



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

May 2021

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 be presented with a My Current Session window. This is where you would choose your Site or location.

My Current Session

▼ Current Details for Amanda Livingston in ETSU

^ Current Site (@): OB/GYN **Default**

Recently visited sites in: ETSU

Type to filter or search **Search**

Site Search Results [Return to Recent Sites](#)

Surgery
325 North State of Franklin Rd Third Floor, Johnson City, TN 37604

Quillen ETSU Physicians
222 E. Main St, Johnson City, TN 37604

Psychiatry
Building 52 Lake Drive VA Medical Center, Mountain Home, TN 37684

Pharmacy Student
TN

Pediatrics
325 North State of Franklin Rd Ground Floor, Johnson City, TN 37604

Osteoporosis
2109 West Market Street, Room 143 ETSU Innovation Lab, Johnson City, TN 37604

Osteo Mobile Unit
Mountain Home, TN 37684



Ophthalmology
325 North State of Franklin Rd 3rd Floor, Johnson City, TN 37604

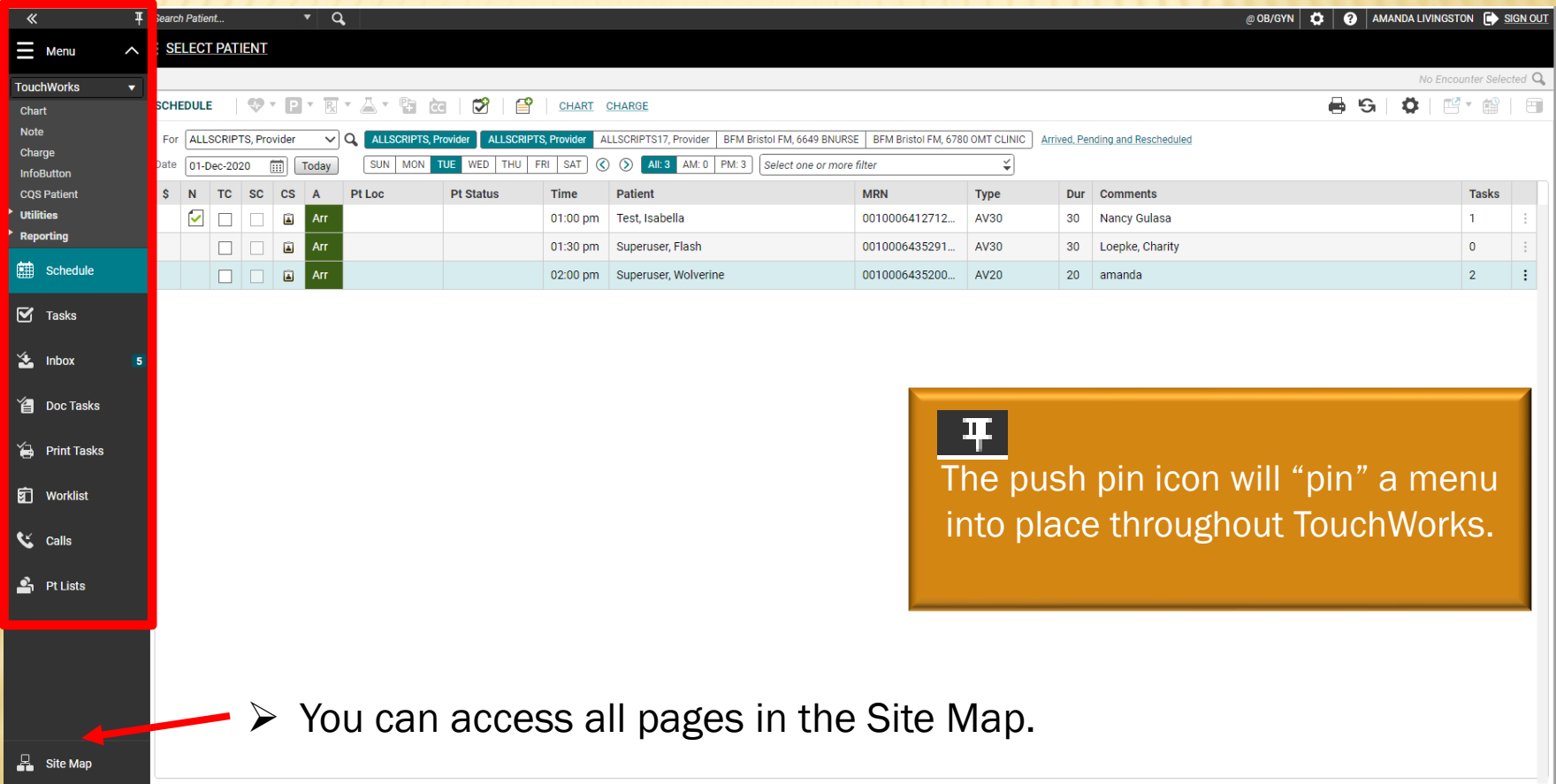
NHC Bristol
245 North St., Bristol, VA 24201

OK **Cancel Sign in**

Some staff will rotate through different sites and specialties. Always make sure you are on the correct one.

ACTION BAR

- The action bar is a menu-based navigational tool you use to access workspaces in Allscripts TouchWorks® EHR that are available to you. It is located on the left.
- You can minimize  or maximize .



The screenshot displays the Allscripts TouchWorks EHR interface. On the left, the Action Bar is visible, containing a list of navigation options. The 'Schedule' option is currently selected and highlighted in blue. A red rectangular box highlights the entire Action Bar. At the bottom of the Action Bar, there is a 'Site Map' icon, which is pointed to by a red arrow. The main content area shows a patient selection screen with a search bar and a list of patients. The table below shows the patient list:

	\$	N	TC	SC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Comments	Tasks
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arr			01:00 pm	Test, Isabella	0010006412712...	AV30	30	Nancy Gulasa	1
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arr			01:30 pm	Superuser, Flash	0010006435291...	AV30	30	Loepke, Charity	0
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arr			02:00 pm	Superuser, Wolverine	0010006435200...	AV20	20	amanda	2



The push pin icon will “pin” a menu into place throughout TouchWorks.

- You can access all pages in the Site Map.

SITE MAP

- The Site Map shows you the pages you have available. We recommend only showing the workspaces you use daily. You can also navigate to your pages from here.

The screenshot displays the TouchWorks Site Map interface. The top header bar includes a search bar, user information (@ Pediatrics), and a 'PROVIDER ALLSCRIPTS' link. The main content area is divided into four sections: MAIN, UTILITIES, REPORTING, and CUSTOMIZATION. A red arrow points from a question mark icon in a yellow box to the top right corner of the Site Map header.


MAIN	UTILITIES	REPORTING	CUSTOMIZATION
Chart Note Charge Schedule Tasks Inbox	Doc Tasks Worklist Calls Pt Lists InfoButton	Reports EPCS Reports	My Security Account (Desktop...) My Preferences My Macros My Favorites Print Defaults Task Views - Manage My Tasks - Customize Document Tasks - Customize


EXTERNAL LINKS: CSMD, EHR website, Opioid Documents will be located in the **HELP** section on the Site Map.

EXTERNAL LINKS: CSMD, EHR website, Opioid Documents will be located in the **HELP** section on the Site Map.


