



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

**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

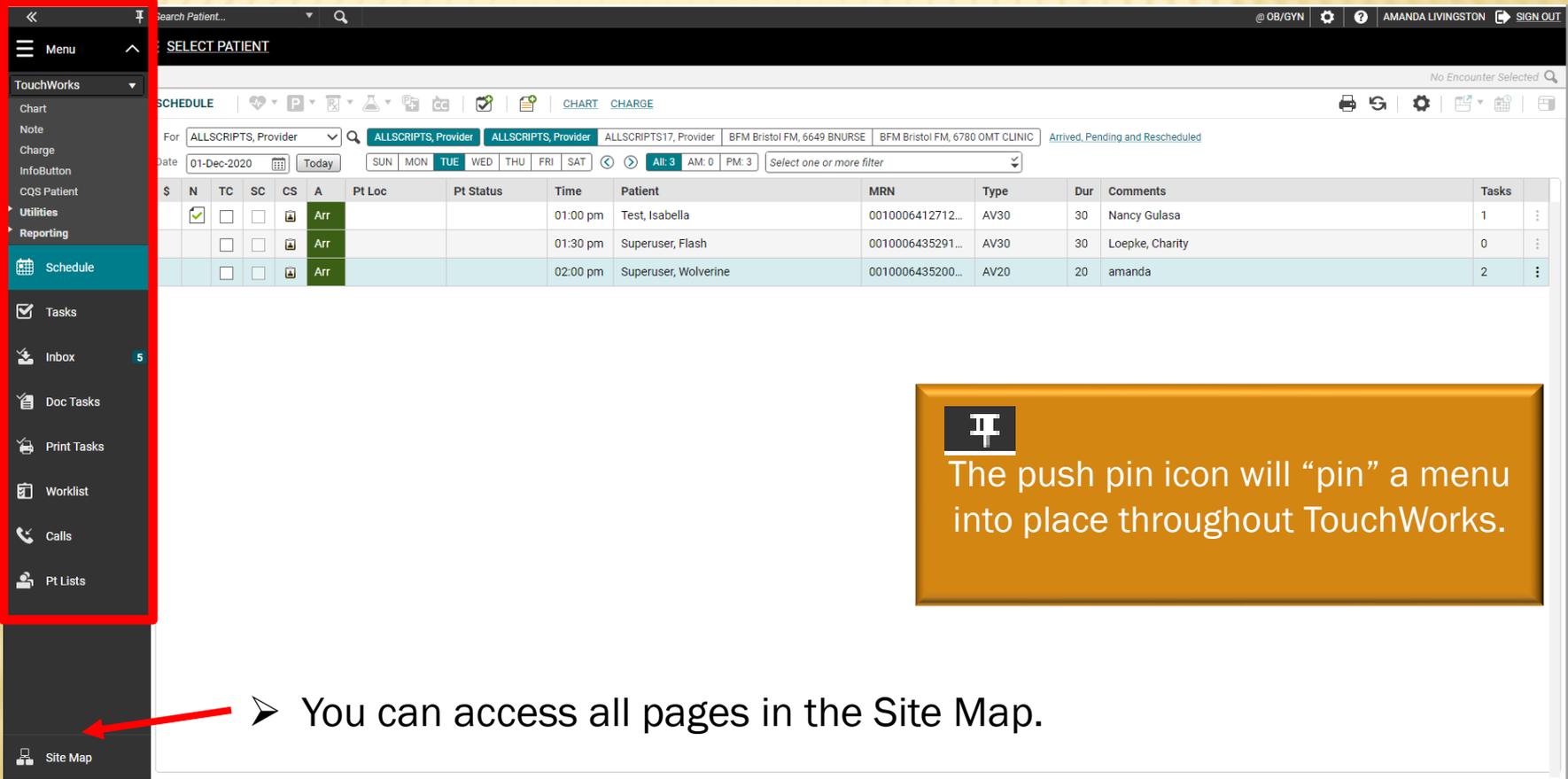
NHC Bristol  
245 North St, Bristol, VA 24201

