Orion Health™ EMR Connect 1.0

User Manual v1.0

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Table of Contents

Revision Summary **6**
Introduction to the User Manual **7**
About this Manual **8**
Getting Started **9**
Workflow **9**
Install the Desktop Application **11**
What's Next 13
Log In **13**
Logging In for the First Time 14
After Successful Log In 16
Log Out **16**
Manually 16
Automatically 17
Action Bar **17**
Create a Patient's Shared Record **20**
Create a Shared Health Record Screen **20**
Data Stored in Shared Record 20
View a Patient's Shared Record **22**
Patient Banner **23**
Restricted Patient Access **24**
Sync Patient Demographic Information **26**
Allergies and Adverse Reactions **27**
Allergies Fields **27**
Upload Allergies **28**
Remove Allergies **29**
Conditions **30**
Conditions Fields **30**
Filter Conditions **31**
Upload Conditions **32**
Remove Conditions **33**
Medication **34**
Filter Medication Orders **35**
Upload Medication Orders **36**

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Pathways **38**
View Enrolled Pathways **38**
Enroll Patient into Pathways **39**
Understand Error Messages **40**
Generate Support Files **43**
Update EMR Connect **44**
Uninstall the Desktop Application **45**

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Revision Summary

Software Release	Document Version	Date	Release/Nature of Amendment
1.0	1.0	December 07, 2016	Limited availability release.

Refer to Printable Documents to download printable versions of the documentation.

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Introduction to the User Manual

The purpose of this document is to describe how to use Orion Health™ EMR Connect (EMR Connect). This manual is aimed at users of EMR Connect. It provides background information and details to ensure ease of use.

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About this Manual

Typographical Conventions

The following typographical conventions are used throughout this manual and in the application's help screens.

Convention	Description
< >	Angle brackets identify variables that you must supply. Do not type the angle brackets.
[ ]	Square brackets represent an optional item. If an item is not marked with square brackets, it is required. Do not type the square brackets.
`monospace`	Monospace type indicates directory names, path names and file names.
bold	Boldface type indicates button names and menu commands.
	Note.
	Warning.
	Information.
	Tip.

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Getting Started

Prerequisites

Before launching EMR Connect, ensure:

- a supported desktop operating system is used.
- a supported EMR system is installed.
- the EMR Connect application is installed.

Workflow

The following describes how EMR Connect can be incorporated into a clinician's workflow in order to assist the clinician and provide more information. After EMR Connect is successfully installed and configured:

1. Log in to Electronic Medical Record (EMR).
2. Log in to EMR Connect.
3. If you are running EMR Connect for the first time, install the EMR Data Connector. Refer to EMR Data Connector for details.
4. Once EMR Connect is launched successfully, put a patient in context in EMR to display the patient-in-context screen in EMR Connect.
5. If the patient does not exist in the Shared Record, create a shared record.
6. Send patient data to the Shared Record. For example, send patient allergy data.
   You have now successfully uploaded patient data to the Shared Record.

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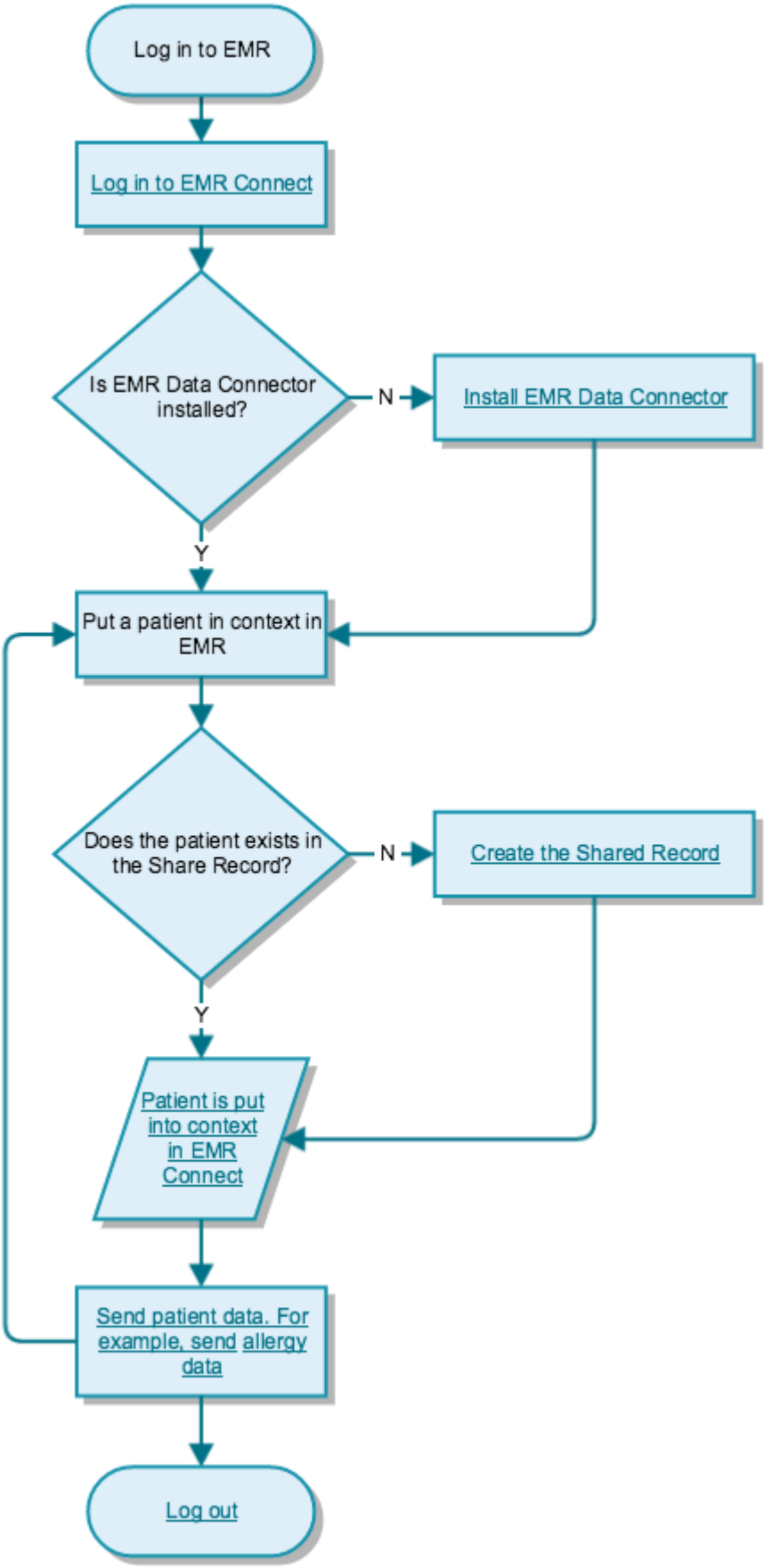

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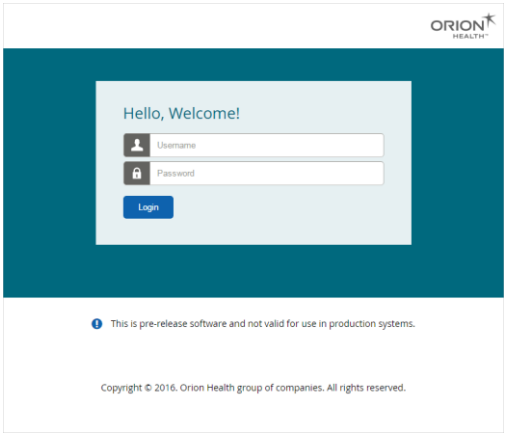
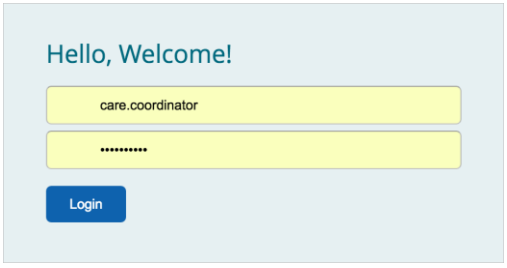
Install the Desktop Application

Before you can launch EMR Connect, you need to install and configure the application.

