Meditech Expanse Training Document
- Medical PAs -

This user guide is for Medical PAs using Meditech Expanse for patients seen at New Victoria Hospital.

Contents:

Important

Appointment Booking

Please note that this guide does not include training on how to book appointments. Training for this will be offered by the Outpatient Team Leads at a later date.

Test System

Access is being provided so that you can familiarise yourself with the navigation of the system only. You will not be able to see clinic appointments and other patient detail information at this time.

1. Accessing Expanse

Meditech Expanse is a cloud-based clinical information system that can be accessed using most mainstream web browsers. Chrome is the recommended browser, but you can also use Microsoft Edge, Google Chrome, Firefox or Safari.

1.1 Microsoft Authenticator

Microsoft Authenticator
Protects your online

Before accessing Meditech for the first time the Microsoft Authenticator application must already be installed on your computer with your new Victoria account already configured. However, if you are using the Authenticator App for the first time, you will be given the option to add and configure your account when you first log into Expanse. Please follow the on-screen instructions at this stage.

1.2 Logging in to Meditech Expanse

Copy and paste this link into your web browser https://nvhtest.meditech-uk.cloud/test

NB. The Live URL will be communicated prior to Go-Live.

When the Sign In page is displayed, enter your New Victoria Hospital username (as used in the Consultant Portal) in an email format (username@newvictoria.co.uk) along with your New Victoria Hospital password.

Next the "Stay signed in?" window displays. If you use a **public or shared** computer, say NO to this, otherwise say "Yes".

You will be prompted to complete the multifactor authentication. Open the Microsoft Authenticator App on your device and approve the sign-in request.

You will see the MEDITECH Expanse screen below. Click on + Launch New Session and you will be taken to your Expanse main menu.
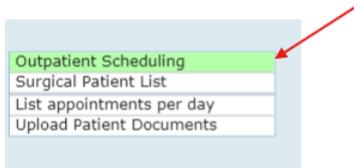

If you have any issues logging in to Expanse, please contact the IT Help Desk on:
itsupport@newvictoria.co.uk

2. Outpatient Clinic Schedules

The Outpatient Scheduling Desktop is used to access your Consultant's clinic schedules as well as patient details.

Click on **Outpatient Scheduling** and you will be taken into **Resource Mode**.
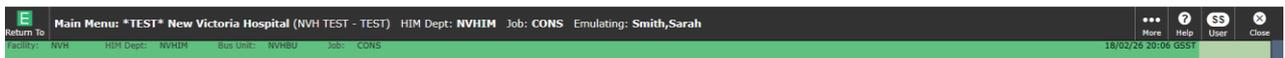

Firstly, familiarise yourself with the black navigation bar at the top:

User: You can see the user who is logged on. (top right)
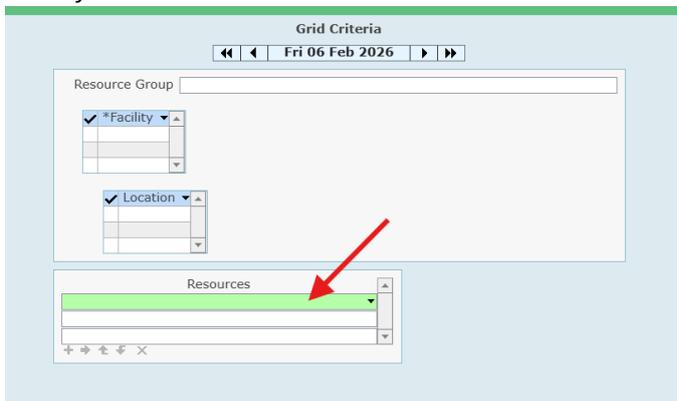**X Close**: Is useful to return to the main menu home screen at any time. (top right)
E Return: Display any previously accessed screen for easy return to that location. (top left)

2.1 Resource mode

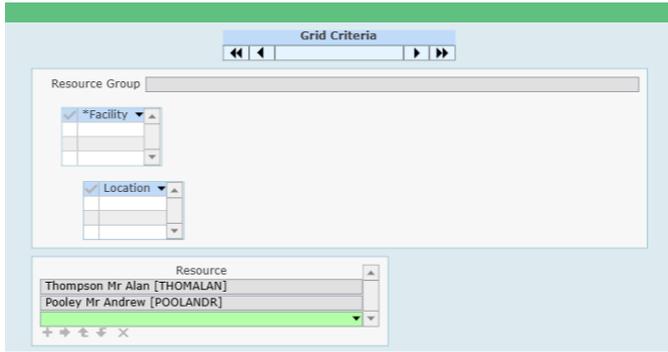Resource in Expanse refers to the Consultant.
Place your cursor in the first line of the **Resources** field.

Enter the first three letters of your Consultant's surname and select return/enter on the keyboard.