**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 .



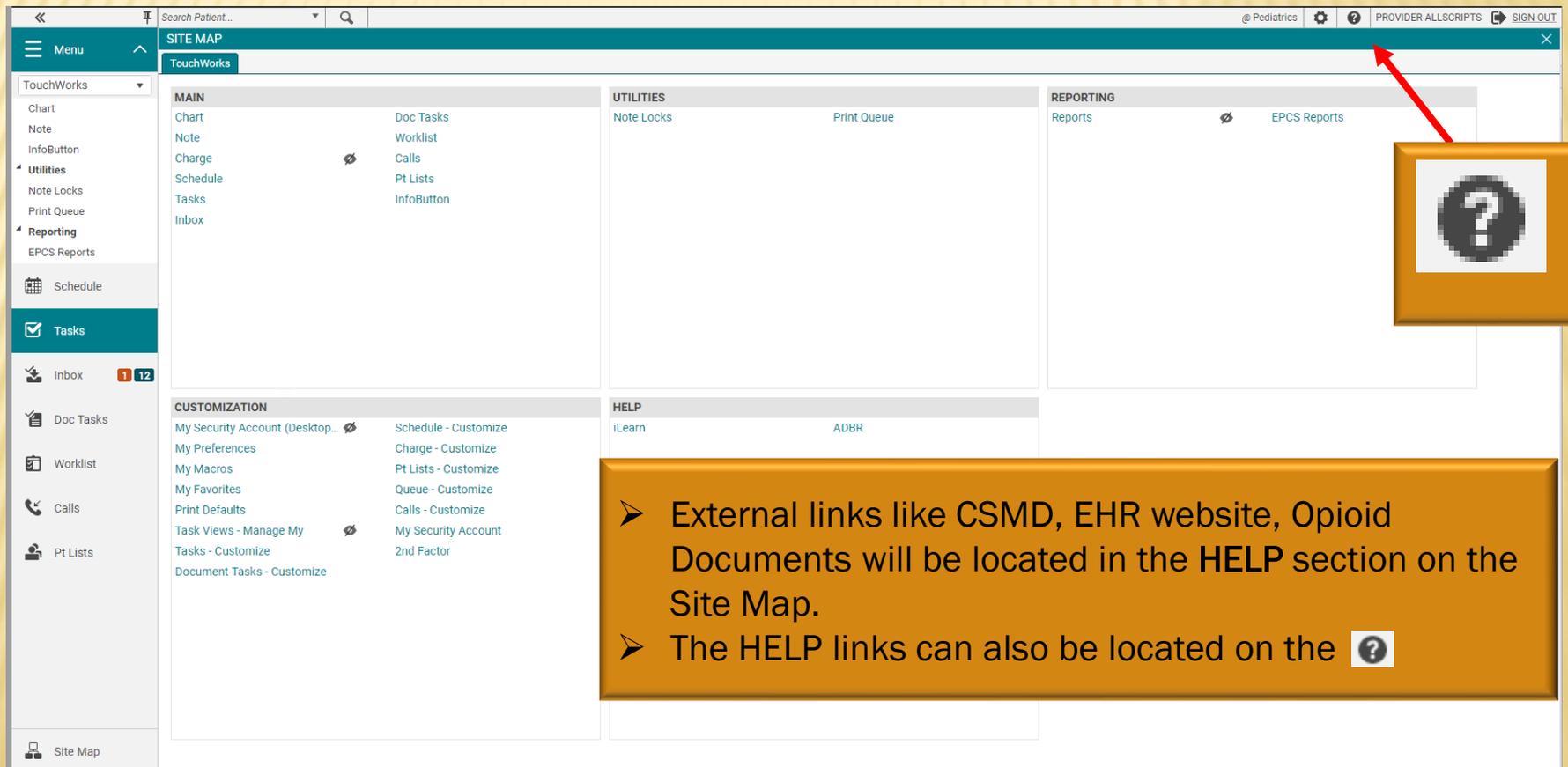
The screenshot displays the Allscripts TouchWorks EHR interface. On the left, a dark grey menu bar contains various navigation options. A red rectangular box highlights the menu items from 'TouchWorks' down to 'Pt Lists'. The 'Schedule' item is highlighted in teal and has a push pin icon next to it. Below the menu bar, the main content area shows a patient selection screen with a search bar and a table of scheduled appointments. The table has columns for status (S, N, TC, SC, CS, A), location (Pt Loc), status (Pt Status), time, patient name, MRN, type, duration, and comments. The first three rows of the table are visible, showing appointments for 'Test, Isabella', 'Superuser, Flash', and 'Superuser, Wolverine'. At the bottom left, a 'Site Map' icon is visible, with a red arrow pointing to it and a callout box explaining its function.

➤ You can access all pages in the Site Map.

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

# 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 navigation bar includes a search field, user information (@Pediatrics), and a 'PROVIDER ALLSCRIPTS' link with a question mark icon. The main content area is organized into five sections:

- MAIN:** Chart, Note, Charge, Schedule, Tasks, Inbox, Doc Tasks, Worklist, Calls, Pt Lists, InfoButton.
- UTILITIES:** Note Locks, Print Queue.
- REPORTING:** Reports, EPCS Reports.
- CUSTOMIZATION:** My Security Account (Desktop...), My Preferences, My Macros, My Favorites, Print Defaults, Task Views - Manage My, Tasks - Customize, Document Tasks - Customize, Schedule - Customize, Charge - Customize, Pt Lists - Customize, Queue - Customize, Calls - Customize, My Security Account, 2nd Factor.
- HELP:** iLearn, ADBR.

A red arrow points to a question mark icon in the top right corner of the interface, which is highlighted in a yellow box. A yellow callout box with a question mark icon is also present in the bottom right corner of the screenshot.