HIDING AND SHOWING PAGES

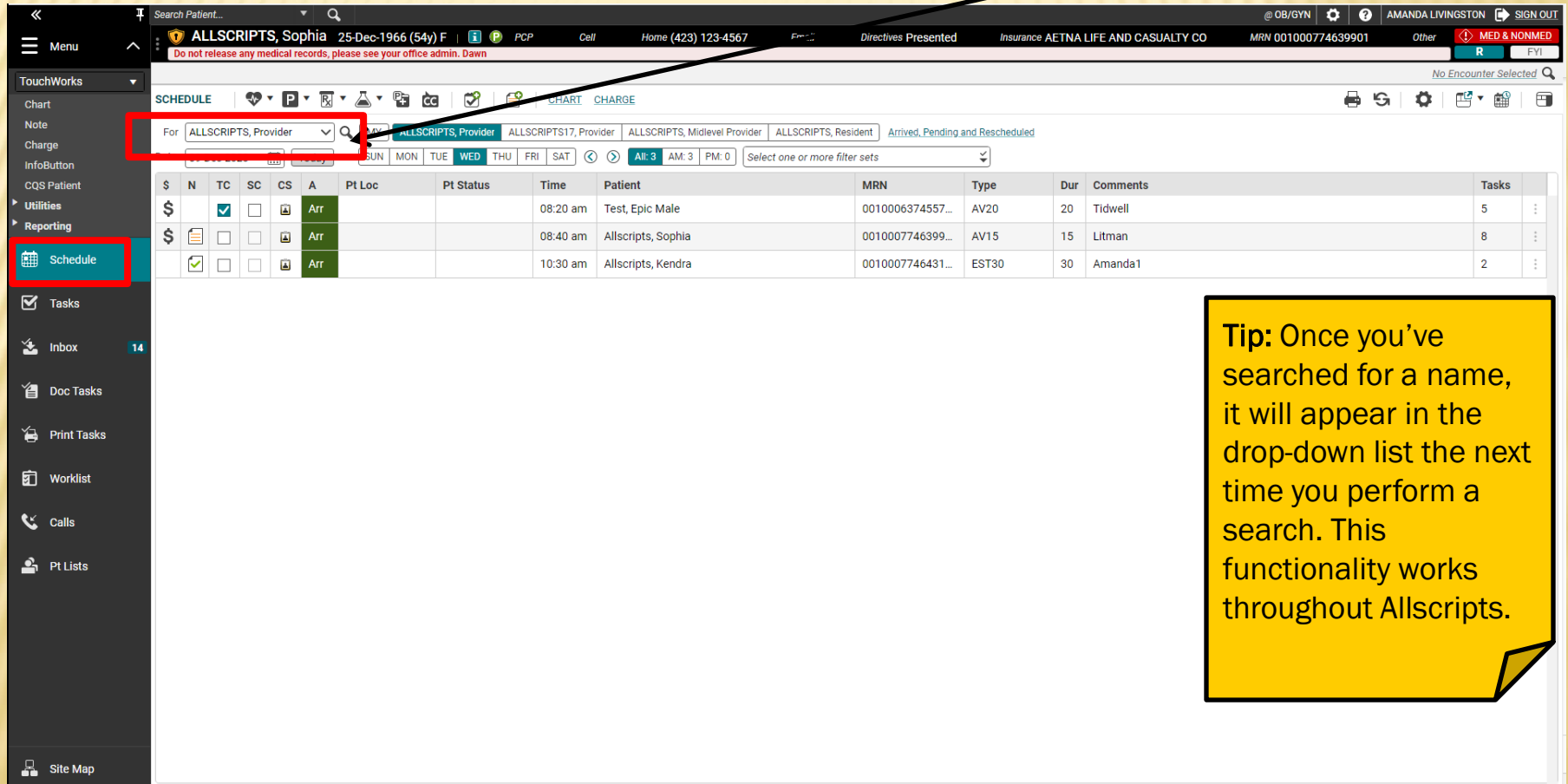
The screenshot displays the TouchWorks application interface. On the left is a vertical navigation menu with categories like TouchWorks, Utilities, Reporting, and Tasks. The main area is titled 'SITE MAP' and contains several panels: MAIN, UTILITIES, REPORTING, CUSTOMIZATION, and HELP. In the MAIN panel, the 'Note' item is highlighted, and a context menu is open with the option 'Show in Menu' selected. An orange callout box points to a hidden from menu icon (a circle with a diagonal line) next to the 'Note' item. Another orange callout box points to the 'Show in Menu' option in the context menu.

The hidden from menu icon  is displayed next to hidden pages. These pages aren't show in the Action Bar.

To show a page in the Action Bar, Click the options icon  and select **Show in Menu**.

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.

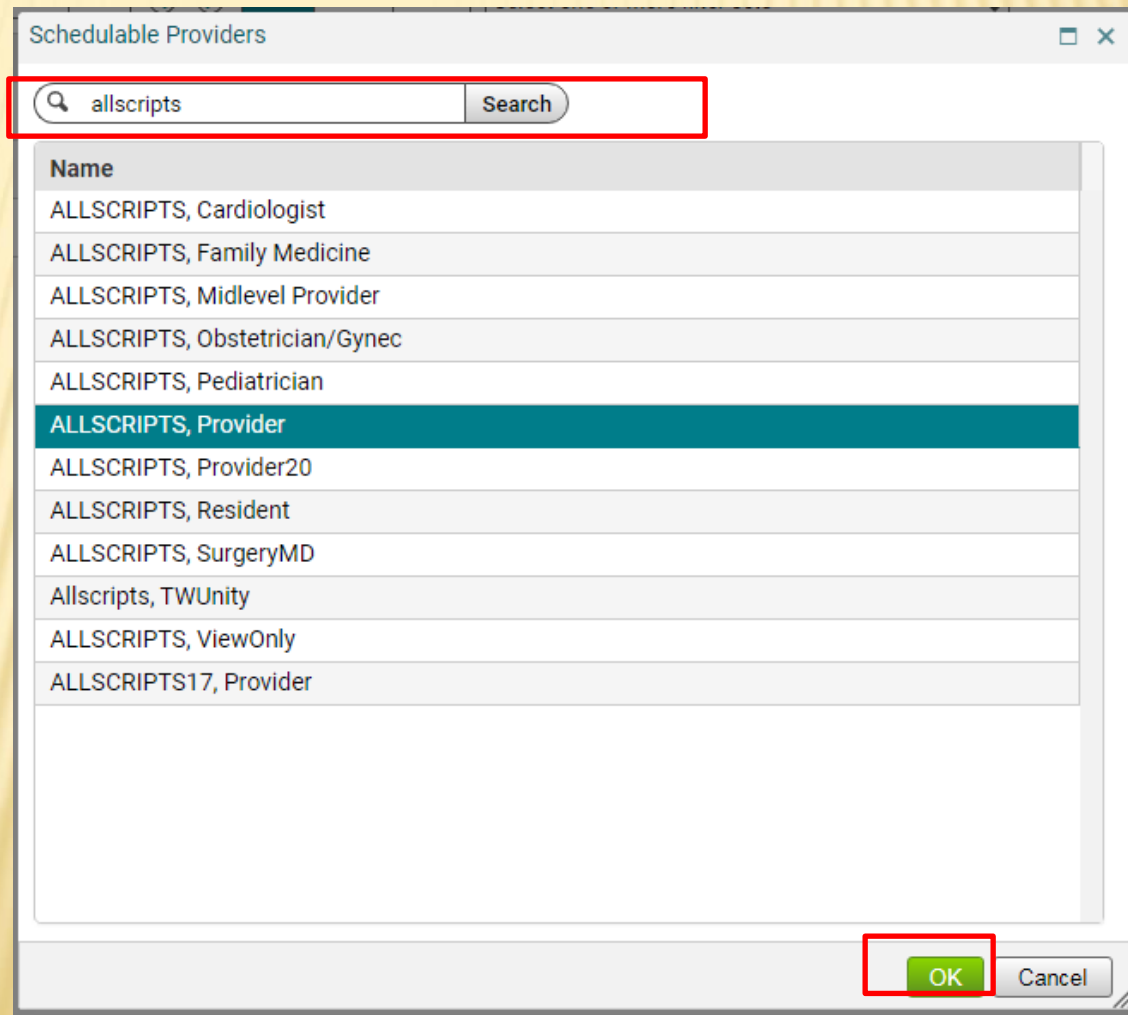


Tip: Once you've searched for a name, it will appear in the drop-down list the next time you perform a search. This functionality works throughout Allscripts.

\$	N	TC	SC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Comments	Tasks
\$		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arr			08:20 am	Test, Epic Male	0010006374557...	AV20	20	Tidwell	5
\$		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arr			08:40 am	Allscripts, Sophia	0010007746399...	AV15	15	Litman	8
\$		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arr			10:30 am	Allscripts, Kendra	0010007746431...	EST30	30	Amanda1	2

SCHEDULE

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



The screenshot shows a window titled "Schedulable Providers". At the top, there is a search bar with a magnifying glass icon, containing the text "allscripts", and a "Search" button. Below the search bar is a list of providers. The provider "ALLSCRIPTS, Provider" is highlighted with a dark teal background. At the bottom right of the window, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red box.