If you wish to view any of your additional Consultants at the same time repeat this in the rows underneath.
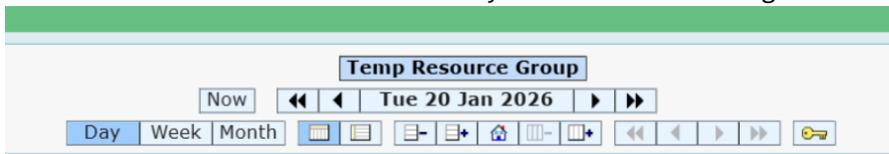
Select **OK** at the bottom right of your screen.

You will now be able to see your Consultant(s) Outpatient Clinic Schedule(s).
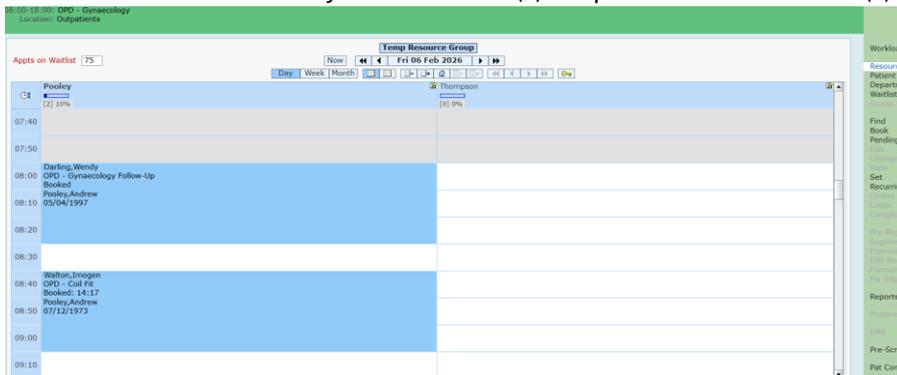
- Grey shaded areas indicate slots not open for booking.
- White areas indicate available days and times for booking.

Resource Mode screen icon functionality:

>	Next day
>>	Next week (+ 7 days)
<	Previous day
<<	Previous week (- 7 days)
Now	Brings you back to today
Day	Day view (for one or multiple Consultants)
Week	Week view. This is only selectable for one Consultant at a time. If you have multiple Consultants select which one you wish to view for before choosing Week.
Month	Month view. This is only selectable for one Consultant at a time. This also displays the percentage of the day that is filled.

Select these to zoom in or out to see more or fewer clinic times.

To return to the standard clinic time view (after zooming in or out).

To return to your main menu starting screen at any time, select "**Close X**" at the very top right of your Expanse display.

2.2 Department Mode

On the right-hand side of the screen you can access the **Department** view.

Department view will show the status of Patients booked in to clinics e.g. Booked/Attended/Cancelled, whether it is a telephone consultation etc.

To exit Outpatient Scheduling select the **Close X** icon at the very top right of your Expanse display.

2.3 Printing and downloading

The menu for printing and downloading is not available in the test site.
It will be provided as a menu option on the live site.

3.Theatre Schedules

The **Surgical Patient List** is used to access your Consultant's theatre schedules.

Click on the **Surgical Patient List**
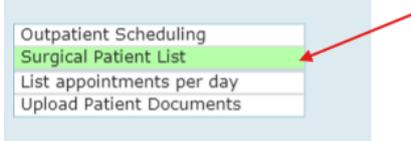
Select the time period you wish to view From **Date** and **Thru Date** and click **Save** (top right).
Do not enter any details in the grey fields.

Click **Save** (top right) and this will take you into your Consultant's/Consultants' surgical list for that period. The headings at the top indicate what is displayed in each column:

Column 1   Patient's Name and Account number V# (visit number).

Column 2   Registration status:
- PRE DAY or PRE IN = Pre Registered Day Case or Inpatient (yet to arrive)
- DIS DAY or DIS IN = Discharged Day Case or Inpatient
- SCH DAY or SCH IN = Scheduled Day Case or Inpatient
- and date/time of admission and time of procedure

Column 3   Surgery status

Column 4   Surgeon, procedure and laterality (if applicable)

Column 5   Anaesthetic

To see additional information about any of the patients in the list click the **arrow >** next to the name.
To collapse the list back, just click the **arrow** again.

To return to your starting screen at any time, select "Close X" (top right).
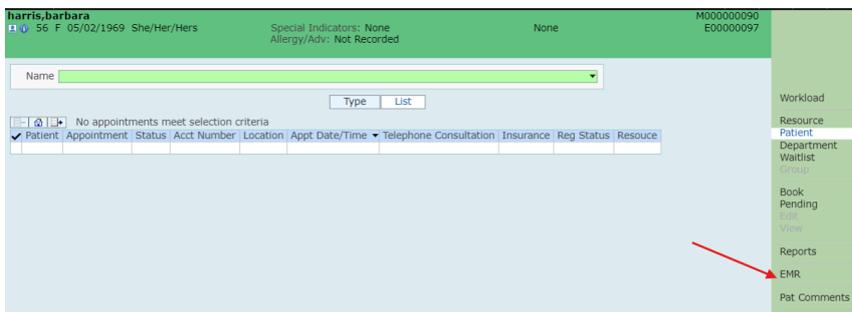
4. Viewing Results

