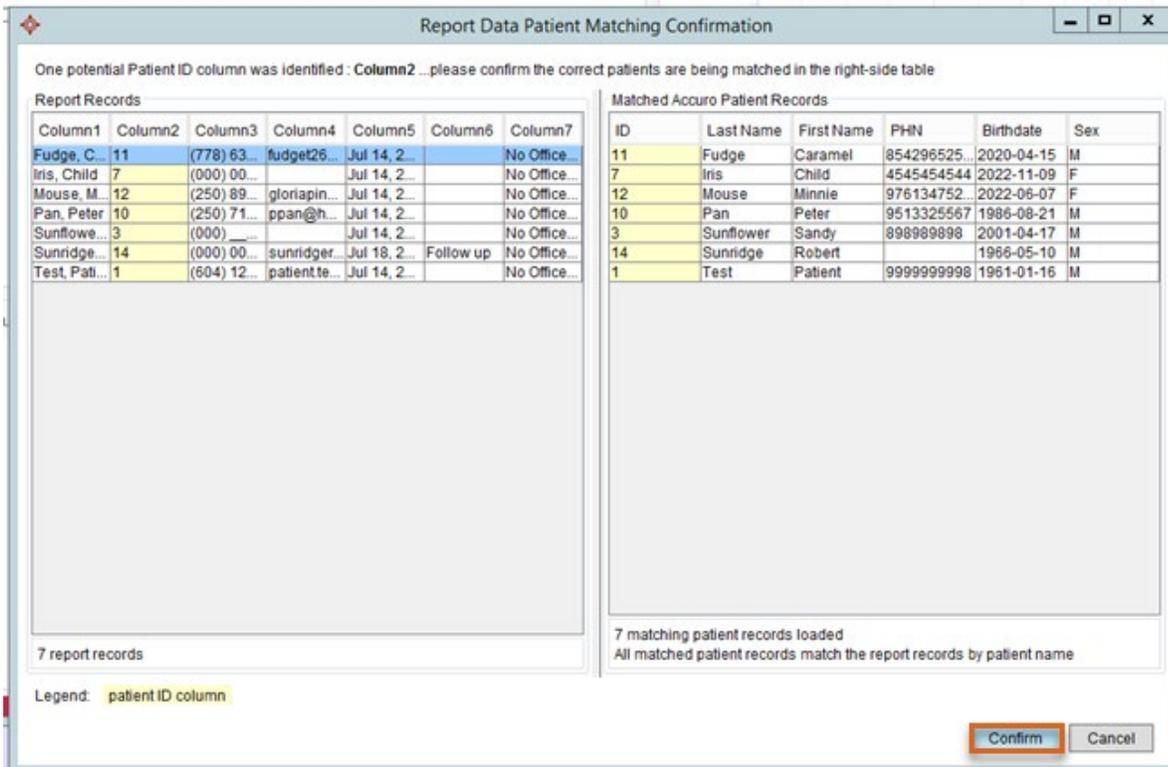


- Click on the piece of the pie to see the list of patients (will need to do this step for each piece of the pie), then click on the small paper icon in top right corner of the **Widget** and click on **Accuro**.

