Standard Operating Procedure (SOP): Introduction to Electronic Health Records (EHR) System and IT Onboarding

This SOP provides a comprehensive **introduction to electronic health records (EHR) system and IT onboarding**, detailing the process of familiarizing new users with the EHR interface, functionalities, and security protocols. It covers user account setup, access permissions, data entry standards, system navigation, troubleshooting basics, and IT support procedures to ensure seamless integration and effective use of the EHR system in healthcare settings.

1. Purpose

To guide new users through the setup and effective use of the EHR system by establishing clear procedures for onboarding and IT support.

2. Scope

This SOP applies to all new staff, clinicians, and relevant personnel requiring access to the EHR system.

3. Responsibilities

- **IT Department:** Facilitate onboarding, create accounts, assign permissions, and provide technical support.
- **Supervisors/Managers:** Identify onboarding needs for new users.
- **New Users:** Complete training and acknowledge security policies.

4. Procedure

1. **User Account Setup:**
   - Obtain user details from HR/supervisor.
   - Create EHR system account and assign initial password.
   - Grant role-based permissions as approved by management.
   - Provide user with login credentials and guidelines for password change upon first login.
2. **Access Permissions:**
   - Assign permissions based on user role (clinician, administrative, etc.).
   - Document access level for auditing and compliance.
3. **Introduction to EHR Interface:**
   - Schedule user training on system navigation, key features, and modules.
   - Demonstrate login/logout procedures and dashboard basics.
4. **Data Entry Standards:**
   - Review data entry protocols (e.g., standardized terminology, mandatory fields).
   - Emphasize patient confidentiality and compliance with data protection regulations (HIPAA, etc.).
5. **Basic Troubleshooting:**
   - Provide guidelines for resolving common issues (password reset, connectivity, session timeout).
   - Direct users to self-help resources and FAQs.
6. **IT Support Procedures:**
   - Explain how to contact IT support (email, phone, ticketing system).
   - Outline response times and escalation process for critical issues.
7. **Completion & Acknowledgment:**
   - User completes onboarding checklist and security training modules.
   - User acknowledges receipt and understanding of policies and procedures.

5. References

- EHR System User Manual
- Data Privacy and Security Policy
- IT Support Contact List

6. Revision History

Version	Date	Description	Author

| 1.0 | 2024-06-12 | Initial release | Compliance Officer |

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