

## Viewing and Entering Past Medical Procedures in the HMP

The HMP (Health Management Profile) tab can be a convenient way to keep track of a patient's past medical procedures. However, navigating through it and entering items can be a bit tricky. Use the following step-by-step to help you take advantage of this valuable resource.

### Step One

To access the HMP, open the patient's Clinical Desktop and click on the HMP tab in the third component of the Clinical Desktop. To expand the view of the HMP, click on the small expansion icon in the top right-hand corner of the screen.

The screenshot shows the Clinical Desktop interface for patient TEST, SANTA. The HMP tab is selected, displaying a table of health management items. A green arrow labeled "HMP" points to the HMP tab. Another green arrow points to the expansion icon in the top right corner of the HMP window.

ItemName	Sched...	Gr...	Most Recent	Date	Sy...	To Do	Incomplete
Obesity							21Dec2011
Lipid Panel (Lipid Profile)							
Health Maintenance							
Colonoscopy			negative	03No...			

User: oarlandr Site: ETSU Family Medicine Asso... Enc Date: 30 Dec 2011 9:49 AM Enc Type: Chart Update

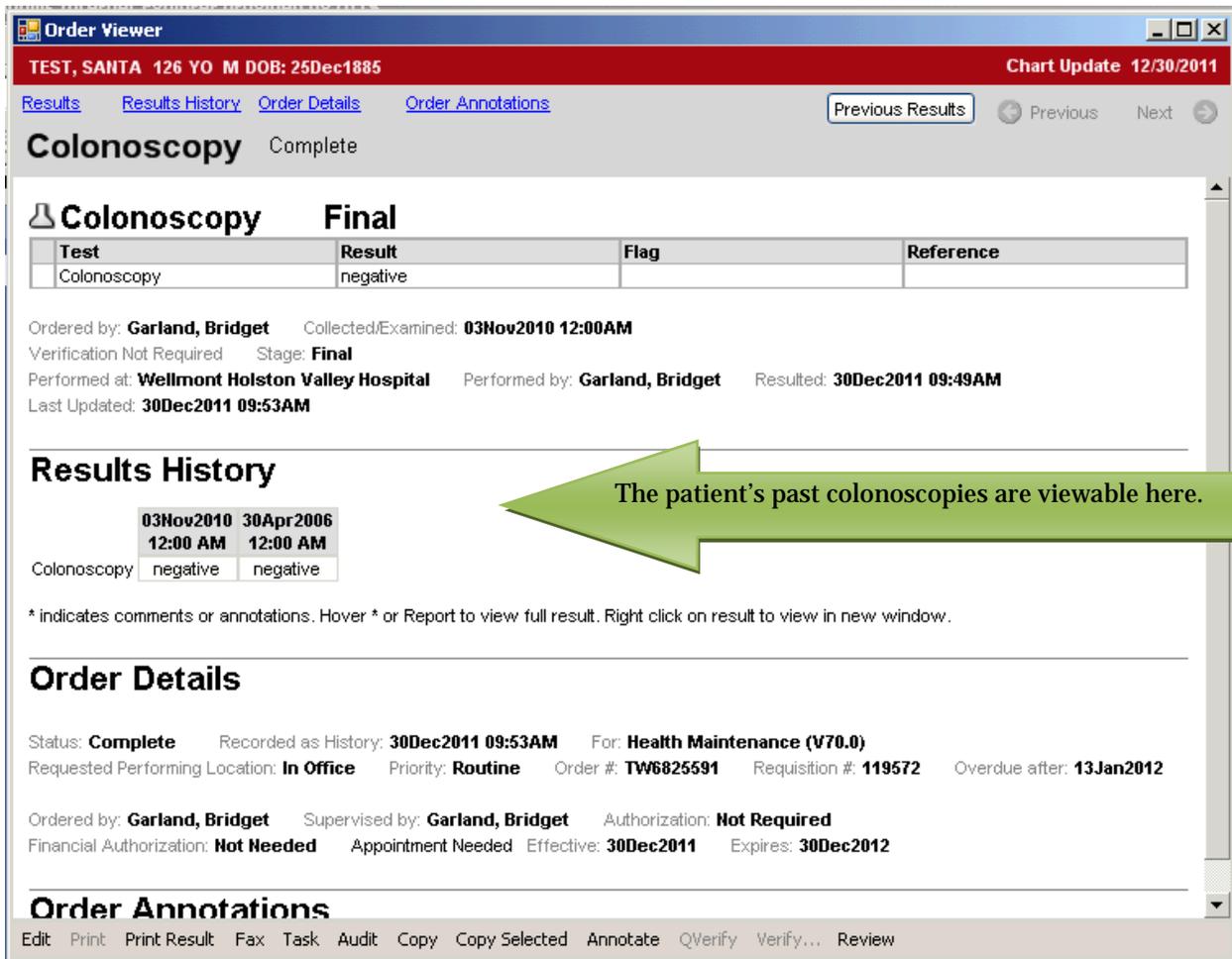
The screenshot shows the Clinical Desktop interface for patient TEST, SANTA. The HMP tab is expanded, displaying a larger table of health management items. A green arrow labeled "Expanded view" points to the expanded view. A green circle highlights the expansion icon in the top right corner of the HMP window.

