

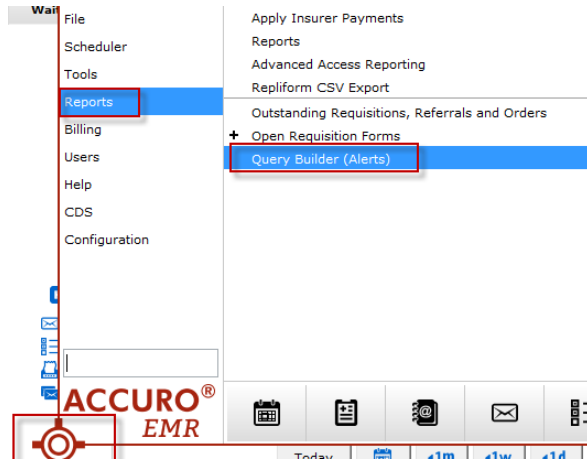
## APPENDIX E

# Adding Group Education Documentation using Report Query and a Clinical Note Template

Last updated: August 11, 2022

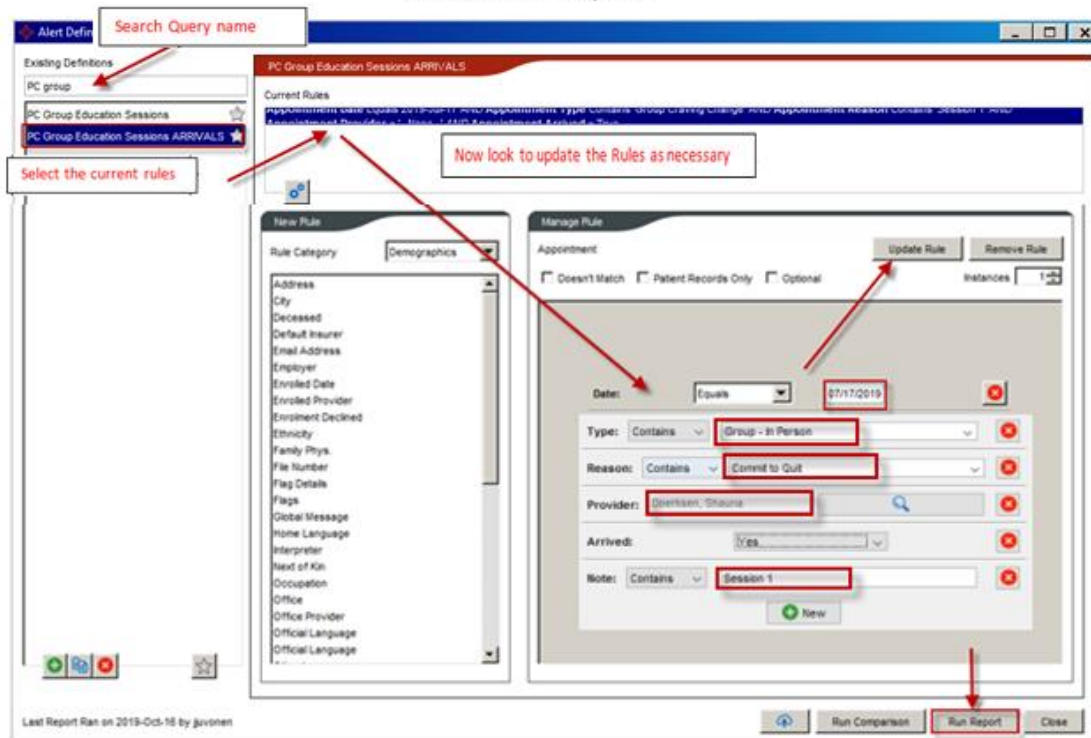
Select the red target located in the bottom left hand corner of your screen

Select 'Reports'



We have built a query for sites to pull their number of arrivals per class named **PC Group Education Sessions ARRIVALS**.

Update the date, Type, Reason, Note and Provider (this would be the site holding the session) and Select 'Update Rule'  
Select 'Run Report'



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An 'Alert Matches' window will appear

Select the patient(s) you would like to generate a patient handout form for.

From drop down list from 'Select Action' choose 'Create Forms' from the list of options.

Within the Create Forms window select the drop down arrow and search for the patient handout you would like to add.

