



EAST TENNESSEE STATE
UNIVERSITY

QUILLEN ETSU PHYSICIANS

Module 1: Daily Schedule & Clinical Desktop

Provider Training Module
Allscripts Touchworks EHR

Quillen EHR Team
Phone: (423) 282-6122, Option 1

June 2020

MODULE INSTRUCTIONS

There are a total of 5 modules that need to be completed prior to the on-site training. It is **REQUIRED** that you complete all of the modules **PRIOR** to training.

These modules are intended to serve two purposes: as an introduction to the system, and as a reference. The modules are very detailed. As such, we don't expect you to retain all of the information in the slides before training; however, we encourage you to print the PDFs, as you will be able to refer back to them as you begin to use the system.

Training will consist mainly of mock practice sessions, so a basic knowledge of the system prior to training is essential. If you have any problems completing these modules, please contact the EHR team. (Contact info is on Slide 1 of each module).

When you first log in, you'll land on the Daily schedule page.

The screenshot displays the Allscripts clinical desktop interface. At the top, the navigation bar includes tabs for 'Daily', 'Clinical Desktop', 'New Note', 'Worklist', 'Task List', 'Batch Sign', 'Appointments', 'Patient Lists', and 'Provider Schedules'. The 'Daily' tab is selected. Below the navigation bar, there is a search bar for 'SELECT PATIENT' and a 'Daily Schedule' section. The schedule is for '01 Jun 2018' and shows a patient named 'TEST, TONY' with a 01:30 PM appointment. A 'Clinical Toolbar' is floating over the schedule, and its close button (an 'x' icon) is circled in red. The toolbar contains various icons for clinical actions and a search bar. At the bottom of the screen, there are buttons for 'Edit Clin Summary', 'Patient Profile...', 'Appt Details...', 'Patient Appts...', 'Print Sched...', 'Print Chart...', and 'New Task...'. The Allscripts logo is visible in the bottom left corner.

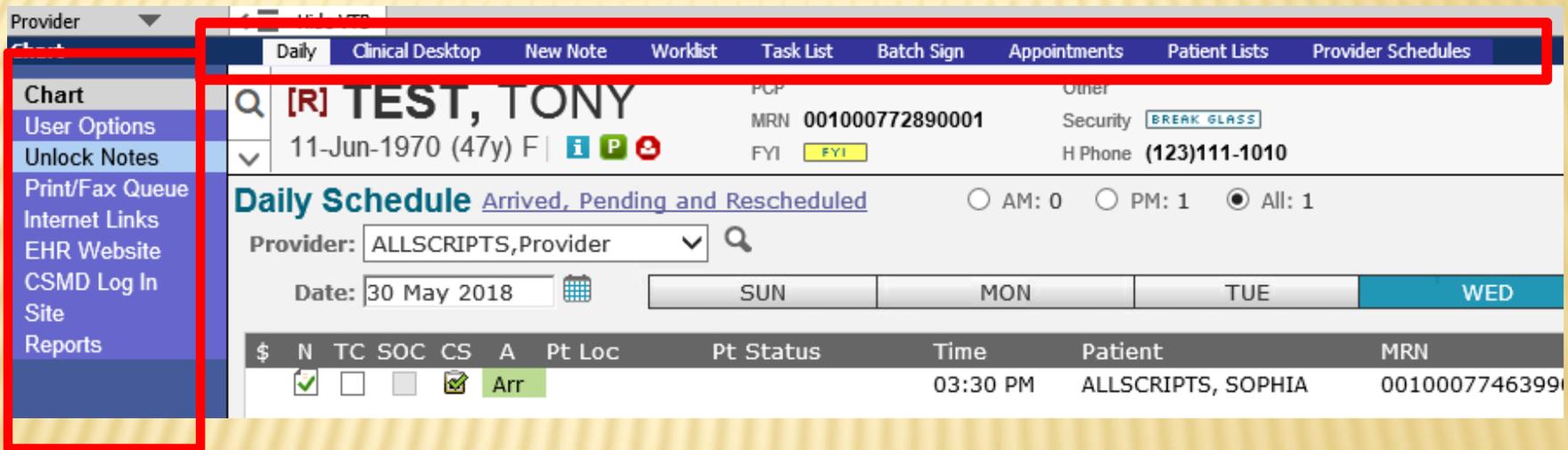
\$	N	TC	SOC	CS	A	Pt	Loc	Pt Status	Time	Patient	MRN	Type	Dur	Tasks	Comments
<input type="checkbox"/>						Arr			01:30 PM	TEST, TONY	001000772890001	AC	30	5	TESTING PLEASE IGNORE

“Floating” Clinical Toolbar

You'll notice a “floating” Clinical Toolbar that can be moved to different locations on the screen. You can drag this out of the way, or you can “x” out of it. (You won't use it on this screen very often). If you need to get it back, click on **Tools** and choose Show/Hide Clinical Toolbar.

TOOLBARS

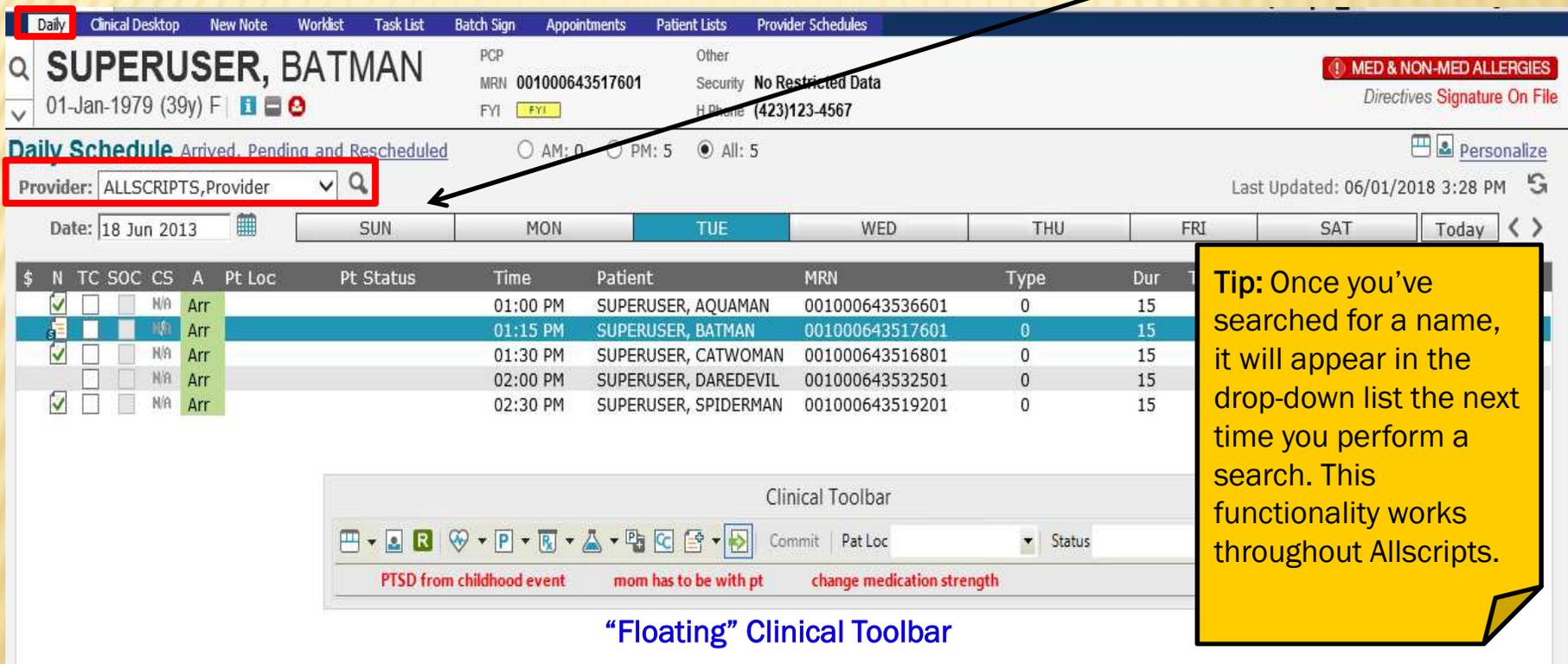
There are two toolbars in Allscripts; the **horizontal toolbar (HTB)** and the **vertical toolbar (VTB)**. The HTB contains all the tabs that you will need for patient documentation.



The VTB contains additional tabs that will allow you to view the print/fax queue, view our website, and change your clinic location.