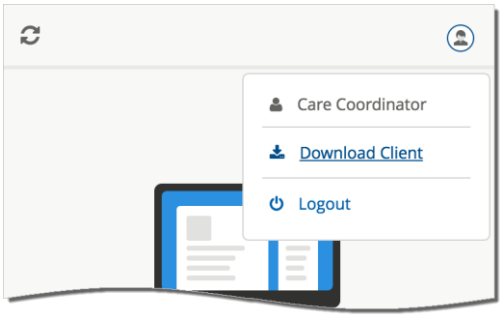
1. Access the EMR Connect webpage in a web browser. The link would be similar to: `https://<companywebpath>/emrc/index.html` and can be obtained from your IT administrator.



2. Log in with your Clinical Portal username and password.



3. Select the **Open menu** icon and select the **Download Client** link.



The **EMR Connect - Download** screen is displayed.

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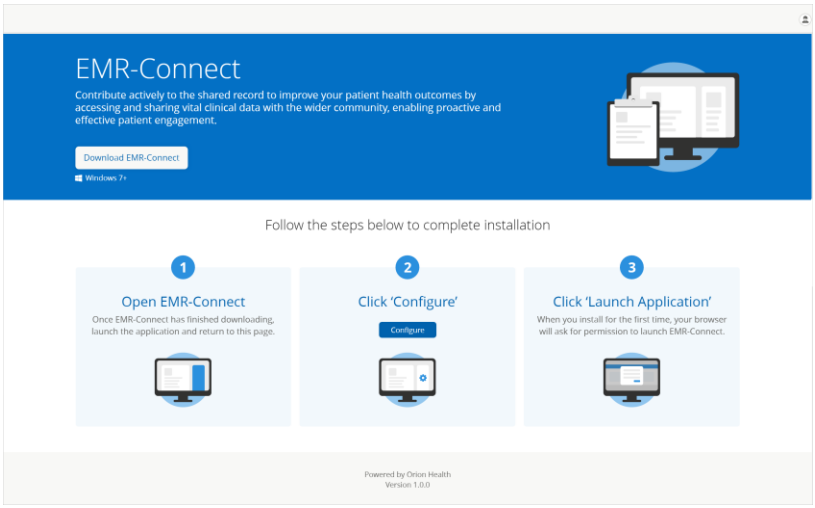
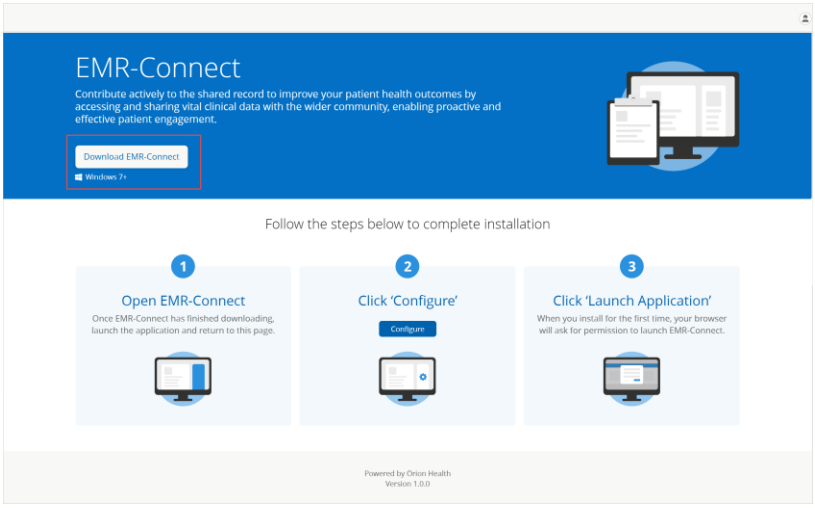


4. Select the **Download EMR Connect** button to download the EMR Connect installer for your computer.



5. Install EMR Connect using the EMR Connect installer.
   The EMR Connect application is launched automatically after installation and the **Welcome** screen is displayed.

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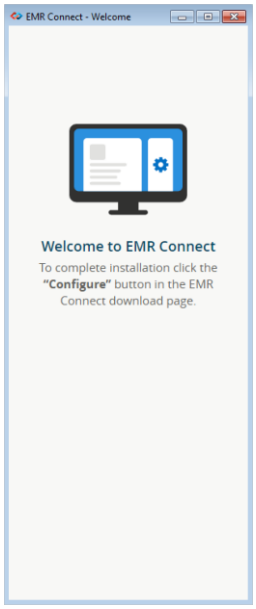
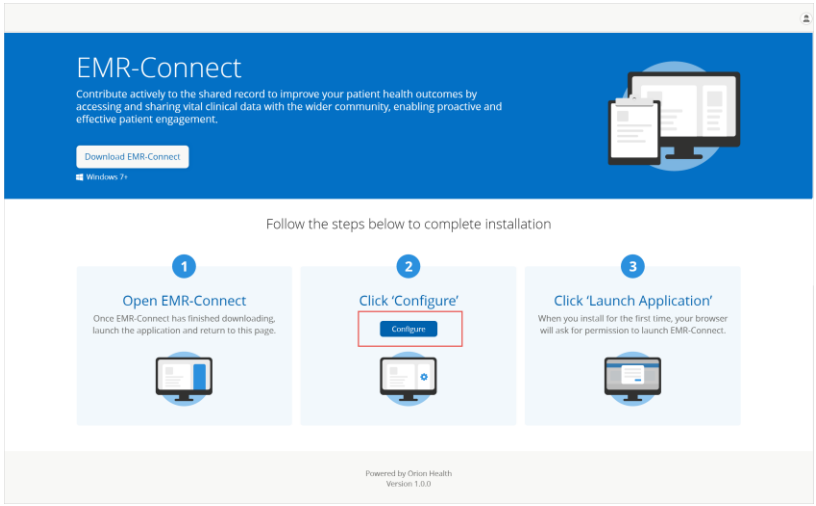


6. Navigate back to the **EMR Connect - Download** screen and select the **Configure** button.



7. If the **External Protocol Request** dialog box is displayed, select the **Launch Application** button.

   EMR Connect is refreshed and the Log In screen is displayed.

What's Next

Log in to the EMR Connect application.

Log In

Once you have installed and configured the EMR Connect application successfully, the EMR Connect Log In screen is displayed. Enter your Clinical Portal username and password to log in.

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- Logging In for the First Time
  - Understanding EMR Data Connector
- After Successful Log In

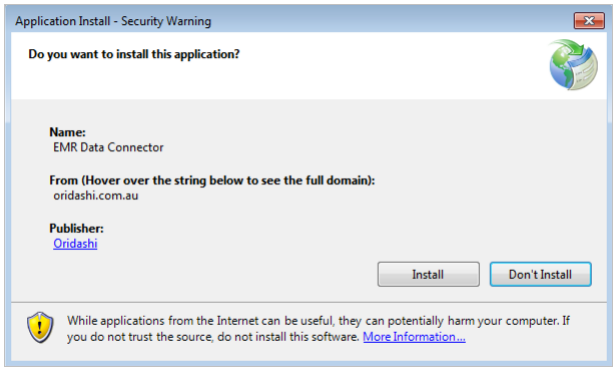
Logging In for the First Time

1. On your first log in, while EMR Connect attempts to communicate with the EMR on your computer, it launches the installation of an additional software package, EMR Data Connector.