Name
ALLSCRIPTS, Cardiologist
ALLSCRIPTS, Family Medicine
ALLSCRIPTS, Midlevel Provider
ALLSCRIPTS, Obstetrician/Gynec
ALLSCRIPTS, Pediatrician
ALLSCRIPTS, Provider
ALLSCRIPTS, Provider20
ALLSCRIPTS, Resident
ALLSCRIPTS, SurgeryMD
Allscripts, TWUnity
ALLSCRIPTS, ViewOnly
ALLSCRIPTS17, Provider

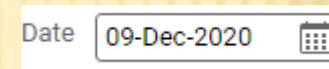
SCHEDULE



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

1. Click on the day of the week

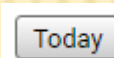


2. Click on the calendar icon next to the Date field



3. Click on the blue arrows   to navigate forward or backward a week

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



SCHEDULE

[CHART](#)
[CHARGE](#)

For ALLSCRIPTS, Provider

MY

ALLSCRIPTS, Provider

ALLSCRIPTS17, Provider

ALLSCRIPTS, Midlevel Provider

ALLSCRIPTS, Resident

Arrived, Pending and Rescheduled

Date 09-Dec-2020

Today

SUN

MON

TUE

WED

THU

FRI

SAT

All: 3

AM: 3

PM: 0

Select one or more filter sets

		TS	SS	CC	A	PL	PL	Time	Patient	MRN	Type	Day
\$		<input checked="" type="checkbox"/>	<input type="checkbox"/>		Arr			08:20 am	Test, Epic Male	0010006374557...	AV20	20
\$		<input type="checkbox"/>	<input type="checkbox"/>		Arr			08:40 am	Allscripts, Sophia	0010007746399...	AV15	15
		<input type="checkbox"/>	<input type="checkbox"/>		Arr			10:30 am	Allscripts, Kendra	0010007746431...	EST30	30

SCHEDULE ICONS

SCHEDULE CHART CHARGE											
For <input type="text" value="ALLSCRIPTS, Provider"/> <input type="text" value="MY"/> <input type="text" value="ALLSCRIPTS, Provider"/> <input type="text" value="ALLSCRIPTS17, Provider"/> <input type="text" value="ALLSCRIPTS, Midlevel Provider"/> <input type="text" value="ALLSCRIPTS, Resident"/> Arrived, Pending and R											
Date <input type="text" value="01-Dec-2020"/> <input type="text" value="Today"/> <input type="text" value="SUN"/> <input type="text" value="MON"/> <input type="text" value="TUE"/> <input type="text" value="WED"/> <input type="text" value="THU"/> <input type="text" value="FRI"/> <input type="text" value="SAT"/> <input type="text" value="All: 3"/> <input type="text" value="AM: 0"/> <input type="text" value="PM: 3"/> <input type="text" value="Select one or more filter sets"/>											
\$	N	TC	SC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Typ
		<input type="checkbox"/>	<input type="checkbox"/>		Arr		Check-Out	01:00 pm	Test, Isabella	0010006412712...	AV
		<input type="checkbox"/>	<input type="checkbox"/>		Arr	Exam 165D	Provider Rea...	01:30 pm	Superuser, Flash	0010006435291...	AV
		<input type="checkbox"/>	<input type="checkbox"/>		Arr	Waiting Room	Nurse Ready	02:00 pm	Superuser, Wolverine	0010006435200...	AV

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

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

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

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

Pt Loc **Pt Status**

PATIENT BANNER

A single click on the patient's name from the 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.

The screenshot displays a medical software interface. At the top, a red-bordered banner contains patient information: **TEST, Etsu**, birth date **01-Oct-2017 (3y) M**, and provider **PCP BRASHEAR MD, JASON**. It also includes contact details like **Cell Home (423) 888-1012** and **Email test.test@email.com**. A red bar below the banner contains the text **2020 - HIPAA Done**, **Review before release of medical records**, and **Patient goes by Fry fry**. To the right of the banner are buttons for **R** and **FYI**.

Below the banner is a navigation bar with **SCHEDULE** and **CHART CHARGE** tabs. The **SCHEDULE** tab is active. Below this is a search bar with **For ALLSCRIPTS, Provider** and a dropdown menu. The **MY** dropdown is open, showing **ALLSCRIPTS, Provider**, **ALLSCRIPTS17, Provider**, **ALLSCRIPTS, Midlevel Provider**, and **ALLSCRIPTS, Resident**. Below the search bar is a date selector set to **09-Sep-2020** and a time selector set to **All: 1 AM: 1 PM: 0**. Below these is a table with columns: **\$**, **N**, **TC**, **SC**, **CS**, **A**, **Pt Loc**, **Pt Status**, **Time**, **Patient**, **MRN**, **Type**, **Dur**, **Comments**, **Tasks**, and **:**. The table contains one row with the following data: **\$**, **N**, **TC**, **SC**, **CS**, **A**, **Pt Loc**, **Pt Status**, **09:00 am**, **Test, Etsu**, **0010007938764...**, **AV15**, **15**, **Crystal**, **14**, and **:**.

PATIENT BANNER - SEARCHING

You can also manually pull a patient into context. In the Patient Banner, click the magnifying glass. In the Search for Patient box, type the patient's LAST NAME, FIRST NAME or date of birth. Highlight the correct patient's name, and then click OK.



Patient Search

>>

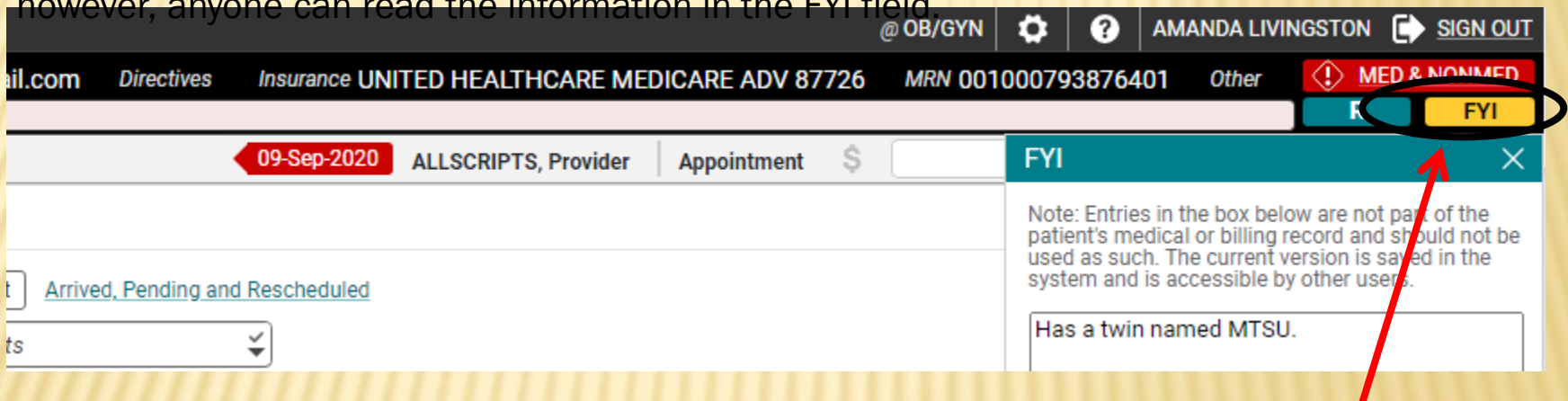
Refine Search

Patient	S	Age	DOB
▼ Allscripts, Alan	M	18y	17-Apr-2003
▼ Allscripts, Allison	F	25y	10-Mar-1996
▼ Allscripts, Amber	F	55y	17-Jun-1965
▼ Allscripts, Betsy	F	75y	18-Mar-1946
▼ Allscripts, Brad	M	45y	13-Aug-1975

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.

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.



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

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

PATIENT BANNER – INFORMATION ICON

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



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.

TEST, Etsu 01-Oct-2017 (3y) M (Male)

FYI



Has a twin named MTSU.

[Update](#) [Remove](#)

Chart Alert	Added By	Date Added	Remove
2020 - HIPAA Done	Waters, Michelle	05-Mar-2020	Delete
Review before release of medical records	Livingston, Amanda	27-Oct-2020	Delete


[Add Alert](#)

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

INFORMATION ICON – CHART ALERTS



Chart Alert	Added By	Date Added	Remove
2020 - HIPAA Done	Waters, Michelle	05-Mar-2020	Delete
Review before release of medical records	Livingston, Amanda	27-Oct-2020	Delete

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

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.

Add/Edit Patient Chart Alerts

Available Alerts

- :: Office policy on opiates given to patient - BFM
- :: ADM PT
- :: 2020 - BMI Done
- :: Patient has a caregiver
- :: CPC+ Patient
- :: Risk Score 1
- :: Risk Score 2
- :: Risk Score 3
- :: Risk Score 4
- :: Risk Score 5
- :: Risk Score 6
- :: Patient does not speak English
- :: Dr. requires 1 hour block

Selected Alerts

- :: 2020 - HIPAA Done
- :: Review before release of medical records

Ad Hoc Alert

[Add to Selected Alerts](#)

[Save Changes](#) [Cancel](#)

The Chart Alerts will appear on the Patient Banner.

2020 - HIPAA Done Review before release of medical records

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.

