QUILLEN ETSU PHYSICIANS

Charting in Allscripts - The Basics

Clinical Staff and Provider Training Module

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Logging into Allscripts is a two-step process, first into the server (Citrix), and then into Allscripts.

Each clinic computer should have a shortcut set up for logging into Citrix. Double click on the icon to access the Citrix login screen.

Note: If you are logging in from home, follow the instructions at the end of this module. You must use Internet Explorer or Safari as your browser.
Logging In

- Enter your Citrix username and password that was provided to you. The password is case sensitive. If you have not received this information, please inform the trainer.
- You will be directed to the screen for choosing your application. Please choose **Quillen Desktop** unless you are using an iPad or small tablet. Otherwise, choose Allscripts Live. *Please note: This screen will time out after one minute if you have not made a selection.*

- Next, enter your username/password for Allscripts. This is the second username and password provided to you.
When you first log in, you will land on the Daily Schedule. You can pull in other providers’ schedules by clicking on the magnifying glass and searching by last name. The schedule defaults to the current date, but you can navigate to other dates by clicking on the days of the week, the calendar icon, or using the arrows to jump forward/backward a week at a time.
A double click on the patient’s name takes you to their chart (the Clinical Desktop)

A single click on the patient’s name pulls them into context and displays their name/demographic info in the Patient Banner
Vertical Toolbar
(Miscellaneous functions, such as Internet Links, changing your site, and checking the fax queue)

Horizontal Toolbar
(Patient Charting is done on these tabs)

Floating Clinical Toolbar
For adding data to the patient’s chart, for viewing the chart in read only mode, and for viewing quick appointments. Used primarily by nursing and check in/out staff.
Click on the icons underneath the Patient Banner to ADD information to the patient's chart. The two panels underneath the Clinical Toolbar is where you can view the information that is already in the patient's chart.
Click on the various tabs to view the patient's problem list, notes, labs, procedures, and radiology.

This side of the chart contains the vitals, medications, orders, allergies, immunizations, and growth chart.

The toolbar gives you options to resolve problems, print/fax notes, and view/print drug education, etc.

Click on the tabs at the top of each section to view various parts of the chart: the Problem List, Notes, Labs, Procedures, Radiology, and the entire Chart, including administrative paperwork. The second panel has the Vital Signs, Medications, Orders, Allergies, and Immunizations.
Sorts/Filters: Most of the tabs also have a variety of sort options and filters from which you can choose, in order to find items more quickly. The sort options are underneath the main tab.

Generally, double clicking on an item allows you to view it. Single clicking (highlighting) an item activates the toolbar, which gives you options for printing, faxing, etc.

Each tab contains different items. Most of the tabs have a variety of sort options and filters from which you can choose in order to find items more quickly. Right clicking on an item opens a menu that expands the options available. This includes resolving problems, editing notes, annotating, and reviewing audit reports.
Entering information into the patient's chart is done through the Clinical Toolbar.

- Active Problems, History items (Past Medical, Family, Social Hx)
- Medications, Medication Administration
- Labs, Radiology, Procedures, Follow ups, Referrals, Education
Adding history items is just like adding active problems. Click on the appropriate tab and then type in the search field and click the binoculars (or hit “enter”). Find the item, and click to add to the chart.

- **PMH** – Past Medical History
- **PSH** – Past Surgical History
- **Med Hx** – Medication History (Meds the patient states they are currently on, but which are not being prescribed by you or another ETSU Physicians provider.)
- **Immun Hx** – Immunization History (Immunizations the patient has received in the past.)
Adding Active Problems

To add it to the patient’s chart, click on the name. This pulls it into the panel on the left. It will remain a pink color until the item is committed.

Search for an item
Clicking the button on the Clinical Toolbar opens the ACI (Add Clinical Item) screen. The Active tab is where you will enter the patient’s new and current diagnoses.