Tests & Diagnostic Reports

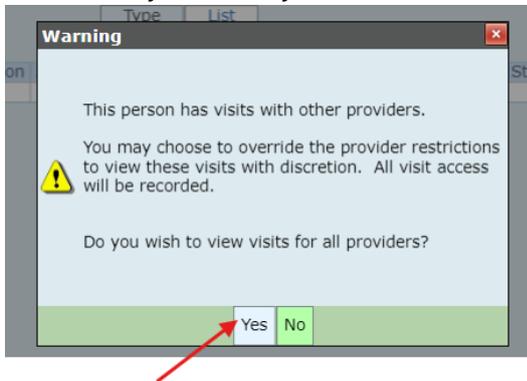To find and view patient test results, from the Main Menu, select **Outpatient Scheduling.**
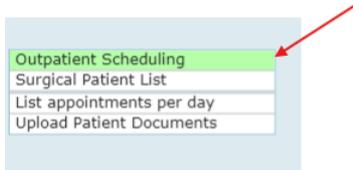
Locate the patient you wish to see results for.
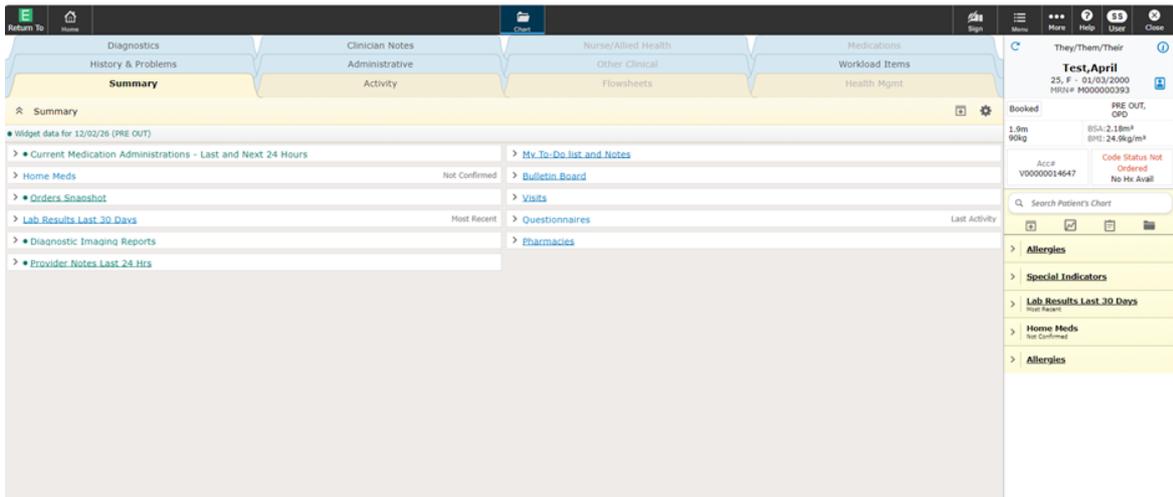If in Outpatient Scheduling, you will then see **EMR** on the right.

The pop up below will appear. Select **Yes**.
Please note you will only be able to view results for your own Consultant's patients (tested?)

You are now taken into the patient's Electronic Medical Record (EMR) or also known as the Chart.
The chart is made-up of tabs to represent a patient's medical folder.

Diagnostics

This is where you will find all diagnostic exam and test results, including: Laboratory, (Microbiology, Pathology), Imaging Reports and Cardiovascular Reports.

Click **Diagnostics** to open the folder.

Along the top row is a list of the different result types – **Lab, Imaging, Microbiology** etc.

