



EAST TENNESSEE STATE
UNIVERSITY

QUILLEN ETSU PHYSICIANS

Module 2: Documenting History

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).

DOCUMENTING HISTORY

To begin documenting history items on your patient, go to the **Chart** and click on the “P” on the **Clinical Toolbar**.

The screenshot shows a medical software interface for a patient named SUPERUSER, Flash, 01-Jan-1979 (42y) F (Male-to-Female/Transgender Female). The patient's chart is open, and the 'Chart' menu item is highlighted in red. A red circle highlights the 'P' icon in the Clinical Toolbar. The main area displays a list of active problems and a detailed view of the 'Record PDMP Consult' section.

Problem	ICD-10	Start Date	Location
Anxiety attack	F41.0	09Nov2020	Livingston, Ama...
Asthma in adult	J45.909	19May2020	Livingston, Ama...
Chest pain, cardiac	R07.9	09Nov2020	Livingston, Ama...
Depression	F32.9	09Nov2020	Livingston, Ama...
Diverticulitis of intestine	K57.92	21May2021	Livingston, Ama...
Dyslipidemia	E78.5	21May2021	Livingston, Ama...
Fatty liver	K76.0		
GERD (gastroesophageal reflux disease)	K21.9		
Hypertension	I10	09Nov2020	Livingston, Ama...
Hypothyroidism in adult	E03.9		
Increasing shortness of breath	R06.02	05Mar2020	Livingston, Ama...
Mild depression	F32.0	27Oct2020	Livingston, Aman...
Mild vitamin D deficiency	E55.9	19May2020	Livingston, Ama...
Multiple allergies	Z88.9	05Mar2020	Livingston, Ama...
Nausea	R11.0	02Jul2020	Guntupalli, Vijay (...)
Tumor of the membranes covering the brai...	D49.7		
Acute idiopathic gout involving toe of left f...	M10.072	05Mar2020	Livingston, Ama...
Acute pain of right knee	M25.561	02Jul2020	Guntupalli, Vijay (...)
Headache, acute	R51.9	17Jun2020	Livingston, Ama...
Health Maintenance		31Jan2020	Fisher, Rod (Inter...

The 'Record PDMP Consult' section shows the following history:

- ALPRAZolam 0.5 MG Oral Tablet; TAKE 1 TABLET 30 MINUTES PRIOR TO MRI. MAY REPEAT IF NEEDED; Therapy: 02Jul2019 to (Evaluate:04Jul2019); Last Rx:08Jul2019; Status: ACTIVE Ordered
- Flintstones Complete CHEW; TAKE 2 TABLET Bedtime; Therapy: (Recorded:05Mar2020) to; Status: ACTIVE Recorded
- HumuLIN R U-500 KwikPen SOPN; Therapy: (Recorded:17Jun2020) to; Status: ACTIVE Recorded
- Nitrofurantoin Monohyd Macro 100 MG Oral Capsule (Macrobid); TAKE 1 CAPSULE TWICE DAILY WITH MEALS; Therapy: 27Aug2019 to (Evaluate:03Sep2019); Last Rx:27Aug2019; Status: ACTIVE Ordered
- Singulair 4 MG Oral Tablet Chewable (Montelukast Sodium); CHEW AND SWALLOW 1 TABLET DAILY; Therapy: 22Jul2019 to; Status: ACTIVE Recorded
- Tylenol Extra Strength 500 MG TABS; Therapy: (Recorded:17Jun2020) to; Status: ACTIVE Recorded

ACTIVE PROBLEMS

Clicking on the “P” icon opens up the **Add Clinical Item** screen (ACI), which is where all of the patient’s history and ordering will be completed. The History Builder tab contains the Active Problems (diagnoses); Past Medical History; Past Surgical History; Family History; Social History; Allergies; Medication History; Immunization History, and Chief Complaints.

Viewing Pane

Name	ICD-10
No active medical problems	
Absence of breast	Z90.10
Conductive hearing loss	H90.2
Depression	F32.9
Developmental language disorder	F80.9
Diverticulitis of intestine	K57.92
Dyslipidemia	E78.5
Dysphagia	R13.10
Encounter for birth control	Z30.9
Encounter for birth control pills maintenance	Z30.41
Encounter for immunization	Z23
Encounter for Papanicolaou smear for cervical cancer screening	Z12.4
Encounter for planning transition from pediatric to adult care provider	Z76.89
Encounter for screening mammogram for breast cancer	Z12.31
Encounter for vaccination	Z23
Hearing loss, bilateral	H91.93
Hepatocellular carcinoma	C22.0
High-risk pregnancy	O09.90
Unspecified disease follow-up	Z00

When adding items to the patient’s chart, always check the Viewing Pane to make sure that they don’t already have a particular diagnosis/history item documented in their chart.