DAILY SCHEDULE

When you first log in, you will see your Daily Schedule. To pull in a provider's schedule, click the drop-down arrow in the Provider field. If their name is not there, click on the  icon. A Search Window will pop up.



Tip: Once you've searched for a name, it will appear in the drop-down list the next time you perform a search. This functionality works throughout Allscripts.

"Floating" Clinical Toolbar

\$	N	TC	SOC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur
✓				N/A	Arr			01:00 PM	SUPERUSER, AQUAMAN	001000643536601	0	15
\$				N/A	Arr			01:15 PM	SUPERUSER, BATMAN	001000643517601	0	15
✓				N/A	Arr			01:30 PM	SUPERUSER, CATWOMAN	001000643516801	0	15
				N/A	Arr			02:00 PM	SUPERUSER, DAREDEVIL	001000643532501	0	15
✓				N/A	Arr			02:30 PM	SUPERUSER, SPIDERMAN	001000643519201	0	15

DAILY SCHEDULE

IN THE “SEARCH FOR” FIELD, TYPE THE PROVIDER’S LAST NAME AND CLICK GO. HIGHLIGHT THE DESIRED PROVIDER AND CLICK OK.

The screenshot displays a medical software interface. At the top, a navigation bar includes tabs for 'Daily', 'Clinical Desktop', 'New Note', 'Worklist', 'Task List', 'Batch Sign', 'Appointments', 'Patient Lists', and 'Provider Schedules'. Below this, a user profile for 'SUPERUSER, BATMAN' is shown, including details like 'PCP', 'MRN 001000643517601', 'Security No Restricted Data', and 'H Phone (423)123-4567'. The main window is titled 'Daily Schedule' and shows a table of providers with columns for '\$', 'N', 'TC', 'SOC', 'CS', 'A', 'Pt Loc', and 'Pt St'. A search window titled 'Search Window -- Webpage Dialog' is overlaid on the table. This window has a 'Search' button and a 'Search For:' field containing the text 'ALLSCRIPTS'. Below the search field is a list of 'Schedulable Providers' including 'ALLSCRIPTS,Cardiologist', 'ALLSCRIPTS,Dermatologist', 'ALLSCRIPTS,Family Medicine', 'ALLSCRIPTS,InfectiousDisease', 'ALLSCRIPTS,Internist', 'ALLSCRIPTS,Midlevel Provider', 'ALLSCRIPTS,Obstetrician/Gynec', 'ALLSCRIPTS,Pediatrician', 'ALLSCRIPTS,Provider', 'ALLSCRIPTS,Psychiatry', 'ALLSCRIPTS,Resident', 'ALLSCRIPTS,SurgeryMD', and 'ALLSCRIPTS17,Provider'. At the bottom of the search window, the 'OK' button is highlighted with a red box.

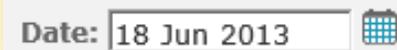
DAILY SCHEDULE

There are several ways to change the date of the schedule:

1. Click on the day of the week



2. Click on the calendar icon next to the Date field



3. Click on the black arrows < > to navigate forward or backward a week

4. To get back to today's date, click on this icon



Daily Schedule [Arrived, Pending and Rescheduled](#) AM: 0 PM: 5 All: 5 Personalize

Provider: ALLSCRIPTS,Provider

Last Updated: 06/01/2018 3:37 PM

Date: 18 Jun 2013 SUN MON TUE WED THU FRI SAT Today < >

DAILY SCHEDULE ICONS

Daily Schedule [Arrived, Pending and Rescheduled](#) AM: 0 PM: 5 All: 5

Provider: ALLSCRIPTS,Provider Last Upd

Date: 18 Jun 2013

SUN	MON	TUE	WED	THU	FRI
-----	-----	-----	-----	-----	-----

\$	N	TC	SOC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Tasks	Comment
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr	215D Exam Rm	Provider Ready	01:00 PM	SUPERUSER, AQUAMAN	001000643536601	0	15	0	Panic atta
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr	232 Exam Rm	Nurse Ready	01:15 PM	SUPERUSER, BATMAN	001000643517601	0	15	1	Depressio
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr			01:30 PM	SUPERUSER, CATWOMAN	001000643516801	0	15	1	Anxiety
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr			02:00 PM	SUPERUSER, DAREDEVIL	001000643532501	0	15	0	New pt - c
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr			02:30 PM	SUPERUSER, SPIDERMAN	001000643519201	0	15	1	F/U Hx of



N Column Note icon: This indicates that a note has been started on the patient



N Column Finished Note icon: Note has been finalized by the attending MD



TC Column Transition of Care: Check if patient is transitioning to your care from another setting



CS Column: Indicates whether or not a Clinical Summary has been printed for the patient



A Column Arrival Status: NSH – No Show ARR – Arrived Pen – Pending Can - Cancelled

Pt Loc	Pt Status
Exam Rm 2	Provider Ready
Waiting Room	Nurse Ready

Pt Loc: Patient Location. This tracks the patient's location throughout the visit.

Pt Status: This indicates the patient's status throughout the visit.

PATIENT BANNER

A single click on the patient's name from the Daily Schedule will pull them into the Patient Banner. If the patient's name is in the Banner, that indicates that you are documenting on that patient's electronic chart, so make a habit of checking the banner when charting to ensure you are working on the correct patient.

Patient Banner:

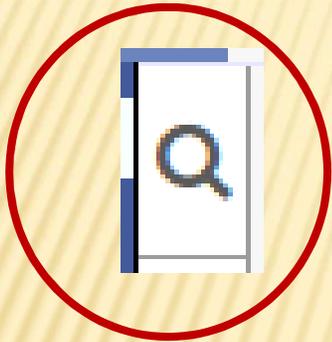
[R] SUPERUSER, BATMAN PCP Other
MRN 001000643517601 Security **BREAK GLASS**
01-Jan-1979 (39y) F | i - **MED & NON-MED ALLERGIES**
FYI FYI H Phone (423)123-4567 Directives Signature On File

Daily Schedule: Arrived, Pending and Rescheduled AM: 0 PM: 5 All: 5 Personalize
Provider: ALLSCRIPTS,Provider Last Updated: 06/01/2018 3:46 PM
Date: 18 Jun 2013 SUN MON **TUE** WED THU FRI SAT Today < >

\$	N	TC	SOC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Tasks	Comments
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr	215D Exam Rm	Provider Ready	01:00 PM	SUPERUSER, AQUAMAN	001000643536601	0	15	0	Panic attacks
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr	232 Exam Rm	Nurse Ready	01:15 PM	SUPERUSER, BATMAN	001000643517601	0	15	1	Depression
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr			01:30 PM	SUPERUSER, CATWOMAN	001000643516801	0	15	1	Anxiety
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr			02:00 PM	SUPERUSER, DAREDEVIL	001000643532501	0	15	1	New pt - delusions of grandeur
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Arr			02:30 PM	SUPERUSER, SPIDERMAN	001000643519201	0	15	1	F/U Hx of alcoholism

PATIENT BANNER - SEARCHING

You can also manually pull a patient into context. In the Patient Banner, click the magnifying glass to choose the Select Patient. In the Select Patient box, type the patient's LAST NAME, FIRST NAME. Highlight the correct patient's name, and then click OK.



Select Patient -- Webpage Dialog

Select Patient

Org: ETSU [Personalize](#)