   EMR Data Connector must be installed and running on your computer in order for EMR Connect to function properly. If you decline the install, or uninstall EMR Data Connector later, you will be prompted with the installation again.

   The `Unable to communicate with the EMR.` message is displayed in the launched EMR Connect during the installation of EMR Data Connector, as EMR Connect cannot communicate with the EMR. Refer to Understand Error Messages for details.

2. Depending on your computer settings, you might be prompted with the following installation window.
   Select the **Install** button to start the installation:



   The following screen is displayed during the installation of EMR Data Connector:

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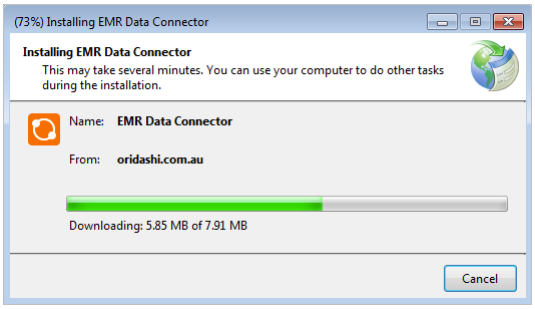

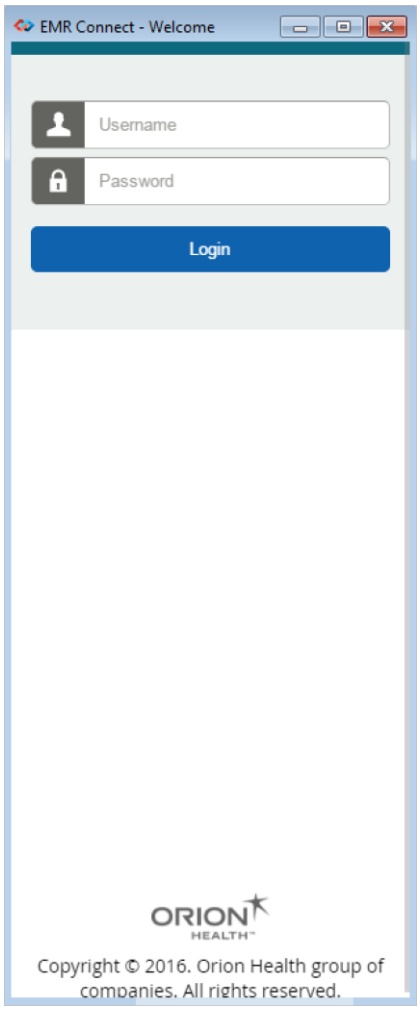

Understanding EMR Data Connector

Once EMR Data Connector is installed and launched successfully, it launches and runs in the system tray automatically every time your computer starts. EMR Data Connector is an independent software package and enables the communication between EMR Connect and the EMR running on your computer.

Right-click on the EMR Data Connector icon in the system tray to display a menu. You can:

- Select **About...** to find out more details about the EMR Data Connector.
- Select **Exit** to stop and close the EMR Data Connector.

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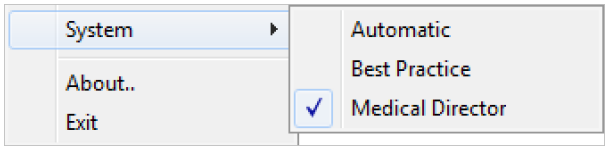
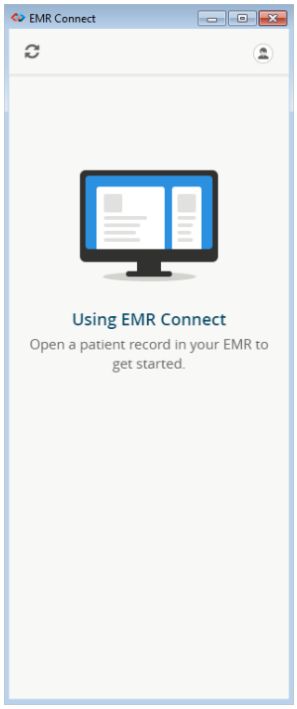
- Select **System** to select the EMR system that communicates with the EMR Data Connector. By default it is set to **Automatic**.



> If you work with more than one EMRs at the same time, the **Automatic** detection may not provide the desired connection. You should manually select the EMR you wish to connect to.
>
> The **Automatic** detection prioritize Best Practise before Medical Director if both EMRs are installed.

After Successful Log In

After you have successfully logged in to EMR Connect, EMR Connect will display the **Using EMR Connect** screen if the EMR is not opened or no patient is put into context in the EMR.



Log Out

Manually

You can manually log out from EMR Connect by navigating to **Open menu** > **Logout**.

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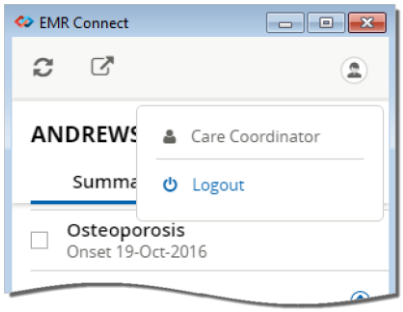
Automatically

You will be automatically logged out if you have not used the application for a specific period of time (by default, it is ten minutes). The inactivity timeout period is configurable by your administrator. You will be redirected back to the **Log In** screen after the automated log out.

To stay logged in within the specified timeout period, you can either:

- Refresh the page.
- Select any button in the EMR Connect dialog screen.
- Move your mouse inside the dialog screen.



Action Bar

The Action Bar is always displayed at the top of EMR Connect. It is context sensitive and displays different icons based on the screen displayed.

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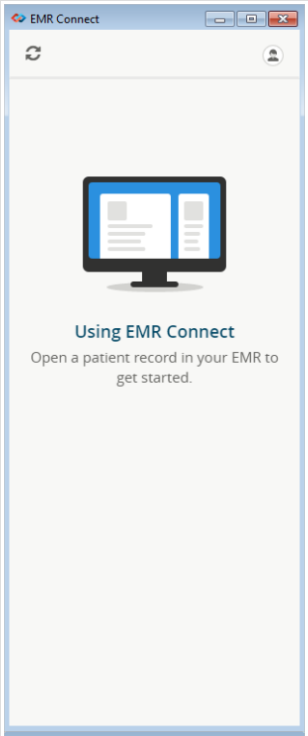
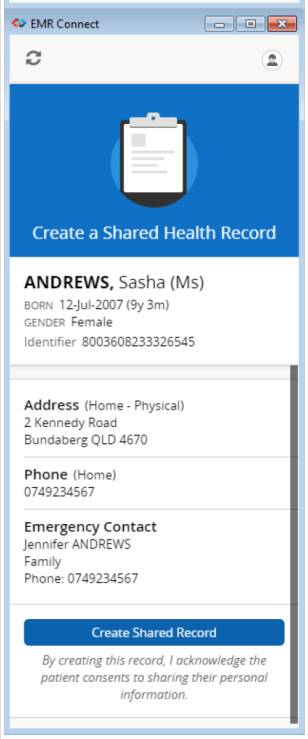
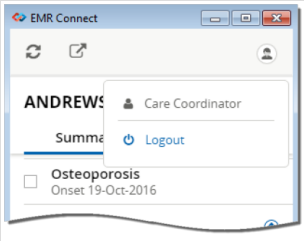
Description	Example
On the Landing Page and **Create a Shared Health Record** screen, the following actions can be performed: • select the **Refresh** icon to refresh the screen and load new data. • select the **Open menu** icon to display the current logged in clinician's name, and the **Logout** option.	 
With a patient in context, the following actions can be performed: • select the **Refresh** icon to refresh the screen and load new data. • select the **Open patient record in Clinical Portal** icon to launch Clinical Portal with the patient in context.	