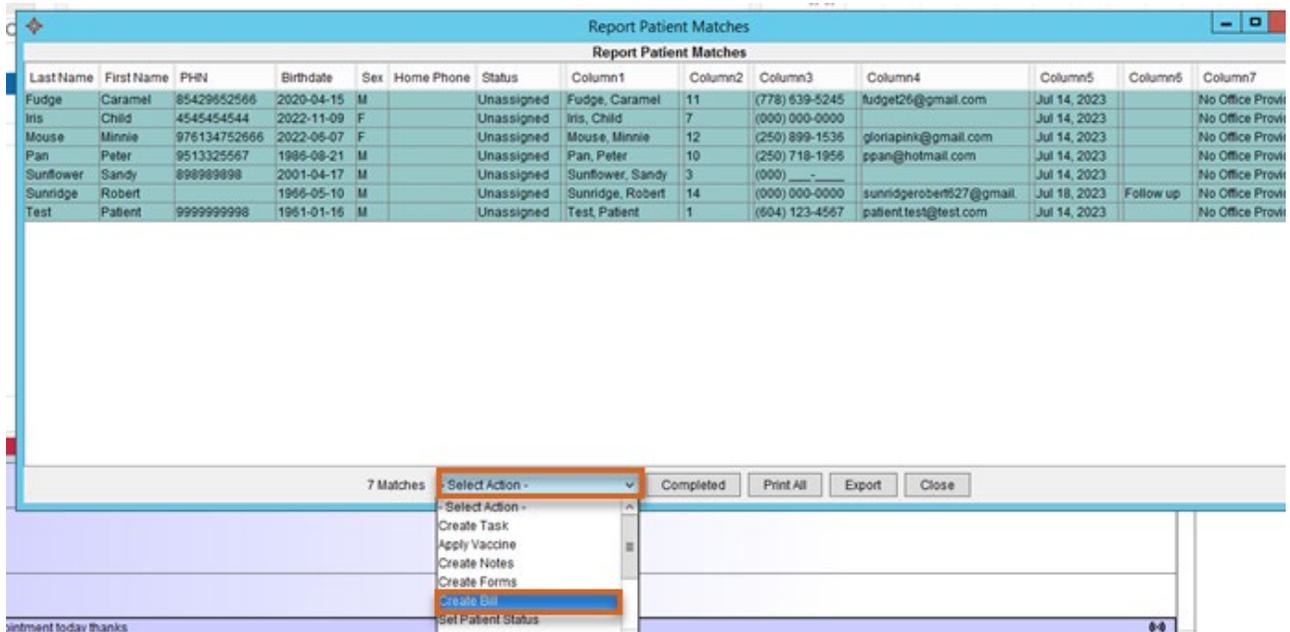
The screenshot displays the Accuro Advanced Reports interface. On the left, there are filters for 'Select a Clinic' (British Columbia Office, Zeeben Medical BC) and 'Select a Clinic Provider' (Zeeben, Judy). The main area is divided into two sections: 'Patient Time Since Last Visit' and 'Patient Active Rx Count'. The 'Patient Time Since Last Visit' section contains a table with columns for Patient ID, Date of Birth, Last Visit Date, and Last Visit Type. The 'Patient Active Rx Count' section features a pie chart with a single slice, indicating 'No Rx'. A context menu is open over the pie chart, listing export options: PDF, Excel (Paginated), Excel, RTF, CSV, Accuro (highlighted), ODT, ODS, DOCX, XLSX (Paginated), XLSX, and PPTX.

Patient ID	Date of Birth	Last Visit Date	Last Visit Type
100-1000001	1970-01-01	2019-01-01	No Phys Follow
100-1000002	1975-01-01	2019-01-01	No Phys Follow
100-1000003	1980-01-01	2019-01-01	No Phys Follow
100-1000004	1985-01-01	2019-01-01	No Phys Follow
100-1000005	1990-01-01	2019-01-01	No Phys Follow
100-1000006	1995-01-01	2019-01-01	No Phys Follow
100-1000007	2000-01-01	2019-01-01	No Phys Follow

- The report Data window pops up and then click on the **Confirm** button in bottom right.



- Highlight all patients in the report window, choose **Create bill** from the **Select Action** dropdown in bottom middle.



- Enter Procedure code **98990** and Diagnostic code **L23** and click **OK**. Be sure to wait for the pop-up window indicating Action Complete.
Note: the diagnosis ICD-9 code 780 (General Symptoms) can also be used instead of L23.

- These bills will now appear in the provider **Daily Claims** window ready for submission.