Partial LN,Optional Partial FN,Optional Full DOB or YOB

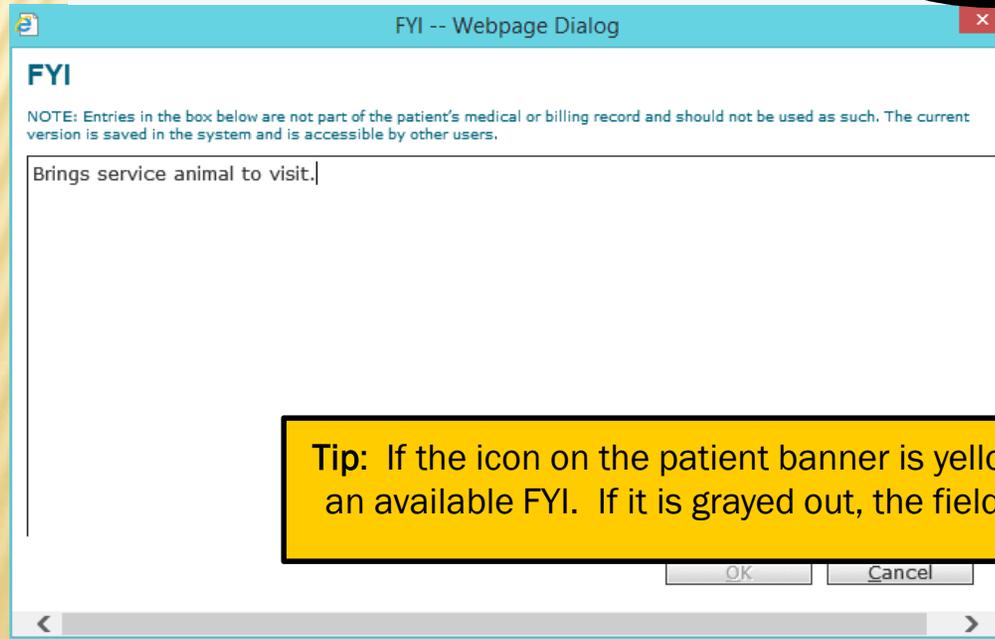
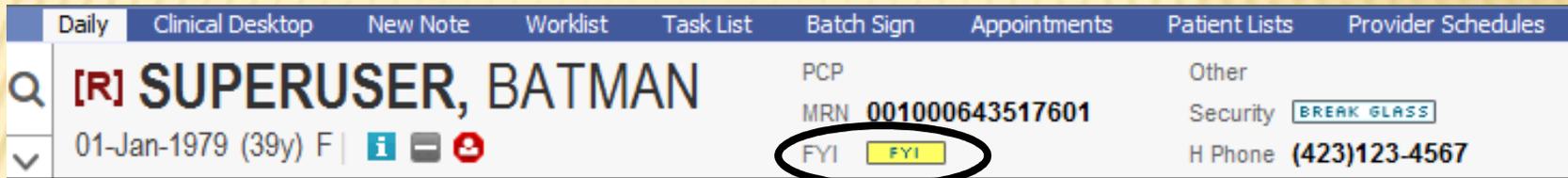
Patient: Name Include InActive

Patient	MRN	Other	SSN	DOB	Age	Sex	InA
TEST,FEMALE D	0010006374565	0013722244	XXX-XX-6666	01 Jan 1996	17Y	F	N
TEST,FRANKENSTEIN	0010006470520		XXX-XX-6789	03 Mar 1979	34Y	F	N
TEST,FUNTIMES	0010006412738			12 Jul 1954	58Y	F	N
TEST 1,FEMALE	0010006563837		XXX-XX-9999	25 Jan 1944	69Y	F	N
TEST 2,FEMALE Q	0010006401574	0013741376	XXX-XX-9999	03 Nov 1954	58Y	F	N
TEST 2,FEMALE	0010006563845		XXX-XX-9999	03 Nov 1955	57Y	F	N

Tip: When searching, you don't have to type the entire name. You can type "Super, Gr," for Superuser, Grover. You can also search by other parameters, such as DOB, phone number, etc. Click the drop down next to Name and choose the search parameter that you want to use. You can set a different parameter as your default, too. Just click on the blue Personalize button in the upper right-hand corner!

PATIENT BANNER – FYI ICON

All of the patient’s demographic information can be accessed from the Patient Banner. The age, sex, allergies, phone number, etc., are visible whenever the patient’s name is in context. The FYI box on the patient banner is similar to a “sticky note” on a paper chart. It is used to document information that is not clinically relevant and is typically used by the front desk staff; however, anyone can read the information in the FYI field.



To read an FYI, click on the yellow FYI button on the Patient Banner.

Tip: If the icon on the patient banner is yellow, there is an available FYI. If it is grayed out, the field is empty.

PATIENT BANNER – INFORMATION ICON

Other patient information can be accessed by clicking on the  on the banner.

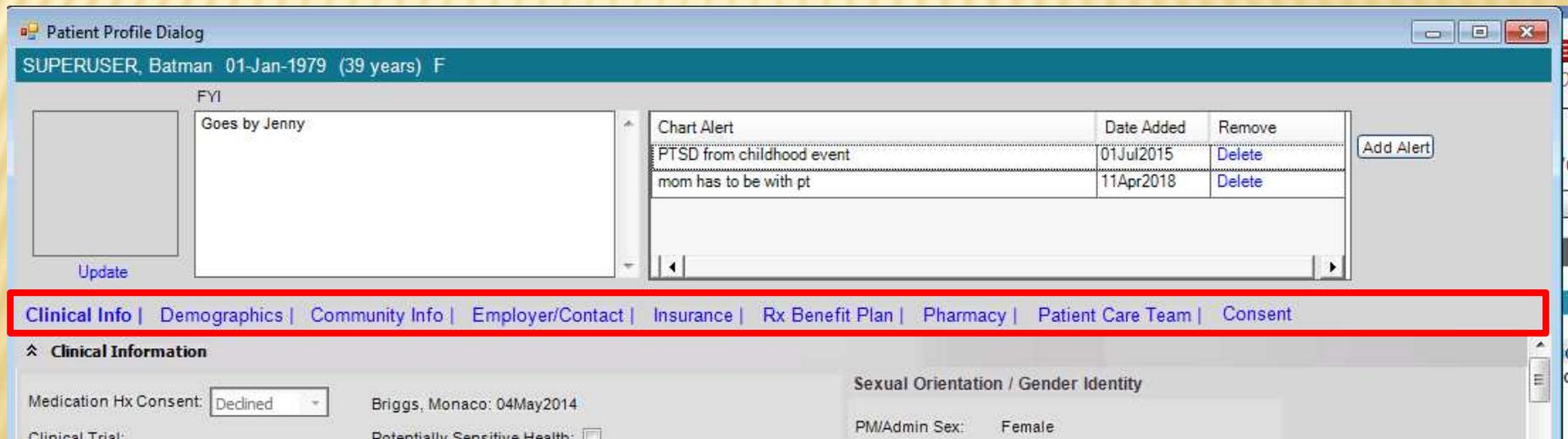


The patient banner displays the following information:

Navigation	Search	Name	PCP	Other
Daily	Q	SUPERUSER, BATMAN		
		01-Jan-1979 (39y) F 	MRN 001000643517601	Security No Restricted Data
			FYI 	H Phone (423)123-4567



Information icon: Clicking on this opens the Patient Profile Dialog box. Information in this section includes the [FYI box](#), [Chart Alerts](#), demographics, emergency contact info, pharmacy info and patient care team. Hyperlinks at the top of the page will take you directly to each individual section.



The Patient Profile Dialog box displays the following information:

Patient Profile Dialog
SUPERUSER, Batman 01-Jan-1979 (39 years) F

FYI
Goes by Jenny

Chart Alert

Chart Alert	Date Added	Remove
PTSD from childhood event	01Jul2015	Delete
mom has to be with pt	11Apr2018	Delete

[Add Alert](#)

Navigation Links: [Clinical Info](#) | [Demographics](#) | [Community Info](#) | [Employer/Contact](#) | [Insurance](#) | [Rx Benefit Plan](#) | [Pharmacy](#) | [Patient Care Team](#) | [Consent](#)

Clinical Information

Medication Hx Consent: Briggs, Monaco: 04May2014

Clinical Trial: Potentially Sensitive Health:

Sexual Orientation / Gender Identity
PM/Admin Sex: Female

INFORMATION ICON – CHART ALERTS



Chart Alert	Date Added	Remove
Hearing Impaired	05Jun2018	Delete
Latex Allergy	05Jun2018	Delete

Add Alert

Chart Alerts are used to document clinically relevant information. You can add a chart alert by clicking on the  on the patient banner.

Red i means Alerts are on the Chart.

Add Alert

Clicking the Add Alert button opens this window, which allows you to add multiple Chart Alerts. There are some available alerts which can just be checked, or you can free text an alert in the Ad Hoc Alert section.

Alerts

Selected Items

- Hearing Impaired
- Latex Allergy

Available Items

- Blind Patient
- Dr. requires 1 hour block
- Dr. requires 30 min block
- Iodine Allergy
- KDS
- Patient does not speak English

Adhoc Alert

Add

OK Cancel

The Chart Alerts will appear on the Clinical Toolbar.



INFORMATION ICON – PATIENT CARE TEAM

The patient care team, which is also accessed through the Information Icon, allows you to add/delete and view other members of the patient’s care team. You can add providers, healthcare agencies and even family members to the care team.

Clinical Info | Demographics | Preferred Communication | Community Info | Employer/Contact | Insurance | Rx Benefit Plan | Pharmacy | **Patient Care Team**

⤴ Patient Care Team

 Show Inactive

Care Team Member	Role	Relationship	Specialty	Comments	City/State	Office Number
SCHOONDYKE MD,JEFFREY					JOHNSON CITY/TN	(423) 926-4468
BERTOTTI MD,MARIAN					JOHNSON CITY/TN	(423) 794-5530
SMITH MD (QETSU), STEVEN M			Cardiology		Johnson City/TN	(423) 979-4100
Poseidon	Care Giver	Father				

Click on the **Add Provider/Agency** button. You can search by last name or specialty. Check the box next to the provider’s name to add it to the patient’s chart.