ItemName	Schedule	Graph	Most Recent	Date	Sy Trend	To Do	Incomplete
Obesity							
Lipid Panel (Lipid Profile)							21Dec2011
Health Maintenance							
Colonoscopy			negative	03Nov2010			
Mammogram (Screening)			Complete	30Aug2009			

## Step Two

To view a past procedure, highlight the result under the most recent column and then click “View” in the bottom left-hand corner of the gray toolbar.

If the procedure has been entered correctly, all past procedure results will be listed under Results History. In the example below, the patient has had two past colonoscopies, the most recent in 2010, and the previous procedure in April 2006. Both results were negative. The Order Viewer also gives information about the most recent procedure, including who ordered it, the performing location, and the date it was entered in the system.



**Order Viewer**  
TEST, SANTA 126 YO M DOB: 25Dec1885 Chart Update 12/30/2011

[Results](#) [Results History](#) [Order Details](#) [Order Annotations](#) Previous Results Previous Next

### Colonoscopy Complete

**Colonoscopy Final**

Test	Result	Flag	Reference
Colonoscopy	negative		

Ordered by: **Garland, Bridget** Collected/Examined: **03Nov2010 12:00AM**  
Verification Not Required Stage: **Final**  
Performed at: **Wellmont Holston Valley Hospital** Performed by: **Garland, Bridget** Resulted: **30Dec2011 09:49AM**  
Last Updated: **30Dec2011 09:53AM**

### Results History

	03Nov2010 12:00 AM	30Apr2006 12:00 AM
Colonoscopy	negative	negative

\* indicates comments or annotations. Hover \* or Report to view full result. Right click on result to view in new window.

### Order Details

Status: **Complete** Recorded as History: **30Dec2011 09:53AM** For: **Health Maintenance (V70.0)**  
Requested Performing Location: **In Office** Priority: **Routine** Order #: **TW6825591** Requisition #: **119572** Overdue after: **13Jan2012**

