Quick Reference

How to Manage HRM COVID-19 Historical Reports through HRM

Video: How and Why to Assign a Provider to Your COVID-19 Vaccination HRM Document

This Quick Reference gives step-by-step instructions covered in the video, showing how to save time and empty your mailbox by assigning the new HRM documents to someone else in your office. This allows the work to be transferred to and carried out by another team member (e.g., Nurse, Clerk, etc.).

You will likely have many **COVID-19 vaccination HRM documents** in your mailbox. To assign the documents to someone else in your office:

1. Open your **Inbox**.
2. When your labs appear, select the one you would like to assign by clicking on the corresponding document (e.g., COVID vaccination HRM document), or patient's name, from the list.
3. The report will be displayed. On the right-hand side, under 'Assigned Providers', type the name of the person in the blank text field to whom you would like to assign this document.
4. A drop-down menu will appear, from which you may select the staff member's name (e.g., John Smith).
5. Select the staff member's name (e.g., John Smith) from the drop-down menu. Once selected, the 'Assigned Providers' field will then be updated to *"Success"*, and will show the added member's name (e.g., "*John Smith*").
6. Click 'Sign-Off'.

This lab will now disappear from your list, and remain in the assigned staff member's (e.g., John Smith's) list. The lab is now in one centralized location, where the assigned staff member can then add Preventions into the patient's chart.

For questions or additional support, please contact OntarioMD at support@ontariomd.com.