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Description	Example
• select the **Open menu** icon to display the current logged in clinician's name, and the **Logout** option.	

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Create a Patient's Shared Record

Once you have logged in to EMR Connect, when you open a patient record in the EMR and the patient does not exist in the Shared Record, you can create the patient's shared record via EMR Connect.

To open EMR Connect and display the **Create a Shared Health Record** screen in order to create the patient's shared record, you can either:

- Double-click on the **EMR Connect** icon in the system tray, or,
- Right-click on the **EMR Connect** icon in the system tray and select **Show**.

Create a Shared Health Record Screen

The **Create a Shared Health Record** screen allows you to review the information that has been retrieved from your EMR and create the Shared Record.

Once you have reviewed the patient information, select the **Create Shared Record** button. The patient is put into context in EMR Connect once the Shared Record is created successfully.

Data Stored in Shared Record

EMR Connect only creates the Shared Record using the following demographic information from your EMR:

- Patient name
- Date of birth (age)
- Gender
- Patient identifiers
- Address information
- Preferred contact

  > Due to current limitations, we are only able to save one form of contact and it must be either **Phone** or **Email**. The form of contact selected as *Preferred* will be saved to the Shared Record.

- Emergency contact

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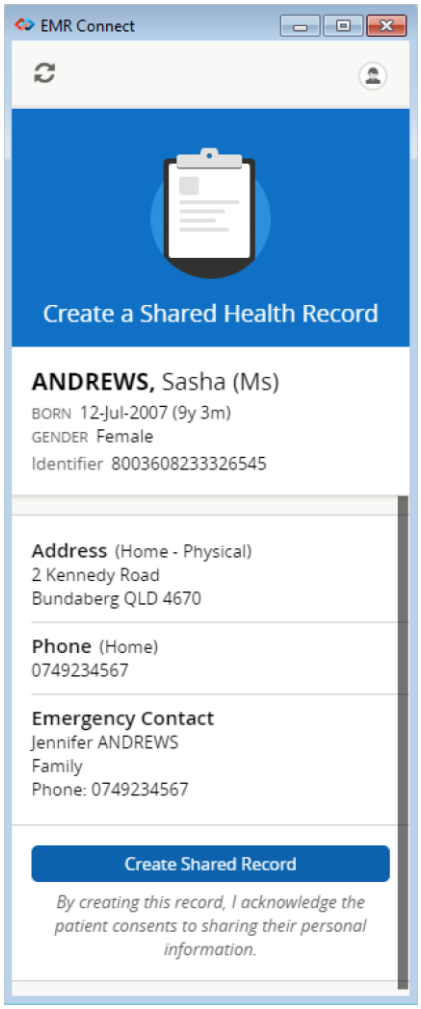

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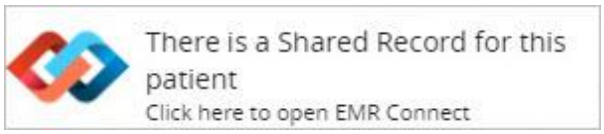
View a Patient's Shared Record

You can view the patient's shared record via EMR Connect under the following conditions:

1. The patient record must be opened in the EMR.
2. The patient must exist in the Shared Record.

Select the system tray notification displayed to open EMR Connect and view the patient's shared record. An example of the notification for *Windows*® 7:



You can also open EMR Connect and view the patient's shared record by:

- Double-clicking on the **EMR Connect** icon in the system tray, or,
- Right-clicking on the **EMR Connect** icon in the system tray and select **Show**.

When a patient is put into context in EMR and you have full access rights to the patient, the patient is put into context in EMR Connect.

The **Private Health Record** screen is displayed in EMR Connect if you do not have full access rights to the patient's record opened in EMR. Refer to Restricted Patient Access for details.

The following user interface is displayed in EMR Connect if you have full access rights to the patient's record:

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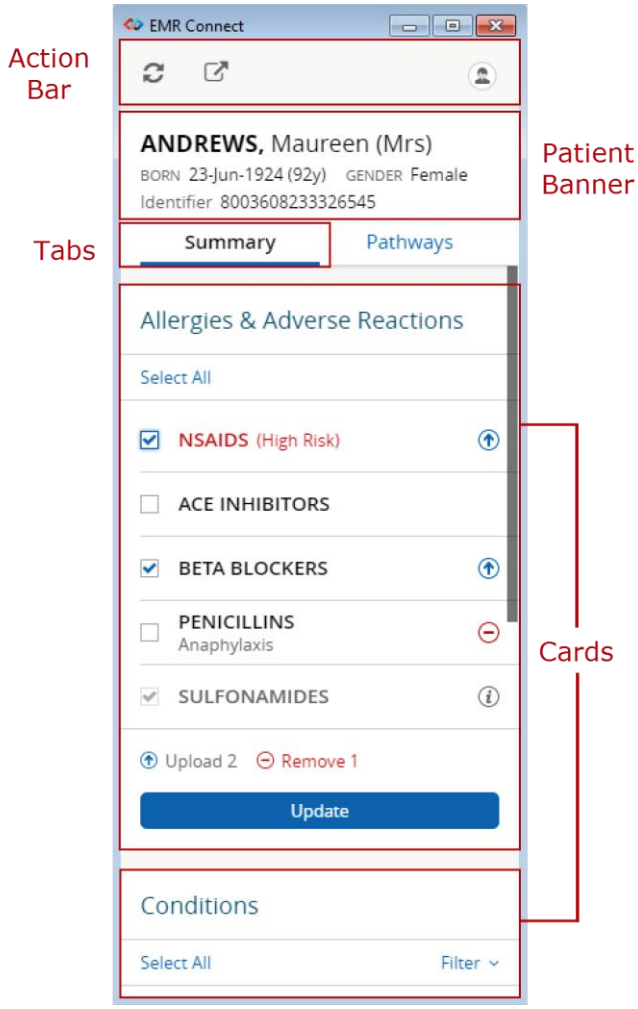

The user interface is divided into different areas:

- Action Bar: The Action Bar is always displayed at the top of EMR Connect. It is context sensitive and displays different icons based on the screen displayed. Refer to Action Bar for details.
- Patient Banner: The Patient banner is always displayed at the top of EMR Connect when a patient is in context. Refer to Patient Banner for details.
- Tabs: The available Tabs are configurable and are dependent on your organization's configurations.
- Cards: The available Cards on each tab are configurable and are dependent on your organization's configurations.

Patient Banner

The Patient Banner is always displayed at the top of EMR Connect when a patient is in context. The Patient Banner can be displayed in the following views:

1. Minimized view

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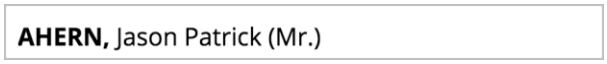

- Patient's last name, first name

2. Standard view

- Patient's last name, first name
- Date of birth (Age)
- Gender
- Primary patient Identifier
- If a patient is deceased:
  - **DECEASED** label
  - Date of death
  - Age at death
  - For example:

The patient banner is reduced to the minimized view as you scroll through the page.

Restricted Patient Access

The **Private Health Record** screen is displayed in EMR Connect if you do not have full access rights to the patient's record opened in EMR. The Patient Banner in Standard view is displayed, but the Tabs and Cards will be unavailable. An existing Circle of Care member must add you to the patient's Circle of Care in order for you to have full access to the patient's information.