- External links like CSMD, EHR website, Opioid Documents will be located in the **HELP** section on the Site Map.
- The **HELP** links can also be located on the 

# HIDING AND SHOWING PAGES

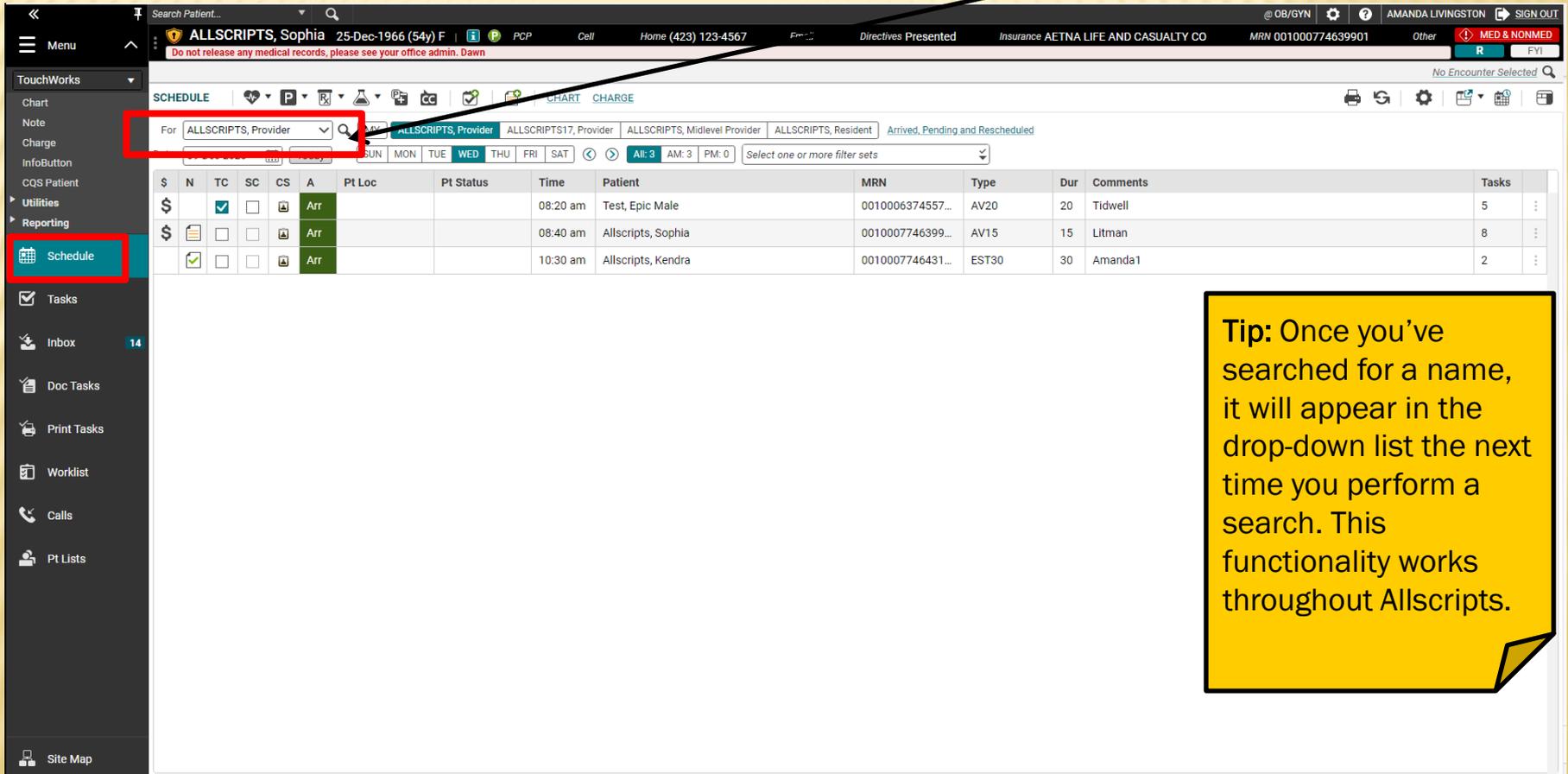
The screenshot displays a software interface with a sidebar menu on the left and a main content area. The sidebar menu includes sections like TouchWorks, Utilities, Reporting, and Customization. The main content area is divided into several panels: MAIN, UTILITIES, REPORTING, and CUSTOMIZATION. The 'Note' page in the MAIN panel is highlighted, and a tooltip shows a 'Show in Menu' option. A callout box points to a 'hidden from menu' icon (a circle with a diagonal line) next to the 'Note' page. Another callout box points to an 'options' icon (three vertical dots) next to the 'Note' page, with the text 'To show a page in the Action Bar, Click the options icon and select Show in 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.



The screenshot shows the Allscripts SCHEDULE interface. The 'Provider' field is highlighted with a red box and a magnifying glass icon. The 'Schedule' menu item in the left sidebar is also highlighted with a red box. A yellow tip box is present in the bottom right corner.

\$	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

**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.

# 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" with a search bar at the top containing the text "allscripts" and a "Search" button. Below the search bar is a list of provider names. The entry "ALLSCRIPTS, Provider" is highlighted in a dark teal color. At the bottom right of the window, there are "OK" and "Cancel" buttons, with the "OK" button highlighted in a red box.