Select the one you are looking for.
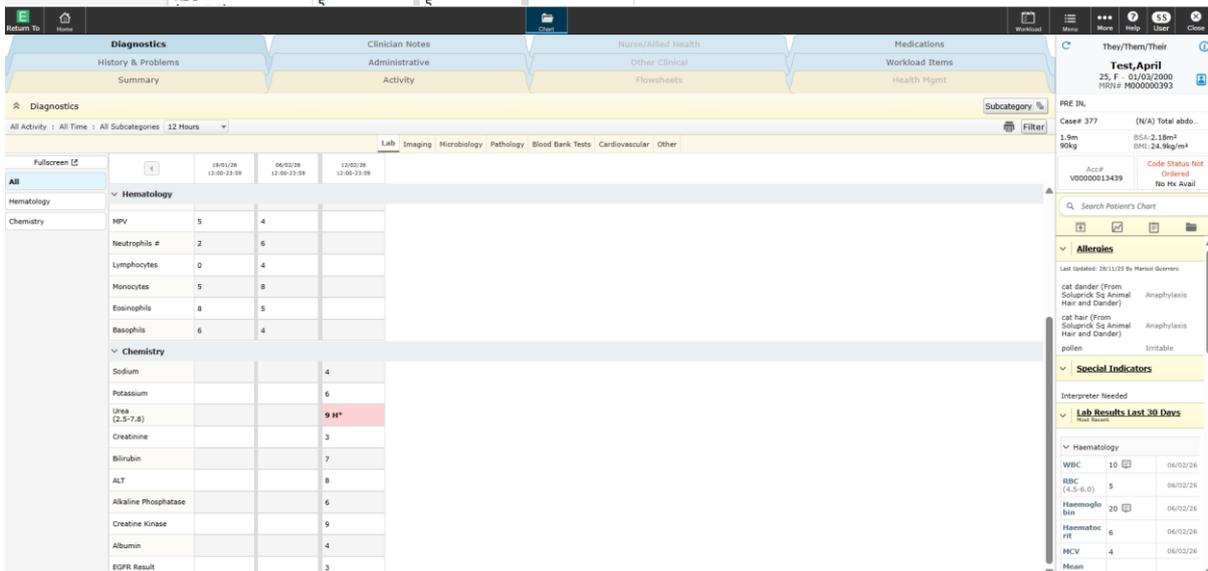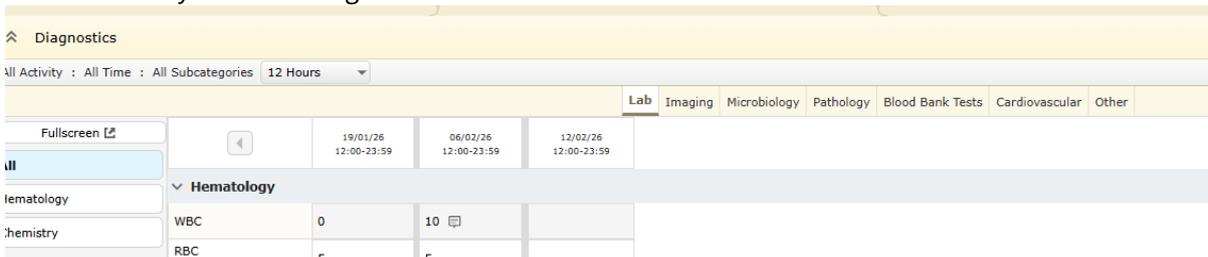
Understanding the Diagnostics display
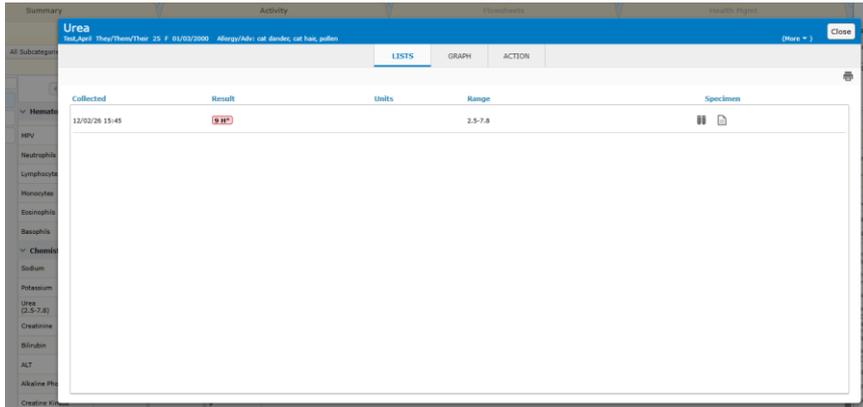
White and grey = normal results
Yellow = abnormal values
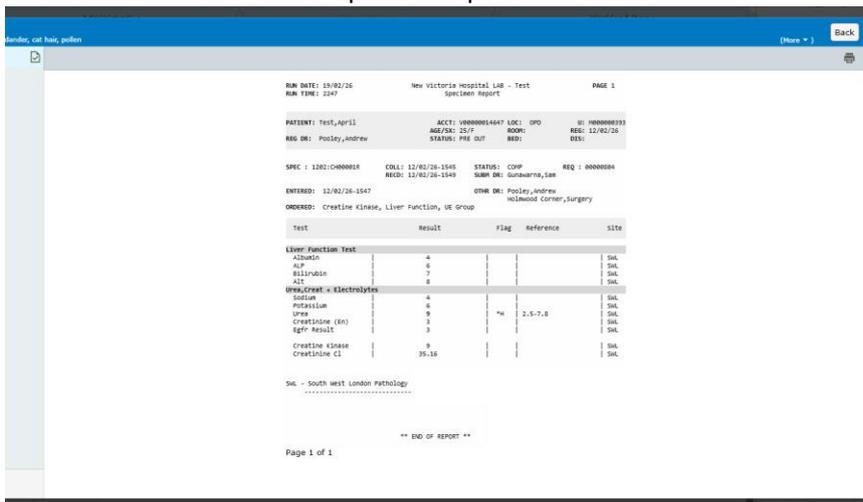**Red =** critically abnormal results
H and L = High and Low values

To see more detail, you can simply click on a result, and it will open an overlay screen which has further information.
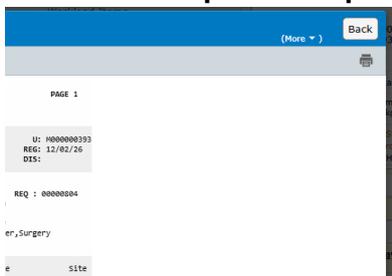
Where there's a little icon like a document, this indicates that there's a report attached to that line.