Patient Care Team

Empaneled To: BRASHEAR MD, JASON ☐ Show Inactive

	Care Team Member	Role	Relationship	Specialty	Comments	City/State	Office Number
	BRASHEAR MD, JASON	Primary Care Provider	Primary Care Provider	Orthopedic Surgery		JOHNSON CITY/TN	(423) 434-6300
	Wood, David MD			Pediatrics		Johnson City/TN	(423) 439-7320
	Floresguerra, Carlos MD			General Surgery		Johnson City/TN	(423) 439-7201
	Test, Monday						(323) 232-3232
	Musil, Clinton MD			Psychiatry		Johnson City/TN	(423) 439-8000
	Watauga Behavioral Health Services (...)		Consulting Specialist			Johnson City/TN	(423) 232-2700
	Jernigan, Thomas MD			Obstetrics/Gynecology		Johnson City/TN	(423) 439-7272

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.

Select PCT Member

TEST, Etsu 01-Oct-2017 (3y) M (Male)

☒ Quick Search ☐ Advanced Search ☐ Browse Favorites

Quick Search

Search Results

Showing 20 results

			Ext	Last/Prac/Agency	First	MI	Specialty
	<input type="checkbox"/>		Ext	MORRIS MD	LAWRENCE		Endocrinology
	<input type="checkbox"/>		Ext	MONTENEGRO MD	FRANKLIN		Endocrinology
	<input type="checkbox"/>		Ext	BEASEY MD	MATTHEW		Endocrinology
	<input type="checkbox"/>		Ext	FOWLER MD	MICHAEL		Endocrinology
	<input type="checkbox"/>		Ext	MIERS MD	WENDELL		Endocrinology
	<input type="checkbox"/>		Ext	ZULUETA MD	CLEMETE		Endocrinology

CHART

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

TEST, Etsu 01-Oct-2017 (3y) M | PCP BRASHEAR MD, JASON Cell Home (423) 888-1012 Email test.test@email.com Directives Insurance UNITED HEALTHCARE

2020 - HIPAA Done Review before release of medical records

SCHEDULE

For ALLSCRIPTS, Provider MY ALLSCRIPTS, Provider ALLSCRIPTS17, Provider ALLSCRIPTS, Midlevel Provider ALLSCRIPTS, Resident Arrived, Pending and Rescheduled

Date 09-Sep-2020 Today SUN MON TUE WED THU FRI SAT All: 1 AM: 1 PM: 0 Select one or more filter sets

\$	N	TC	SC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Com
					Arr			09:00 am	Test, Etsu	0010007938764...	AV15	15	Cryst

TEST, Etsu 01-Oct-2017 (3y) M | PCP BRASHEAR MD, JASON Cell Home (423) 888-1012

2020 - HIPAA Done Review before release of medical records

ETSU - ...

Chart

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

Active Problems Alpha Rec: 21-Oct-2020

Problem	Notes	Labs	Radiology	Procedures/Pathology	Chart	Worklist
Abnormal rapid eye movement sleep					G47.8	⊙05
ADHD					F90.9	⊙26
Advanced diabetic maculopathy with retino...					E08.311	⊙05
Autism					F84.0	⊙08
Bilateral hearing loss, unspecified hearing l...					H91.93	⊙08
* Bronchitis					J40	⊙21
Colon cancer screening					Z12.11	⊙03
Conductive hearing loss					H90.2	⊙20

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

CHART

The chart has two main components. Each component contains different tabs, where you will access the patient's information.

The screenshot displays the CHART medical software interface for patient TEST, Etsu, born 01-Oct-2017 (3y M). The interface is divided into two main components:

- Component 1:** Located on the left, it contains a list of medical conditions and procedures. A red box highlights the **Clinical Toolbar** at the top of this component, which includes icons for various clinical actions like adding notes, labs, radiology, etc. Below the toolbar are tabs for **Problem**, **Notes**, **Labs**, **Radiology**, **Procedures/Pathology**, **Chart**, and **Worklist**.
- Component 2:** Located on the right, it displays a **Vital Signs** table. A blue box highlights the tabs for **Vital Signs**, **Meds**, **Med Actions**, **Orders**, **Allergies**, **Immunizations**, **Flowsheets**, **HMP/Reminders**, and **Growth Chart**.

The **Vital Signs** table shows data for 30 Sep 2020, 29 Sep 2020, 20 Sep 2020, 02 Sep 2020, and 31 Aug 2020. The table includes columns for Item Name, Date, Time, and various vital signs (Temperature, Systolic, Diastolic, Heart Rate, Pulse Quality, Respiration, Respiration Quality).

Item Name	30 Sep 2020	29 Sep 2020	20 Sep 2020	02 Sep 2020	31 Aug 2020
Temperature	10:31 AM	09:36 AM	07:57 PM	10:06 AM	10:02 AM
Systolic	37.06 C	128			37 C
Diastolic		80			
Heart Rate					
Pulse Quality					
Respiration					
Respiration Quality					

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.

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

Active Problems ▾ Alpha ▾ Rec: 21-Oct-2020

▶	📅 ✎	Abnormal rapid eye movement sleep	G47.8	🕒 05Oct2020 Gar
▶	📅 ✎ 🟢	ADHD	F90.9	🕒 26Apr2021 Livi
▶	📅 ✎ 🟢 HCC	Advanced diabetic maculopathy with retino...	E08.311	🕒 05Oct2020 Gar
▶	📅 ✎	Autism	F84.0	🕒 08Dec2020 Livi
▶	📅 ✎ 🟢	Bilateral hearing loss, unspecified hearing		020 Bar
▶	📅 ✎ *	Bronchitis		021 Ricl
▶	📅 ✎	Colon cancer screening		020 Liv
▶	📅 ✎ 🟢	Conductive hearing loss		020 Hei
▶	📅 ✎ 🟢	Developmental language disorder	F80.9	🕒 31Aug2020 Ne

Tip: Each tab on the Clinical Desktop has a couple of different sort options which can be used to help you find information quickly.

PROBLEM TAB

TEST, Etsu 01-Oct-2017 (3y) M | PCP BRASHEAR MD, JASON | Cell Home (423) 888-1012 | Email test.test@email.com | Directives MED & NONMED R FYI

2020 - HIPAA Done Review before release of medical records

09-Sep-2020 ALLSCRIPTS, Provider Appointment \$ Post

ETSU - ... CHARGE

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

Active Problems Alpha Rec: 21-Oct-2020

Abnormal rapid eye movement sleep	G47.8	05Oct2020 Gar
ADHD	F90.9	26Apr2021 Livi
Advanced diabetic maculopathy with retin...	E08.311	05Oct2020 Gar
Autism	F84.0	08Dec2020 Liv
Bilateral hearing loss, unspecified hearing ...	H91.93	08Sep2020 Bar
* Bronchitis	J40	21Apr2021 Ricl
Colon cancer screening	Z12.11	03Nov2020 Liv
Conductive hearing loss	H90.2	20Sep2020 Hei
Developmental language disorder	F80.9	31Aug2020 Ne
Developmental language disorder	F80.9	20Sep2020 Hei
Diabetes	E11.9	07May2021 Liv
Difficulty of mother performing breastfeed...	Z39.1	29Sep2020 Liv
Dysphagia	R13.10	31Aug2020 Ne
Dysphagia	R13.10	28Oct2020 Gar
E. coli UTI (urinary tract infection)	+N39.0	17Aug2020 Liv
Encounter for immunization	Z23	20Aug2020 Nic
Encounter for Papanicolaou smear of cervix	Z12.4	04Nov2020 Liv
Encounter for vaccination	Z23	03Nov2020 Liv
Hepatocellular carcinoma	C22.0	21Oct2020 Livi
History of ear infection	Z86.69	21Aug2020 Liv
History of graft versus host disease	Z86.2	06Jul2020 Livi

Vital Signs Meds M

VitalSigns/Findings

1m 6m 1y 5y All

Item Name

Temperature

Systolic

Diastolic

Heart Rate

Pulse Quality

Respiration

Respiration Quality

Height

0-24 Length Percentile

2-20 Stature Percentile

Weight

0-24 Weight Percentile

2-20 Weight Percentile

BMI Calculated

BMI Percentile

BSA Calculated

Head Circumference

0-24 Head Circumference Percen

O2 Saturation

InfoButton New Edit **Resolve** Impression Reconcile Reconcile Hx New Edit Enter Result Print

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 TAB

TEST, Etsu 01-Oct-2017 (3y) M | PCP BRASHEAR MD, JASON | Cell Home (423) 888-1012 | Email test.test@email.com | Directives MED & NONMED R FYI

