



RESOURCES FOR CLERKS

Niagara Health Tip Sheets and Videos

<https://www.niagarahealth.on.ca/site/his-tip-sheets>

Digital Dive Ins

Monarch Digital Dive-Ins are short virtual information sessions that focus on a variety of HIS topics.

Please take a moment to review any recorded pertinent Digital Dive Ins for your area (e.g. Capacity Management, Referral Management, Registration and Scheduling etc)

<https://niagarahealthsystem.sharepoint.com/sites/source-net/Programs/HIS/Pages/Digital-Dive-ins.aspx>

Clerical categories

Registration
Scheduling
Health Information Management
Capacity Management
General
Referral Management
Work Queue Monitor
Reporting

Sandbox

The sandbox is your opportunity to explore further functionality with HIS. Participant guides from many of our learning labs are available for you to use to direct your learning.

<https://niagarahealthsystem.sharepoint.com/sites/source-net/Programs/HIS/Pages/Sandbox.aspx>

Work Queue Monitor (WQM) Tip sheet and Resources

[WQM Guide](#)

[Work Queue Monitor \(WQM\) \(video\)](#)

This is the application replacing most fax machines

[Combine Work Item](#)

[Split Work Item](#)

[Delete Work Item](#)

[How to Access WQM](#)

[For Ambulatory](#)

[WQM with Referral Management](#)

[Identify Requested Review](#)

[Identify Requested Sign](#)

[Route Work Item](#)

[Scheduling](#)



HOSPITAL INFORMATION SYSTEM (HIS)

Referral Management Tip sheet and Resources

[Referral Management through WQM \(video\)](#)

[ED/UCC Referral to PARC/PCC \(video\)](#)

[Adding an External Referral Receiving through WQM to a Receiving Referral List \(video\)](#)

[SCS ED Ortho Clinic Referrals from SCS ED to SCS Ortho Clinic \(video\)](#)

[NFS and WS ED Ortho Clinic Referrals from Welland and Niagara Falls ED \(video\)](#)

[Placing an Internal Referral and External Referral \(video\)](#)

[Setting Up a Generating Referral List \(video\)](#)

[Setting up a Receiving Referral List \(video\)](#)

[Generating Referrals \(video\)](#)

[Generating a Referral to an External Referral Source \(video\)](#)

[Accepting a Referral to a Clinic and Scheduling from within Referral Management \(video\)](#)

[Organization Referral - Sending an Internal Referral](#)

[Organization Referral - Receiving an Internal Referral](#)

[Organization Referral - Receiving an External Referral](#)

[Organization Referral - Sending an External Referral](#)

[Organization Referral - Creating Incoming/Outgoing Referral List](#)

[Ambulatory - Accepting an Internal Referral](#)

[MH Referral Management](#)

[Cardiac Catheterization Referral Process](#)

[Referral Ontario Health at Home](#)



Registration Tip Sheets and Resources

[Quick Reg Using FirstNet](#)

[Clerk Registration Demo](#)

[Capturing Birth Sex at Registration](#)

[ESignature \(eSig\) \(video\)](#)

[Registration Conversation Types](#)

[Registration Crosswalk](#)

[Registration - Tips and Tricks](#)

[Registration - Today's Expected Arrivals](#)

[Accepting an Internal Referral](#)

[Registering a Walk In Xray Patient](#)

[Ordering Specialty Surfaces](#)

[Ad Hoc Printing Labels and Wristbands](#)

[Physician Not in Database](#)

[Wrong Encounter Assigned](#)

HOSPITAL INFORMATION SYSTEM (HIS)

[Discern Reporting Portal](#)

[Lock Manager](#)

[Registering and Editing Scheduled Recurring Encounters](#)



HOSPITAL INFORMATION SYSTEM (HIS)

Scheduling Tip Sheets and Resources

[Checking in an Appointment](#)

[Viewing an Appointment Book](#)

[Viewing Appointment History](#)

[Scheduling Hot Keys Guide](#)

[Scheduling Icons](#)

[Scheduling an Appointment Steps](#)

[Scheduling Appointment Book - Appointment Colour Guide](#)

[Scheduling Essentials \(video\)](#)

[Scheduling Multiple Appointments](#)

[Clerk Scheduling Demo \(video\)](#)

[Scheduling Essentials \(video\)](#)

[Rescheduling an Appointment](#)

[How to Book A Group Session](#)

[How to Add a Slot](#)

[How to Add a Patient to a Request List](#)

[Recording Contact Attempts for Scheduling a Patient](#)

[Scheduling - Recurring](#)

[Scheduling a Block](#)

[Scheduling to Orders](#)

[Scheduling an Order from the Request List](#)

[How to add Scheduling Appointment Book to Appbar](#)

[Wrong Encounter Assigned](#)



HOSPITAL INFORMATION SYSTEM (HIS)

Capacity Management Tip Sheets and Resources

[Capacity Management Guide](#)

[Admission & Receiving Orders](#)

[Transport Request Process](#)

[External Transfer](#)

[Using the Discharge Gadget](#)

[Clerical Discharge and External Transfer Patient Process](#)

[Discharging a Patient](#)

[Discharging Unit Role for all Discharges](#)

[Care Aware Perspectives](#)

[Careview Attributes - MEDSURG](#)

[Careview Attributes - Mental Health](#)

[Careview Attributes - Rehab - Complex Care](#)

[Ordering Non-Urgent Patient Transport](#)

[MTP Blood Products Request](#)

[Lab Specimens Request](#)

[Wrong Encounter Assigned](#)

[Oracle Health Capacity Management Overview \(video\)](#)

[Viewing Available Surgical Beds \(video\)](#)

[Viewing Patient Downgrades \(video\)](#)

[How to Filter Patient Attributes \(video\)](#)

[How to View Census per Unit \(video\)](#)