Click the **document icon** to open the report.

**To download or print the report**, select the **printer icon** which is located top right.

5.Uploading Documents

Patient follow-up letters, GP letters and discharge summaries are currently sent via email to the Hospital Medical Records department. With Meditech Expanse, these documents, when saved as PDFs can now be uploaded directly to the patient's E-Chart, removing the need to email these.

Please follow the steps below.

From the main menu select **Upload Patient Documents.**
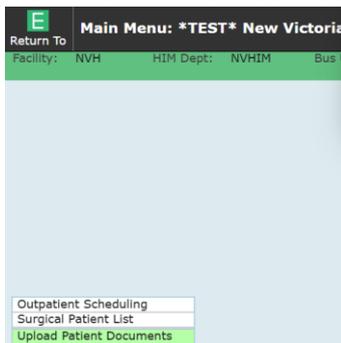
You can upload by using either the P**atient Account Number (V#)** or **Medical Record Number (M#)**. If using the Patient Account number, make sure Account is selected and enter the V# number into the field below and select your return/enter key.
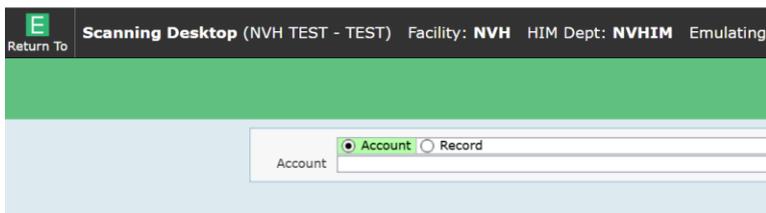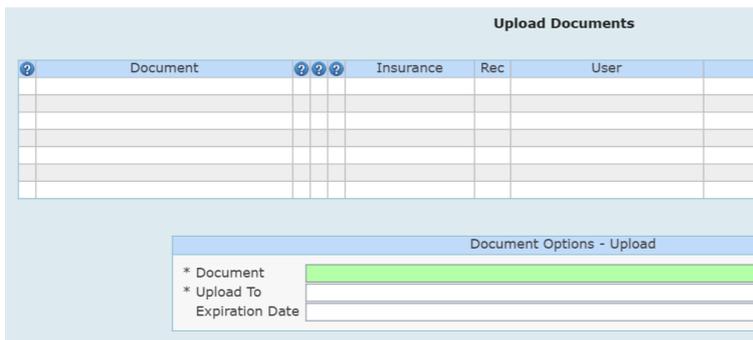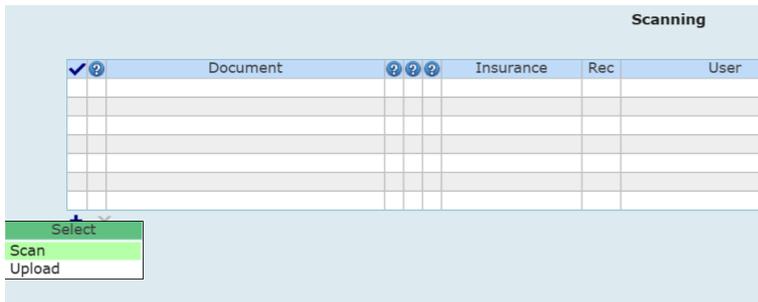

If using the **Medical Record Number (M#)** make sure **Record** is selected and enter the M# number into the field below and select your return/enter key.
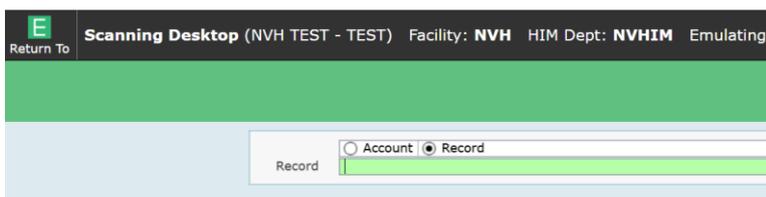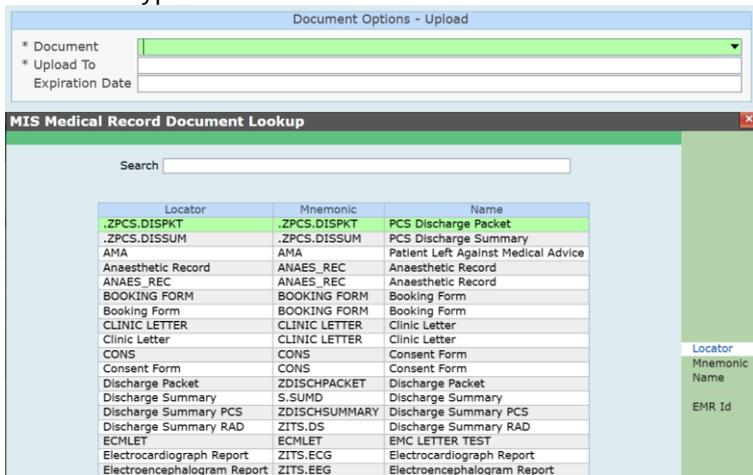
Click the **+ icon** and select **Upload**