This panel shows items that are already in the patient’s chart.
Once you’ve added items to the patient’s chart, and have clicked OK to close the ACI screen, you need to **Commit** the items to save them.

Pink = Unsaved information
Black = Saved information

Commit often to avoid losing information!
The yellow **Commit** button prompts the Encounter Summary and enables the user to
- Permanently save an item to the chart, but it also will allow a user to
- Review new items, and
- Delete items entered incorrectly.

Providers (except for residents) will not have the Encounter Summary automatically pop up.
In order to ensure that the problem list remains current and up to date, the Reconciliation button will turn yellow at each appointment. Once the list has been verified/updated, click the yellow button to indicate that the list is current. For most clinics, this is a provider task.
In order to ensure that the medication list remains current and up to date, the Reconciliation button will turn yellow at each appointment. Once the list has been verified/updated, click the yellow button to indicate that the list is current. For most clinics, this is a clinical staff task; some providers reconcile the med list rather than the nurse.
Before ordering a new medication, always check the current meds list. If the patient is already taking the medication, you can just renew it (Always choose Renew with Changes; simply choosing Renew will not allow you to update it).
If the medication is not available for renewal and needs to be ordered, click the Rx button and search for the medication. To order, check the box next to the medication.
The following fields need to be filled out for prescriptions:

1. **Link to** (why are you prescribing this med?)
2. **Sig information** (days, quantity, refills)
3. **Send to Retail** – this e-prescribes the med
4. **Pharmacy**
5. **Ordered by/Managed by/Supervised by** fields

**MEAC residents and Clinical Staff** - All 3 of these fields will ALWAYS need to be filled in with your preceptor’s name.

**Family Medicine residents** can leave their name in the Ordered by and Managed by fields, and will put their preceptor’s name in the Supervised by field.
At the top of the Rx tab, you will notice that you can fill in a lot of the necessary information before you click on the med. If you fill in the **Send to Retail**, **Pharmacy**, and preceptor’s name in the **Entering for:** field, you will only have to fill out the sig information when you click the medication to order it. Additionally, this information will be saved for subsequent meds for this patient. On the Medication Details screen, fill in the sig information, then click OK. Once you commit, it will go to the pharmacy.
Ordering - Labs

Clicking on the beaker takes you into the ACI screen, directly to the Lab tab.

Search for the lab you want to order, and check the box. In the details box, make sure to link it to the appropriate Active Problem, and fill in the Ordered by/Supervised by/Managed by fields as per protocol for your clinic.

Fields that are highlighted bright yellow in the system are REQUIRED fields.
Make sure to use an **exact date** in the To Be Done: field. Do not use a fuzzy date (i.e. approximately, before next appointment); the order will not cross to the interface. Also, **do not edit a lab order**. Once the order has been committed, you should not change it. Cancel the order and reorder if a change needs to be made.
Keywords to use when searching for radiology:

- MRI
- Xray
- US
- Angio
- CT
- Mammo
Favorites and Quick lists

You can create favorites and quick lists for items that you use often.

Favorites – *as you type* in the search field, items that you have saved as a favorite pull up.

If you still don’t see what you are looking for, hit “enter” or click the binoculars icon to pull up the Master list.

The Quick list will populate as soon as you click on the tab. These are items that you use every day. It is recommended that you keep this list as short as possible, so you can find these items quickly.

**Note:** Your Quick list button must be “on” in order to see these items.

To add an item as either a favorite or a quick list, **right click** on it and choose *Favorite Item* or *Quick list Item*.
To start a note, ALWAYS double click on the patient’s name from the Daily Schedule tab. This links the note with the appointment date. (If you do not double click from the schedule, your vitals (and possibly other items) will not pull into your note)

Double clicking the patient’s name takes you to the Clinical Desktop.