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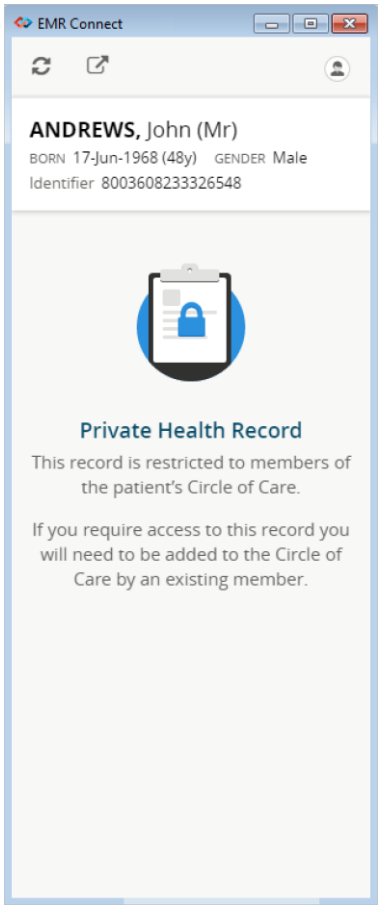

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Sync Patient Demographic Information

After a patient's shared record has been created from EMR Connect, the patient's demographic information are synced with EMR automatically. The demographic information that are synced automatically are:

- Patient name
- Date of birth (age)
- Gender
- Patient identifiers
- Addresses
- Preferred contact
- Emergency contact
- Deceased status

In order to update any of the patient's demographic information in EMR Connect and ensure it is also updated in the Shared Record automatically:

1. Update the patient's demographic information in EMR.
2. Keep the patient in context in EMR for up to one minute, until the changes are available in EMR Connect.

   Do not refresh EMR Connect by selecting the **Refresh** icon .

   The patient's demographic information will update in the Patient Banner in EMR Connect automatically, as well as update in the Shared Record.

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Allergies and Adverse Reactions

The **Allergies and Adverse Reactions** card is displayed on the **Summary** tab. You can view the patient's allergies from both EMR and Shared Record, as well as upload or remove allergies to Shared Record.

Severe allergies are displayed in red with the label **(High Risk)** and is always display at the top of the allergies list. The list is sorted into three categories: High Risk, Low Risk, Standard. The allergies in the categories are sorted alphabetically.

If an allergy is greyed out and has an **Info** icon next to it, the allergy was uploaded to the Shared Record from another facility and cannot be removed from the Shared Record via EMR Connect. The allergy can only be removed by clinicians within the patient's circle of care, who belong to the same facility as the clinician who uploaded it via EMR Connect.

If an allergy is greyed out and has a **Warning** icon next to it, it indicates that EMR does not provide the facility information to EMR Connect. Please contact your IT administrator to resolve this issue.

EMR Connect displays allergies information from both EMR and Shared Record. When you update an allergy in the EMR, the updated allergy is automatically updated in EMR Connect (You need to select the **Refresh** icon for the updated allergy to display). However, the allergy is not automatically updated in the Shared Record until you select the **Update** button.

Allergies Fields

The following fields are displayed for each allergy:

Fields	Description	Example
Substance	Name of the substance.	**ANT BITES**
Criticality	Estimate of the potential clinical harm or seriousness, of the reaction to the identified substance. Can be classified as High Risk or Low Risk. • High Risk: exposure to the substance may result in a life threatening or organ system threatening outcome. • Low Risk: exposure to the substance is unlikely to result in a life threatening or organ system threatening outcome.	**(High Risk)**
Reaction Manifestation	Clinical symptoms or signs associated with the allergy reaction.	**Rash**

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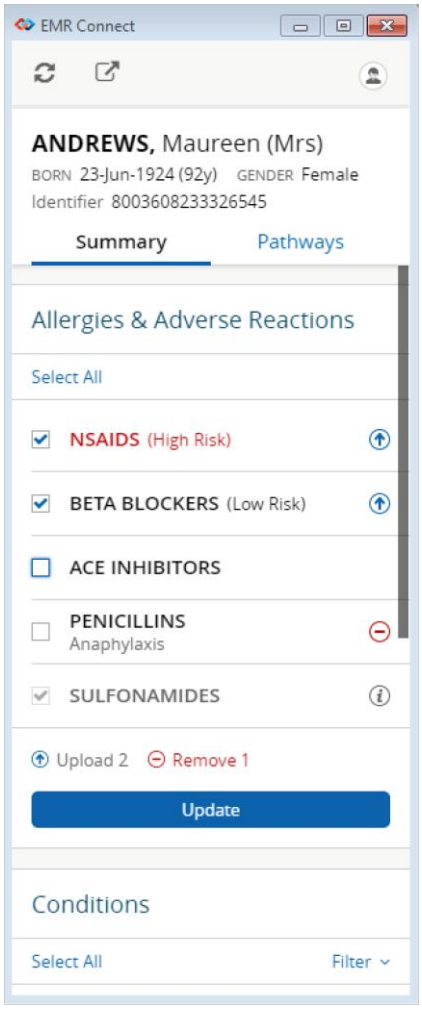

Upload Allergies

Allergies in EMR Connect can be uploaded to the Shared Record. For more information on the **Allergies and Adverse Reactions** card, refer to Allergies and Adverse Reactions for details.

To upload allergies:

1. Select the checkboxes next to the allergies you want to upload to Shared Record.
   An **Upload** icon is displayed next to the allergies.
2. Select the **Update** button to upload the allergies.
   An **Update successful** message is displayed.

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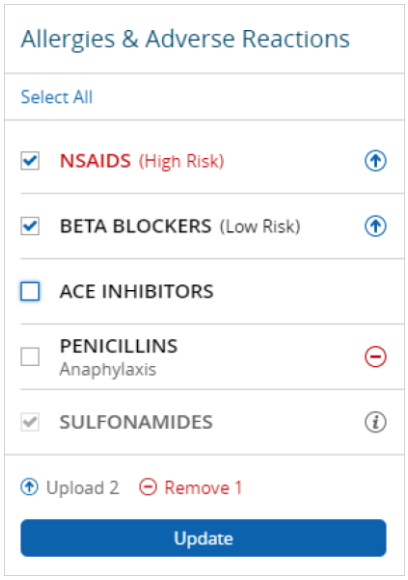
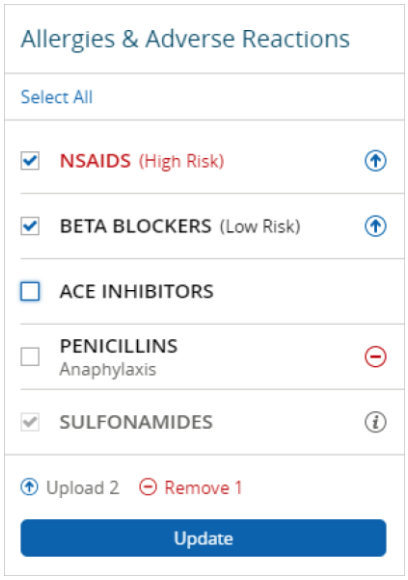


Remove Allergies

Allergies from EMR Connect can be removed from the Shared Record. For more information on the **Allergies and Adverse Reactions** card, refer to Allergies and Adverse Reactions for details.

To remove allergies:

1. Clear the checkbox next to the allergies you want to remove from the Shared Record.
   A **Delete** icon ⊖ is displayed next to the allergies.
2. Select the **Update** button to remove the allergies.
   An **Update successful** message is displayed.



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Conditions

The **Conditions** card is displayed on the **Summary** tab. You can view the patient's conditions from both the EMR and Shared Record, as well as upload or remove conditions to Shared Record.

If a condition is greyed out and has an **Info** icon next to it, the condition was uploaded to the Shared Record from another facility and cannot be removed from the Shared Record via EMR Connect. The condition can only be removed by clinicians within the patient's circle of care, who belong to the same facility as the clinician who uploaded it via EMR Connect.