Click in the field to the right of **Document** and click the down arrow to display a drop-down list of document types.
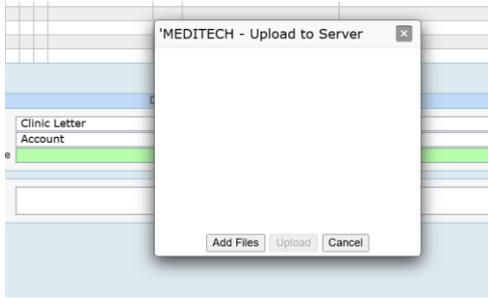

Choose the correct document type you wish to upload e.g. "**Clinic Letter**".

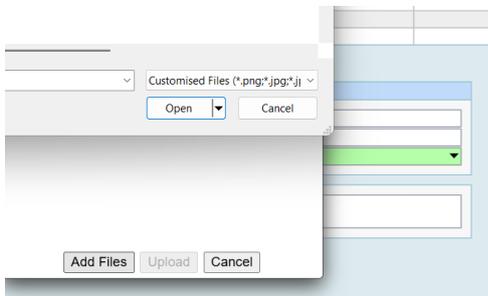Click **Upload** (bottom-right corner).
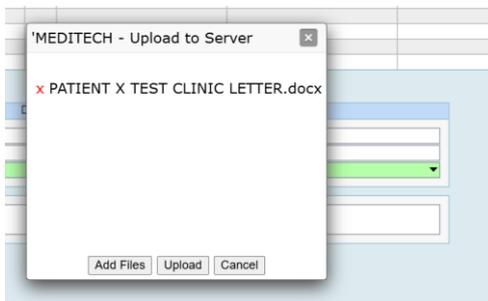
A **pop-up window** appears.

Select **Add Files** to find and select your relevant document(s) from your own device. Please note the required format is PDF.

In the same pop-up window, click **Open**.

A **second pop-up window** appears:

Click **Upload**

The system displays the document you are choosing to upload. If the document is correct, select **OK** at the bottom right of your screen.

Select **Back** bottom right to return to the upload screen or select the **X Close** icon top right to return to the main menu home screen.

6. Support

For issues around logging in and access to Expanse contact:
        IT Help Desk at: expansesupport@newvictoria.co.uk

For support on viewing and navigating schedules contact:
        Fiona Keaney or Barabara Harris at: opdenquiries@newvictoria.co.uk

For issues on uploading patient documents to the EMR:
        Medical Records at: medicalrecords@newvictoria.co.uk

## 7. Setting up Microsoft Authenticator for the First-time

- When your username and password have been accepted by the system (on Expanse log in phase), you will be displayed a notification to configure additional security on your account.
- This is where the system will start **MFA** (Multi Factor Authentication) registration process.
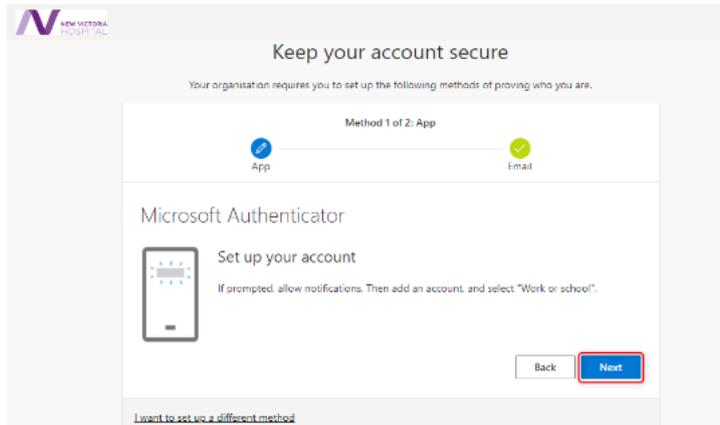
Click **NEXT**
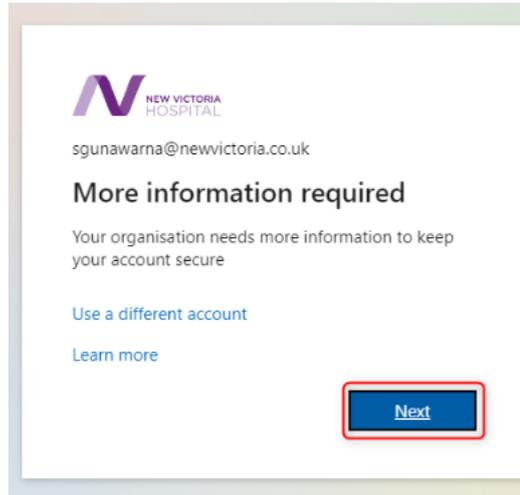
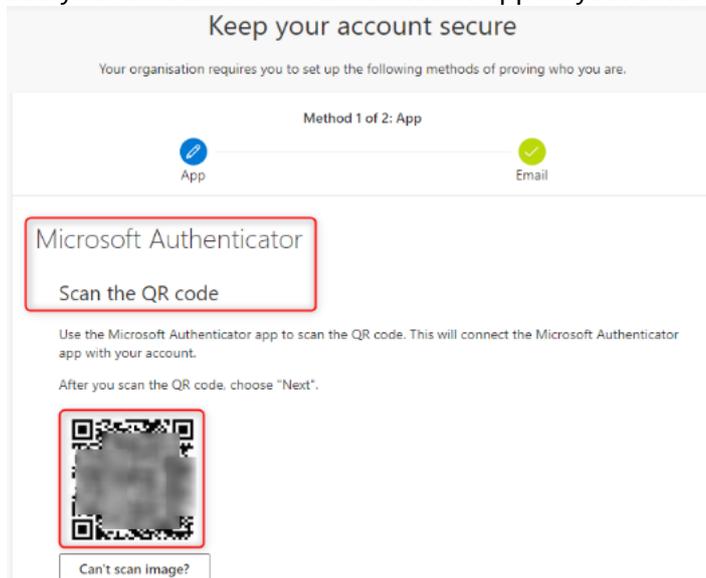***** **Ensure you have the Microsoft Authenticator App downloaded and installed before proceed any further.**