Click on the New Note tab to start a note
In the Note Selector box, make sure your specialty is correct, and that your name is in the Owner field. Click the drop-down arrow next to the Visit Type field to choose the note type. (The note types will vary depending on your specialty). Click OK.
Starting a Note

In some of our clinics, the nurse will start the note and fill in the Chief Complaint/Reason for Visit. If the note has been started, you will have a note icon on the Daily Schedule. Simply double click the note icon to open the note.
Notes

**Table of Contents** - Navigate through the note by clicking on the headings and forms in this panel (the forms are indented underneath the section headers)

**Clinical Desktop** - Patient’s chart - contains the same tabs as on the Clinical Desktop tab. Allows you to view items in the patient’s chart while in the note

**Note Input** - As you click on section headings/forms in the Table of Contents, that section will open here, so you can document.

**Note Accumulator Workspace (NAW)** - As you click on forms/type in the boxes above, the text will display in this section.
Note Accumulator Workspace (where the text populates as you click the buttons on the forms)
Allscripts notes are set to auto populate certain sections from the patient’s chart. You can choose to hide/show specific items in these sections.

**Sections which auto populate:**
- Active Problems
- Past Medical History
- Social History
- Family History
- Surgical History
- Current Meds
- Allergies
- Immunizations
- Vitals
- Results/Data (Labs)
- Assessment
If you do not wish these items to appear in your note, you CAN hide them. On the toolbar below each section, you can choose to Hide All/Show All, or Hide/Show individual items.
You can read your note in a read-only view at any point during the documentation process.

Click “View” in the lower left-hand corner.

To return to the “edit” mode of your note, click “close.”

Click close to return to edit mode
To sign your note, click the “Sign” button. You will be prompted to put in your password. Click OK.
If you are a resident or clinical staff, once you click OK, you will get a Co-Sign Note task box which prompts you to send the note to the co-signer for a final signature.
Switch the radio button from Team to User, and if your co-signer is not in the drop-down list, click the magnifying glass button and search by their last name. Once you have pulled their name in, just click OK to send the task. You do not have to type anything in the Comment field.
The Batch Sign tab allows you to quickly sign off on your notes, review documents sent by other providers, and sign scanned results.
Tasking is how we communicate with each other about patient care. Tasks can be generated by the system, by a colleague, or by a patient. Make sure to check your task list every time you log into the system. Ideally, it should be checked when you first log in and again before you log out, to make sure that all issues have been handled before leaving the clinic.
1. **System-generated tasks**: These tasks pop in when workflows require completion; signing a note, renewing a medication, etc.

2. **Manually created tasks**: These tasks are sent by other employees in the office and are usually related to patient care – inquiries regarding test results, requests to return phone calls, etc.

3. **FMH (Follow My Health) tasks**: These are tasks sent by your patients via the Patient Portal (Follow My Health™). You need to respond to all FMH tasks within 48 hours at the latest. This is an organizational policy.
Single click on a task to read the comments.

Double click to take you to the area where the task needs to be performed.
If you need to reply to a task, or reassign it to another person, highlight the task by single clicking on it, and then click the appropriate button.
Completing Tasks

When you have finished a task, click the “Done” button.

**Note:** This applies to manually created tasks. System-generated tasks will drop off your list automatically once you have completed the action (signed the note, renewed the medications, etc.) **Never, never REMOVE a task.**
If you have a patient pulled up in the Patient Banner, you can click the Appointments tab and see past and future appointments that are scheduled with any provider in the MEAC/Family Medicine system.
As part of the Affordable Care Act, Medicare has developed the Shared Savings Program, which is a new approach to the delivery of healthcare. Congress created the SSP to facilitate coordination among providers to improve the quality of care and reduce unnecessary costs. ETSU participates in the SSP through Qualuable, our Accountable Care Organization (ACO).

Currently, this targets Medicare patients, and thus, predominantly affects our primary care offices; however, some elements also affect our specialists. Through our participation in this program, our primary care residents will be required to document certain items in the EHR in order to remain compliant.