If a condition is greyed out and has a **Warning** icon next to it, it indicates that EMR does not provide the facility information to EMR Connect. Please contact your IT administrator to resolve this issue.

EMR Connect displays conditions information from both EMR and Shared Record. When you update a condition in the EMR, the updated information is automatically updated in EMR Connect (You need to select the **Refresh** icon for the updated condition to display). However, the condition is not automatically updated in the Shared Record until you select the **Update** button.

Conditions Fields

The following fields are displayed for each condition:

Fields	Description	Example
Condition	Identification of the condition, problem or diagnosis.	**Migraine**
Label	The **Resolved** label Resolved or **Confidential** label Confidential is displayed next to the **Condition** field depending on its status. To view **Resolved** or **Confidential** conditions, refer to Filter Conditions for details.	Resolved
Onset	Estimated or actual date or date-time the condition began.	**Onset 27-Sep-2016**

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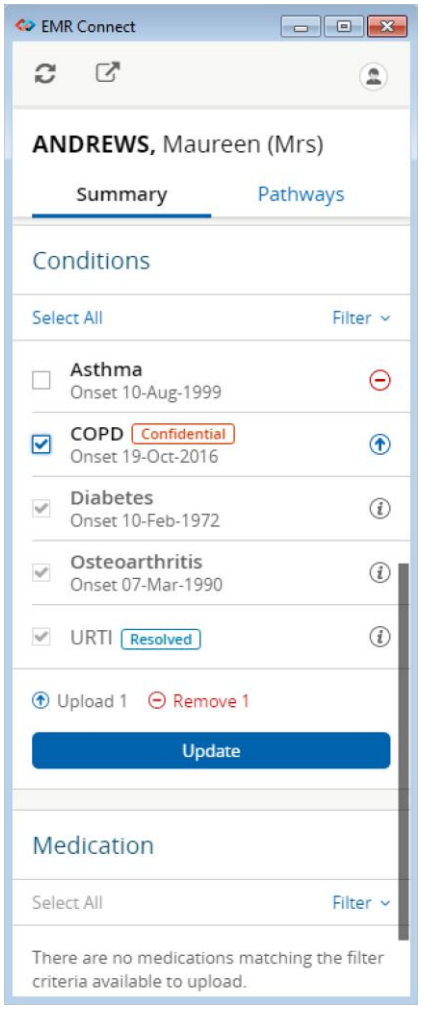

Filter Conditions

By default EMR Connect does not display **Resolved** or **Confidential** conditions. To display these conditions, select the **Filter** option on the top right corner of the **Conditions** card and select the respective checkbox.

If a condition is:

- either **Resolved** or **Confidential** and it has been uploaded to Shared Record, the respective label is displayed regardless of the **Filter** option.
- both **Resolved** and **Confidential** but it has not been uploaded to Shared Record, the labels are not displayed if only the **Resolved** filter is selected.

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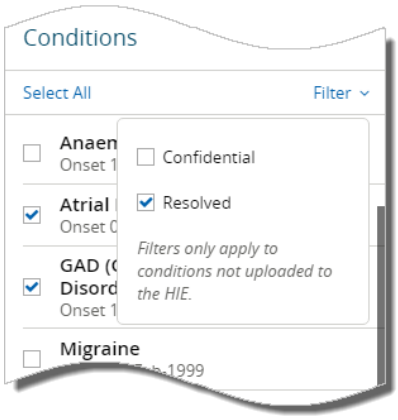
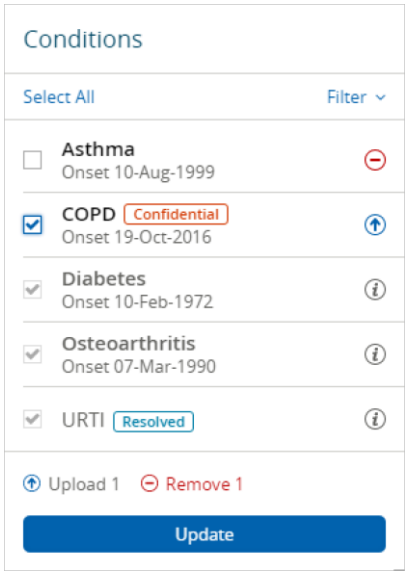


Upload Conditions

Conditions in EMR Connect can be uploaded to the Shared Record. For more information on the **Conditions** card, refer to Conditions for details.

To upload conditions:

1. Select the checkboxes next to the conditions you want to upload to Shared Record.
   An **Upload** icon is displayed next to the conditions.
2. Select the **Update** button to upload the conditions.
   An **Update successful** message is displayed.



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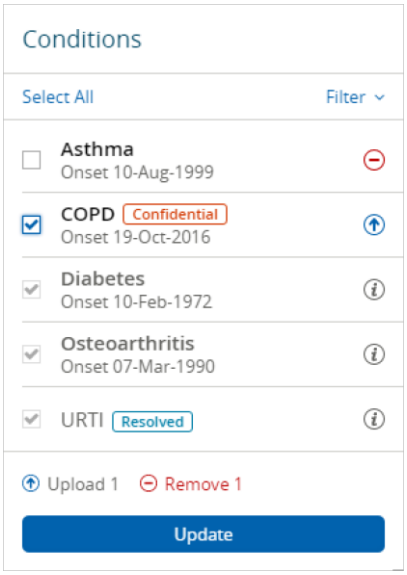
Remove Conditions

Conditions in EMR Connect can be removed from the Shared Record. For more information on the **Conditions** card, refer to Conditions for details .

To remove conditions:

1. Clear the checkbox next to the conditions you want to remove from the Shared Record.
   A **Delete** icon is displayed next to the conditions.
2. Select the **Update** button to remove the conditions.
   An **Update successful** message is displayed.



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Medication

The **Medication** card is displayed on the **Summary** tab. You can view the patient's medication orders from both the EMR and Shared Record as well as upload medication orders to the Shared Record.

Only the most recent medication order for a given medication is shown in EMR Connect. To view **Uploaded** medication orders or any medication orders prescribed more than 3 months ago, refer to Filter Medication Orders for details.

If a medication order is greyed out and has an **Info** icon next to it, the medication order was uploaded to the Shared Record from another facility. The medication order cannot be removed from EMR Connect.

If a medication order is greyed out and has a **Warning** icon next to it, it indicates that EMR does not provide the facility information to EMR Connect. Please contact your IT administrator to resolve this issue.

Medications Fields

The following fields are displayed for each medication order:

Fields	Description	Example
Medication	Medication prescribed.	**PANADOL 500mg**
Dosage	Dosage of the medication required.	**Take 5ml three times daily**
Last Prescribed	Time the prescription was last authorized.	**Last Prescribed 16-Aug-2016**

Medication orders uploaded to the Shared Record are greyed out as they cannot be removed once uploaded.

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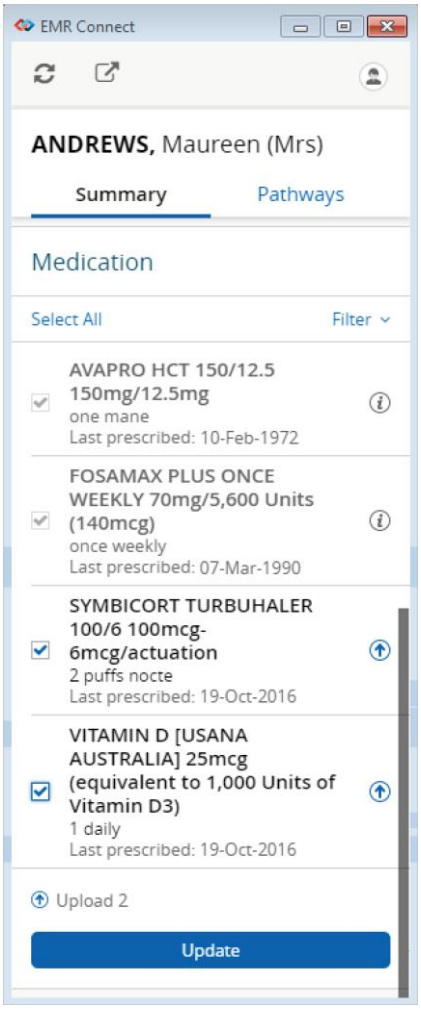

Filter Medication Orders

By default EMR Connect does not display **Uploaded** medication orders or any medication orders prescribed more than 3 months ago.