Accuro EMR 2017.0

Daily Claims										
Provider	Patient Name	Patient Healt...	Date	Insurer	PCo...	Procedure	DCo...	Diagnostic	DCode 2	
Zeeben, Judy	Dahlia, Debbie	78787878	2023-Jul-17	MSP	01105	BCMA Servi...	250	DIABETES ...	0	
Zeeben, Judy	Dahlia, Debbie	78787878	2023-Jul-17	MSP	00112	VISIT, EME...	250	DIABETES ...	0	
Zeeben, Judy	Dahlia, Debbie	78787878	2023-Jul-17	MSP	31010	RHEUMAT...	393	CHRONIC ...	0	
Zeeben, Judy	Dahlia, Debbie	78787878	2023-Jul-17	MSP	00510	CONSULTA...	586	RENAL FAI...	0	
Zeeben, Judy	Hyacinth, Happy	123123212	2023-Jul-17	MSP	00510	CONSULTA...	586	RENAL FAI...	0	
Zeeben, Judy	Peony, Patti	4545435	2023-Jul-17	MSP	00510	CONSULTA...	586	RENAL FAI...	0	
Zeeben, Judy	Rose, Salty	78787878	2023-Jul-17	MSP	00510	CONSULTA...	586	RENAL FAI...	0	
Zeeben, Judy	Sunflower, Elderly	5656565656	2023-Jul-17	MSP	00510	CONSULTA...	586	RENAL FAI...	0	
Zeeben, Judy	Tester, Chester	0000000000	2023-Jul-17	MSP	00510	CONSULTA...	586	RENAL FAI...	0	

Using the Query builder to create your Panel Report

1. Ensure you have the **Office Provider** selected.

Accuro EMR 2016.02 - Links Clinic
Patient: Test, Billing (Bill) 1953-Apr-23 (63 Yr female) 99999-9999 H (000) 000-0000 C (780) 888-9636 W (780) 454-0351 Winnie The P...
Foot Note: Last Updated: 2016-Sep-02

Home
Scheduler
Traffic

Last Name: Test ULI: Search Only
First Name: Billing (Bill) Identifier: Search Only
Middle Name: Birthdate: MM/DD/YYYY

--None-- Patient Status: Active 2016 Office Provider: Pooh, Winnie The

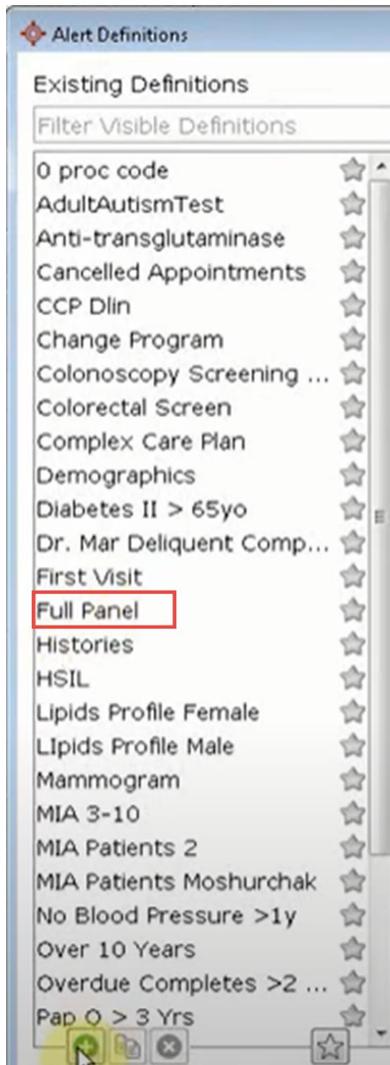
Demographics Other Relationships Notes Status History Private Billing Insurer Rules Providers

2. Click on the  button on the **Home** screen. Start typing **Query** and the Query Builder Screen will appear.

File
Scheduler
Tools
Reports
Billing
Users
Help
Backup
CDS
Configuration
Search Result
quer