To add a family member, click on the **Add Patient Caregiver/Resource** button and free text their name.

TEST, Courtney 19-Jun-2010 (7 years) F

Quick Search
 Advanced Search
 Browse Favorites

Quick Search

⤴ Search Results

Showing 7 results

	Ext	Last/Prac/Agency	First	MI	Specialty	Practice	City
<input checked="" type="checkbox"/>		STUART MD (QETSU)	CHARLES	A	Endocrinology		Johnson City
<input type="checkbox"/>		Peiris	Alan		Endocrinology	Internal Medicine - Johnson City	
<input type="checkbox"/>		Stuart	Charles		Endocrinology	CEB II	
<input type="checkbox"/>		Nakhla	Shadi		Endocrinology	CEB II	
<input type="checkbox"/>		Ghably	Jack		Endocrinology	CEB II	
<input type="checkbox"/>		Morris	Lawrence		Endocrinology	Internal Medicine - Kingsport	
<input type="checkbox"/>		Davis	Ronald		Endocrinology	CEB II	

THE CLINICAL DESKTOP

To look at the patient's chart, from the Daily tab, double click their name on your schedule. This will take you to the next tab, the Clinical Desktop, which is their electronic chart.

Daily Clinical Desktop New Note Worklist Task List Batch Sign Appointments Patient Lists Provider Schedules

SUPERUSER, DAREDEVIL PCP ADAMS MD, JOHN Other
MRN 001000643532501 Security No Restricted Data
FYI FYI H Phone (423)123-4567

01-Jan-1979 (39y) F

Daily Schedule Arrived, Pending and Rescheduled AM: 0 PM: 5 All: 5

Provider: ALLSCRIPTS,Provider Last Updated: 06/01/2018 4:07 PM

Date: 18 Jun 2013 SUN MON **TUE** WED THU FRI SAT Today < >

\$	N	TC	SOC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Tasks	Comments
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A	Arr	215D Exam Rm	Provider Ready	01:00 PM	SUPERUSER, AQUAMAN	001000643536601	0	15	0	Panic attacks
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A	Arr	232 Exam Rm	Nurse Ready	01:15 PM	SUPERUSER, BATMAN	001000643517601	0	15	1	Depression
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A	Arr			01:30 PM	SUPERUSER, CATWOMAN	001000643516801	0	15	1	Anxiety
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A	Arr			02:00 PM	SUPERUSER, DAREDEVIL	001000643532501	0	15	1	New pt - delusions of grandeur
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		N/A	Arr			02:30 PM	SUPERUSER, SPIDERMAN	001000643519201	0	15	1	F/U Hx of alcoholism

Daily **Clinical Desktop** New Note Worklist Task List Batch Sign Appointments Patient Lists Provider Schedules

SUPERUSER, DAREDEVIL PCP ADAMS MD, JOHN Other
MRN 001000643532501 Security No Restricted Data
FYI FYI H Phone (423)123-4567

01-Jan-1979 (39y) F

ETSU - Clinician

Hearing Impaired Latex Allergy

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

All Problem List Rec: 29Dec2017

Name	ICD-10	Managed By
Active		
Adiaspiromycosis	B48.8	
Body mass index (BMI) of 24.0-24.9 in...	Z68.24	
Elevated blood pressure reading...	R03.0	
Gout	M10.9	

HMP/Reminders Growth Chart

Vital Signs Meds Med Flowsheet Ord

VitalSigns/Findings

Data Includes: All

Item Name	Select
Temperature	<input type="checkbox"/>
Systolic	<input type="checkbox"/>

Tip: It's important that you **ALWAYS** access the patient's chart by double clicking from the **Daily Schedule** (if they have an appointment), because this links the appointment date with your chart documentation.

THE CLINICAL DESKTOP

The Clinical Desktop is the patient's "electronic chart." There are two main components. Each component contains different tabs, where you will access the patient's information.

Clinical Desktop | New Note | Worklist | Task List | Batch Sign | Appointments | Patient Lists | Provider Schedules

SUPERUSER, DAREDEVIL | PCP ADAMS MD, JOHN | Other | Security No Restricted Data | MED & NON-MED ALLER
MRN 001000643532501 | FYI FYI | H Phone (423)123-4567

ETSU - Clinician

Clinical Toolbar

Hearing Impaired | Latex Allergy

Component 1

Problem	Notes	Labs	Radiology	Procedures/Pathology	Chart	Worklist
All	Problem List	Rec: 29Dec2017				
Name	ICD-10	Managed By				
Active						
Adiaspiromycosis	B48.8					
Body mass index (BMI) of 24.0-24.9 in...	Z68.24					
Elevated blood pressure reading...	R03.0					
Gout	M10.9					

Component 2

HMP/Reminders	Growth Chart	Vital Signs	Meds	Med Flowsheet	Orders	Allergies	Immunizations	Flowsheets
VitalSigns/Findings								
Data Includes: All								
Item Name	Select	12 Apr 2018	11 Apr 2018	25 Oct 2017				
Temperature	<input type="checkbox"/>	10:51 AM	11:24 AM	9:43 AM				
Systolic	<input type="checkbox"/>	98.2 F	98.4 F	98.6 F , Oral	98			

PROBLEM TAB

The first tab that you will see when you open the patient's electronic chart is the *Problem* tab. This is where all of the patient's active problems, past medical history, social history, etc. will appear.

The screenshot displays the EHR interface for a patient named SUPERUSER, DAREDEVIL. The 'Problem' tab is highlighted, showing a list of active and past medical history items. The active problems include Adiaspiromycosis, Body mass index (BMI) of 24.0-24.9 in..., Elevated blood pressure reading..., Gout, Hypertension, Influenza vaccination contraindicated, Other problems related to lifestyle, Thoracic outlet syndrome, and Health Maintenance. The past medical history includes History of Abscess of axilla, History of Convulsions in the newborn, History of acute pancreatitis, History of cholelithiasis, History of endometriosis, History of essential hypertension, History of frequent headaches, History of migraine headaches, History of Papanicolaou smear, History of spontaneous abortion, History of trichomoniasis, and Less than 8 weeks gestation of... A yellow callout box provides a tip: 'Tip: Each tab on the Clinical Desktop has a couple of different sort options which can be used to help you find information quickly.'

Item Name	Select	12 Apr 2018 10:51 AM	11 Apr 2018 11:24 AM	25 Oct 2017 9:43 AM	07 Jul 9:23
Temperature	<input type="checkbox"/>	98.2 F	98.4 F	98.6 F , Oral	98 F
Systolic	<input type="checkbox"/>	122	120		125
Diastolic	<input type="checkbox"/>	87	70		82
Heart Rate	<input type="checkbox"/>	87	88		70
Pulse Quality	<input type="checkbox"/>				
Respiration	<input type="checkbox"/>				19
Respiration Quality	<input type="checkbox"/>				
Height	<input type="checkbox"/>				5 ft 9 in
Weight	<input type="checkbox"/>				175 lb
BMI Calculated	<input type="checkbox"/>				25.84kg
BSA Calculated	<input type="checkbox"/>				1.95m2
O2 Saturation	<input type="checkbox"/>				
Pain Scale	<input type="checkbox"/>				
Last Blood Sugar	<input type="checkbox"/>				
LMP	<input type="checkbox"/>				16Dec08
Mammogram	<input type="checkbox"/>				
How many times in the last 12 months have you had a fever?	<input type="checkbox"/>				
How many times in the last 12 months have you had a cough?	<input type="checkbox"/>				
Do you have a fever?	<input type="checkbox"/>				

PROBLEM TAB

ETSU - Clinician

Problem | Notes | Labs | Radiology | Procedures/Pathology | Chart | Worklist

Problem List | Rec: 29Dec2017

Name	ICD-10	Managed By
Active		
Adiaspiromycosis	B48.8	
Body mass index (BMI) of 24.0-24.9 in...	Z68.24	
Elevated blood pressure reading...	R03.0	
Gout	M10.9	
Hypertension	I10	
Influenza vaccination contraindicated	Z28.09	
Other problems related to lifestyle	Z72.89	
Thoracic outlet syndrome	G54.0	
Health Maintenance		
Past Medical History		
History of Abscess of axilla	L02.419	
History of Convulsions in the newborn	P90	
History of acute pancreatitis	Z87.19	
History of cholelithiasis	Z87.19	
History of endometriosis	Z87.42	
History of essential hypertension	Z86.79	
History of frequent headaches		
History of migraine headaches	Z86.69	
History of Papanicolaou smear	Z98.890	
History of spontaneous abortion	Z87.59	
History of trichomoniasis	Z86.19	
Less than 8 weeks gestation of...	Z3A.01	

Resolve | Impression | Reconcile | Reconcile Hx

The Problem tab is where you will be able to view all of the patient's active problems (diagnoses), past medical, social, family and surgical histories.