SEARCHING TIPS

To add a new diagnosis to a patient's chart, type the name in the search field. If you click the magnifying glass (or hit "enter"), your search will return results from the entire ICD-10 dictionary. As you can see, that is going to be overwhelming for most diagnoses. So, Allscripts has devised some shortcuts to make searching easier.

The screenshot shows the 'Add Clinical Item' window for a patient named SUPERUSER, Flash, 01-Jan-1979 (42y) F (Male-to-Female/Transgender Female). The patient's chart was last updated on 21-May-2021. The interface includes tabs for 'History Builder' and 'Orders'. Below these are various clinical categories: 'Problems', 'Medications', 'Orders', 'Allergies', 'Active', 'PMH', 'PSH', 'Fam Hx', 'Social Hx', 'Allergies', 'MedHx', 'Immun Hx', and 'Chief Complaints'. A search bar is active with the text 'hypertension'. The search results are displayed in a table with columns for 'Name' and 'ICD-10'. The results are organized into 'My Favorites' and 'All' sections.

Name	ICD-10
My Favorites	
Hypertension	I10
Hypertension, uncontrolled	I10
All	
Hypertension	I10
Hypertension, accelerated	
Hypertension, benign	
Hypertension complications	

Tip: You will need to search by 3 characters minimum.

Tip: you can also search by the ICD-10 code

QUICK LISTS & FAVORITES

Quick Lists

Quick Lists are lists of items that are “docked” onto a particular tab. For example, every time I click on the Active tab, the following items are available, without searching.

The screenshot shows the 'History Builder' interface with the 'Active' tab selected. The search bar is empty, and the 'My Favorites' dropdown is visible. Below the search bar, a 'Quicklist' is displayed with a list of medical conditions:

Name
No active medical problems
Absence of breast
Anxiety
Conductive hearing loss
Counseling for transition from pediatric to adult care provider
COVID-19 vaccine series completed
Depression
Developmental language disorder
Diverticulitis of intestine
Dyslipidemia
Encounter for birth control

Favorites

Favorites are “autofill” items. As soon as you start typing in the search field, they will pop up. If you have typed the entire word and still haven’t found what you need, you can click the magnifying glass or hit “enter.”

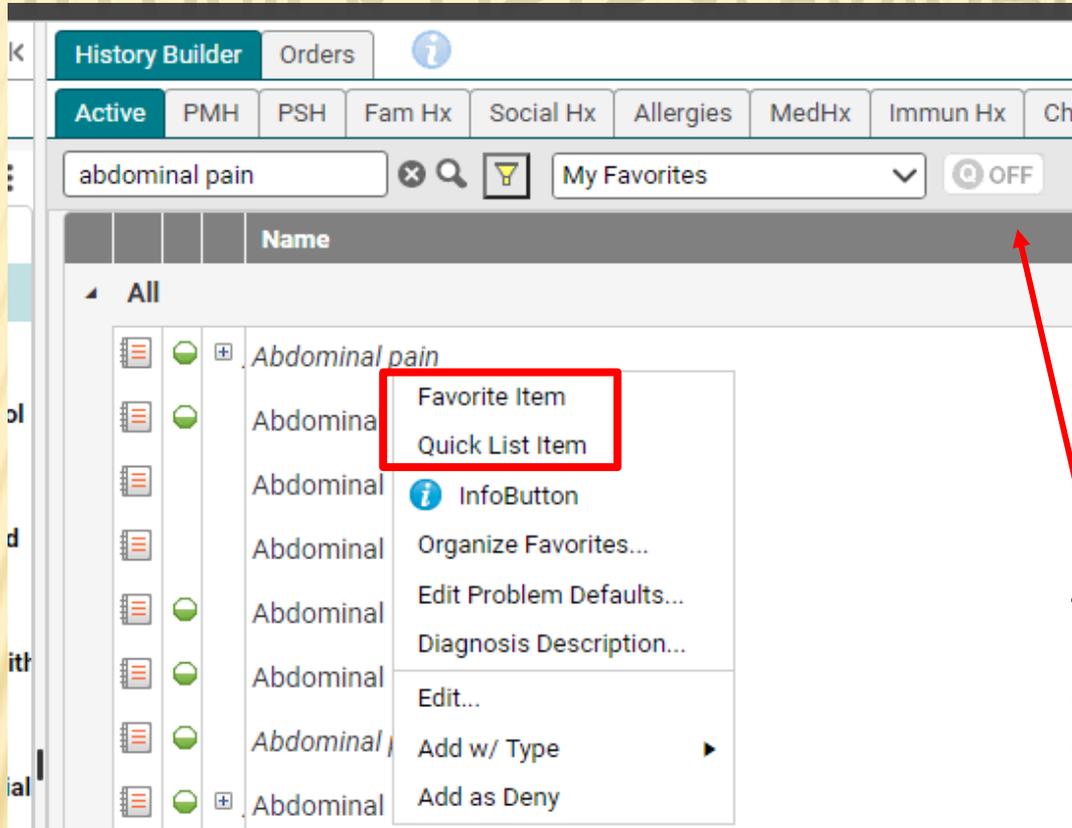
The screenshot shows the 'History Builder' interface with the 'Active' tab selected. The search bar contains the text 'hyper'. The 'My Favorites' dropdown is visible, and a list of favorite items is displayed:

Name
Hypertension
Hypertension, uncontrolled

Tip: Saving items to your quick list and favorites lists will save you a LOT of time! It is highly recommended that you take advantage of these time-saving features!

SAVING TO QUICK LISTS & FAVORITES

Saving an item to a Quick List/Favorites list is easy – simply **right click** on the item and choose either Quick List or Favorite Item. (Note: If you save an item to your Quick List, it will automatically save it as a Favorite item).



Tip: To view your Quick List, make sure that the Quick List icon is turned on.

Tip: The EHR also has the ability to set up folders for frequently ordered items. We will not cover that in these slides; however, if you are interested in using the folders, the instructions for set up and use are available on our website. <https://www.quillenphysiciansehr.com/how-tos.html>

ADDING/ASSESSING AN ACTIVE PROBLEM

Adding an active problem (diagnosis) to the patient's chart is simple. From the Active tab, simply click on the **paper** icon next to the name of the problem. This will add the problem to the patient's chart and also assess it. It will automatically pull the item into the Assessment section of your note. The item will appear in pink in the Viewing Pane until it has been committed (saved).

The screenshot shows the 'Active' tab in a medical software interface. The search bar contains 'abdominal pain'. The results list includes 'Abdominal pain, diffuse', 'Abdominal pain in child', 'Abdominal pain in female' (highlighted with a red box and a green checkmark), 'Abdominal pain in male', 'assessed' (highlighted with a yellow box), 'Abdominal pain in pregnancy', 'Abdominal pain, recurrent', 'Abdominal pain, suprapubic', and 'Abdominal pain with jaundice'.

Green check on the paper means the diagnosis is assessed/evaluated and will be billed. If you don't want the dx code assessed/billed, uncheck the paper.

CLINICAL QUALIFIER TOOL

The plus sign beside of the ICD-10 code indicates the diagnosis code can be more specific.

The screenshot shows the 'Add Clinical Item' window for patient 'TEST, Allscripts 01-Jan-1970 (51y) F'. The interface includes tabs for 'Problems', 'Medications', 'Orders', and 'Allergies'. The 'Active Problems' section is expanded, showing a list of conditions including 'Chronic pain', 'Counseling for initiation of birth control', 'Depression', 'Depression, major, single episode, mild', 'Diabetes insipidus, nephrogenic', and 'Diabetes mellitus type II, uncontrolled'. The 'History Builder' section is active, showing a search for 'hypertension'. The search results are displayed in a table with columns for 'Name' and 'ICD-10'. The 'My Favorites' section is expanded, showing a list of hypertension-related conditions. A red circle highlights a plus sign next to the 'Hypertension' entry, indicating that the diagnosis code can be more specific.

Name	ICD-10
My Favorites	
<input type="checkbox"/> Hypertension	I10
<input type="checkbox"/> Hypertension, uncontrolled	I10
All	
<input type="checkbox"/> Hypertension	I10
<input type="checkbox"/> Hypertension, accelerated	I10
<input type="checkbox"/> Hypertension, benign	I10
<input type="checkbox"/> Hypertension complications	I10

DUR Alerts: Drug-Drug (0) | Prior Adverse Reactions (0) | Disease (0) | Duplicate Therapy (0) | Dose (0)

OK Cancel

ICD-10 SELECTION

Work top to bottom on the left tool bar until out of choices. Required fields must be filled out. Be sure to add the green check box for added/assessed problem.

Select Clinical Qualifier

Clear All

Without Long Term Use

Unspecified Long Term Insulin Use S...

Diabetes Mellitus Complication Status ▲

Without Complication

With Circulatory Complication

With Diabetic Arthropathy

With Hyperglycemia

With Hyperosmolarity

With Hypoglycemia With Ketoacidosis

With Kidney Complications

With Neurologic Complications

With Ophthalmic Complications

With Oral Complications

With Skin Complications

With Other Specified Complication

Diabetes Mellitus Complication Detail ▲

With Diabetic Retinopathy With Cataract

With Diabetic Macular Edema, Resolv...