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

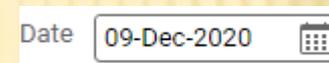
# SCHEDULE

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

1. Click on the day of the week



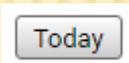
2. Click on the calendar icon next to the Date field



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

A screenshot of a scheduling software interface. A red rectangular box highlights the top navigation area, which includes the 'SCHEDULE' title, various icons (heart, P, Rx, flask, etc.), and search filters. Below the navigation area, there is a date field set to '09-Dec-2020', a 'Today' button, and a day selection menu with 'WED' selected. Below these are three rows of schedule entries with columns for status, time, patient name, MRN, type, and duration.

	N	TS	SS	CC	A	PT Loc	PT Status	Time	Patient	MRN	Type	Dur
\$		<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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Arr			10:30 am	Allscripts, Kendra	0010007746431...	EST30	30

# SCHEDULE ICONS

SCHEDULE | | | | | | | | | CHART CHARGE

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

Date 01-Dec-2020 Today SUN MON **TUE** WED THU FRI SAT All: 3 AM: 0 PM: 3 *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 checked="" 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

Arr  
Pen

**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 patient banner is highlighted with a red border. It contains the following information: a profile picture of a man, the name 'TEST, Etsu', birth date '01-Oct-2017 (3y) M', and contact information for 'PCP BRASHEAR MD, JASON' including a cell phone number '(423) 888-1012' and email 'test.test@email.com'. It also lists insurance as 'UNITED HEALTHCARE MEDICARE ADV 87726' and MRN '001000793876401'. A red warning bar below the banner reads '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 'CHARGE' tabs. A search bar shows 'ALLSCRIPTS, Provider' selected. A date filter is set to '09-Sep-2020' with a weekly calendar view. A table below shows a single appointment for 'Test, Etsu' at '09:00 am' with MRN '0010007938764...' and duration '15'. The table has columns for status, location, status, time, patient name, MRN, type, duration, comments, and tasks.

\$	N	TC	SC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Comments	Tasks
					Arr			09:00 am	Test, Etsu	0010007938764...	AV15	15	Crystal	14

# 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

>>

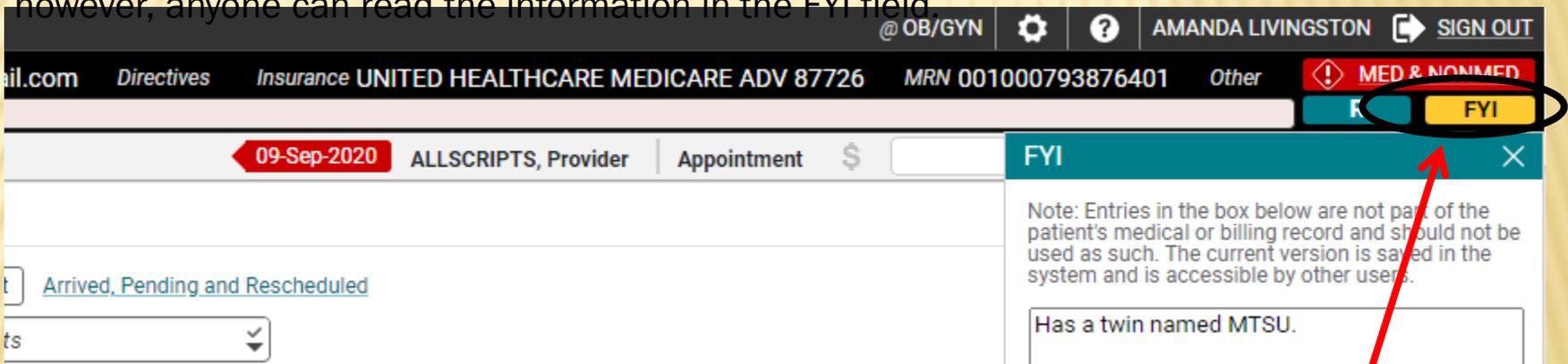
Refine Search

Patient	S	Age	DOB
▼ <a href="#">Allscripts, Alan</a>	M	18y	17-Apr-2003
▼ <a href="#">Allscripts, Allison</a>	F	25y	10-Mar-1996
▼ <a href="#">Allscripts, Amber</a>	F	55y	17-Jun-1965
▼ <a href="#">Allscripts, Betsy</a>	F	75y	18-Mar-1946
▼ <a href="#">Allscripts, Brad</a>	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	<a href="#">Delete</a>
Review before release of medical records	Livingston, Amanda	27-Oct-2020	<a href="#">Delete</a>

[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

Add Alert

**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**

Enter free text

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.