2020 - HIPAA Done Review before release of medical records

09-Sep-2020 ALLSCRIPTS, Provider Appointment \$ Post

ETSU - ... CHARGE

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

Active Problems Alpha Rec: 21-Oct-2020

Problem	ICD-10	Date	Status
Abnormal rapid eye movement sleep	G47.8	05Oct2020	Gar
ADHD	F90.9	26Apr2021	Liv
Advanced diabetic maculopathy with retin...	E08.311	05Oct2020	Gar
Autism	F84.0	08Dec2020	Liv
Bilateral hearing loss, unspecified hearing ...	H91.93	08Sep2020	Bar
* Bronchitis	J40	21Apr2021	Ric
Colon cancer screening	Z12.11	03Nov2020	Liv
Conductive hearing loss	H90.2	20Sep2020	Hei
Developmental language disorder	F80.9	31Aug2020	Ne
Developmental language disorder	F80.9	20Sep2020	Hei
Diabetes	E11.9	07May2021	Liv
Difficulty of mother performing breastfeed...	Z39.1	29Sep2020	Liv
Dysphagia	R13.10	31Aug2020	Ne
Dysphagia	R13.10	28Oct2020	Gar
E. coli UTI (urinary tract infection)	N39.0	17Aug2020	Liv
Encounter for immunization	Z23	20Aug2020	Nic
Encounter for Papanicolaou smear of cervix	Z12.4	04Nov2020	Liv
Encounter for vaccination	Z23	03Nov2020	Liv
Hepatocellular carcinoma	C22.0	21Oct2020	Liv
History of ear infection	Z86.69	21Aug2020	Liv
History of graft versus host disease	Z86.2	06Jul2020	Liv

Vital Signs Meds M

VitalSigns/Findings

1m 6m 1y 5y All

Item Name

Temperature

Systolic

Diastolic

Heart Rate

Pulse Quality

Respiration

Respiration Quality

Height

0-24 Length Percentile

2-20 Stature Percentile

Weight

0-24 Weight Percentile

2-20 Weight Percentile

BMI Calculated

BMI Percentile

BSA Calculated

Head Circumference

0-24 Head Circumference Percentile

O2 Saturation

80

175.26 cm

100.7 kg

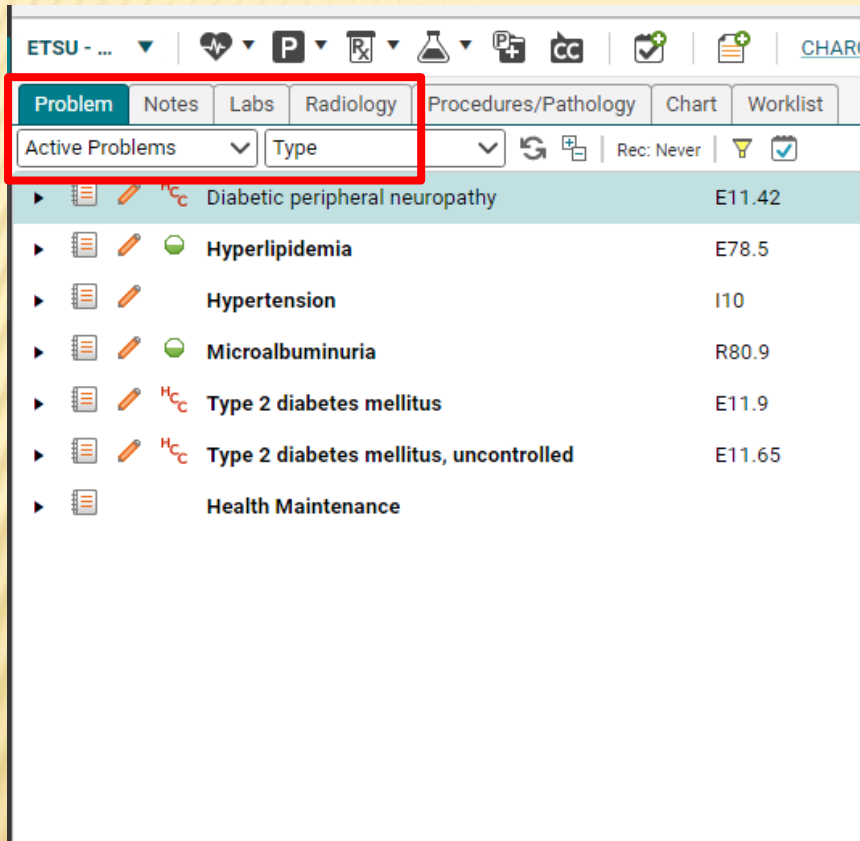
32.78kg/m2

2.16m2

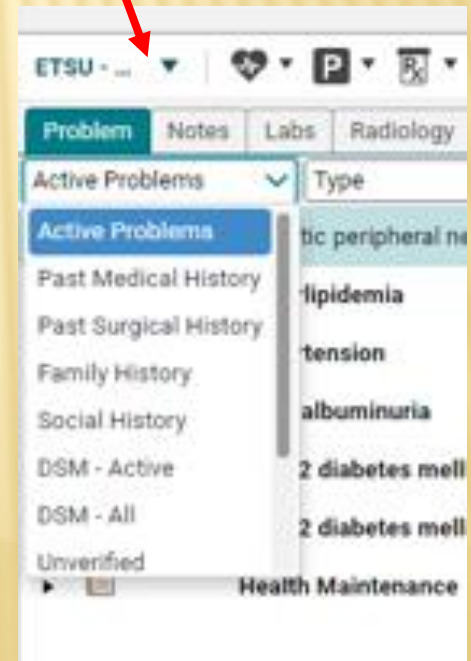
InfoButton New Edit **Resolve** Impression Reconcile Reconcile Hx New Edit Enter Result Print

Active Problems is the default. Use the dropdown to see PMH, PSH, PFH, and SoxHx.

PROBLEM DROPDOWN



Problems tab will now default to only Active Problems.
Use the dropdown arrow to show All Problems or to select a Problem list.



PROBLEM RECONCILIATION

The screenshot shows a medical software interface with a top navigation bar containing 'Commit' and 'Follow-Up' buttons. Below this is a toolbar with various medical icons and a 'CHARGE' button. The main area has tabs for 'Problem', 'Notes', 'Labs', 'Radiology', 'Procedures/Pathology', 'Chart', and 'Worklist'. The 'Problem' tab is active, showing a list of 'Active Problems' filtered by 'Alpha'. A red box highlights a yellow button labeled 'Rec: 12-Nov-2020' in the top right of the problem list. The list contains the following items:

Problem	ICD Code	Date/Time	Provider
Abnormal biliary HIDA scan	R94.8	26Apr2017	Spencer, J
Benign essential hypertension	I10	16Jul2020	Das, Deba
Benign thyroid adenoma	D34	12Nov2020	Obeidat, I
Biliary dyskinesia	K82.8	27Jun2017	Das, Debi
BMI 30.0-30.9,adult	Z68.30	16Jul2020	Das, Deba
Calf pain	M79.669	13Sep2019	Maiden, I
Calf swelling	M79.89	13Sep2019	Maiden, I

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.

CHART VIEW FILTERING

Notes, Labs, Radiology, Procedures/Pathology, Chart tabs have the ability to show 1 year, 3 years, 5 years, All.

1 year is system default and allows for fastest loading times.

You can toggle to alternate values and set your own default filter by clicking Make Default.

The screenshot displays the Chart View Filtering interface. At the top, there are tabs for Problem, Notes, Labs, Radiology, and Procedures/Pathology. The Labs tab is selected. Below the tabs, there is a dropdown menu for Labs, a dropdown for None, and a button for Make Default. The filter is set to 5 years, and the text 'Filtering: Last 5 years' is displayed. Below the filter, it shows '60 of 719 Chart Items (1 Invalid and 417 Audit Items) - Filters Applied'. The list of chart items includes:

- Comprehensive Metabolic Panel (CMP) - Done: 15-Dec-2020
- sLabs - Copeland, Rebecca; Enc: 03-Nov-2020 - Image Enc
- sLabs - Copeland, Rebecca; Enc: 26-Oct-2020 - Image Enc
- Culture, Urine - Done: 28-Sep-2020 - Copeland, Rebecca; Er
- CBC Automated Differential - Done: 28-Sep-2020 - Copeland
- Lipid Panel (Lipid Profile) - Done: 28-Sep-2020 - Copeland,
- Urinalysis w/ Microscopic (UA) - Done: 28-Sep-2020 - Copel
- Comprehensive Metabolic Panel (CMP) - Done: 28-Sep-2020
- Basic Metabolic Panel (BMP) - Done: 15-Sep-2020 - Mahbo
- Renal Function Panel - Done: 18-Jun-2020 - Mahboob, Rash
- Aldosterone - Done: 18-Jun-2020 - Mahboob, Rashid; Enc: 15
- Renin - Done: 18-Jun-2020 - Mahboob, Rashid; Enc: 15-Jun-
- sLabs - Copeland, Rebecca; Enc: 04-Jun-2020 - Form Enc