To display these medication orders, select the **Filter** option on the top right corner of the **Medication** card and select:

- The **Uploaded** checkbox to display the medication orders that have been added to the Shared Record.
- One of the **Last Prescribed Date** radio buttons to change the time frame of the displayed medication orders.

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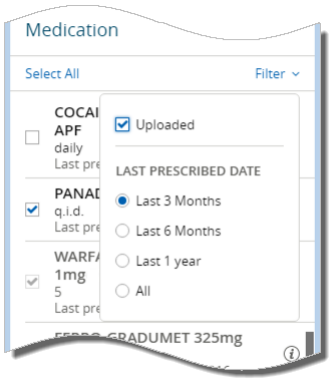
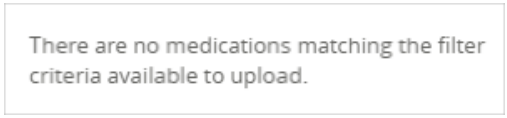


If there are no medication orders matching the filter ranges, the following message is displayed:



For more information on the **Medication** card, refer to Medication for details.

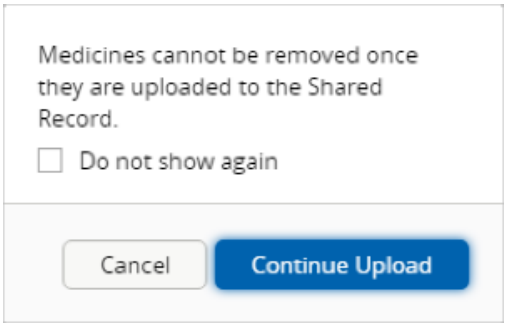
Upload Medication Orders

Medication orders in EMR Connect can be uploaded to the Shared Record. For more information on the **Medication** card, refer to Medication for details.

To upload medication orders:

1. Select the checkboxes next to the medication orders you want to upload to Shared Record. An **Upload** icon is displayed next to the medication order.
2. Select the **Update** button to upload the medication order. An **Update successful** message is displayed.

If this is the first time you upload medications or you have not selected the **Do not show again** checkbox previously, the following dialog is displayed to remind you that medication orders added to the Shared Record cannot be removed:



Medication orders uploaded to the Shared Record are greyed out as they cannot be removed once uploaded.

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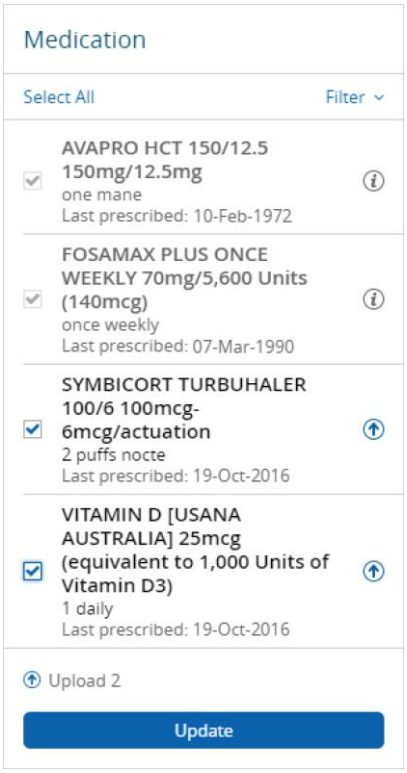

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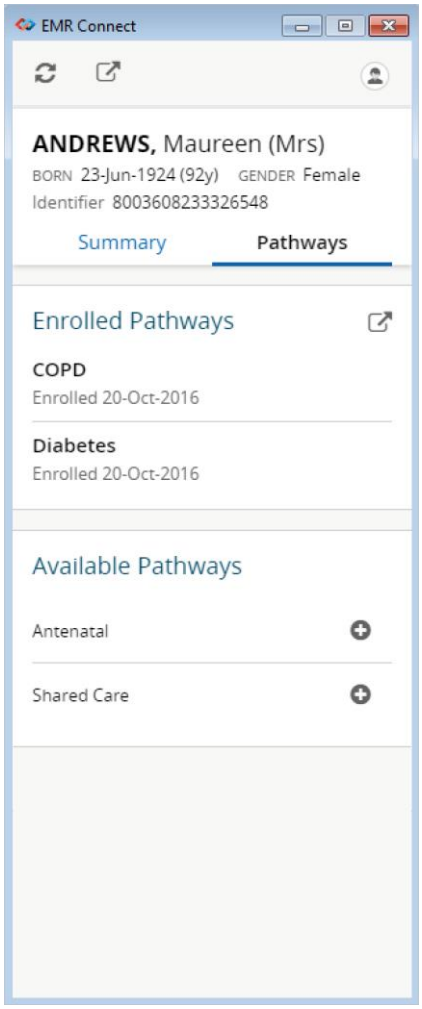
Pathways

Once a patient is in context, you can select the **Pathways** tab and the following two cards are displayed:

- Enrolled Pathways
- Available Pathways



View Enrolled Pathways

You can view the pathways the patient in context is enrolled in in the **Enrolled Pathways** card.

The available fields are:

Fields	Description	Example
Pathway name	Name of the pathway.	**Maternity**
Enrollment date	Date enrolled in pathway.	Enrolled 07-Jul-2016

To navigate the pathways in Clinical Portal, select the **Open** icon .

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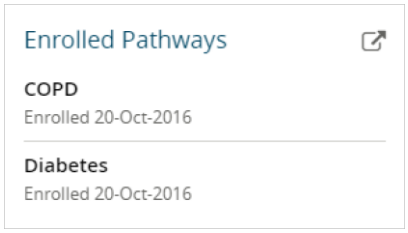

Enroll Patient into Pathways

You can enroll the patient in context into the available pathways listed on the **Available Pathways** card.

The available field are:

Field	Description	Example
Pathway name	Name of the pathway.	Maternity

To enroll the patient in the pathway, select the **Enroll** icon next to the required pathway.

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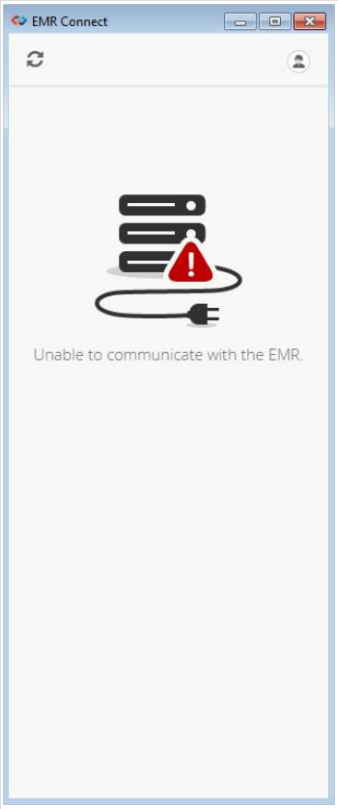
Understand Error Messages

The following describes the error messages you may see in EMR Connect:

Error	Description
	`Unable to communicate with the EMR.` EMR Connect cannot establish a connection with your EMR system. This error message may display when: • you first log in to EMR Connect. On your first log in to EMR Connect, you will be prompted to install the EMR Data Connector on your computer. This error message is displayed in EMR Connect while the EMR Data Connector is installing. After it is installed successfully, the error is replaced by either the patient in context screen if a patient is opened in the EMR (it might display the **Create a Shared Health Record** screen if required), or the landing page if no patient is opened in the EMR. • there is a communication issue between EMR Connect and EMR. The communication problem may be caused by the EMR Data Connector not working properly. EMR Connect will try to recover and reconnect with EMR, or reinstall the EMR Data Connector. If EMR Connect does not recover automatically, right-click on the EMR Data Connector icon in the system tray and select **Exit** in order for it to restart automatically. If the problem persists, please contact your IT administrator and send them the `debug_info.zip` file. Refer to Generate Support Files for details.