With Other Ophthalmic Complication

With Chronic Kidney Disease

With Microalbuminuria

Diabetes

	Name	ICD-10	
▲ All			
<input type="checkbox"/>	Diabetes	E11.9	
<input type="checkbox"/>	Type 1 diabetes mellitus with hypoglycemic coma	E10.641	
<input type="checkbox"/>	Drug or chemical induced diabetes mellitus with microalbuminuria, without long-term current use of insulin	E09.29	+
<input type="checkbox"/>	Diabetes mellitus due to underlying condition with microalbuminuria, with long-term current use of insulin	E08.29	+
<input type="checkbox"/>	Diabetes mellitus of other type with microalbuminuria, with long-term current use of insulin	E13.29	+
<input type="checkbox"/>	Diabetes mellitus of other type with hyperosmolar coma, with long-term current use of insulin	E13.01	+
<input type="checkbox"/>	Diabetes mellitus of other type with hyperosmolar coma, without long-term current use of insulin	E13.01	
<input type="checkbox"/>	Diabetes mellitus of other type with microalbuminuria, without long-term current use of insulin	E13.29	+
<input type="checkbox"/>	Diabetes mellitus due to underlying condition with microalbuminuria, without long-term current use of insulin	E08.29	+
<input type="checkbox"/>	Drug or chemical induced diabetes mellitus with microalbuminuria, with long-term current use of insulin	E09.29	+
<input type="checkbox"/>	Type 1 diabetes mellitus with ketoacidotic coma	E10.11	

HCC ICONS FOR DX CODES

HCC-Hierarchical Condition Categories

CMS uses HCCs to reimburse Medicare Advantage plans based on the health of their members. It pays accurately for the predicted cost expenditures of patients by adjusting those payments based on demographic information and patient health status. The risk assessment data used is based on the diagnosis information pulled from claims and medical records which are collected by physician offices, hospital inpatient visits and in outpatient settings.

Icon	Meaning
	Assessed
	Assessed & Unspecified
	Master
	Master & Unspecified
	Unassessed
	Unassessed & Unspecified

**Please note-Unassessed=Not assessed for the current calendar year*

(from <https://www.medirevv.com/blog/what-is-hcc-coding-understanding-todays-risk-adjustment-model>)

ADDING MULTIPLE ACTIVE PROBLEMS

To add a 2nd active problem, simply clear out the search field by clicking the “x” and type in the new problem. Click the paper icon to add it to the chart.

The screenshot shows the 'Add Clinical Item' window for patient TEST, Allscripts, 01-Jan-1970 (51y) F. The 'Problems' tab is active, and the search field contains 'migraine'. A red arrow points to the 'x' icon in the search field. The search results list includes 'Migraine', 'Migraine, abdominal', 'Migraine, cervicogenic', 'Migraine equivalent', 'Migraine, hemiplegic', 'Migraine, intractable', and 'Migraine, menstrual'. The 'OK' button is highlighted with a red box.

DUR Alerts: Drug-Drug (0) | Prior Adverse Reactions (0) | Disease (0) | Duplicate Therapy (0) | Dose (0)

OK Cancel

To save these items, click OK.

COMMITTING PROBLEMS

TEST, Allscripts 01-Jan-1970 (51y) F | PCP Cell

PVP bonus eligible testing alert

Commit

ETSU - ... CHARGE

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

Active Problems Alpha Rec: 30-Mar-2021

Name	ICD-10	Last Assessed
Problems		
Anxiety	F41.9	02Jun2021 Livingston, Am
Chronic pain	G89.29	22May2021 ALLSCRIPTS. A
Counseling for initiation of birth control m...	Z30.09	
Depression, major, single episode, mild	F32.0	
Diabetes mellitus type II, controlled, with n...	E11.9	
Dyslipidemia	E78.5	
Encounter for screening involving social d...	Z13.9	
Migraine, intractable	G43.919	
Nicotine dependence	F17.200	
Health Maintenance/Risks		
Health Maintenance		03Mar2021 Williams, Robin

Once you click OK, you will be returned to the Chart. Items in pink are unsaved items. To save them, click the yellow **Commit** button. We recommend that you commit after adding approximately 10 items to the chart.

There is no auto-save feature in Allscripts, so **commit often!**

ENCOUNTER SUMMARY

Encounter Summary

TEST, Allscripts 01-Jan-1970 (51y) F

Appointment Type: Reason For Visit: Pat Loc:

View By: Problem

Alert Last Updated: Error: CDS Service not available.