NOTES TAB

ETSU - ... | Commit | Follow-Up

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

All Notes by Spec... | None

1y 3y 5y All Default Filtering: All

68 of 495 Chart Items (2 Invalid and 314 Audit Items) - Filters Applied

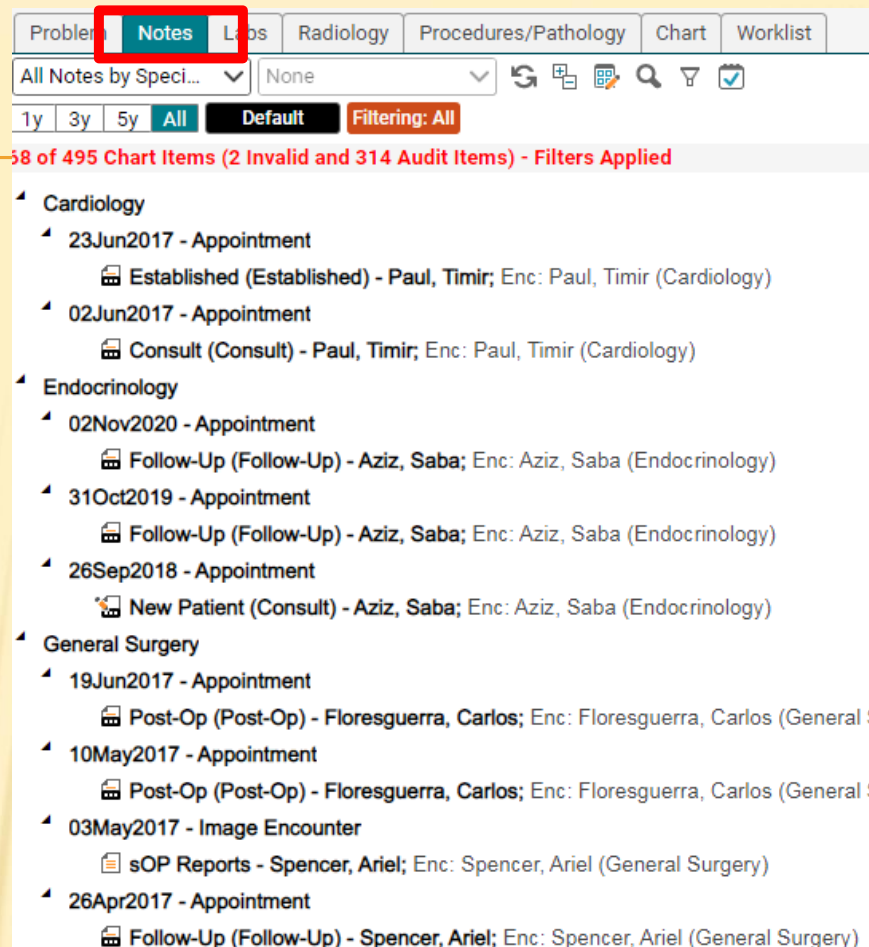
- Cardiology
 - 23Jun2017 - Appointment
 - Established (Established) - Paul, Timir; Enc: Paul, Timir (Cardiology)
 - 02Jun2017 - Appointment
 - Consult (Consult) - Paul, Timir; Enc: Paul, Timir (Cardiology)
- Endocrinology
 - 02Nov2020 - Appointment
 - Follow-Up (Follow-Up) - Aziz, Saba; Enc: Aziz, Saba (Endocrinology)
 - 31Oct2019 - Appointment
 - Follow-Up (Follow-Up) - Aziz, Saba; Enc: Aziz, Saba (Endocrinology)
 - 26Sep2018 - Appointment
 - New Patient (Consult) - Aziz, Saba; Enc: Aziz, Saba (Endocrinology)
- General Surgery
 - 19Jun2017 - Appointment
 - Post-Op (Post-Op) - Floresguerra, Carlos; Enc: Floresguerra, Carlos (General Surgery)
 - 10May2017 - Appointment
 - Post-Op (Post-Op) - Floresguerra, Carlos; Enc: Floresguerra, Carlos (General Surgery)
 - 03May2017 - Image Encounter
 - sOP Reports - Spencer, Ariel; Enc: Spencer, Ariel (General Surgery)
 - 26Apr2017 - Appointment
 - Follow-Up (Follow-Up) - Spencer, Ariel; Enc: Spencer, Ariel (General Surgery)
 - MSHA Adult Surgery Orders (MSHA Adult Surgery Orders) - Spencer, Ariel; Enc: Spencer..
 - Surgery - Scheduling Form - Spencer, Ariel; Enc: Spencer, Ariel (General Surgery)

View 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



The small “s” indicates that this is a scanned document
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 Procedures/Pathology Chart

Labs ▾ None ▾ ↺ + 📄 🔍

1y 3y 5y **All** **Default** **Filtering: All**

21 of 150 Chart Items (0 Invalid and 94 Audit Items) - Filters Applied

- 🧪 CBC Automated Differential - Done: 03-Nov-2020 - Aziz, Saba; Enc
- 🧪 Comprehensive Metabolic Panel (CMP) - Done: 03-Nov-2020 - Az
- 🧪 CBC Automated Differential - Done: 16-Oct-2020 - Shah, Rupal; En
- 🧪 Basic Metabolic Panel (BMP) - Done: 16-Oct-2020 - Shah, Rupal;
- 🧪 Culture, Blood 2 (Aerob / Anaerob) - Done: 08-Oct-2020 - Shah, R
- 🧪 Culture, Blood 1 (Aerob / Anaerob) - Done: 08-Oct-2020 - Shah, R
- 🧪 CBC Automated Differential - Done: 08-Oct-2020 - Shah, Rupal; En
- 🧪 Comprehensive Metabolic Panel (CMP) - Done: 08-Oct-2020 - Sh
- 🧪 Urinalysis w/ Microscopic (UA) - Done: 07-Oct-2020 - Shah, Rupal
- 🧪 Culture, Urine - Done: 07-Oct-2020 - Shah, Rupal; Enc: 05-Oct-202
- 🧪 Culture, Urine - Done: 29-Sep-2020 - Shah, Rupal; Enc: 29-Sep-20

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

Radiology

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

Imaging None

1y 3y 5y All Default Filtering: All

2 of 150 Chart Items (0 Invalid and 94 Audit Items) - Filters Applied

- sEchocardiogram - Smith, Steven; Enc: 28-Oct-2020 - Image Encounter - Smith, Steven
- Mammogram - Screening - Bilateral - Done: 09-Jan-2020 - Shah, Rupal; Enc: 09-01-2020 - Image Encounter - Shah, Rupal

Procedures

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

Procedures None

1y 3y 5y All Default Filtering: All

3 of 324 Chart Items (2 Invalid and 201 Audit Items) - Filters Applied

- sPathology Reports - Riley, Phillip; Enc: 27-Nov-2018 - Image Encounter - Riley, Phillip
- sCardiac/Medical Clearance - Riley, Phillip; Enc: 16-Nov-2018 - Image Encounter - Riley, Phillip
- sSurgery Scheduling - Riley, Phillip; Enc: 19-Oct-2016 - Image Encounter - Riley, Phillip

Chart

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

All by Section by S... None

Filtering: All

- Transition of Care (Transition of Care) - Shah, Rupal; Enc: 16-Oct-2020
- Acute (Acute) - Griwan, Akshit; Enc: 08-Oct-2020 - Appointment - Griwan, Akshit
- New Patient (New Patient) - Bookout, Eric; Enc: 08-Oct-2020 - Appointment - Bookout, Eric

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.