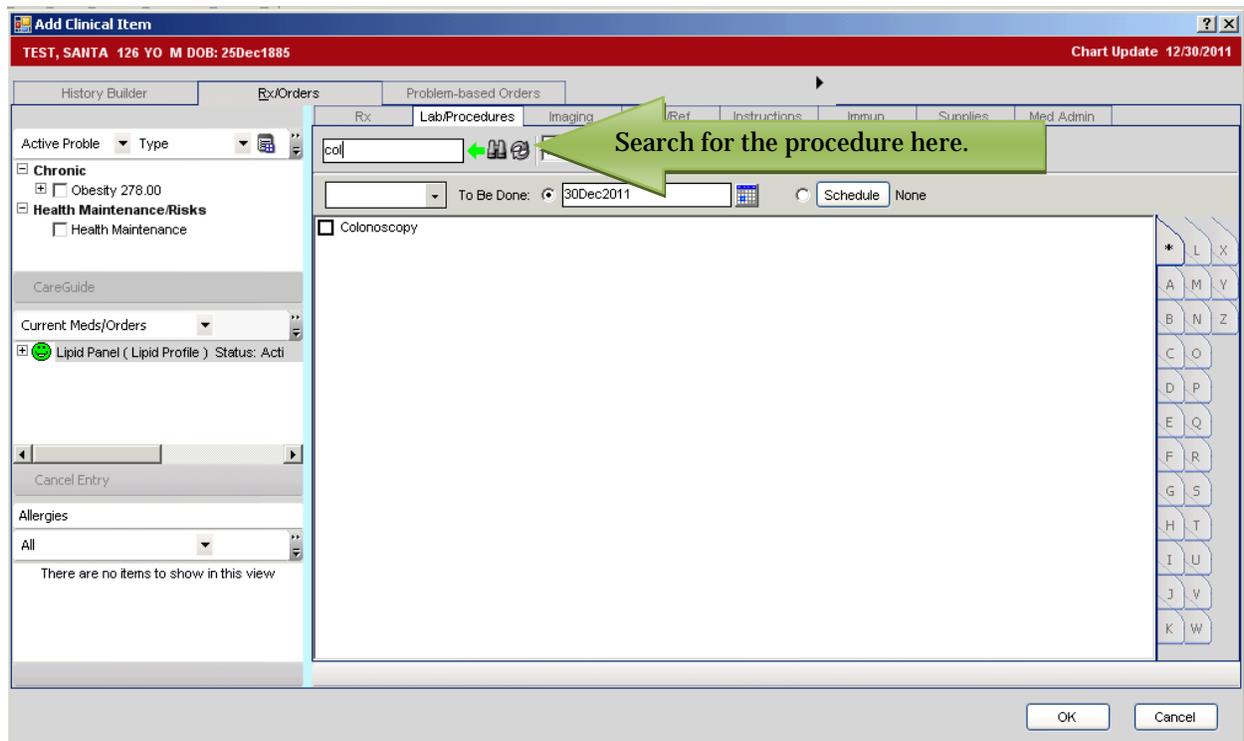
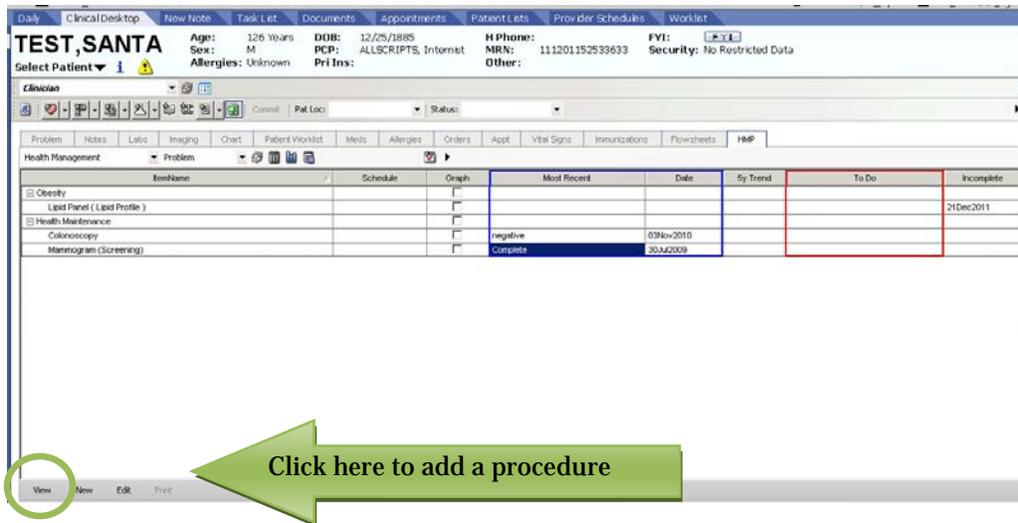
Ordered by: **Garland, Bridget** Supervised by: **Garland, Bridget** Authorization: **Not Required**  
Financial Authorization: **Not Needed** Appointment Needed Effective: **30Dec2011** Expires: **30Dec2012**

### Order Annotations

Edit Print Print Result Fax Task Audit Copy Copy Selected Annotate QVerify Verify... Review

## Step Three

To enter a past procedure so that it can be viewed in the HMP, click on “New” in the bottom left-hand corner of the gray toolbar. The Add Clinical Item box will pop up. Make sure that the Lab/Procedures secondary tab is clicked, then search for the procedure you would like to add by typing in the box next to the binoculars icon. If you are adding a procedure that is consider to be “imaging,” click on the Imaging tab to search for the procedure.



### **Step Four**

Once the procedure has been located, right click on the procedure and choose “Enter Result.” DON’T check the box next to the procedure. An Order Details box will pop up with the Results tab highlighted. If you entered the patient’s chart by searching for the patient rather than through the daily schedule, an Encounter Selector may pop up. If so, select “New Encounter” and “Chart Update” for the Type.

**Add Clinical Item**  
 TEST, SANTA 126 YO M DOB: 25Dec1885

History Builder | Rx/Orders | Problem-based Orders

Rx | Lab/Procedures | Imaging | FU/Ref | Instructions | Immu

Active Problem | Type | My Favorites | Record

Chronic  
 Obesity 278.00

Health Maintenance/Risks  
 Health Maintenance

CareGuide

Current Meds/Orders

Lipid Panel (Lipid Profile) Status: Acti

Cancel Entry

Allergies  
 All

There are no items to show in this view

Colonoscopy

- Favorite Item
- Quick List Item
- Duplicate
- Edit
- Reminder
- Reported Order
- Enter Result**
- Alpha Tab
- List Mode

To Be Done: 30Dec2011

Right-click, then choose "Enter Result."