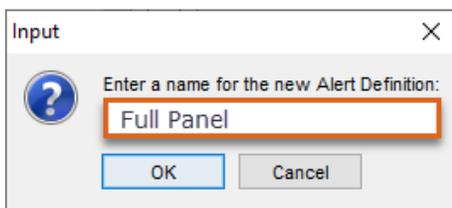
Query Builder (Alerts)

3. Select your query name from the list. i.e., **Full Panel** (if previously created).

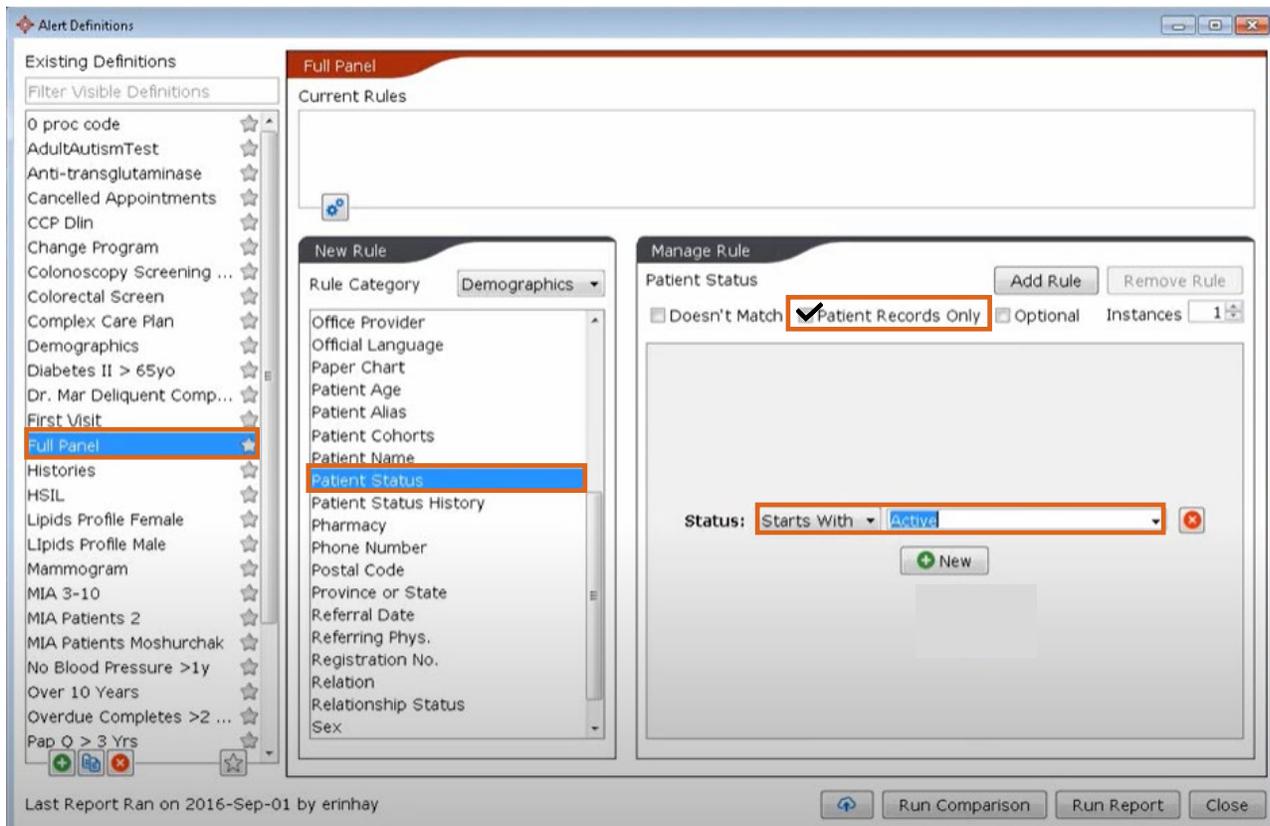


** If you have not yet created the report query, you would click  **Add** button and an Input screen would appear allowing you to enter a name for your query.

