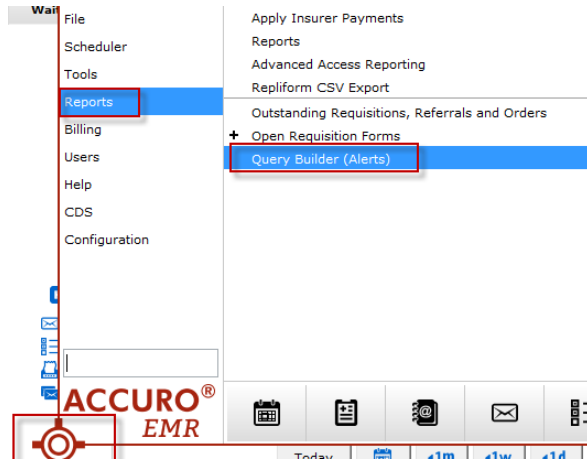# APPENDIX E
Adding Group Education Documentation using
Report Query and a Clinical Note Template
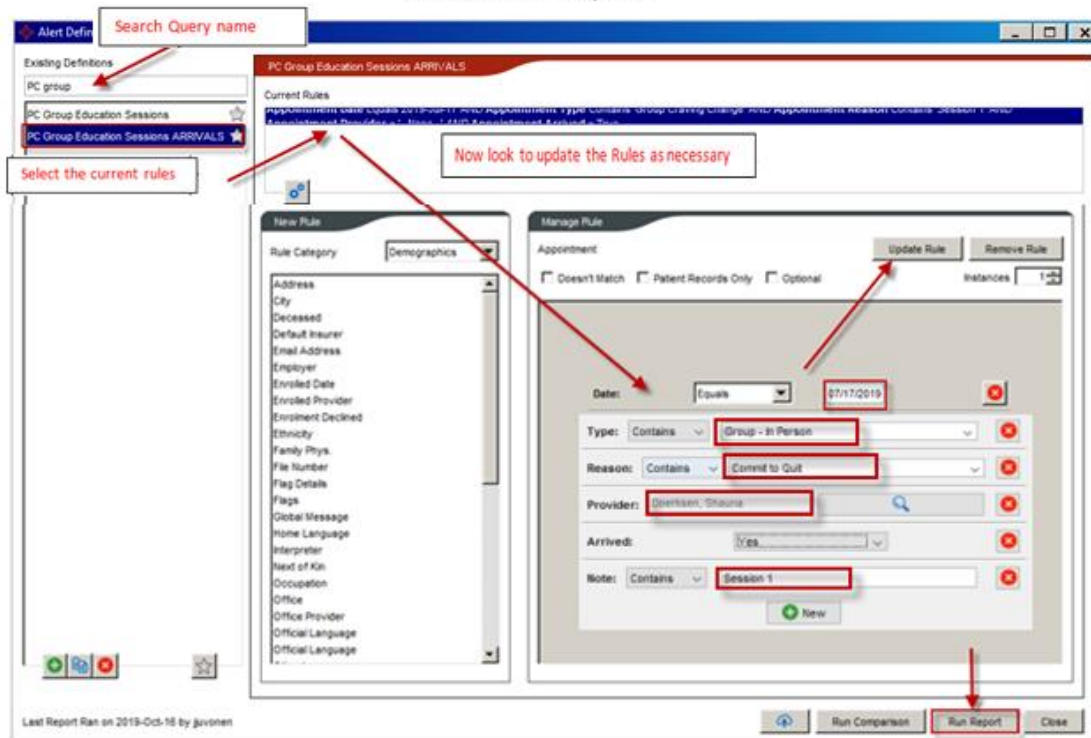
Last updated: August 11, 2022

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'

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.
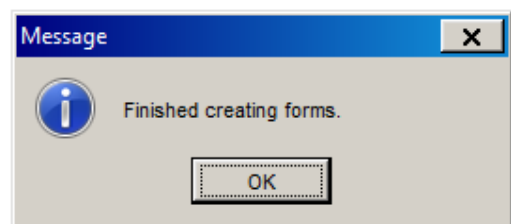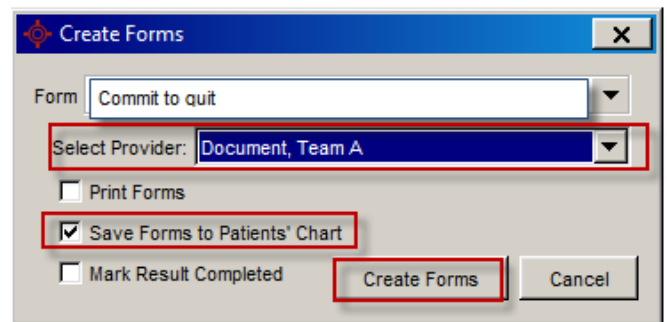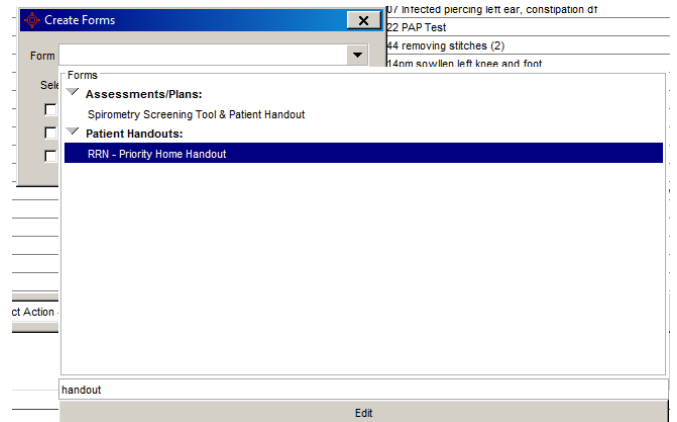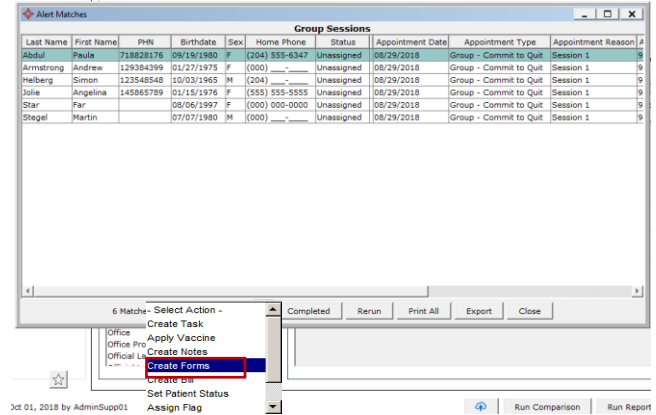
Select the Provider

Check off the 'Save forms to Patients' chart box

Select 'Create Forms'

A Message window will appear

Select OK

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

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'

An 'Alert Matches' window will appear