Alert Displayed: Active for Livingston, Amanda

- MU** Ethnicity is not documented
- MU** Meds list is not reconciled for encounter
- MU** Problems list is not reconciled for encounter

- Anxiety (F41.9) ADDED; ASSESSED
- Dyslipidemia (E78.5) ADDED; ASSESSED
- Migraine, intractable (G43.919) ADDED; ASSESSED
- Depression (F32.9) INVALIDATED

Rx - For Internal Use Only*

Reporting

- Transition of Ca
- Summary of Ca

Save and continue Save Delete Unsaved

Clicking on the Commit button will pull up the **Encounter Summary**. This allows you to review your changes and either **Save and Continue** or Delete Unsaved. If there is an item that you do NOT want to save, you can uncheck the box, and then click Save and Continue to save the remainder of your items.

Tip: The Encounter Summary also contains reminders of items that need to be taken care of before the patient checks out. The MU Alerts **MU** relate to Meaningful Use. The  Alerts relate to medical items that need attention. Right clicking on an MU item will give you options for completion.

PAST MEDICAL HISTORY

The screenshot shows the 'Add Clinical Item' window in the Epic EMR system. The patient information is TEST, Epic Female, 26-Jan-1942 (79y) F, with an appointment on 02-Jun-2021. The 'History Builder' tab is active, and the 'PMH' sub-tab is selected. A search for 'heart attack' has been performed, resulting in a list of items with their ICD-10 codes. The 'History Builder' and 'PMH' tabs are highlighted with a red box.

Name	ICD-10
Heart attack	I21.9
Additional heart attack (anterolateral wall)	I21.09
Additional heart attack (inferolateral wall)	I21.19
Additional heart attack (inferoposterior wall)	I21.19
Additional heart attack (subendocardial)	I22.8

Once you've committed your changes, click on the "P" again to get back into the ACI.

The Past Medical History tab is similar to the Active Problems tab in terms of searching. You can set up Quick Lists and Favorites on each of the tabs in the ACI.

To add a PMH item to the patient's chart, click on the **NAME** of the item. Don't click the paper icon unless you are actually ASSESSING that item at the current visit. In other words, if you want the item to show up in the Assessment section of your note, click the paper icon. To just add it to the chart, click the name (to add the check box to the left of the paper).

ADDING VS ASSESSING PROBLEMS

The screenshot shows the 'History Builder' window in an EHR system. The search bar contains 'pulmonary nodule'. The 'All' dropdown menu is open, showing a list of search results. The first result, 'Pulmonary nodule', is highlighted with a red box. The background shows the 'Problems' section of the patient's chart, with 'History of Pulmonary nodule' listed under 'Other Problems'.

If you click on the **Name** of the item (i.e., Pulmonary nodule), it will only add it to the PMH section in your note. It will NOT show up in the Assessment section.

If you click on the **Paper** icon, it will add a green checkmark on the paper icon. This indicates that the item is being assessed, and it will show up in the assessment section of the note. **REMEMBER:** Check mark on paper is assessment/billing dx code.

The screenshot shows the 'History Builder' window in an EHR system. The search bar contains 'pulmonary nodule'. The 'All' dropdown menu is open, showing a list of search results. The first result, 'Pulmonary nodule', has a green checkmark on its paper icon, indicating it is being assessed. This result is highlighted with a red box. The background shows the 'Problems' section of the patient's chart, with 'History of Pulmonary nodule' listed under 'Other Problems'.

ADDING DETAILS

The screenshot shows a software interface for managing medical data. At the top, there are tabs for 'History Builder' and 'Orders'. Below that, a navigation bar includes 'Active', 'PMH' (selected), 'PSH', 'Fam Hx', 'Social Hx', and 'Allergies'. A search bar contains the text 'pulmonary nodule'. Below the search bar is a table with a 'Name' column. The table is filtered to show 'All' items. A list of 'Pulmonary' problems is displayed. A context menu is open over one of the items, listing options: 'Favorite Item', 'Quick List Item', 'InfoButton', 'Organize Favorites...', 'Edit Problem Defaults...', 'Diagnosis Description...', 'Edit...' (highlighted with a red box), 'Add w/ Type', and 'Add as Deny'.

You can easily add additional details to any problem by right-clicking on the problem and choosing **Edit**

ADDING DETAILS

Problem Details

TEST, Epic Female 26-Jan-1942 (79y) F Appointment: 02-Jun-2021

History of Pulmonary nodule

Status: Resolved Include In: PMHX Active DSM

Details | Add'l Details | Assessment Hx | Impression Hx | Annotations

Details

Codes ICD-9CM 793.11; ICD-10CM R91.1; SNOMED 786838002; SNOMEDVersion SNOMEDCT US Edition RF2 Release March 2021 Dx Desc

Description 1000 Chars, 947 remaining
Diagnosed by CT in March 2020. CT due to cow attack.