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"/>	<input type="checkbox"/>	★	Ext	MORRIS MD	LAWRENCE		Endocrinology
<input type="checkbox"/>	<input type="checkbox"/>	★	Ext	MONTENEGRO MD	FRANKLIN		Endocrinology
<input type="checkbox"/>	<input type="checkbox"/>	★	Ext	BEASEY MD	MATTHEW		Endocrinology
<input type="checkbox"/>	<input type="checkbox"/>	★	Ext	FOWLER MD	MICHAEL		Endocrinology
<input type="checkbox"/>	<input type="checkbox"/>	★	Ext	MIERS MD	WENDELL		Endocrinology
<input type="checkbox"/>	<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

Commit 09-Sep-2020 ALLSCRIPTS, F

SCHEDULE | CHART CHARGE

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

Commit

ETSU - ... | CHARGE

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist Vital Signs Meds

Active Problems Alpha Rec: 21-Oct-2020

Abnormal rapid eye movement sleep	G47.8	050
ADHD	F90.9	26
Advanced diabetic maculopathy with retino...	E08.311	050
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

Item Name  
Temperature  
Systolic  
Diastolic  
Heart Rate  
Pulse Quality  
Respiration

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 a medical chart for a patient named TEST, Etsu, born 01-Oct-2017 (3y M). The interface includes a header with patient details, a clinical toolbar with various icons, and two main components. Component 1 is a list of medical conditions, and Component 2 is a table of vital signs.

**Clinical Toolbar**

**Component 1**

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

**Component 2**

# 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	ICD-10 Code	Date	Provider
Abnormal rapid eye movement sleep	G47.8	05Oct2020	Gar
ADHD	F90.9	26Apr2021	Livi
Advanced diabetic maculopathy with retino...	E08.311	05Oct2020	Gar
Autism	F84.0	08Dec2020	Liv
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

09-Sep-2020 ALLSCRIPTS, Provider Appointment \$

ETSU - ... CHARGE

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

Active Problems Alpha Rec: 21-Oct-2020

Problem	ICD-9	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	Livi

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

09-Sep-2020 ALLSCRIPTS, Provider Appointment

ETSU - ... CHARGE

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

Active Problems Alpha Rec: 21-Oct-2020

Problem	ICD-9	Start 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

The screenshot shows the ETSU medical software interface. The 'Problem' tab is selected, and the 'Active Problems' dropdown is open, showing a list of medical conditions. A red box highlights the 'Problem' tab and the 'Active Problems' dropdown.

Problem	Type
Diabetic peripheral neuropathy	E11.42
Hyperlipidemia	E78.5
Hypertension	I10
Microalbuminuria	R80.9
Type 2 diabetes mellitus	E11.9
Type 2 diabetes mellitus, uncontrolled	E11.65
Health Maintenance	

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

A close-up screenshot of the 'Active Problems' dropdown menu. A red arrow points to the dropdown arrow in the main interface. The dropdown menu is open, showing a list of options: Active Problems, Past Medical History, Past Surgical History, Family History, Social History, DSM - Active, DSM - All, and Unverified. The 'Active Problems' option is highlighted in blue.

# PROBLEM RECONCILIATION

The screenshot shows a medical software interface with a list of active problems. The interface includes a top navigation bar with 'Commit' and 'Follow-Up' buttons, and a toolbar with various icons. Below the toolbar, there are tabs for 'Problem', 'Notes', 'Labs', 'Radiology', 'Procedures/Pathology', 'Chart', and 'Worklist'. The 'Problem' tab is active, and the list is filtered by 'Alpha'. A yellow button labeled 'Rec: 12-Nov-2020' is highlighted with a red box. The list of problems includes:

Problem	ICD Code	Date	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, Deba
BMI 30.0-30.9,adult	Z68.30	16Jul2020	Das, Deba
Calf pain	M79.669	13Sep2019	Maiden, T
Calf swelling	M79.89	13Sep2019	Maiden, T

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.

Problem Notes Labs Radiology Procedures/Pathology

Labs None

1y 3y 5y All Make Default Filtering: Last 5 years

60 of 719 Chart Items (1 Invalid and 417 Audit Items) - Filters Applied

- 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: 1:
- Renin - Done: 18-Jun-2020 - Mahboob, Rashid; Enc: 15-Jun-
- sLabs - Copeland, Rebecca; Enc: 04-Jun-2020 - Form Enc

# NOTES TAB

The screenshot shows a medical software interface with the following elements:

- Top bar: "Commit" button, "Follow-Up" checkbox, and "CHARGE" link.
- Navigation tabs: "Problem", "Notes" (highlighted with a red box), "Labs", "Radiology", "Procedures/Pathology", "Chart", and "Worklist".
- Filtering: "All Notes by Speci..." dropdown, "None" selection, and "Filtering: All" button.
- Summary: "68 of 495 Chart Items (2 Invalid and 314 Audit Items) - Filters Applied".
- Chart Items List:
  - 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)
- Bottom toolbar: "View", "Note", "Edit" (highlighted with a red box), "Print", "Fax", and "Task".

The 2<sup>nd</sup> 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

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

All Notes by Speci... None

1y 3y 5y All Default Filtering: All

58 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 S
  - 10May2017 - Appointment
    - Post-Op (Post-Op) - Floresguerra, Carlos; Enc: Floresguerra, Carlos (General S
  - 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)



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

The screenshot displays a medical notes application interface. On the left, the 'Note Viewer' window shows a patient's information (Owner: Saba Aziz, Status: Final) and a list of notes. The selected note is dated 26 Aug 2020 and contains a 'Review of Systems' section. The main window is in 'Edit Mode', showing a detailed 'Review of Systems' form for a 'COMPLETE-FEMALE' patient. The form includes sections for Constitutional, Head and Face, Eyes, ENT, Cardiovascular, and Respiratory systems, each with a grid of symptoms and checkboxes (e.g., 'Y N' for Yes/No). A toolbar at the top right includes icons for 'Add Note Form', 'Add Text Entry', 'Add Image', and 'CHART CHARGE'. The bottom of the screen features an 'Annotate' toolbar with options like 'Edit', 'Audit', 'Document Hx', 'Task', 'Attach As Result', 'Print', 'Fax', 'Invalidate', 'Close', and 'Sign'. The status bar at the bottom indicates 'View Output', 'Sign', 'Final', 'Author', 'Recompile', 'Save & Close', 'Save', and 'Close'.