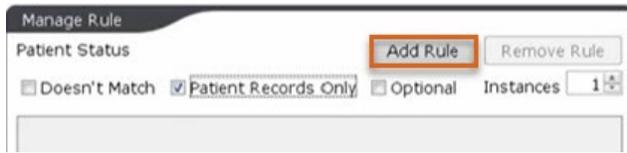
Type in the name of the new report name i.e. **Full Panel (Patient Panel)** you are creating and click **OK**.



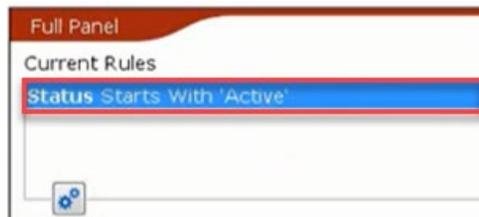
4. Click the Accuro Start Menu, click **Reports** and select **Query Builder (Alerts)** from the list displayed. The **Alert Definitions** window is now displayed.
5. Click to select a **Definition**.
6. Click the drop-down list and select a **Rule Category** from the list displayed. Click to select the appropriate item from the list displayed.



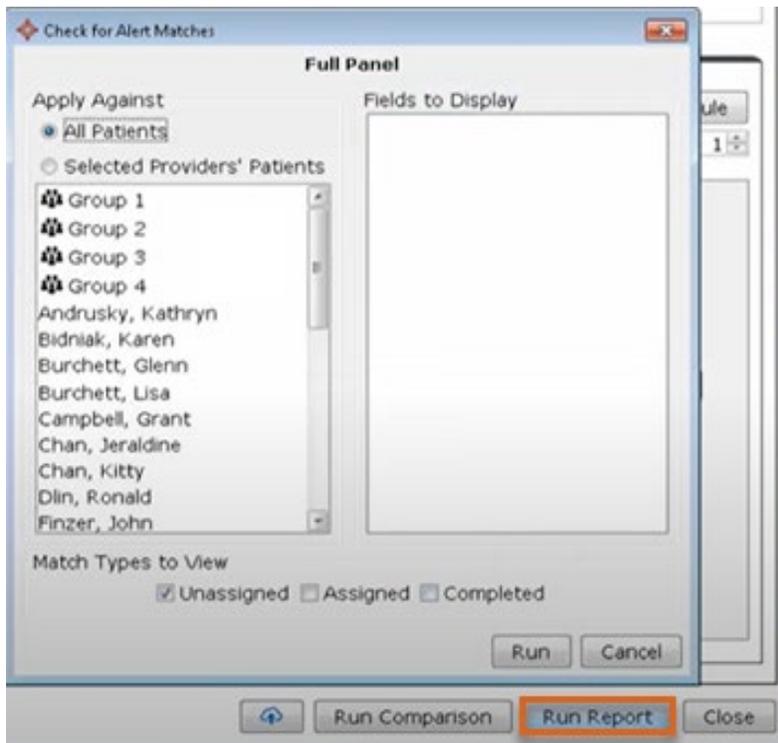
- a. Highlight '**Patient Status**'.
 - b. Click  **Add** button to add a new rule.
 - c. Select '**Status: Starts With**', Select '**Active**' from the drop-down menu.
 - d. Add a '**Checkmark**' beside **Patient Records Only**.
7. Click on **Add Rule**.