Impressions Copy Last Current Impression 2000 Chars, 1963 remaining TT
Follow up CT in April 2021. Resolved.

Managed by ALLSCRIPTS17, Provider Provider Referring

Dates Onset... MM/DD/YYYY Today Resolved MM/DD/YYYY Today

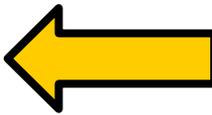
Last Assessed: 02-Jun-2021 Last Reviewed: Suppress on Resolve

Secondary to

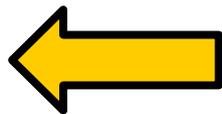
Add'l Details

Severity

Save and Return to ACI Save and Close ACI Cancel



Items added to the **Description** field will show up in the note and on the Chart.



Items added to the **Current Impression** field will be visible on the Chart.

You can also add an onset date, resolution date, and managing provider, if you like.

Tip: Double clicking on the problem from the Clinical Desktop will open up a window with all the details and impression history.

PAST SURGICAL HISTORY

Add Clinical Item

TEST, Epic Female 26-Jan-1942 (79y) F Appointment: 02-Jun-2021

History Builder Orders

Active PMH **PSH** Fam Hx Social Hx Allergies MedHx Immur

Past Surgical Histo... Alpha

tonsil

Name

Problems

- History of Appendectomy
- History of Thyroidectomy
- History of Tonsillectomy

My Favorites

- Tonsillectomy
- Tonsillectomy with adenoidectomy

All

- Tonsillectomy
- Tonsillectomy with adenoidectomy

New Edit CareGuide

DUR Alerts: Drug-Drug (0) Prior Adverse Rea

OK Cancel

The Past Surgical History tab works the same way as the PMH tab. Search for your item in the Search field; right click and save it as a Quick List item if you use it frequently, and click on the **NAME** to add it to the patient's chart.

FAMILY HISTORY

The screenshot shows the 'Add Clinical Item' window for a patient named TEST, Epic Female, 26-Jan-1942 (79y) F. The window is titled 'Add Clinical Item' and has a patient header 'TEST, Epic Female 26-Jan-1942 (79y) F' and an appointment date 'Appointment: 02-Jun-2021'. The 'Family History' tab is selected, and the 'Fam Hx' button is highlighted with a red box. The 'My Favorites' list includes 'No pertinent family history', 'Breast cancer', 'Colon cancer', 'COPD (chronic obstructive pulmonary disease)', 'Depression', and 'Diabetes'. The '4 Selected' list includes 'Daughter', 'Son', 'Sister', and 'Maternal Grandmother'. The 'My Priority' section shows a list of family history items with ICD-10 codes and Z codes.

Name	ICD-10
Family history of cardiac disorder : Daughte...	Z82.49
Family history of chronic obstructive pulmo...	Z82.5
Family history of malignant neoplasm of col...	Z80.0
Family history of Malignant neoplasm of lo...	

Name	ICD-10
No pertinent family history	
Breast cancer	C50.919
Colon cancer	C18.9
COPD (chronic obstructive pulmonary disease)	J44.9
Depression	F32.9
Diabetes	E11.9

Name	ICD-10
Daughter	
Son	
Sister	
Maternal Grandmother	
Paternal Grandmother	
Maternal Grandfather	
Paternal Grandfather	
Maternal Aunt	

The Family History tab works a little differently from the other tabs. If you click on the relationship before you choose the family history, it will indicate which family member had the history. You can choose multiple family members for one diagnosis, as well. Family History for first degree relatives needs to be documented.

SOCIAL HISTORY

Add Clinical Item

TEST, Epic Female 26-Jan-1942 (79y) F Appointment: 02-Jun-2021

History Builder Orders

Active PMH PSH Fam Hx **Social Hx** Allergies MedHx Immun Hx Chief Complaints

Social History My Priority

Name	ICD-10
My Priority	
Other Problems	
Current every day smoker	F17.200
Divorced	
Drinking alcohol regularly, feeling guilty abo...	
Living in tent	Z59.0
Living will on file	Z87.898
Never a smoker	

Quicklist

- Always uses sea
- Caffeine use
- Current every da
- Current some da
- Diet is high in sa
- Electronic cigare
- Former smoker
- Has average die

DUR Alerts: Drug-Drug (0) | Prior Adverse Reactions (0) | Disease (0) | Duplicate Therapy (0) | Dose (0)

OK Cancel

A smoking status **MUST be entered in every patient who is 13 years of age and older. There are numerous smoking statuses available in the Social Hx section, but there are only **8** that will satisfy the Quality Program requirements. Those are listed on Slide #27. Make sure you document a smoking status on all of your eligible patients.**