**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

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, S
- Mammogram - Screening - Bilateral - Done: 09-Jan-2020 - Shah, Rupal; Enc: 09-

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

## Chart

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

All by Section by S... None

Encounter Problem Provider Section Specialty

All by Section by Sub-Section

Imaging Labs

Filtering: All

and 94 Audit Items)

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

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.

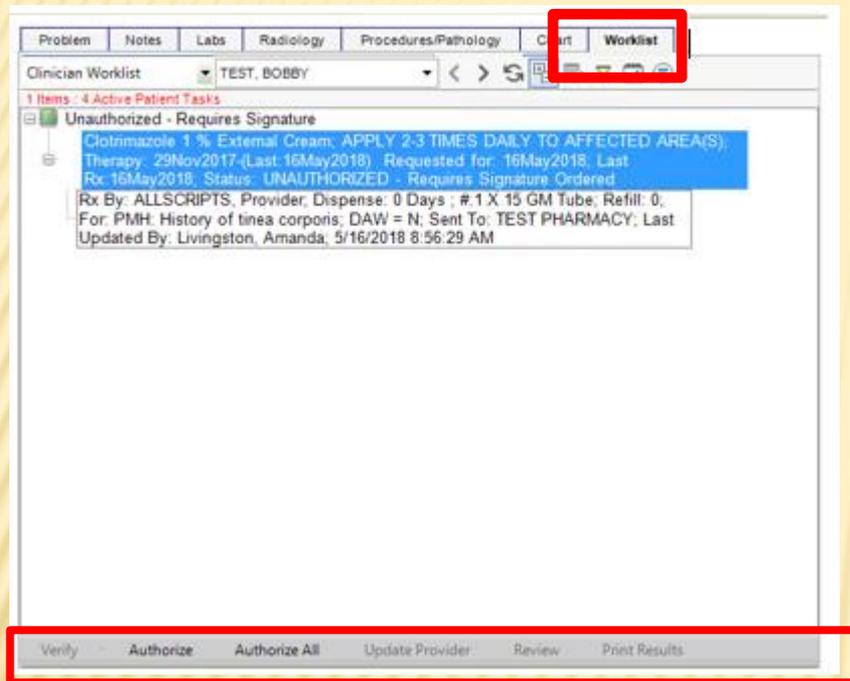
# CHART TAB- SORT BY ENCOUNTER

The screenshot shows a medical chart interface with several tabs: Problem, Notes, Labs, Radiology, Procedures/Pathology, Chart, and Worklist. The 'Chart' tab is active. Below the tabs, there is a dropdown menu for 'Encounter' currently set to 'None'. A red arrow points to this dropdown. Below the dropdown are filters for '1y', '3y', '5y', 'All', 'Default', and 'Filtering: All'. The main content area displays a list of 56 chart items, sorted by date from most recent to oldest. The items include:

- 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

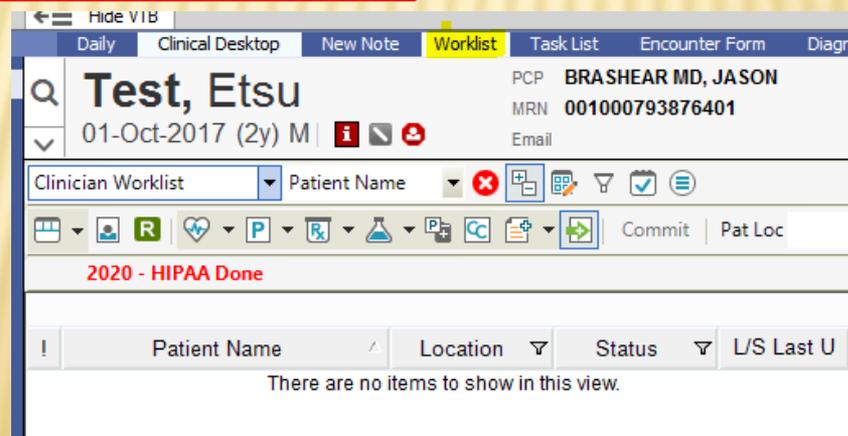
Changing the dropdown to Encounter, sorts the Chart tab by date with the most recent information on top.