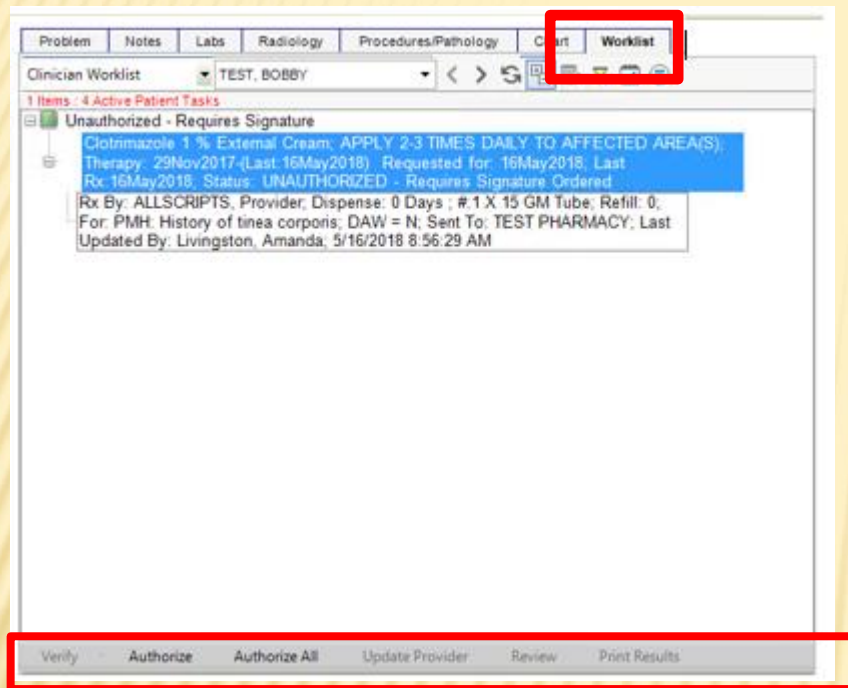
CHART TAB- SORT BY ENCOUNTER

The screenshot shows a medical chart interface with tabs for Problem, Notes, Labs, Radiology, Procedures/Pathology, Chart, and Worklist. The 'Chart' tab is selected. Below the tabs, there is a dropdown menu labeled 'Encounter' with a downward arrow, currently set to 'None'. A red arrow points to this dropdown. Below the dropdown, there are filters for '1y', '3y', '5y', 'All', 'Default', and 'Filtering: All'. Below the filters, a status bar indicates '56 of 150 Chart Items (0 Invalid and 94 Audit Items)'. The main list shows encounters sorted by date, with the most recent at the top:

- 18Nov2020 - Image Encounter
 - sMedical Release Forms - Shah, Rupal; Enc: Shah, Rupal (Internal Medicine)
- 03Nov2020 - Appointment
 - New Patient (Consult) - Aziz, Saba; Enc: Aziz, Saba (Endocrinology)
 - CBC Automated Differential - Done: 03-Nov-2020 - Aziz, Saba; Enc: Aziz, Saba
 - Comprehensive Metabolic Panel (CMP) - Done: 03-Nov-2020 - Aziz, Saba
- 31Oct2020 - Image Encounter
 - sSelf Check Blood Sugar - Aziz, Saba; Enc: Aziz, Saba (Endocrinology)
- 28Oct2020 - Image Encounter
 - sEchocardiogram - Smith, Steven; Enc: Smith, Steven (Cardiology)
- 23Oct2020 - Form Encounter
 - sRef Physician_Urology - Shah, Rupal; Enc: Shah, Rupal (Internal Medicine)
- 16Oct2020 - Chart Update
 - Results Note (Results Note) - Shah, Rupal; Enc: Shah, Rupal (Internal Medicine)
- 16Oct2020 - Appointment
 - Transition of Care (Transition of Care) - Shah, Rupal; Enc: Shah, Rupal (Internal Medicine)
 - CBC Automated Differential - Done: 16-Oct-2020 - Shah, Rupal; Enc: Shah, Rupal

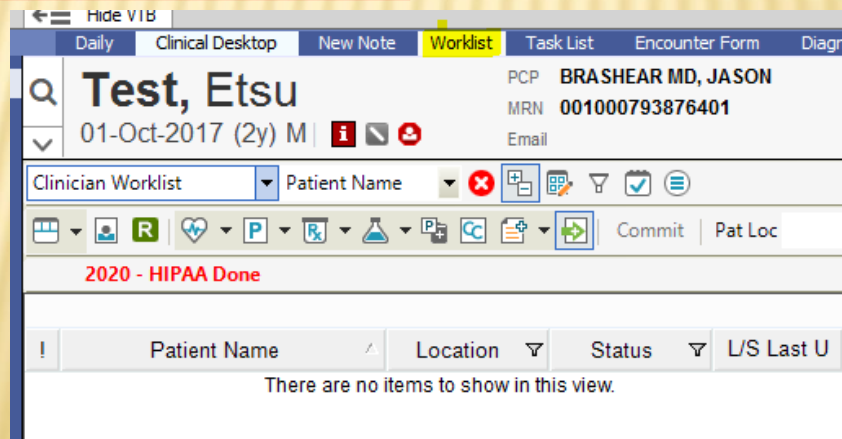
Changing the dropdown to Encounter, sorts the Chart tab by date with the most recent information on top.

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

	Select	21 Sep 2017 8:31 AM	16 Jun 2017 3:26 PM	18 Oct 2016 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

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)
8. Print the Medications list. (You may need to use the arrow to see the option.)



RECONCILING MEDICATIONS

The screenshot shows a medical software interface with the 'Meds' tab selected. The 'Current Medications' section displays a list of medications. A yellow button labeled 'Rec: 15Aug2013' is highlighted with a red box. The list of medications includes:

- 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.

MED ACTIONS

- ✗ Med flowsheet has been updated to Med Actions.
- ✗ Green check mark indicates patient is taking medication.
- ✗ Red dash indicates patient is non-compliant, not taking medication.
- ✗ Red dash does not remove med from Current Meds to Past Meds.
- ✗ Dropdown box allows a not-taking reason.
- ✗ R D/C allows to record discontinue from this tab and does move med from Current Meds to Past Meds.
- ✗ 3 dots  opens additional menu.
- ✗ Can also  right click for an additional menu.
- ✗ Changes must be Committed.
- ✗ This can be used as part of the medication reconciliation.
- ✗ Please work with medical directors for each specialty to determine best practices for your team.
- ✗ Right now, this is a physician and nurse practitioner tab, not a nursing tab.

MED ACTIONS SCREENSHOT

Vital Signs	Meds	Med Actions	Orders	Allergies	Immunizations	Flowsheets	HMP/Reminders	Growth Chart
Med Actions ▼ Problem ▼ Alpha ▼ Rec: Done								
Record PDMP Consult Select non-consult reason ▼ Type non-consult reason History								
137.16 cm 15-Dec-2020 45.36 Kg 15-Dec-2020 1.29 BSA <input type="checkbox"/> Brand/Generic								
Current Meds			Last Rx	Taking				
Acute upper respiratory infection								
▶ Hydrocod Polst-CPM Polst ER 10-8 MG/5...			26-Jun-2019	out	<input type="text"/>		Renew R D/C	⋮
Costochondral pain								
▶ Diclofenac Sodium 1 % GEL			14-Aug-2019	out	<input type="text"/>		Renew	
Esophageal reflux								
▶ Pantoprazole Sodium 40 MG Oral Tablet D...			30-Dec-2019	out	Problem Swallowing		Renew	
Health Maintenance								
▶ Shingrix 50 MCG Intramuscular Suspension...			13-Sep-2018	out	<input type="text"/>		Renew	
Hypertension								
▶ amLODIPine Besylate 5 MG Oral Tablet			06-Oct-2020	out	<input type="text"/>		Renew	
▶ cloNIDine HCl - 0.1 MG Oral Tablet			26-Jun-2019	out	<input type="text"/>		Renew	
▶ Losartan Potassium 50 MG Oral Tablet			14-Sep-2020	out in 5wk	<input type="text"/>		Renew	
▶ Metoprolol Succinate ER 50 MG Oral Tabl...			22-May-2020	out in 14d	<input type="text"/>		Renew	
▶ Spironolactone 25 MG Oral Tablet			15-Dec-2020	out	<input type="text"/>		Renew	
PMH: History of cough								

New...
 View
 Edit
 Renew
 Renew with changes
 Continue
 Complete Today
 Complete On
 Order D/C
 Record D/C
 Temporary Deferral
 Permanent Deferral
 Enter in Error
 Print Medication List

ORDERS TAB

Vital Signs Meds Med Actions **Orders** Allergies Immunizations Flowsheets HMP/Ref

Current Orders Problem Alpha

Record PDMP Consult Select non-consult reason Type non-consult reason

- Acute amebic rectocolitis, AKI (acute kidney injury)
 - CT Abdomen & Pelvis - wwo cont Status:Hold For - Scheduling; Requested for:21May2021;
- Type 2 diabetes mellitus, uncontrolled
 - CBC Automated Differential; Status:Active
 - Comprehensive Metabolic Panel (CMP) .020;
 - Hemoglobin A1C; Status:Active; Request
 - Lipid Panel reflex Direct LDL; Status:Active; Requested for:03Dec2020;
 - Microalbumin / Creatinine Ratio, Urine (Random); Status:Active; Requested for:03Dec2020;

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 Procedures Follow Up/Referral Instructions Cancel

ALLERGIES TAB

The screenshot shows the 'Allergies' tab selected in a medical software interface. The top navigation bar includes tabs for Vital Signs, Meds, Med Actions, Orders, Allergies (highlighted with a red box), Immunizations, and Flowsheets. Below the navigation bar, there are filters for 'All' (dropdown), 'Type' (dropdown), a refresh icon, a plus icon, and a 'Rec: 05-Mar-2020' button (highlighted with a red box) next to a calendar icon. The main content area is divided into two sections: 'Medication' and 'Non-Medication'. Under 'Medication', there is a red warning icon next to the text 'Shellfish-derived Products : Anaphylaxis;', followed by 'Aspirin TABS' and 'Keflex TABS'. Under 'Non-Medication', there are 'Peanuts' and 'Shellfish' listed.