You can also resolve, edit and refine problems from this tab. Cleaning up the patient's active problem list is easy – just highlight the problem and choose “Resolve” from the toolbar.

You can also right-click on the problem, which will open up an extensive menu.

PROBLEM RECONCILIATION

The screenshot shows a medical software interface for a patient named Courtney Test. The patient's chart is dated 19-Jun-2010 (7y). The interface includes a navigation bar with options like 'Chart', 'Daily', 'Clinical Desktop', 'New Note', 'Worklist', 'Task List', and 'Batch Sign'. Below the navigation bar, there are tabs for 'Problem', 'Notes', 'Labs', 'Radiology', 'Procedures', 'Immunology', 'Chart', and 'Worklist'. The 'Problem' tab is active, showing a list of medical problems. A yellow button labeled 'Rec: 27Dec2017' is highlighted with a red box. The list of problems is organized into 'Active' and 'Past Medical History' sections.

Name	ICD-10	Managed By
Active		
ADHD (attention deficit hyperactivity...	F90.1	
Ankle pain	M25.579	
Arthralgia of left knee	M25.562	
Chronic otitis media of right ear	H66.91	
Cystitis	N30.90	
Immunization not carried out because...	Z28.82	
Irregular heartbeat	I49.9	
LVEF <40%	R09.89	
Mild vitamin D deficiency	E55.9	
Moderate asthma without complication,...	J45.909	
Pelvic cellulitis		
Pelvic pain	R10.2	
Social problem	Z65.9	
Health Maintenance		
Past Medical History		
Abdominal pain	R10.9	
History of Abnormal weight gain	R63.5	
History of Chronic bronchitis with acute...	J20.9	+

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.

Different clinics have different policies regarding resolving problems entered in by other clinics. Please use your clinical discretion.

NOTES TAB

Daily Clinical Desktop **New Note** Worklist Task List Batch Sign Appointments Patient Lists Provid

Q **SUPERUSER, DAREDEVIL** PCP **ADAMS MD, JOHN** Other
MRN **001000643532501** Security
FYI **FYI** H Phone

01-Jan-1979 (39y) F

ETSU - Clinician

Hearing Impaired Latex Allergy

Problem **Notes** Labs Radiology Procedures/Pathology Chart Worklist

All Notes by Specialty None

72 of 417 Chart Items (9 Invalid and 269 Audit Items) - Filters Applied

- Family Medicine
 - 24Aug2017 - Chart Update
 - Communication Note (no co-sign) (Communication Note (no co-sign)) - Gibbs, Hailey; Enc: Return to Work or School - Gibbs, Hailey; Enc: Gibbs, Hailey (Family Medicine)
 - 21Jan2015 - Chart Update
 - Established (Established) - ALLSCRIPTS, Family Medicine; Enc: ALLSCRIPTS, Family Me
 - 18Nov2014 - Form Encounter
 - sHome Health - Turner, Angel; Enc: Turner, Angel (Family Medicine)
 - 11Jul2013 - Chart Update
 - Established (Established) - Pizzola, Jason; Enc: Pizzola, Jason (Family Medicine)
 - 11Jul2013 - Appointment
 - BFM - No Show Letter - ALLSCRIPTS, Family Medicine; Enc: ALLSCRIPTS, Family Medici
 - BFM - No Show x 2 - ALLSCRIPTS, Family Medicine; Enc: ALLSCRIPTS, Family Medicine
 - 27Jun2013 - Appointment
 - Chart Documentation (Chart Documentation) - Marconi, David; Enc: Marconi, David (Famil
 - Follow-Up (Follow-Up) - Marconi, David; Enc: Marconi, David (Family Medicine)
- General Surgery
 - 28Nov2017 - Appointment
 - New Patient (New Patient) - Jones, Jon; Enc: Jones, Jon (General Surgery)
 - Follow-Up (Follow-Up) - Jones, Jon; Enc: Jones, Jon (General Surgery)
 - Follow-Up (Follow-Up) - Jones, Jon; Enc: Jones, Jon (General Surgery)
- Internal Medicine
 - 12Apr2018 - Chart Update
 - Results Note (Results Note) - ALLSCRIPTS, Provider; Enc: Livingston, Amanda (Internal M
 - 11Apr2018 - Appointment
 - HM 19-49 Years Established (HM 19-49 Years Established) - ALLSCRIPTS, Provider; Enc:
 - Results Note (Results Note) - ALLSCRIPTS, Provider; Enc: ALLSCRIPTS, Provider (Intern

View New Note **Edit** Print Fax Task

The 2nd tab is the Notes tab. This is where all of the patient's notes reside. To read a note, double click on it. To edit a note, highlight and choose "edit" from the toolbar.

Tip: If your patient is seen by other providers within the organization, their notes will be available on the Clinical desktop too.

NOTES TAB - ICONS



Finalized note icon: This note has been signed by the attending physician



Unfinalized note icon: This note still requires a signature



sAnnual

The small “s” indicates that this is a scanned document



sArchive

sArchive – document was part of the original paper chart

NOTES – VIEW MODE VS. EDIT MODE

View Mode: This is similar to a “read-only” mode. You can’t make any changes on this page. This is how you should always open a note unless you are charting in it.

To open a note in View Mode, double click the note icon on the Clinical Desktop.

Edit Mode: This is what the screen looks when you are actively charting on a patient.

There are two main ways to open a note in Edit mode:

1. Double click on the note icon on the Daily Schedule.
2. Highlight the note icon on the Notes tab and choose “edit” on the toolbar.

LABS TAB

Problem	Notes	Labs	Radiology	Pro
 Labs None				
10 of 484 Chart Items (10 Invalid and 303 Audit Items) -				
	Hemoglobin A1C - Done: 22-Jul-2015 - Log			
	CBC Automated Differential - Done: 22-Jul			
	CBC Manual Differential - Done: 10-Jul-201			
	Basic Metabolic Panel (BMP) - Done: 08-			
	Thyroid Panel w TSH - Family Medicine (O			
	Drug Screen Urine, Rflx Confirmation (FM			
	Thyroid Panel w TSH - Family Medicine (O			
	* Culture, Urine - Done: 11-Jun-2014 - Und			
	* Vitamin D, 25 Hydroxy, Total , D2 , D3 - I			

We have an interface with "Orchard" (our own lab), so labs sent to our lab will result back into the system electronically. Labs that are sent to outside vendors will come back on paper and will be scanned in by medical records personnel.



Normal lab that has been verified



Normal lab that has not been verified



Abnormal lab that has been verified



Abnormal lab that has not been verified

sLaboratory Results

Scanned lab



Lab that has been resulted back manually

Procedures

Problem Notes Labs **Procedures** Radiology Chart Worklist

Procedures None

22 of 1199 Chart Items (50 Invalid and 623 Audit Items) - Filters Applied

Diagnostics

- PPD TB Test - Done: 19Aug2011 - Avonda, Thomas; Enc: 19Aug2011 - Chart Update - Avonda, Thomas (Fan
- Pap Smear - Done: 25Jan2012 - Garland, Bridget; Enc: 16Jan2012 - Established Pa
- Spirometry w/wo Bronchodilator - Done: 04Jun2012 - Mohon, Ricky; Enc: 04Jun201
- PPD TB Test - Done: 05Jun2012 - Richardson, Carrie; Enc: 04Jun2012 - Chart Cop
- 24 Hour Holter - Done: 11Jul2012 - Garland, Bridget; Enc: 10Jul2012 - Telephone C
- Stress Test (Stress Test) - Hammonds, Suzanne; Enc: 06Aug2012 - Established Pat
- Stress Test (Stress Test) - Garland, Bridget; Enc: 06Aug2012 - Established Patient
- Stress Test (Stress Test) - Garland, Bridget; Enc: 16Aug2012 - Established Patient
- Stress Test (Stress Test) - Garland, Bridget; Enc: 16Aug2012 - Established Patient
- Stress Test (Stress Test) - Garland, Bridget; Enc: 16Aug2012 - Established Patient
- Stress Test (Stress Test) - Garland, Bridget; Enc: 16Aug2012 - Established Patient
- Stress Test (Stress Test) - Garland, Bridget; Enc: 16Aug2012 - Established Patient