# 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

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

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

Current Meds None Alpha [Refresh] [Print]

Record PDMP Consult Select non-consult reason History

Vital Signs **Meds**

Current Medications  
Current Medications  
Past Medications  
All Meds

ALPRAZolam 0.5 MG Oral Tab (Evaluate:04Jul2019); Last Rx  
Flintstones Complete CHEW;  
Humulin R U-500 KwikPen S  
Nitrofurantoin Monohydrate Macro (Evaluate:03Sep2019); Last Rx  
Singulair 4 MG Oral Tablet Ch  
ACTIVE Recorded  
Tylenol Extra Strength 500 MG TABS; Therapy: (Recorded:17Jun2020) to; Status: ACTIVE Recorded

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.)

InfoButton New Renew with changes Order D/C Record D/C

Complete Today  
Reconcile  
Print Medication List  
Drug Ed

# 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.

# 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 | Brand/Generic

Current Meds	Last Rx	Taking	
<b>Acute upper respiratory infection</b>			
<ul style="list-style-type: none"> <li>Hydrocod Polst-CPM Polst ER 10-8 MG/5...</li> </ul>	26-Jun-2019 <b>out</b>	<input type="checkbox"/>	<input type="button" value="Renew"/> <input type="button" value="RD/C"/>
<b>Costochondral pain</b>			
<ul style="list-style-type: none"> <li>Diclofenac Sodium 1 % GEL</li> </ul>	14-Aug-2019 <b>out</b>	<input checked="" type="checkbox"/>	<input type="button" value="Renew"/>
<b>Esophageal reflux</b>			
<ul style="list-style-type: none"> <li>Pantoprazole Sodium 40 MG Oral Tablet D...</li> </ul>	30-Dec-2019 <b>out</b>	<input checked="" type="checkbox"/> Problem Swallowing	<input type="button" value="Renew"/>
<b>Health Maintenance</b>			
<ul style="list-style-type: none"> <li>Shingrix 50 MCG Intramuscular Suspension...</li> </ul>	13-Sep-2018 <b>out</b>	<input type="checkbox"/>	<input type="button" value="Renew"/>
<b>Hypertension</b>			
<ul style="list-style-type: none"> <li>amLODIPine Besylate 5 MG Oral Tablet</li> </ul>	06-Oct-2020 <b>out</b>	<input type="checkbox"/>	<input type="button" value="Renew"/>
<ul style="list-style-type: none"> <li>cloNIDine HCl - 0.1 MG Oral Tablet</li> </ul>	26-Jun-2019 <b>out</b>	<input type="checkbox"/>	<input type="button" value="Renew"/>
<ul style="list-style-type: none"> <li>Losartan Potassium 50 MG Oral Tablet</li> </ul>	14-Sep-2020 out in 5wk	<input type="checkbox"/>	<input type="button" value="Renew"/>
<ul style="list-style-type: none"> <li>Metoprolol Succinate ER 50 MG Oral Tabl...</li> </ul>	22-May-2020 out in 14d	<input type="checkbox"/>	<input type="button" value="Renew"/>
<ul style="list-style-type: none"> <li>Spirolactone 25 MG Oral Tablet</li> </ul>	15-Dec-2020 <b>out</b>	<input type="checkbox"/>	<input type="button" value="Renew"/>
<b>PMH: History of cough</b>			

- 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/Ren

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 'Allergies' tab is highlighted with a red box. Below the tabs, there is a search bar with 'All' selected, a 'Type' dropdown menu, a refresh icon, and a yellow button labeled 'Rec: 05-Mar-2020' with a checkmark icon, also highlighted with a red box. 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

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

The screenshot displays the EHR interface with the 'Flowsheets' tab highlighted in a red box. The navigation bar includes 'Vital Signs', 'Meds', 'Med Actions', 'Orders', 'Allergies', 'Immunization', 'Flowsheets', 'MP/Reminders', and 'Growth Chart'. Below the navigation bar, the 'FlowSheets' dropdown is set to 'ACEs Screener' and 'Family Medicine'. The '1y' age filter is selected. A dropdown menu is open, listing the following items:

Item Name	
ACEs - Primary Caregiver	<input type="checkbox"/>
ACEs Impact of Childhood	<input type="checkbox"/>
ACEs Highest Caregiver	<input type="checkbox"/>
ACEs Child Section 1 Sc	<input type="checkbox"/>
ACEs - Child Section 2A	<input type="checkbox"/>
ACEs - Child Section 2B	<input type="checkbox"/>

The dropdown menu items are: ACEs Screener, ADM Clinic Flowsheet, Alcohol screening questionnaire (AUDIT), Anticoagulation Flowsheet, Auditory function Screening, Care Plan, CHF Flowsheet, and Chronic Pain Management Flowsheet.