ALLERGIES

TEST, Epic Female 26-Jan-1942 (79y) F Appointment: 02-Jun-2021

History Builder Orders Allergies

Internal Medicine Medication Non-Medication

No Known Allergies Erythromycin Derivatives Septra TABS

No Known Drug Allergies Flagyl TABS Sulfa Drugs

Amoxicillin TABS Heparins Tetracyclines

Aspirin TABS hydroCHLORothiazide TABS Toradol SOLN

Atenolol TABS Ibuprofen TABS Tylenol TABS

Augmentin TABS Iodinated Contrast Media Zithromax TABS

Medication

- Penicillins
 - Acetic Acid-Aluminum Acetate SOLN
 - Gabapentin TABS
 - NSAIDs
- Non-Medication
 - Banana
 - Corn
 - Kiwi
 - Latex
 - Mango

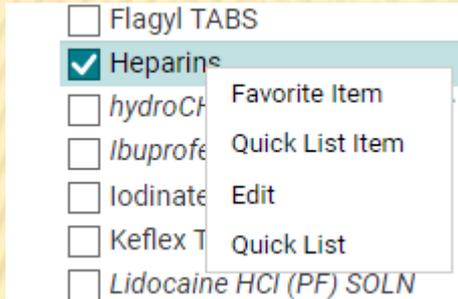
Cancel Entry

DUR Alerts: Drug-Drug (0) | Prior Adverse Reactions (0) | Disease (0) | Dup

OK Cancel

The only thing that is different on the Allergies tab is that you will need to make sure you have the appropriate radio button clicked – for **Medication** or **Non-Medication** allergies. If you search for “strawberry” and the Medication button is checked, you will only get fragrances and flavorings.

ADDING REACTIONS TO ALLERGIES



To add details to an allergy, right click and edit.

This opens up a details box where you can document the status, category, a reaction date and a reaction type. To document a reaction, click on the + Add Reaction button and check the box next to the appropriate reaction type. If a reaction is severe, it will mark it with an icon



The 'Allergy Details' form for 'Heparins' is shown. The patient information is 'TEST, Epic Female 26-Jan-1942 (79y) F' and the appointment is '02-Jun-2021'. The 'Status' is set to 'Active', 'Category' is empty, and 'ReactionDate' is 'MM/DD/YYYY'. A red box highlights the 'Status', 'Category', and 'ReactionDate' fields. The 'Reactions' section shows a table with columns for 'Reaction' and 'Severity', and a '+ Add Reaction' button circled in red. A yellow arrow points from the button to the 'Allergy Reactions' dialog box. The dialog box contains a list of reaction types with checkboxes, such as 'Abdominal pain', 'Anaphylaxis', 'Anemia', 'Angina', 'Angioedema', 'Anorexia', 'Anxiety', 'Arrhythmia', 'Asthma', 'Bleeding', 'Bradycardia', 'Cardiac arrest', 'Cerebral vasculitis', 'Chest pain', 'Coagulation disorder', 'Confusion', 'Constipation', 'Cough', 'Decreased libido', 'Delirium', 'Depression', 'Dermatitis', 'Diarrhea', 'Difficulty swallowing', 'Dizziness', 'Drowsiness', 'Dry mouth', 'Dyspepsia', 'Eczema', 'Edema', 'Electrocardiogram abnormal', 'Elevated hepatic enzymes', 'Exercise intolerance', 'Fatigue', 'Fever', 'Flushing', 'Gastrointestinal hemorrhage', 'Gastrointestinal upset', 'Hallucinations', 'Headache', 'Hives', 'Hyperglycemia', 'Hypertension', 'Hypoglycemia', 'Hypotension', 'Indigestion', 'Insomnia', 'Irregular menses', 'Irritability', 'Itching', 'Jaundice', 'Laryngeal spasm', 'Leg Cramps', 'Loss of appetite', 'Loss of sense of smell', 'Methemoglobinemia', and 'Muscle weakness'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The main form has 'Save and Return to ACI', 'Save and Close ACI', and 'Cancel' buttons at the bottom.

MEDICATION HISTORY

TEST, Epic Female 26-Jan-1942 (79y) F Appointment: 02-Jun-2021

Problems Medications Orders Allergies

Current Medications Status

- Allopurinol 300 MG Oral Tablet; TAKE 1 TABLET DAILY; Therapy: 18Oct2018 to (Evaluate:22Sep2019); Last Rx:24Jul2019 Ordered
- amLODIPine Besylate 5 MG Oral Tablet; TAKE 1 TABLET DAILY AS DIRECTED; Therapy: 22Jun2018 to (Evaluate:27Mar2019) Requested for: 26Mar2019; Last Rx:26Mar2019 Ordered
- Baclofen 10 MG Oral Tablet; TAKE 1 TABLET 3 TIMES DAILY; Therapy: 01Feb2018 to (Evaluate:03Mar2018) Requested for: 01Feb2018; Last Rx:01Feb2018 Ordered
- Doxycycline Hyclate 100 MG Oral Tablet; TAKE 1 TABLET EVERY 12 HOURS DAILY; Therapy: 22Jun2018 to (Evaluate:27Jun2018) Requested for: 22Jun2018; Last Rx:22Jun2018 Ordered
- Fluconazole 150 MG Oral Tablet; SIG: 1 po q day x 3