Chart

Problem Notes Labs Procedures Radiology **Chart** Worklist

All by Section by Sub-Section None

526 of 1199 Chart Items (50 Invalid and 623 Audit Items)

Notes

- Office Notes
 - Follow-Up (Follow-Up)
 - Follow-Up (Follow-Up)
 - Follow-Up (Follow-Up)
 - Follow-Up (Follow-Up)
 - Established (Established)
 - Acute (Acute) - ALLSCRIPTS, Provider; Enc: 17Apr2014 - Chart Update - ALLSC
 - Established (Established) - ALLSCRIPTS, Provider; Enc: 17Apr2014 - Chart Upda
 - Follow-Up (Follow-Up) - Jernigan, Thomas; Enc: 14Apr2014 - Appointment - Jemi
 - Established (Established) - Vadlamudi, Ramya; Enc: 16Mar2014 - Chart Update -
- Problem
- Provider
- Section
- Specialty
- All by Section by Sub-Section
- Imaging
- Labs
- Patient Information

Radiology

Problem Notes Labs Procedures **Radiology** Chart Worklist

Imaging None

29 of 1199 Chart Items (50 Invalid and 623 Audit Items) - Filters Applied

Diagnostics

- Mammogram (Screening) - Done: 17Apr2014 - Jones, Tracy; Enc: 04Dec2013 - App
- Xray Chest - Done: 17Apr2014 - Jones, Tracy; Enc: 17Apr2014 - Chart Update - Jon
- sCT Scans / MRI - Bochis, Melania; Enc: 24Jan2014 - Non-Appointment - Summers,
- Mammogram (Screening) - Done: 04Dec2013 - Gandhi, Drashti; Enc: 04Dec2013 -
- Mammogram (Screening) - Done: 18Sep2013 - Carter, Heather; Enc: 18Sep2013 -
- * Mammogram (Screening) - Done: 16Sep2013 - Gandhi, Drashti; Enc: 16Sep2013 -
- sPET Scan - Rose, Douglas; Enc: 03Oct2012 - Image Encounter - Rose, Douglas (F
- Test Note (Note for Testing Purposes) - Cesare, Charles; Enc: 01Oct2012 - Establis
- sUltrasound - Bochis, Melania; Enc: 16Aug2012 - Image Encounter - Bochis, Melani

The next couple of tabs in the first component are pretty self-explanatory: the *Procedures* tab contains procedure reports; *Imaging* has x-rays, CT scans, etc., and the *Chart* tab contains the entire chart—notes, labs, procedures, imaging and administrative documents.

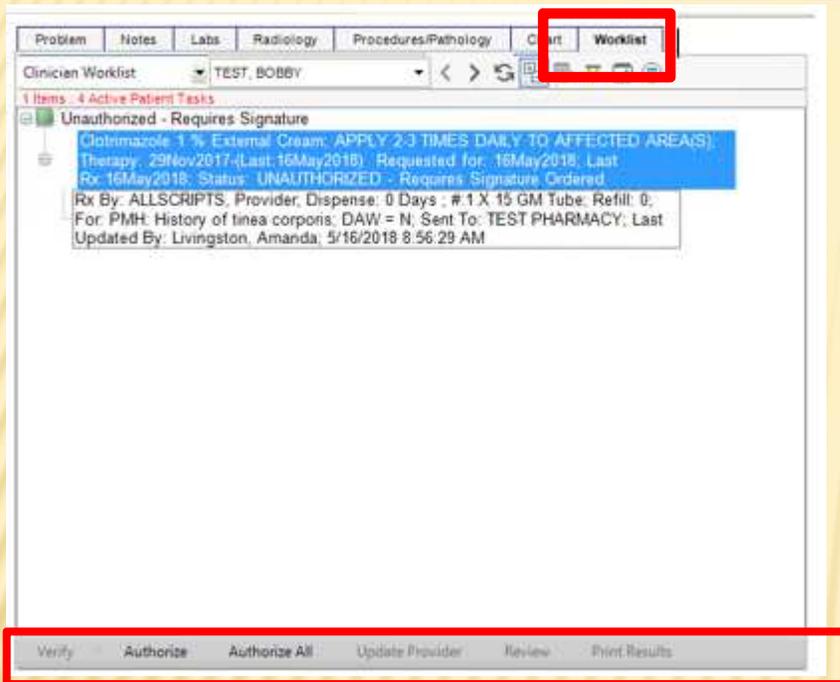
Each tab has a sort option that will allow you to find items easier.

CHART TAB- SORT BY ENCOUNTER

The screenshot shows a software interface with a tabbed menu at the top: Problem, Notes, Labs, Radiology, Procedures/Pathology, Chart, and Worklist. The 'Chart' tab is active. Below the tabs, there is a dropdown menu currently set to 'None'. A red arrow points to this dropdown menu. Below the dropdown, there are icons for refresh, zoom, search, and task. The main area displays a list of chart items, starting with '345 of 766 Chart Items (0 Invalid and 421 Audit Items)'. The list is sorted by encounter date, with the most recent at the top: 12May2020 - Appointment, 28Apr2020 - Result, 28Apr2020 - Appointment, 30Mar2020 - Result, 30Mar2020 - Appointment, 02Mar2020 - Result, 02Mar2020 - Appointment, 10Jan2020 - Result, 10Jan2020 - Appointment, 19Nov2019 - Form Encounter, 18Oct2019 - Result, and 18Oct2019 - Appointment.

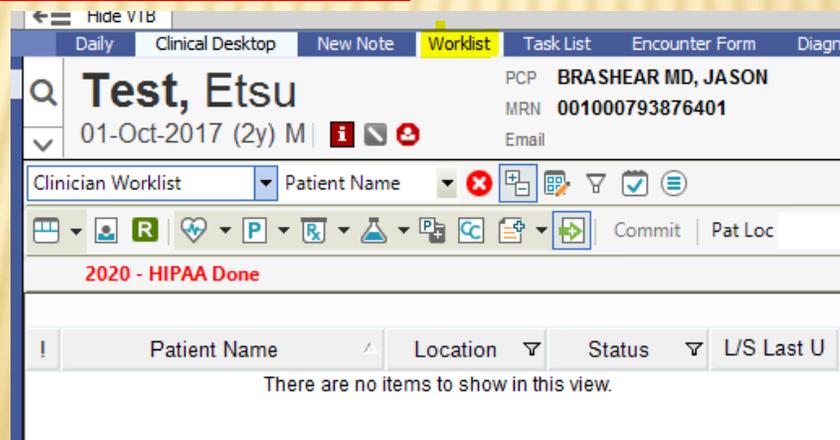
Changing the dropdown to Encounter, sorts the Chart tab by date with the most recent information on top.

WORKLIST TAB



The worklist contains items that need to be verified, such as labs, and medications that need authorization by an attending physician.

Labs will automatically go to the preceptor for signature, but they may be forwarded to the resident for review. It is good practice to check your worklist when you first log in and before you log out for the day.



VITALS TAB

HMP/Reminders Growth Chart

Vital Signs Meds Med Flowsheet Orders Allergies Immunizations Flowsheets

VitalSigns/Findings    

Data Includes: All

Item Name	Select	21 Sep 2017	16 Jun 2017	18 Oct 2016
		8:31 AM	3:26 PM	10:54 AM
Temperature	<input type="checkbox"/>	98.7 F ,...	99 F ,...	
Systolic	<input type="checkbox"/>	101 , LUE,...	172	120
Diastolic	<input type="checkbox"/>	88 , LUE,...	56	80
Heart Rate	<input type="checkbox"/>	90	66	
Pulse Quality	<input type="checkbox"/>			
Respiration	<input type="checkbox"/>			
Respiration Quality	<input type="checkbox"/>			
Height	<input type="checkbox"/>	4 ft	5 ft 4 in	5 ft 4 in
2-20 Stature Percentile	<input type="checkbox"/>	99 %	99 %	99 %
Weight	<input type="checkbox"/>	55 lb	122 lb	130 lb
2-20 Weight Percentile	<input type="checkbox"/>	99 %	99 %	99 %
BMI Calculated	<input type="checkbox"/>	16.78kg/m2	20.94kg/m2	22.31kg/m2
BMI Percentile	<input type="checkbox"/>	85 %	99 %	99 %
BSA Calculated	<input type="checkbox"/>	0.92m2	1.59m2	1.63m2
O2 Saturation	<input type="checkbox"/>			
FiO2	<input type="checkbox"/>			

◀

New Edit Enter Result Print

Typically, your nurse will enter the vitals. Once they have been saved, they will appear here.