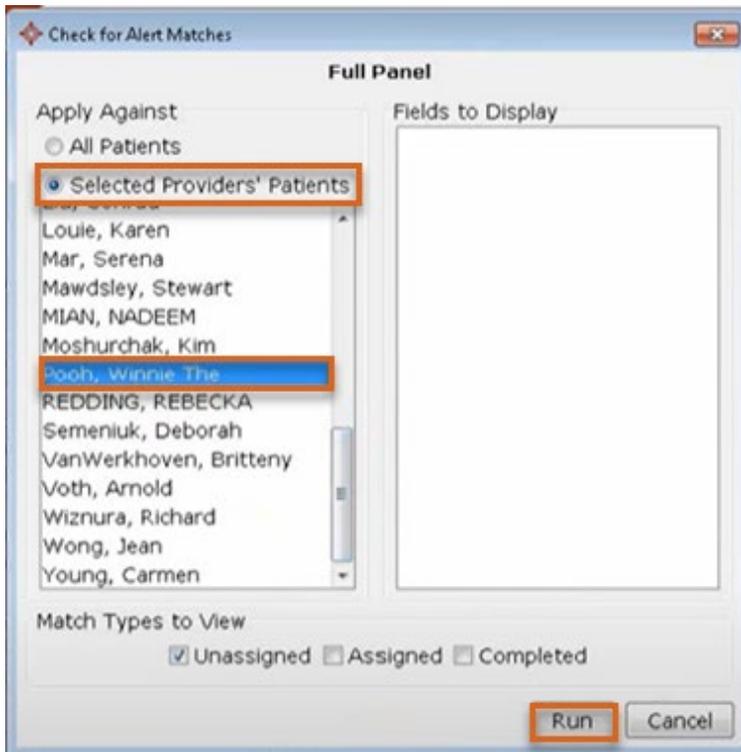
8. Now you can see the current rule **Status Starts With 'Active'**.



9. Click on **Run Report** in the bottom right corner and the following screen will be presented.



10. To select the physician you have permissions to select **'Selected Providers' Patients'**, highlight the physician (i.e., **Pooh, Winnie The**), and click the **'Run'** button.



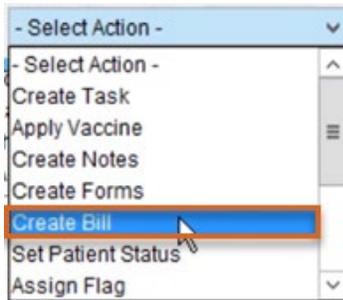
11. A list of your panel patients will be generated.

The screenshot shows a window titled "Full Panel" containing a table of patient information. The table has the following columns: Last Name, First Name, PHN, Birthdate, Sex, Home Phone, Status, and Patient Status.

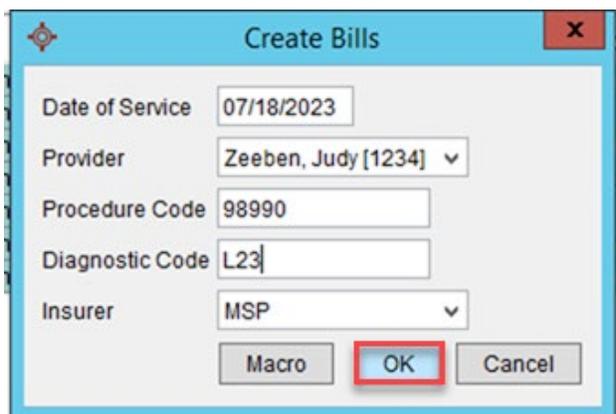
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Status
Dahlia	Debbie	78787878	08/18/1987	F	(000) 000-0000	Unassigned	Active
Hyacinth	Happy	123123212	02/04/1993	F	(000) 000-0000	Unassigned	Active
Lily	Larry			M	(000) 000-0000	Unassigned	Active
Peony	Patti	4545435	09/17/2015	M	(000) ___-___	Unassigned	Active
Rose	Salty	78787878	01/28/1988	M	(000) ___-___	Unassigned	Active
Sunflower	Elderly	5656565656	04/01/1953	M	(000) 000-0000	Unassigned	Active
Tester	Chester	0000000000	07/05/1988	M	(604) 478-0328	Unassigned	Active

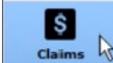
12. Press Ctrl + A, to select all patients and then select the 'Select Action' drop down menu.