- Click **NEXT** to start the strong authentication set up process *(On your computer)*.
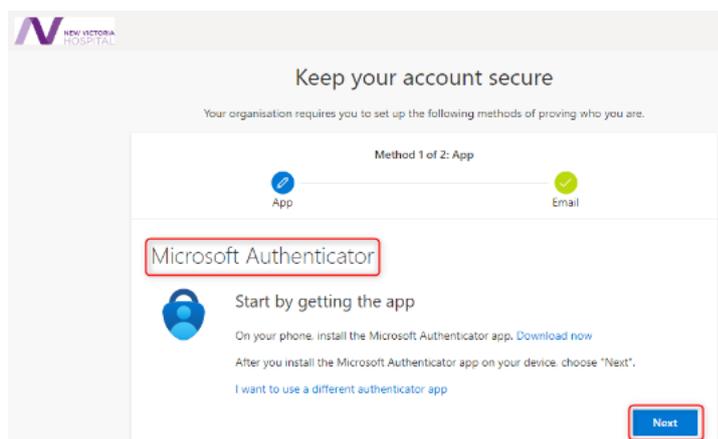
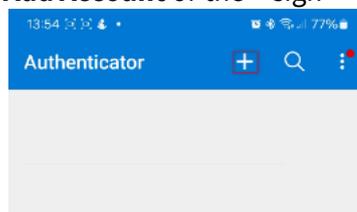- Click **NEXT** on the **Keep your account secure** page. *(On your computer)*

- You will be shown a **QR code** on the screen. Using the QR code is the quickest was to add your account to the Authenticator App on your smart device.
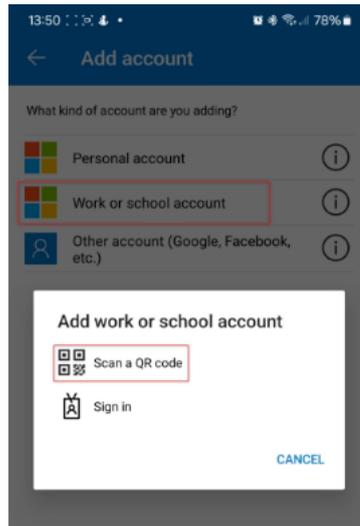

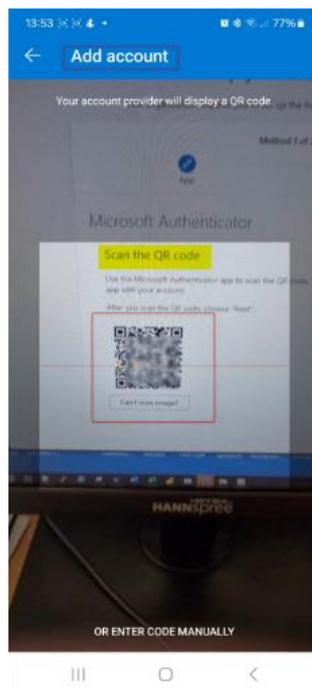- Open the **Microsoft Authenticator App.** *(On your Smart Device)*

 - Tap on **Add Account** or the **+** sign

- o Select **Work or School Account** and tap on **Scan a QR code**

- o Your smart device will open your camera at this stage. Point it to the QR code you have open on your computer screen.


