SOS MA Electronic Medical Record Skills Checklist

	Demonstrated	Practiced	Competent
Routine Functions			
1. Log in/Log out			
2. Secure Screen			
Charting and encounters			
1. Chart review			
• Problem list*			
• Lab tests –filter by FOBT/FIT*			
• Procedures –filter by type of test (flex sig, colonoscopy)			
• Administrative scans (look for GI encounters)			
2. Telephone Visit			
• Chief complaint (cancer screening add SOS study comment)			
• Contact information (out most often)			
• Documentation (can use smart phrases correctly)			
• Cc'ing other providers, exiting, closing encounter (how and when)			
4. Staff Message use			
5.. Use Smart Phrases			
Orders			
1. Association, pending, signing, routing, canceling			
2. Flex sigs and routing to correct center			
2. Internal referrals to GI			
3. External referrals to Digestive Consultants			
Inbasket Management			
1. Staff Messages			
2. Secure Message Folder			
3. Calls Folder			
4. Opening new and ongoing encounters			
5. Cc'ing patient secure messages			
Other			
1. Vacation and day off procedures			
2. Add addendum to closed encounter note			