13. Select **Create Bill** from the drop-down list.



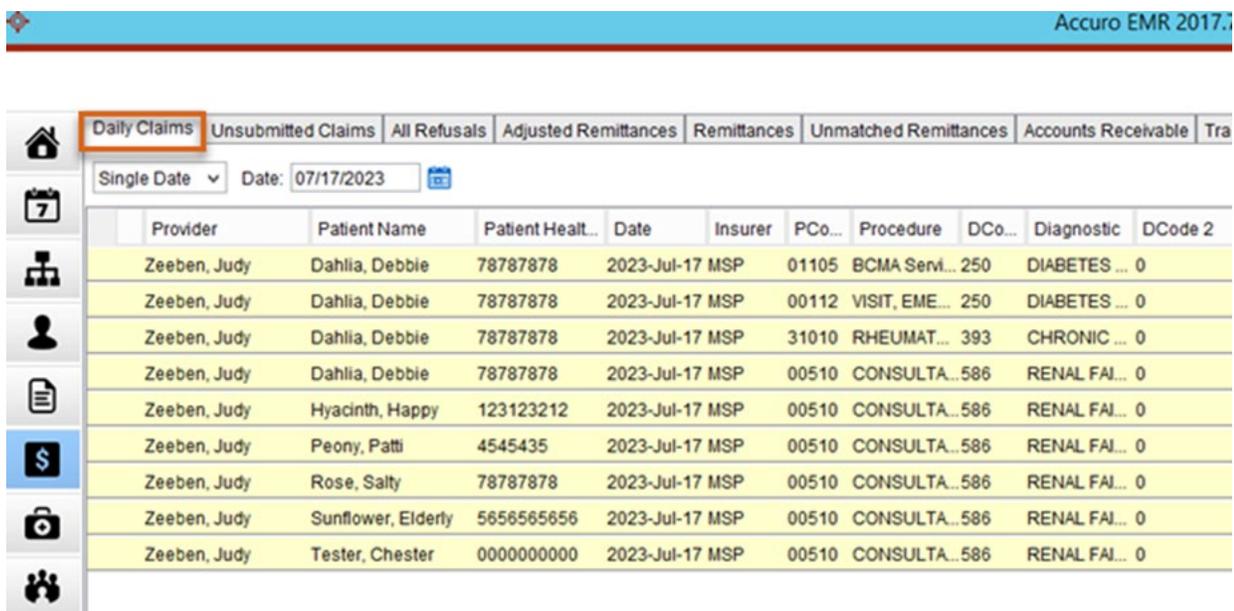
14. Select **Date Of Service**, **Provider**, **Procedure Code**, **Diagnosis Code** (L23 for LFP physician or 780 for fee for service or alternate payment method providers), and **Insurer**.



15. Select **OK**. Your bills will be generated in the Claims section ready to be submitted. Successful message will appear.
16. To see the claims you just billed for, close the query builder, and launch the  app by selecting the **Claims Button**.



17. Your claims listing will appear as below.



Where To Access Extra Support

- EMR vendor support – QHR Accuro Support Desk support@qhrtech.com | 1 866-729-8889
- [Access Accuro User Guide here](#)
- Technical troubleshooting or Workflow support - Practice Support Program
PSP@doctorsofbc.ca

Provincial Attachment System (PAS)

- Information on PAS can be found on the Doctors of BC website [here](#)
- For additional information or support on PAS: HealthBCSupport@phsa.ca

Quick links

- [Adding Provider to Patient Chart](#)
- [Enabling Office Provider Patient Searches](#)
- [Patient Flags set up](#)
- [Customizing Patient Flags](#)
- [Query Builder](#)
- [Query Builder actions](#)