- o Your smart device screen will flicker a few times and display a screen like below. Click **FINISH** to complete account addition. Depending on your device make and model you may or may not see the pop-up notifying **App Lock Enabled**. If you do, tap **OK**
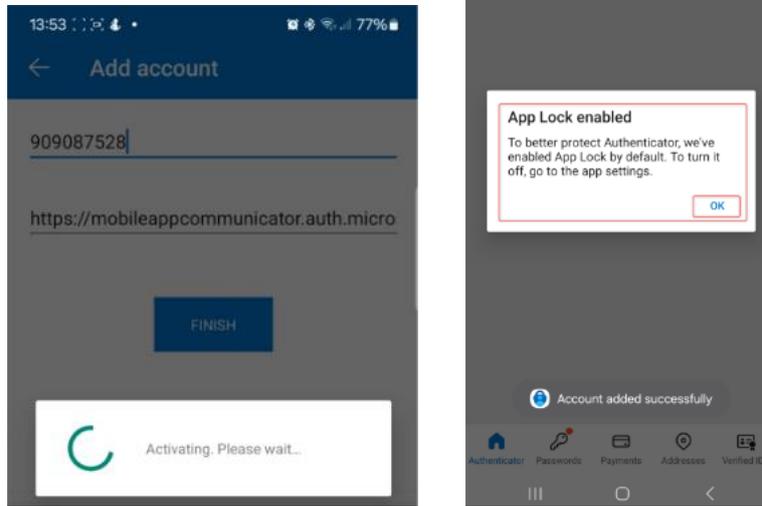
- o Your New Victoria Hospital email account will be listed on the Authenticator App as below.
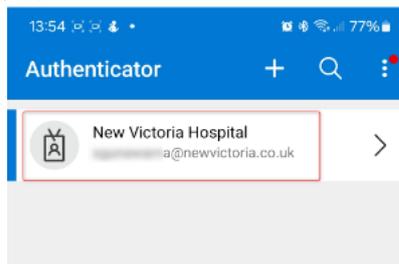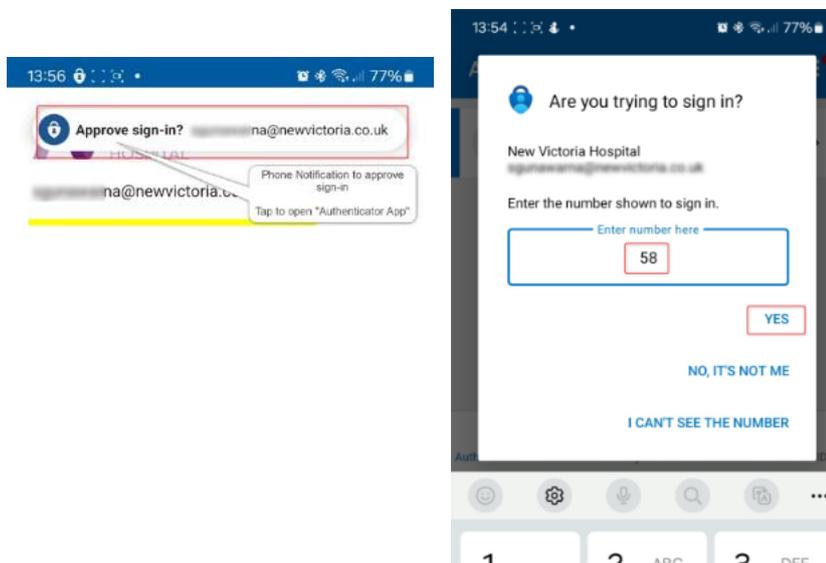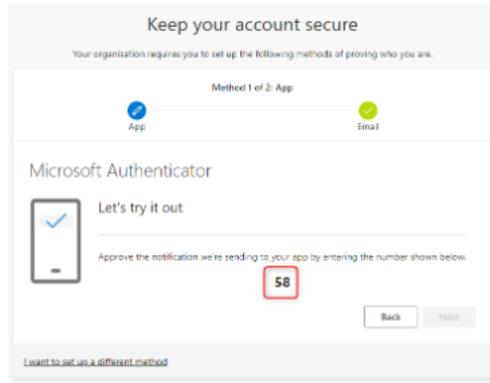

- **On your computer** screen you will still have the page with the QR code. Click **NEXT** to proceed.
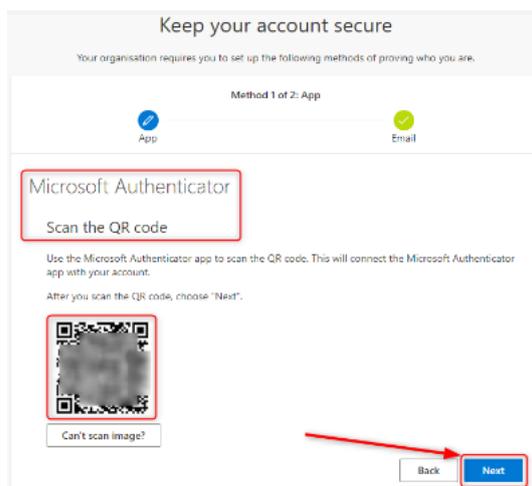
- System will now start a validation process to verify your identity. You will see a screen like below **on your computer** and a logon notification will be sent to your Authenticator App on your smart device.

- Tap on the notification *(On your smart device)* and enter the number displayed on your computer screen.

- Click **NEXT** on your computer screen to complete the verification process. You will see a **Success** screen with Microsoft authenticator listed as the **Default sign-in method**.