Rx | Lab/Procedures | Imaging | FU/Ref | Instructions | Immun | Supplies | Med Admin

Colonoscopy | My Favorites | Record w/o Ordering

To Be Done:

**Encounter Selector -- Webpage Dialog**

**Existing Encounters:**

Date	Provider	Type
30 Dec 2011	Unassociated	Chart Update
31 Dec 2011	Unassociated	Message
08 Dec 2011	Unassociated	Other
08 Dec 2011	Gilreath, Jesse	Chart Update
07 Dec 2011	Guha, Bhuvana	Chart Update
07 Dec 2011	Unassociated	Chart Update

**New Encounter:**

Date: 30 Dec 2011

Type:

- CCR
- Chart Update**
- ECLETREL
- Established Patient Visit
- Form Encounter
- iHealth Visit
- Image Encounter
- Lab
- Med Admin Charge
- Message
- Non-Appointment
- Other
- Result
- Result Charge
- Result Review
- Telephone Call
- Transcription Encounter

Cancel

Cancel

Quillen Physicians Admini...

An Encounter Selector will appear if the patient was searched for rather than entered through the Daily Schedule. Select "New Encounter" and Chart Update."

## Step Five

Enter the date the procedure was performed in the Collected/Examined field. After entering the date, the Results Item field will be highlighted in yellow. Enter the results of the procedure in the Value field. You can also flag the result or enter a reference range or a stage, if needed.

Order Details  
TEST, SAHITA 126 YO M DOB: 25Dec1885  
Chart Update 12/30/2009  
Order Entry Results  
Colonoscopy Link to: [0]

Status: Active Status... Active

Results Details  
Resulted: 30Dec2011 11:22AM Collected/Examined: 30Dec2011 11:22AM  
CC Results To :  
Ordered By: Garland, Bridget  
Performing Location: In Office Performed By: Garland, Bridget

Result Annotations  
Results Item(s)  
Component Value Units  
Colonoscopy

Select a Date and Time  
Nov 18 2009 11:22 AM  
November 2009  
Sun Mon Tue Wed Thu Fri Sat  
1 2 3 4 5 6 7  
8 9 10 11 12 13 14  
15 16 17 18 19 20 21  
22 23 24 25 26 27 28  
29 30  
December 2009  
Sun Mon Tue Wed Thu Fri Sat  
6 7 8 9 10 11 12  
13 14 15 16 17 18 19  
20 21 22 23 24 25 26  
27 28 29 30 31  
3 4 5 6 7 8 9  
Jump: 2 weeks Today  
Selection: 18NOV2009 11:22 AM  
OK Cancel

Enter the date the procedure was performed, and then enter the result.

Order Details  
TEST, SAHITA 126 YO M DOB: 25Dec1885  
Chart Update 12/30/2009  
Order Entry Results  
Colonoscopy Link to: [0]

Status: Active Status... Active

Results Details  
Resulted: 30Dec2011 02:36PM Collected/Examined: 18Nov2009 02:36PM  
CC Results To :  
Ordered By: Garland, Bridget Route To:  
Performing Location: In Office Performed By: Garland, Bridget Accession #: Billing Provider: Billing Location:

Result Annotations  
Existing Annotations: New Annotation:  
Clear

Results Item(s)  
Component Value Units Flag Ref Range Stage  
Colonoscopy Final

Save and Return to ACI Save and Close ACI Cancel

## Step Six

If desired, the performing location field can also be updated, as well as the Ordered By field (if an internal provider). Notes can be made in the Comments from Performing Location or in the New Annotation field.

Next, click on the Order Entry tab and then enter Health Maintenance in the Link to: field.

Order Details

TEST, SANTA 426 YO M DOB: 25Dec1889

Order Entry Results

Colonoscopy

Status: Active

Link to: [0]

Health Maintenance

Obesity

Show All Problems

Additional Details

Comments To Performing Location:

Ordered By: Garland, Bridget

Managed By: Garland, Bridget Supervised By: Auth: Not Required

CC Results To

Fin. Auth: Not Needed Fin. Auth. #: Appointment Status: Appointment Needed

Effective: 30Dec2011 Expires: 30Dec2012 Done: 18Nov2009 02:36PM Now

Patient Instructions:

Order Instructions:

Order: TW6832350 Requisition: Label Type:

Link Unverified Order:

Save and Return to Add Save and Close ACI Cancel

- Click “Save and Close” at the bottom of the Order Details box.
- Click “OK” on the Add Clinical Item box.
- Click on the yellow Commit button.
- Approve the Encounter Summary by clicking on “Save and Continue.” The procedure will then be added to the HMP.