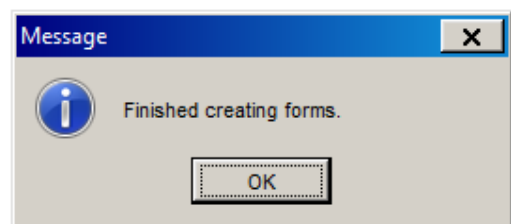
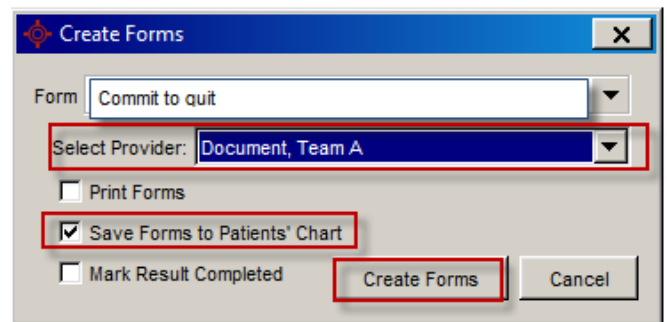
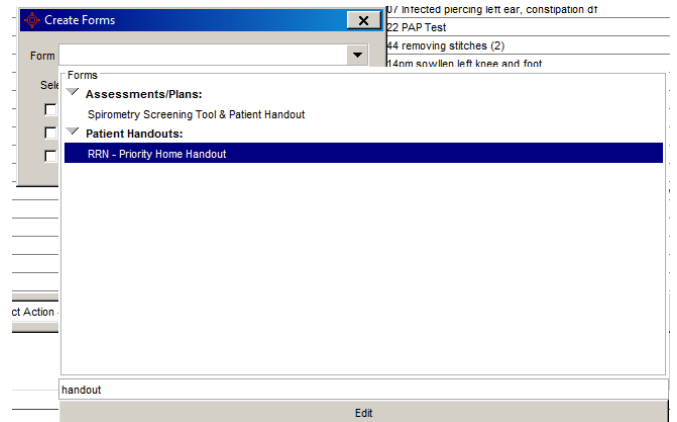
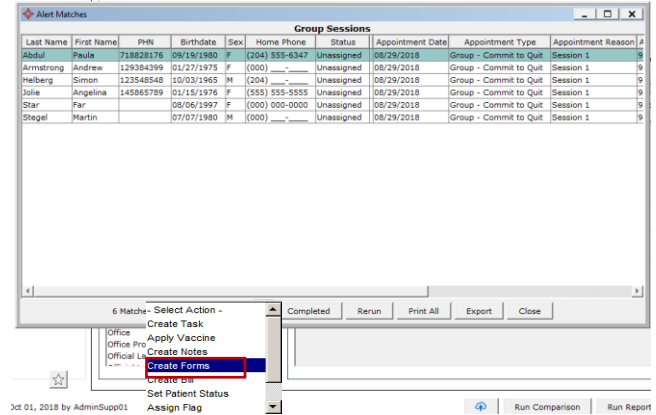
Select the Provider

Check off the 'Save forms to Patients' chart box

Select 'Create Forms'

A Message window will appear

Select OK



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## Adding Group Education Documentation using Report Query and a Clinical Note Template

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PC Education Session Query – This will show all registrants regardless of attendance

*If clinicians want additional options for queries please connect with your sites ESS analyst at [servicedesk@sharedhealthmb.ca](mailto:servicedesk@sharedhealthmb.ca)*

Search for the PC Education Session Query

Update the date, Type, Reason, Note and Provider (this would be the site holding the session) and Select 'Update Rule'  
Select 'Run Report'

The screenshot shows the 'PC Group Education Sessions' interface. On the left, a list of 'Existing Definitions' includes 'PC Group' and 'PC Group Education Sessions'. A red box labeled 'Search Query name' points to the search bar. A red box labeled 'Select the current rules' points to the 'PC Group Education Sessions' entry. The main window shows 'Current Rules' and a 'New Rule' configuration panel. The 'New Rule' panel has a 'Rule Category' dropdown set to 'Demographics' and a list of fields. The 'Manage Rule' panel shows configuration for 'Appointment' with the following settings: 'Date' set to 'Equals' and '08/29/2018'; 'Type' set to 'Contains' and 'Group - Is Person'; 'Reason' set to 'Contains' and 'Commit to Quit'; 'Provider' set to 'Group Ed: APO'; and 'Note' set to 'Contains' and 'Session 1'. A red box labeled 'Now look to update the Rules as necessary' points to the 'Update Rule' button. At the bottom right, a red box labeled 'Run Report' points to the 'Run Report' button. The status bar at the bottom indicates 'Last Report Ran on Oct 01, 2018 by AdminSupp01'.

An 'Alert Matches' window will appear

The 'Alert Matches' window displays a table of group sessions. The table has the following columns: Last Name, First Name, Ptn, Birthdate, Sex, Home Phone, Status, Appointment Date, Appointment Type, and Appointment Reason. The data is as follows:

Last Name	First Name	Ptn	Birthdate	Sex	Home Phone	Status	Appointment Date	Appointment Type	Appointment Reason
Abdul	Paula	71852176	09/19/1980	F	(204) 535-6347	Unassigned	08/29/2018	Group - Commit to Quit	Session 1
Armstrong	Andrew	129384399	01/27/1975	F	(000) -	Unassigned	08/29/2018	Group - Commit to Quit	Session 1
Helberg	Simon	123548548	10/03/1965	M	(204) -	Unassigned	08/29/2018	Group - Commit to Quit	Session 1
Jolie	Angeline	145865789	01/15/1976	F	(555) 555-5555	Unassigned	08/29/2018	Group - Commit to Quit	Session 1
Star	Far		08/06/1997	F	(000) 000-0000	Unassigned	08/29/2018	Group - Commit to Quit	Session 1
Stegal	Martin		07/07/1980	M	(000) -	Unassigned	08/29/2018	Group - Commit to Quit	Session 1

The window footer shows '6 Matches', a 'Select Action' dropdown, and buttons for 'Completed', 'Rerun', 'Print All', 'Export', and 'Close'.