A few examples of the quality measures include:

- Tobacco screening and cessation education/medication
- Reconciling medications and allergies at each visit
- Performing fall screening
- Flu and pneumonia vaccinations
- Appropriate cancer screening
- Depression screening and follow up
- Careful follow up of chronic conditions, such as diabetes, IVD, CAD and HTN

For more information about the ACO, please visit our website: [http://www.quillenphysiciansehr.com/meaningful-use.html](http://www.quillenphysiciansehr.com/meaningful-use.html)
Takeaways

- Drop-down lists are populated by searching for users. If a user is NOT in your drop-down list, click the search button, or the button next to the search field and search by last name.

- Right-clicking on an item will often give you more menu options.

- **MEAC RESIDENTS AND ALL NURSES - ALWAYS** put your preceptor’s/doctor’s name in ALL 3 fields when ordering.

- **FAMILY MEDICINE RESIDENTS** – Your name goes in the Ordered by and Managed by fields. Your preceptor’s name goes in the Supervised by field.

- **Double click** on the patient’s name from the Daily Schedule before starting your note.
Takeaways

- Make sure you check your task list and worklist EVERY time you log into the system and as often as required by your clinic.

- **Commit, Commit, Commit.** Make sure to commit and/or save OFTEN! When saving in a note, save at least after each section.
Remote Access

- **To log in from home:**
  - Download Citrix Receiver (receiver.citrix.com)
  - Open your browser (Internet Explorer or Safari) and type in the following: [access.qetsu.org](http://access.qetsu.org)
  - **Note:** The newer versions of Internet Explorer are not compatible, so if you have version 10 or above, you will need to run it in compatibility mode. For instructions on how to do this, please click on the How-To tab on the website.

- **To log in from ETSU or VA campus (on a wired device):**
  - Download Citrix Receiver (receiver.citrix.com)
  - Open your browser (Internet Explorer or Safari only) and type in the following: [http://citrixweb/etsu.edu](http://citrixweb/etsu.edu)

Call the Helpdesk 423-282-6122, Option 1 for assistance.
Troubleshooting tips and instructions for installing Allscripts on your tablet/phone are available on our website at [www.quillenphysiciansehr.com](http://www.quillenphysiciansehr.com)
Quillen ETSU Physicians Clinics

- Internal Medicine – Johnson City & Kingsport
- Infectious Disease
- Surgery
- OB-GYN – Johnson City & Elizabethtown
- Pediatrics
- Cardiology
- Dermatology
- Endocrinology
- Fertility
- Psychiatry
- Osteoporosis
- Sports Medicine
- Family Medicine – Johnson City, Bristol & Kingsport
Quillen ETSU Physicians

The Clinical Education Building (CEB) at 325 N. State of Franklin Rd.

- Surgery – Third Floor
- Internal Medicine and Endocrinology – Second Floor
- Lab – Second Floor
- OB-GYN – First Floor
- Pediatrics and Genetics – Ground Floor
Located behind the main Clinical Education Building (CEB) is CEB2. This building is home to Cardiology and Dermatology.
Other Specialties and Locations

**Psychiatry** – Located on the VA campus (Building 52). They also have satellite clinics in the three Family Medicine clinics, OB-GYN, and Internal Medicine.

**Fertility & Urogynecology -Women’s Services** - Located at 1319 Sunset Drive, Suite 103, Johnson City

**Elizabethton OB/GYN** – 1505 West Elk Avenue, Suite 1, Elizabethton

**Osteoporosis Center** – Located in the ETSU Innovation Lab – 2109 West Market Street, Room 143, Johnson City

**BucSports** – Orthopedic and Sports Medicine – ETSU Mini-Dome, John Bell Dr, Johnson City

**Infectious Diseases** – 615 North State of Franklin, Johnson City
Family Medicine

ETSU Family Medicine has three locations – Johnson City, Bristol, and Kingsport.