Quick Reference

How to Manage HRM COVID-19 Historical Reports through HRM

Video: Setting a Default Category for the HRM COVID-19 Immunization Reports

This Quick Reference gives step-by-step instructions covered in the video, showing how to set a default category for the HRM COVID-19 Immunization Reports.

1) To set up a **default category** for these reports:
   - View a report in the **Lab Posting Preview** window, and do **one** of the following:
     - i. Select a **pre-set category**, or
     - ii. Create a more **specific sub-category** for these particular reports using the 'PS Categories' drop-down list.

       Example: To create a sub-category to the Procedure Report:
       - a) Select 'Procedure Report' from the drop-down list.
       - b) Right-click on 'Procedure Report' and select 'Add custom sub-category for Procedure Report'.
       - c) In the **Input** dialog box, under 'Enter the name of the new custom subcategory of Procedure Report:' type "COVID Immunization Received" (or desired text) and click 'OK'.
     - The sub-category "COVID Immunization Received [Procedure Report]" is now created, and can be found in the 'PS Categories' drop-down list (in alphabetical order).

2) From the 'PS Categories' drop-down list, double-click on the chosen category (e.g., "COVID Immunization Received [Procedure Report]").
   - This will move the chosen category under 'Report Categories' (located directly to the right of the 'PS Categories' section)

3) Click 'Set as default for future reports'.

4) In the **Auto-categorization** dialog box that appears, under 'Do you wish to continue?' click 'OK'.

5) In the **Auto-categorization** dialog box that appears, under 'The categorization has been successfully saved. All future reports with the same classifications will be auto-categorized accordingly,' click 'OK'.

Any COVID-19 Immunization Report will now be automatically categorized.

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