History Builder Orders

Active PMH PSH Fam Hx Social Hx Allergies **MedHx** Immun Hx Chief Complaints

My Favorites ON Pharmacy Supplies

Multi Complete CAPS

Multi For Her CAPS

Multi For Him CAPS

Prenatal Vitamin TABS

Prenatal/Iron Oral Tablet

Don't forget to check Pharmacy Supplies when search for pharmacy supplies.

The Med Hx tab is where you will document medications that the patient states they are on (not medications that you are ordering for the patient). If the patient isn't sure what dosage they are on, there are some generic options that can be used. This includes OTC.

Cancel Entry

DUR Alerts: Drug-Drug (2) Prior Adverse Reactions (0) Disease

OK Cancel

Tip: Before adding any medications, review the medication list – it's possible that the medication has already been added to the patient's chart by another provider/nurse.

IMMUNIZATION HISTORY

Add Clinical Item

TEST, Epic Female 26-Jan-1942 (79y) F Appointment: 02-Jun-2021

History Builder Orders

Problems Medications Orders Allergies

Active Problems Type

Active PMH PSH Fam Hx Social Hx Allergies MedHx **Immun Hx** Chief Complaints

My Favorites ON Done MM/DD/YYYY

- HPV, unspecified formulation
- Influenza, seasonal, injectable
- Janssen COVID-19 Vaccine 0.5 ML Intramuscular Suspension
- Moderna COVID-19 Vaccine 100 MCG/0.5ML Intramuscular Suspension
- Pfizer-BioNTech COVID-19 Vacc 30 MCG/0.3ML Intramuscular Suspension

Please note the names of the Covid vaccines in the EHR.

The Immun Hx tab is where you will document immunizations that the patient has had done in the past. Clicking the box will open a details box which will require a date. The date can also be entered in the Done field on the ACI.

Cancel

CHIEF COMPLAINTS

Add Clinical Item

TEST, Epic Female 26-Jan-1942 (79y) F Appointment: 02-Jun-2021

History Builder Orders

Problems Medications Orders Allergies

Active PMH PSH Fam Hx Social Hx Allergies MedHx Immun Hx **Chief Complaints**

Chief Complaints Alpha

Name

There are no items to show in this view.

Abcess Anorgasmia Blepharoplasty

Abdominal Pain Anxiety Blood Pressure Check

Abdominal Swelling Aphasia Blurry Vision Left

Abdominoplasty Arm Pain Blurry Vision Right

Alcohol Abuse Arthralgias Body Contouring

Anal Itching Ataxia Bone Pain

Anal Pain Back Pain Bone Pain in the Foot

Anaphylactic Reaction Bad Breath Bradycardia

Anemia Behavioral Concerns Brain Anomalies

Ankle Pain Belching Breast Augmentation

Ankle Swelling Birthmark Breast Mass

Annual Exam Bleeding During Pregnancy Breast Pain

Anorexia Bleeding Gums Breast Reconstruction Con

OK Cancel

Tip: The chief complaint is the **symptom**, not the diagnosis. So, you will find “shortness of breath,” but not “asthma.” Also, once you make the diagnosis of asthma, you will need to add that to the patient’s chart from the Active problems tab.

Typically, the nurse will document the chief complaints when she begins the note. We do have some clinics, however, where the physician starts their own note. In those cases, simply check the box next to the appropriate complaint and then click OK. In other instances, it is typed into the note, and this section isn’t used often.

ITEMS TO SAVE TO THE QUICK LIST

It is recommended that you save the following items to your history tabs, so that you can find them easily.

PMH tab

- Medical history non-contributory
- Medical history unknown
- No significant past medical history

PSH tab

No Prior Surgery

Social Hx tab

Never smoker
Tobacco smoking status unknown
Current every day smoker 305.1 Z72.0
Current some day smoker 305.1 Z72.0
Heavy tobacco smoker 305.1 F17.200
Light tobacco smoker 305.1 Z72.0
Smoker, current status unknown 305.1 Z72.0
Former smoker V15.82 Z87.891

Med Hx tab

Unable To Obtain



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PLEASE PROCEED TO THE NEXT MODULE – ORDERING AND MANAGING RX