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

Vital Signs Meds Med Actions Orders Allergies **Immunizations** Flowsheets HMP/Reminders Growth Chart

Immunizations Ser... All Statuses

☐ Show Age ☐ Last Given

	1	2	3	4	5
DTP/DTaP (4)	27-Sep-2019	26-Nov-2019	27-Jan-2020	07-Aug-2020	
Hepatitis A (1)	07-Aug-2020				
Hepatitis B (4)	24-Jul-2019	27-Sep-2019	26-Nov-2019	27-Jan-2020	
HIB (3)	27-Sep-2019	27-Dec-2019	07-Aug-2020		
HPV (0)					
Influenza (3)	27-Jan-2020	13-Mar-2020	29-Sep-2020		
Meningococcal (0)					
MMR (1)	07-Aug-2020				
PCV (4)	27-Sep-2019	26-Nov-2019	27-Jan-2020	07-Aug-2020	
PPSV (0)					
Polio (3)	27-Sep-2019	26-Nov-2019	27-Jan-2020		
Rotavirus (3)	27-Sep-2019	26-Nov-2019	27-Jan-2020		
Td/DT (0)					
Varicella (1)	07-Aug-2020				

Immun Immun Hx Edit **Print** Fax

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

Vital Signs Meds Med Actions Orders Allergies Immunization **Flowsheets** CMP/Reminders Growth Chart

FlowSheets ACEs Screener Family Medicine

1m 6m 1y 5y All

Item Name

- ACEs - Primary Caregiver
- ACEs Impact of Childhood
- ACEs Highest Caregiver
- ACEs Child Section 1 Score
- ACEs - Child Section 2A
- ACEs - Child Section 2B

ACEs Screener

- ADM Clinic Flowsheet
- Alcohol screening questionnaire (AUDIT)
- Anticoagulation Flowsheet
- Auditory function Screening
- Care Plan
- CHF Flowsheet
- Chronic Pain Management Flowsheet

New Column Enter Result Edit Print

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

Vital Signs Meds Med Actions Orders Allergies Immunizations Flowsheets HMP/Reminders Growth Chart

Health Management Problem

🔄 📄 📊 📅

Item	Schedule	Select	Goal	Most Recent	Date	To Do	Incomplete
<div>▲ AKI (acute kidney injury)</div> <div>▶ Basic Metabolic Panel (BMP)</div>		<input type="checkbox"/>		Complete	03No...		
<div>▲ Dysuria</div> <div>▶ Culture, Blood 1 (Aerob / Anaer...</div>		<input type="checkbox"/>		Complete	080c...		
▶ Culture, Urine		<input type="checkbox"/>		Complete	070c...		
▶ Urinalysis Reflex Microscopic (...		<input type="checkbox"/>		Complete	070c...		
▶ Urinalysis w/ Microscopic (UA)		<input type="checkbox"/>		Complete	070c...		
▶ Hyperlipidemia		<input type="checkbox"/>					
<div>! ▶ Hypertension</div>		<input type="checkbox"/>					
▶ Obesity (BMI 30.0-34.9)		<input type="checkbox"/>					
▶ Osteopenia		<input type="checkbox"/>					
▶ Osteopenia of multiple sites		<input type="checkbox"/>					
▶ Rash		<input type="checkbox"/>					
<div>! ▶ Type 2 diabetes mellitus, uncon...</div>		<input type="checkbox"/>					
<div>! ▶ Uncontrolled type 2 diabetes m...</div>		<input type="checkbox"/>					
<div>! ▶ Vaginal candidiasis</div>		<input type="checkbox"/>					
<div>▲ Vaginal dryness, menopausal</div> <div>Estradiol 0.1 MG/GM Vaginal Cr...</div>		<input type="checkbox"/>					
▶ Medications not linked to a problem		<input type="checkbox"/>					
▶ Orders not linked to a problem		<input type="checkbox"/>					

HMP—Health Management Profile

This table keeps track of all items t with a particular diagnosis. Basically in table format. At a quick glance, y was ordered, if it is due or near due when last ordered.

You can also set goals for various i lab items, etc.

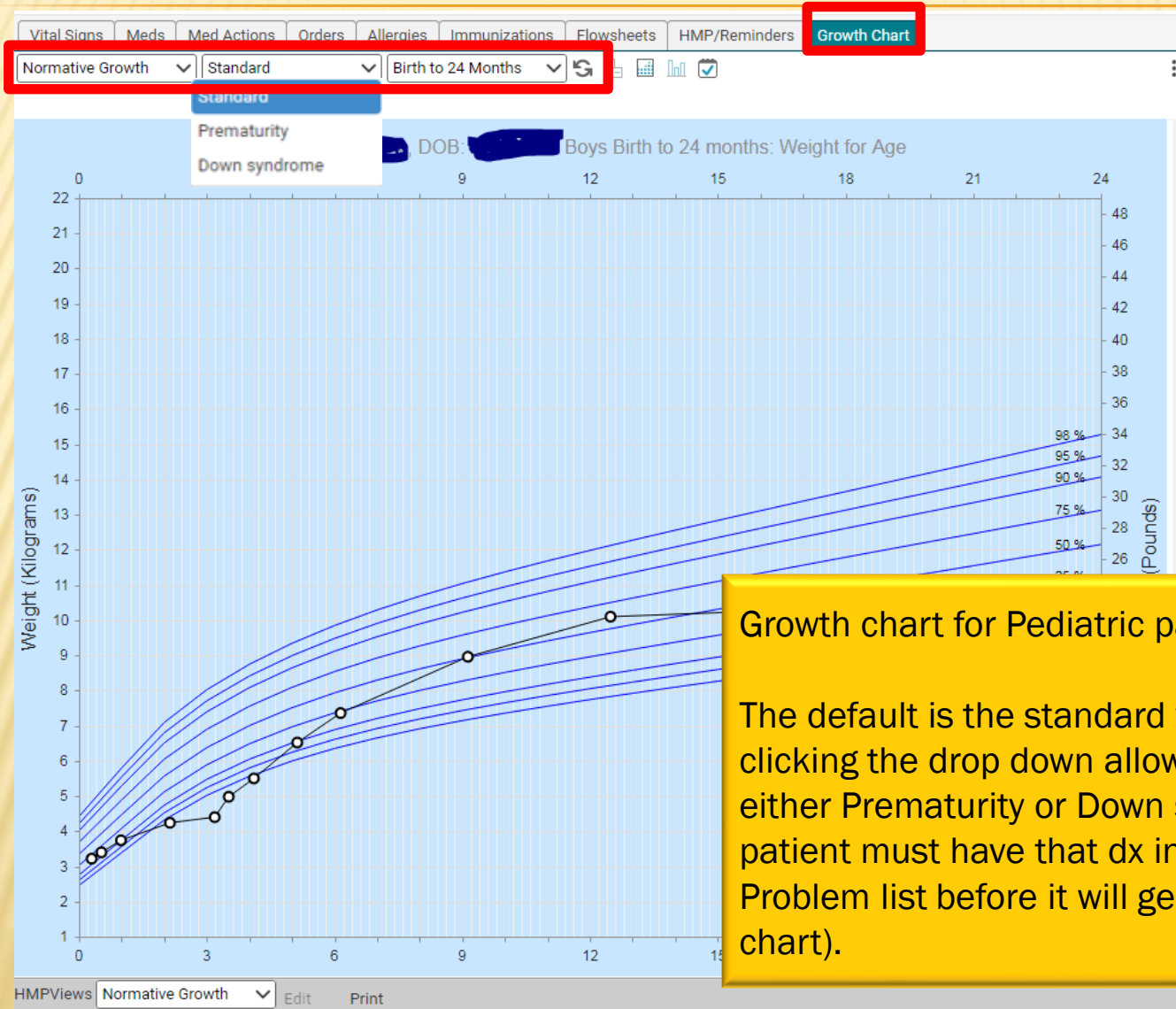
Order Create Reminder Edit Last Done Done Today Renew With Changes Refer ▼ Record D/C

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).



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PLEASE PROCEED TO THE NEXT MODULE – DOCUMENTING HISTORY