The vitals can also be viewed in a graph format. Check the boxes next to the items you want to view and then click the graph icon on the toolbar at the top. To return your screen to normal, click the Refresh button.

MEDS TAB

HMP/Reminders Growth Chart

Vital Signs **Meds** Med Flowsheet Orders Allergies Immunizations Flowsheets

Current Medications None Alpha Rec: 19Feb2018

Clotrimazole 1 % Extern Therapy: 29Nov2017 (La Status: UNAUTHORIZED

Fluconazole 200 MG Ora Therapy: 08Dec2017 to Ordered

Vital Signs Meds

Current Medications

Past Medications

All Meds

MES DAILY TO AFFECTED AREA(S);
ed for: 16May2018; Last Rx:16May2018;
dered

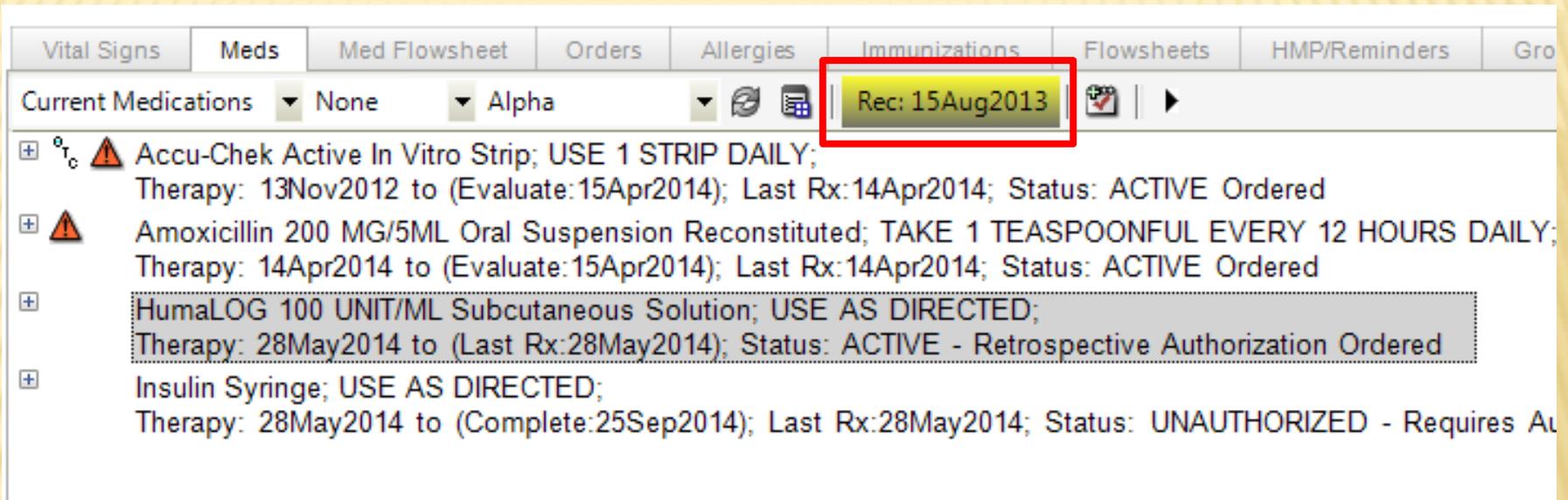
1 TABLET DAILY AS DIRECTED;
ast Rx:08Dec2017; Status: ACTIVE

New Renew with changes Reprint Rx/Resend Rx Record D/C Order D/C

The Meds tab allows you to do the following:

1. View the Current Medications. To view the details, double click the med
2. View the Past Medications/All Medications. To view discontinued and completed meds, click the drop down and choose Past Medications
3. Prescribe a new medication (click on the **New Rx** button on the toolbar)
4. Renew a medication (click on the **Renew w/ Changes** button)
5. **Discontinue/Complete** a medication
6. **Reprint/Resend** a medication
7. View/print the drug education on a prescription (**Drug Ed** button)

RECONCILING MEDICATIONS



The screenshot shows a medical software interface with the 'Meds' tab selected. The 'Current Medications' section is set to 'None' and 'Alpha'. A yellow button labeled 'Rec: 15Aug2013' is highlighted with a red box. Below the button, a list of medications is displayed:

- Accu-Chek Active In Vitro Strip; USE 1 STRIP DAILY; Therapy: 13Nov2012 to (Evaluate:15Apr2014); Last Rx:14Apr2014; Status: ACTIVE Ordered
- Amoxicillin 200 MG/5ML Oral Suspension Reconstituted; TAKE 1 TEASPOONFUL EVERY 12 HOURS DAILY; Therapy: 14Apr2014 to (Evaluate:15Apr2014); Last Rx:14Apr2014; Status: ACTIVE Ordered
- HumaLOG 100 UNIT/ML Subcutaneous Solution; USE AS DIRECTED; Therapy: 28May2014 to (Last Rx:28May2014); Status: ACTIVE - Retrospective Authorization Ordered
- Insulin Syringe; USE AS DIRECTED; Therapy: 28May2014 to (Complete:25Sep2014); Last Rx:28May2014; Status: UNAUTHORIZED - Requires Au

An important component on the Meds tab is the **Reconciliation** button. Each time a patient is seen, the medication list will need to be reviewed and updated. Once the list has been verified as being correct, you will need to click the yellow button to verify that the meds list was reconciled at the current visit. The last date that the list was reconciled will be stamped on the button, so the next person to view the meds list will know when it was last updated.

MEDICATION FLOWSHEET

Vital Signs		Meds		Med Flowsheet		Orders		Allergies		Immunizations		Flowsheets		HMP/Reminders		Growth Chart	
Medication Flowsheet		All Meds															
Data Includes: All																	
Medication		Problem...		Status		16 Apr 2018		12 Apr 2018		11 Apr 2018		01 Nov 2017					
o/c Afrin 12 Hour SOLN				Complete													
o/c Afrin Nasal Spray SOLN				Complete													
Allopurinol 300 MG Oral Tablet		Dorsalgia		Active		Authorized TAKE 1...											
Amoxicillin 125 MG/5ML Oral Suspension Reconstituted		PMH: BMI 25.0-...		Active								Record as History					
Amoxicillin 200 MG/5ML Oral Suspension Reconstituted				Complete													
Amoxicillin-Pot Clavulanate 875-125 MG Oral Tablet				Discontinued													
Amphetamine-Dextroamphet ER 20 MG Oral Capsule Extended...				Complete													
Aspirin 81 MG TABS				Discontinued													
o/c Aspirin EC 325 MG Oral Tablet Delayed Release																	
Atenolol 100 MG Oral Tablet		Dorsalgia Essential															
Atenolol 25 MG Oral Tablet																	
Atenolol TABS		Atypical															

The Medication Flowsheet tab allows you to view the patient's meds in a easy-to-view table. The columns with a funnel icon allow you to sort the meds by problem, status and medication name.

ORDERS TAB

Vital Signs Meds Med Flowsheet **Orders** Allergies Immunizations Flowsheets

Current Orders None Alpha

- 1 month Follow up - Follow-up Status: Hold For - Scheduling Requested for: 01Jun2014
- CBC Automated Differential Status: Active Requested for: 01Jun2014
- DXA Bone Densitometry Status: Hold For: 01Jun2014
- Weight Management Support/Program For: Diabetes mellitus Status: Hold For: 01Jun2014

Current Orders
Current Orders
Past Orders
All Orders

The **Orders** tab shows all of the Current Orders for the patient. These are items that have been ordered, but not yet resulted/completed. Past orders can be viewed by changing the sort field from **Current Orders** to **Past Orders** or **All Orders**. New items can also be ordered by clicking on the appropriate option on the toolbar.

The faces are tied to the patient's insurance formulary:

- Red face - insurance will not pay for this test
- Yellow face - insurance will pay a partial amount
- Green face - insurance will pay for test

Laboratory Radiology Follow Up/Referral Education Edit Print Req

ALLERGIES TAB

Vital Signs | Meds | Med Flowsheet | Orders | **Allergies** | Immunizations

All | Type | Rec: 02Feb2018 | [Checkmark] [Menu]

- Medication
 - Horse-derived Products : Adverse Reaction : Chest pain
- Non-Medication
 - ⚠ Animal dander - Horses : Adverse Reaction : Anaphylaxis
 - ⚠ Shellfish : Shortness of breath Eggs

Just like with the Medications, the Allergies will need to be **reconciled** at each visit. If the allergies are up-to-date and accurate, click the yellow button to reconcile the allergies.