## Step Seven

If the procedure was the most recent the patient has had performed, the result is viewable under the Most Recent column. If not, it will be viewable by *single* clicking the result and then choosing "View" (See **Step Two** above).

**Order Viewer**  
TEST, SANTA 126 YO M DOB: 25Dec1885 Chart Update 12/30/2011

Results Results History Order Details Order Annotations Previous Results Previous Next

### Colonoscopy Complete

**Colonoscopy Final**

Test	Result	Flag	Reference
Colonoscopy	negative		

Ordered by: **Garland, Bridget** Collected/Examined: **03Nov2010 12:00AM**  
Verification Not Required Stage: **Final**  
Performed at: **Wellmont Holston Valley Hospital** Performed by: **Garland, Bridget** Resulted: **30Dec2011 09:49AM**  
Last Updated: **30Dec2011 09:53AM**

### Results History

03Nov2010 12:00 AM	18Nov2009 2:36 PM	30Apr2006 12:00 AM
Colonoscopy negative	Colonoscopy negative	Colonoscopy negative

\* Indicates comments or annotations. Hover \* or Report to view full result. Right click on result to view in new window.

### Order Details

Status: **Complete** Recorded as History: **30Dec2011 09:53AM** For: **Health Maintenance (V70.0)**  
Requested Performing Location: **In Office** Priority: **Routine** Order #: **TW6825591** Requisition #: **119572** Overdue after: **13Jan2012**

Ordered by: **Garland, Bridget** Supervised by: **Garland, Bridget** Authorization: **Not Required**  
Financial Authorization: **Not Needed** Appointment Needed Effective: **30Dec2011** Expires: **30Dec2012**

### Order Annotations

Edit Print Print Result Fax Task Audit Copy Copy Selected Annotate QVerify Verify... Review

All of the patient's previous colonoscopies are viewable here.

The procedures are also viewable by going to the Chart tab on the Clinical Desktop.

**TEST, SANTA** Age: 126 Years DOB: 12/25/1885 H Phone: 111  
Sex: M PCP: ALLSCRIPTS, Internist MRN: 111  
Allergies: Unknown Pri Ins:

Problem Notes Labs Imaging **Chart**

All Items 8 Audit Items

Colonoscopy - Done: 03Nov2010 - Garland, Bridget; Enc: 30Dec2011 - Chart Update - Garland, Bridget (Unassi)

Colonoscopy - Done: 30Apr2006 - Garland, Bridget; Enc: 30Dec2011 - Chart Update - Garland, Bridget (Unassi)

Colonoscopy - Done: 18Nov2009 - Garland, Bridget; Enc: 30Dec2011 - Chart Update - Garland, Bridget (Unassi)

**TEST, SANTA** Age: 126 Years DOB: 12/25/1885 H Phone: 111201  
Sex: M PCP: ALLSCRIPTS, Internist MRN: 111201  
Allergies: Unknown Pri Ins:

Problem Notes Labs Imaging **Chart**

Procedures

3 of 12 Chart Items (0 Invalid and 8 Audit Items) - Filters Applied

Notes

Colonoscopy - Done: 03Nov2010 - Garland, Bridget; Enc: 30Dec2011 - Chart Update - Garland, Bridget (Unassi)

Colonoscopy - Done: 30Apr2006 - Garland, Bridget; Enc: 30Dec2011 - Chart Update - Garland, Bridget (Unassi)

Colonoscopy - Done: 18Nov2009 - Garland, Bridget; Enc: 30Dec2011 - Chart Update - Garland, Bridget (Unassi)

The patient's past colonoscopies are also viewable under Chart>Procedures.

## **Additional Information**

- A past procedure is only viewable in the HMP if it has been resulted, not just recorded as “Done.” Any procedure that has been entered without a result cannot be edited and then resulted. You must “Enter in Error” and then enter it the correct way, as outlined above.
- In order for a procedure to show up in the HMP as a health maintenance item, as well as appear in an office note in the Health Maintenance section, it must first be linked to Health Maintenance. Other problems can be linked to it, but must be entered as secondary.
- Remember that some procedures are found under Imaging. If you cannot locate the item under the Lab/Procedure tab (for recording) or under the Chart>Procedures (for viewing), check under the Imaging tab (to record) and Chart>Imaging (for viewing the result).