At the bottom of the interface, there are buttons for 'New Column', 'Enter Result', 'Edit', and '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
<ul style="list-style-type: none"> <li>▲ AKI (acute kidney injury)               <ul style="list-style-type: none"> <li>▶ Basic Metabolic Panel ( BMP )</li> </ul> </li> <li>▲ Dysuria               <ul style="list-style-type: none"> <li>▶ Culture, Blood 1 ( Aerob / Anaer...</li> <li>▶ Culture, Urine</li> <li>▶ Urinalysis Reflex Microscopic ( ...</li> <li>▶ Urinalysis w/ Microscopic ( UA )</li> </ul> </li> <li>▶ Hyperlipidemia</li> <li>! ▶ Hypertension</li> <li>▶ Obesity (BMI 30.0-34.9)</li> <li>▶ Osteopenia</li> <li>▶ Osteopenia of multiple sites</li> <li>▶ Rash</li> <li>! ▶ Type 2 diabetes mellitus, uncon...</li> <li>! ▶ Uncontrolled type 2 diabetes m...</li> <li>! ▶ Vaginal candidiasis</li> <li>▲ Vaginal dryness, menopausal               <ul style="list-style-type: none"> <li>Estradiol 0.1 MG/GM Vaginal Cr...</li> </ul> </li> <li>▶ Medications not linked to a problem</li> <li>▶ Orders not linked to a problem</li> </ul>		<input type="checkbox"/>		<ul style="list-style-type: none"> <li>▶ Complete</li> <li>▶ Complete</li> <li>▶ Complete</li> <li>▶ Complete</li> </ul>	<ul style="list-style-type: none"> <li>03No...</li> <li>080c...</li> <li>070c...</li> <li>070c...</li> </ul>		

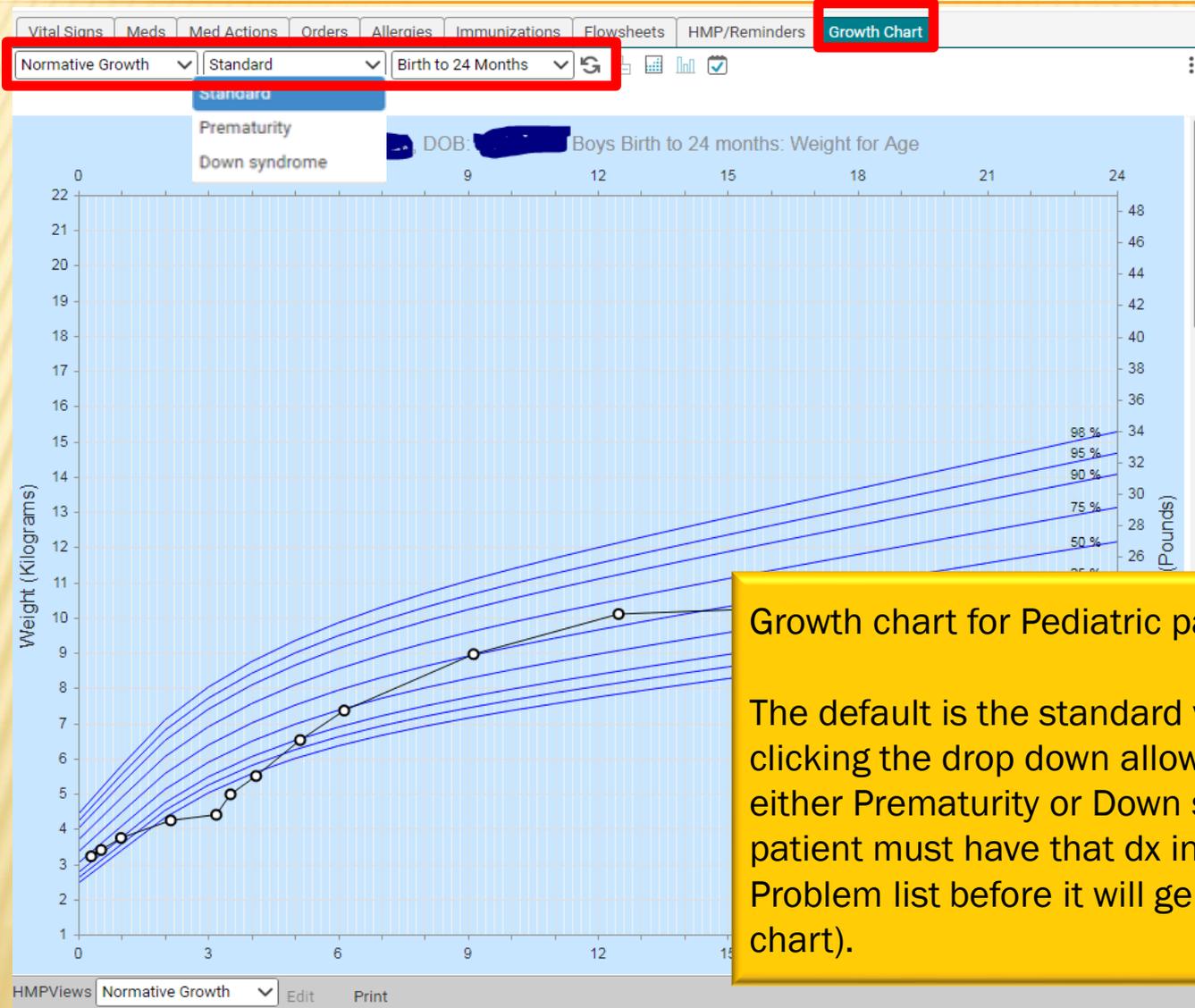
Order Create Reminder Edit Last Done Done Today Renew With Changes Defer Record D/C

## 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**