The **Allergies** tab shows all of the patient's allergies. Allergies with serious reactions, such as anaphylaxis, will have a warning icon  next to it. Double clicking on an allergy will open the **Allergy Viewer** screen which will show any additional information documented about the allergy.

IMMUNIZATIONS TAB

	Last Given	1	2	3
▶ DTP/DTaP (4)	16-Jun-2017 (16m)	12-Mar-2016 (31d)	05-Jul-2016 (4m)	13-Sep-2016 (7m)
Hepatitis A (1)	10-Mar-2017 (13m)	10-Mar-2017 (13m)		
Hepatitis B (3)	13-Sep-2016 (7m)	12-Mar-2016 (31d)	05-Jul-2016 (4m)	13-Sep-2016 (7m)
HIB (4)	13-Sep-2017 (19m)	12-Apr-2016 (2m)	05-Jul-2016 (4m)	16-Jun-2017 (16m)
HPV (0)				
Influenza (0)				
Influenza Refused (1)	24-Apr-2018 (2y)	24-Apr-2018 (2y)		
Meningococcal (0)				
MMR (1)	16-Jun-2017 (16m)	16-Jun-2017 (16m)		
PCV (4)	10-Mar-2017 (13m)	12-Apr-2016 (2m)		
PPSV (0)				
Polio (3)	13-Sep-2016 (7m)	12-Mar-2016 (31d)		
Rotavirus (2)	05-Jul-2016 (4m)	12-Apr-2016 (2m)		
Td/DT (0)				
Varicella (1)	10-Mar-2017 (13m)	10-Mar-2017 (13m)		

As immunizations are ordered, they will automatically flow into this table. The immunization list can be printed by clicking Print on the bottom toolbar.

FLWSHEETS TAB

Growth Chart | Vital Signs | Meds | Med Flowsheet | Orders | Allergies | Immunizations | **Flowsheets**

FlowSheets | BFM Anticoagula | Family Medicine

	25 Aug 2014	21 Aug 2014	18 Aug 2014
ect	1	1	1
Depo Flowsheet			
Diabetes Care			
Direct Oral Anticoagulant Flowsheet			
ER Flowsheet			
HTN Flowsheet			
Humana SQR Flowsheet			
Infectious Disease Flowsheet			
JCFM Anticoagulation			
KFM Anticoagulation Flowsheet			
MOCA Flowsheet			
Normative Growth Chart			
Nutrition Labs			
Peds Score Form			
PHQ-9			
Post Concussion Symptom Scale			
Prevention			
Quality Measures Assessment Form			
SBIRT Questions			
Testosterone Injections			
TOC Flowsheet			
Treatment Goals/Progress			
Urine FlowSheet			
Urine Pregnancy			
Vitals			

Flowsheets allow you to keep track of various clinical items—usually based upon specific disease processes. Flowsheets are created by the EHR team, depending upon the needs of each clinic.

HMP/REMINDERS TAB

HMP/Reminders Growth Chart

Vital Signs Meds Med Flowsheet Orders Allergies Immunizations Flowsheets

Health Management Problem

Filter Applied: Suppress Other Orders

Item	Sche...	Se	Goal	Most Recent	Date	5y...	To Do	Incompl...
Weight		<input type="checkbox"/>	New	160 lb	14...			
BMI		<input type="checkbox"/>	New	24.33 kg/m2	14...			
BSA		<input type="checkbox"/>	New	1.86 m2	14...			
Head Circumference		<input type="checkbox"/>	New	9.449 IN	14...			
<input checked="" type="checkbox"/> Cancer		<input type="checkbox"/>						
Activity, normal								
EKG (Performed At...								
Repeat Blood...								
Xray Abdomen								
Xray Chest								
<input checked="" type="checkbox"/> Community acquired...								
Ace Bandage								
<input checked="" type="checkbox"/> Urinalysis (DIPSTICK...								
<input checked="" type="checkbox"/> Diabetes mellitus								
HumaLOG 100...								
Insulin Syringe								
1 month Follow up								

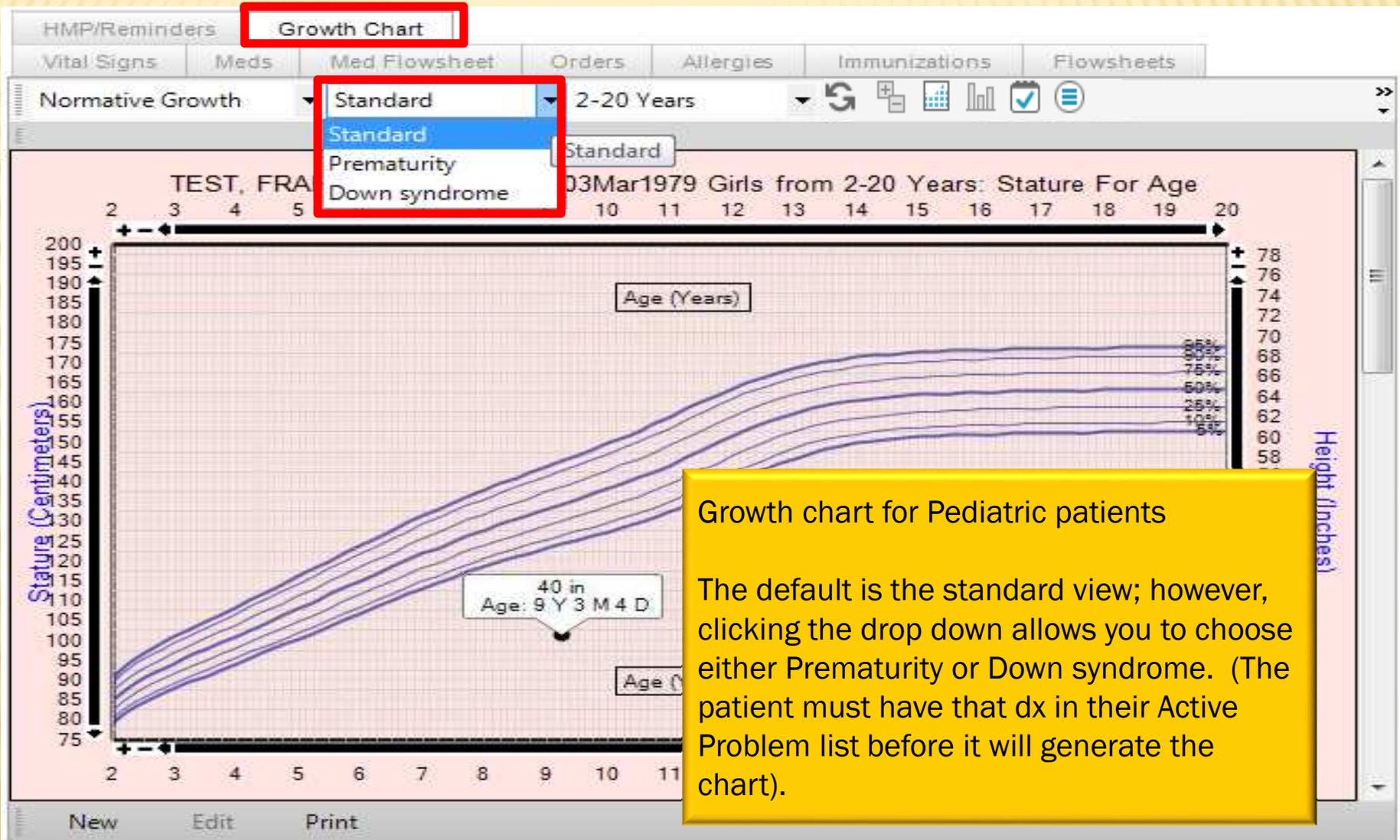
Order Create Reminder Edit Last Done Done Today Renew w/ Changes

HMP—Health Management Profile

This table keeps track of all items that have been ordered with a particular diagnosis. Basically, this is the patient's Plan in table format. At a quick glance, you can view when an item was ordered, if it is due or near due, and what the value was when last ordered.

You can also set goals for various items, such as weight, BMI, lab items, etc.

GROWTH CHART TAB



Growth chart for Pediatric patients

The default is the standard view; however, clicking the drop down allows you to choose either Prematurity or Down syndrome. (The patient must have that dx in their Active Problem list before it will generate the chart).



EAST TENNESSEE STATE
UNIVERSITY

PLEASE PROCEED TO THE NEXT MODULE – DOCUMENTING HISTORY