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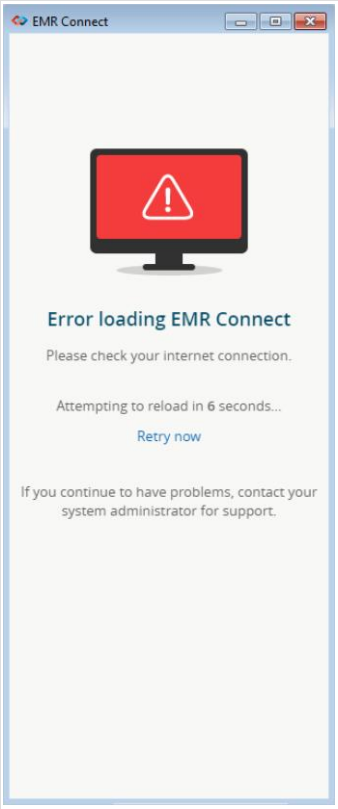
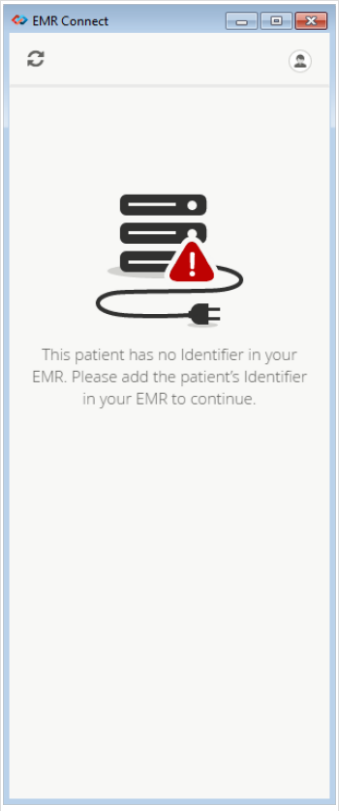
Error	Description
	`Error loading EMR Connect. Please check your internet connection.` EMR Connect is unable to connect to the server, possibly due to issues with the internet connection. EMR Connect will try to recover and reconnect every 20 seconds. If your internet connection is working properly but the problem persists, please contact your IT administrator and send them the `debug_info.zip` file. Refer to Generate Support Files for details.
	`The patient has no identifier in your EMR. Please add the patient's identifier in your EMR to continue.` The patient in context in EMR does not have an IHI configured. You need to configure an IHI for the patient you have opened in EMR. EMR Connect only supports one primary namespace (for example IHI). Patient without primary namespace identifier can not be loaded.

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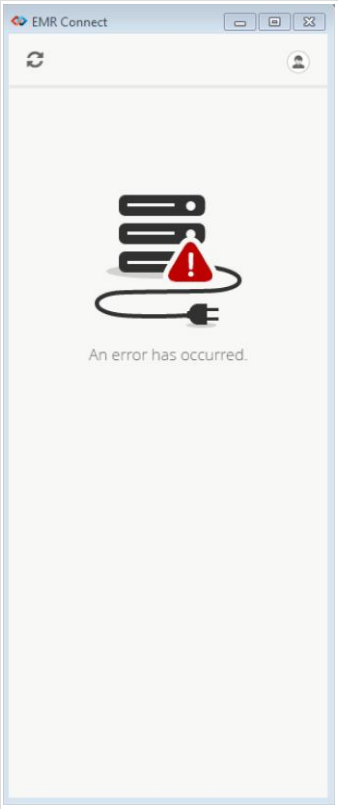
Error	Description
	`An error has occurred.` An error has occurred with retrieving patient data in EMR Connect. This may be due to a network problem, or any issues where EMR Connect cannot display patient information. Refresh the screen by selecting the **Refresh** icon. If the problem persists, please contact your IT administrator and send them the `debug_info.zip` file. Refer to Generate Support Files for details.

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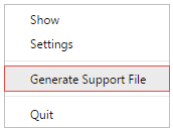
Generate Support Files

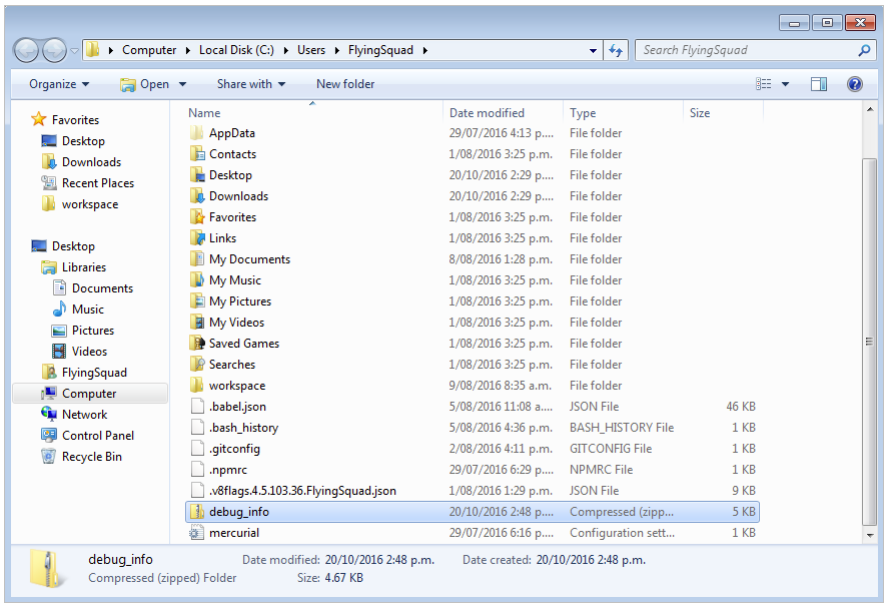
In order for the IT administrators or Orion Health to provide the best technical support, you can generate the support logs files of EMR Connect from your computer and send it to them along with your support request.

To generate the support log files:

1. Right-click on the **EMR Connect** icon in the system tray.
2. Select **Generate Support File**.



A file `debug_info.zip` is generated in the folder at `C:\Users\<your user name>\debug_info.zip`.



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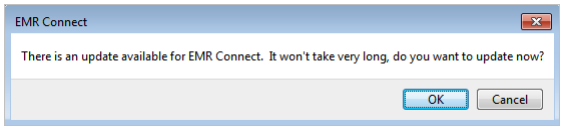
Update EMR Connect

EMR Connect is updated automatically. The following dialog box is displayed when a new version is available:



Select the **OK** button to update EMR Connect. It takes less than a minute to complete.

If you cannot update EMR Connect at this instance, select the **Cancel** button to close the dialog box. It will prompt you again on the next relaunch of EMR Connect.

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Uninstall the Desktop Application

To uninstall the EMR Connect desktop application from your computer:

1. Navigate to **Control Panel > Uninstall a program** to display the **Programs and Features** screen.
2. Select `EMR Connect` from the list of programs and select the **Uninstall** button.

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