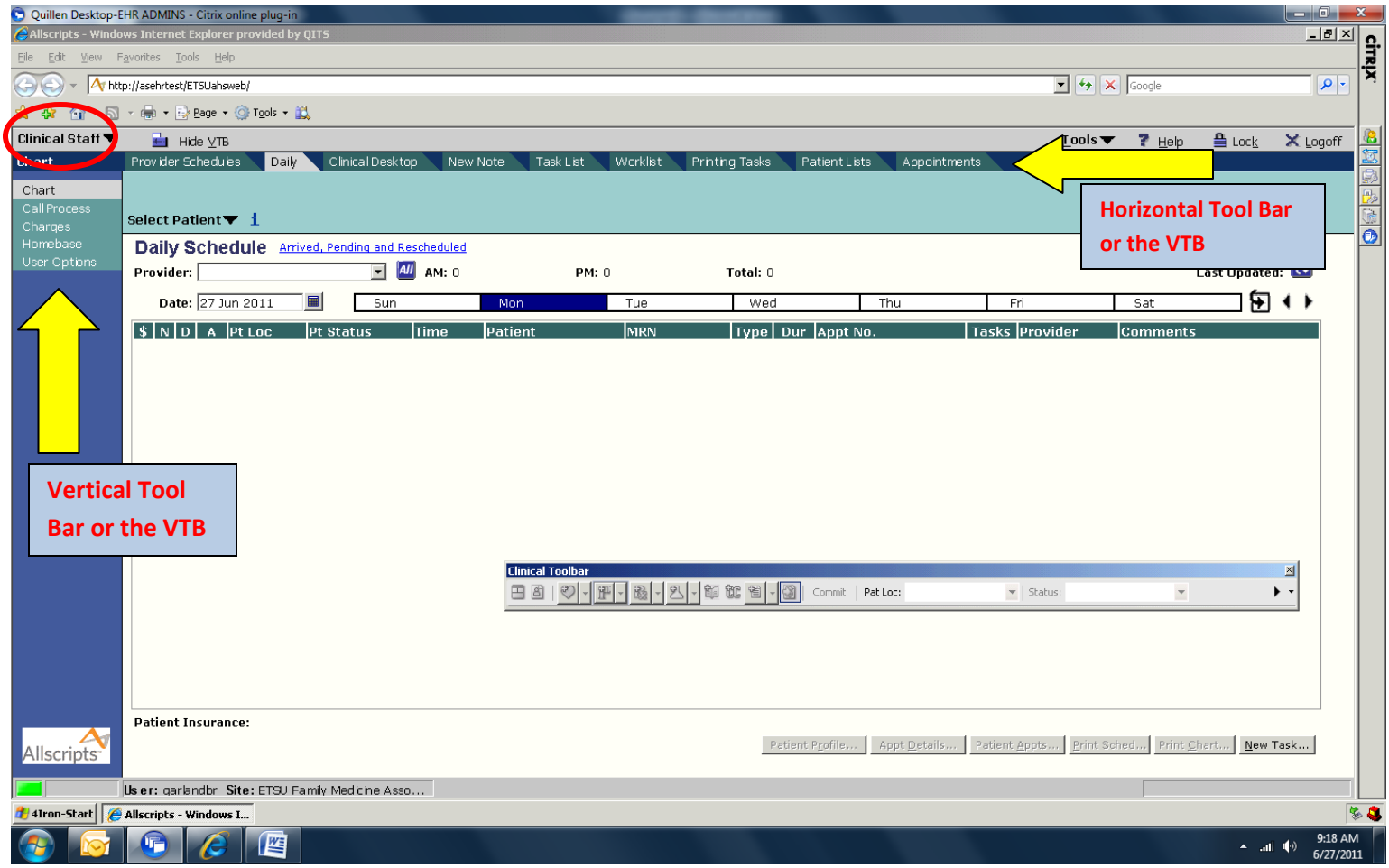
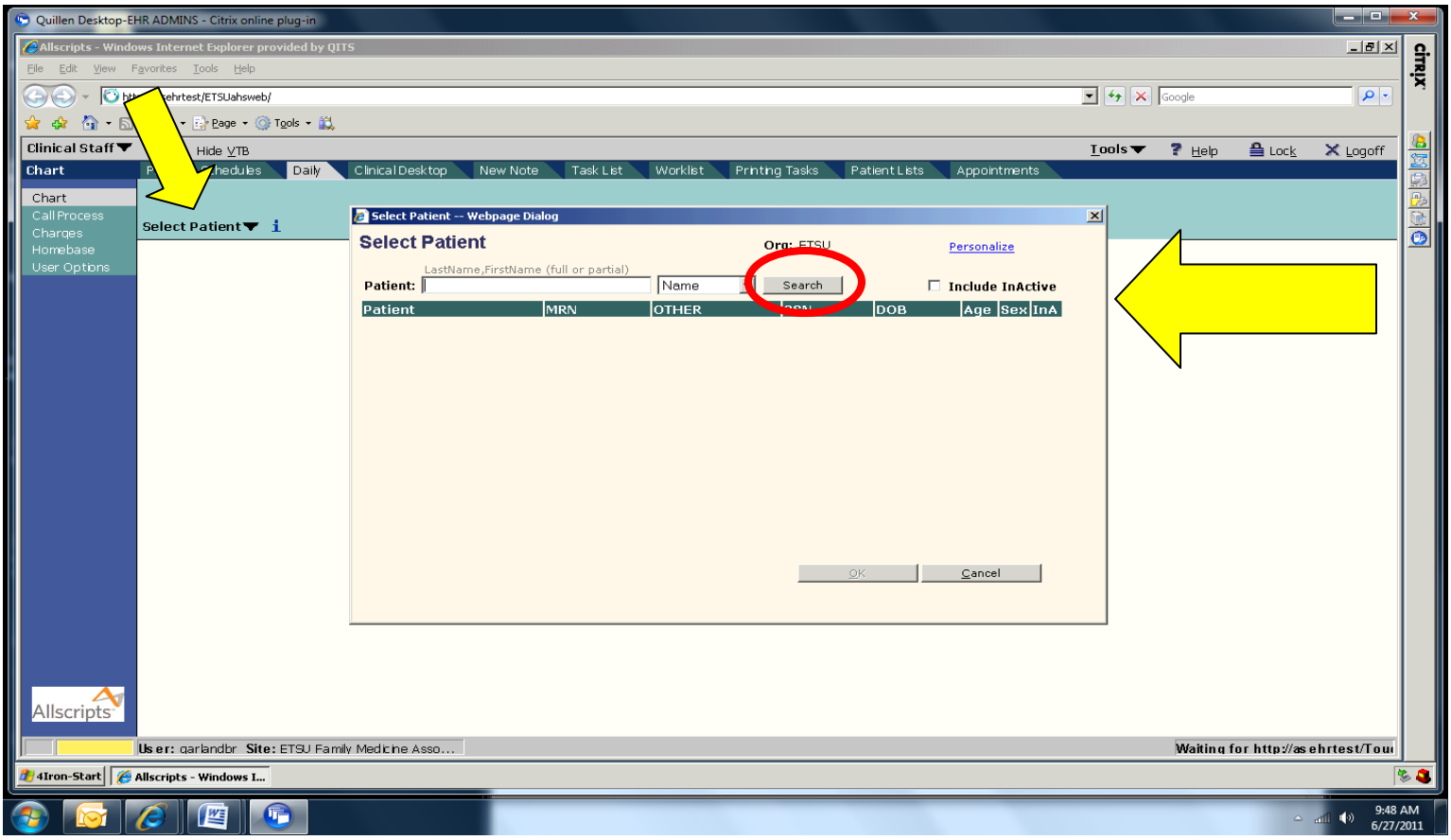
Allscripts Basic Navigation for Clinical Staff



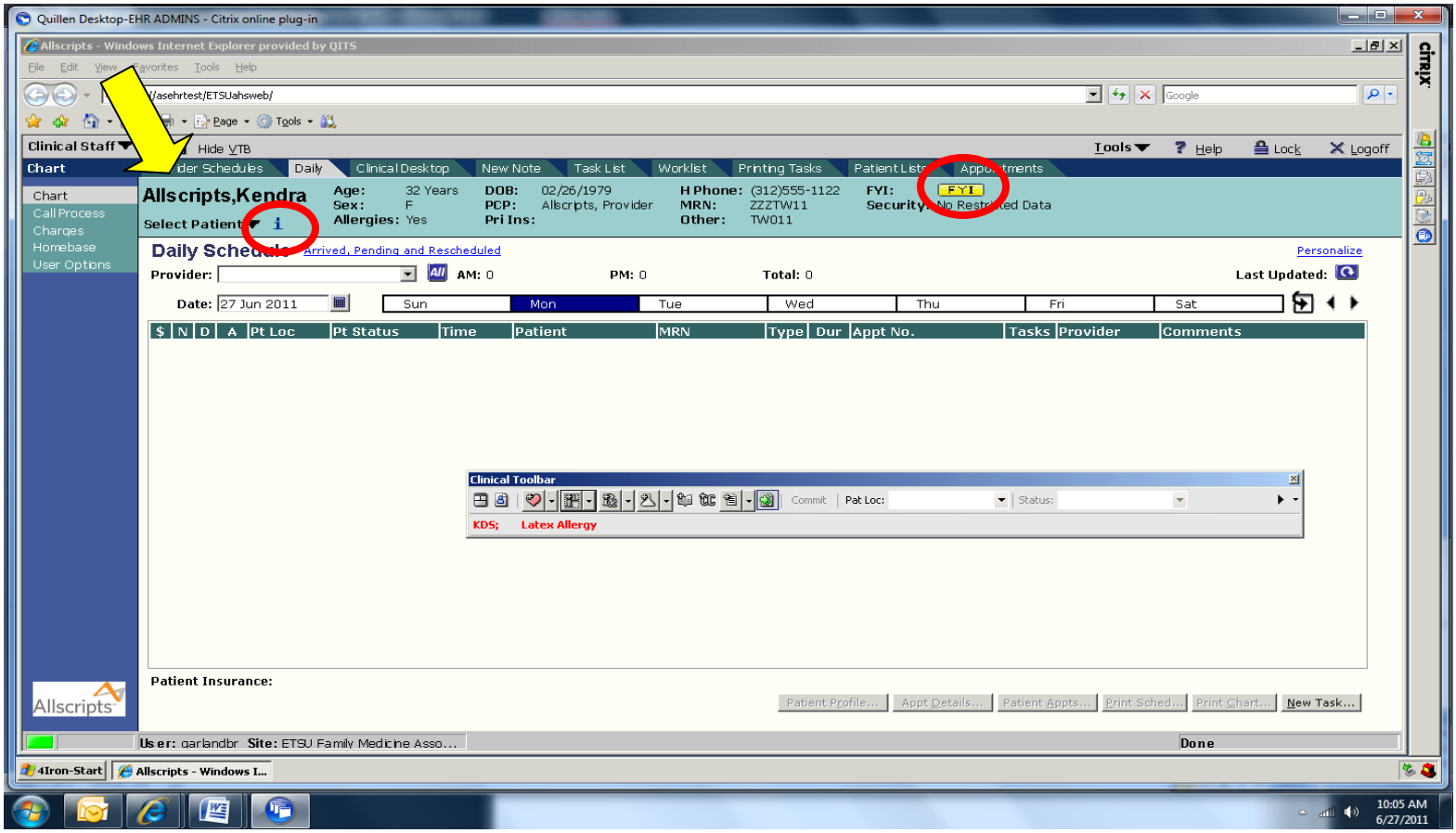
Once you are logged into Allscripts, you will automatically be taken to your Workplace. The workplaces in Allscripts are defined by the user role. The words **Clinical Staff** appear here. If your workplace does not say Clinical Staff, please contact us so that we can fix it.

Features and Tabs in the Workplace

The tabs across the top of the page (Provider Schedules, Daily, Clinical Desktop, New Note, etc.) comprise your **Horizontal Toolbar**, or the **HTB.** The links on the left-hand side of the page (Chart, Call Process, etc.) are called your **Vertical Tool Bar**, or the **VTB**.



The **Patient Banner** is used to identify a patient and access his or her chart. There are several ways to pull up a patient, and the ***recommended*** way is to ***pull them up from the doctor's schedule***, but the first way we will demonstrate is by using the Patient Banner search. Underneath the HTB, in the left-hand corner, you will see a link termed **Select Patient**. Click on the drop down arrow and a small box will appear with two choices: "Search" or "Clear." Clicking on "Search" will pull up another box in which you can enter your search criteria. The default is set to Last Name, but you can also choose to search by DOB, medical record number, etc. Type in the patient's last name and click on "Search." If more than one patient has the same last name, choose the correct patient from the list, click on their name, and select OK. Their name should have populated in the field under the HTB, or the Patient Banner.

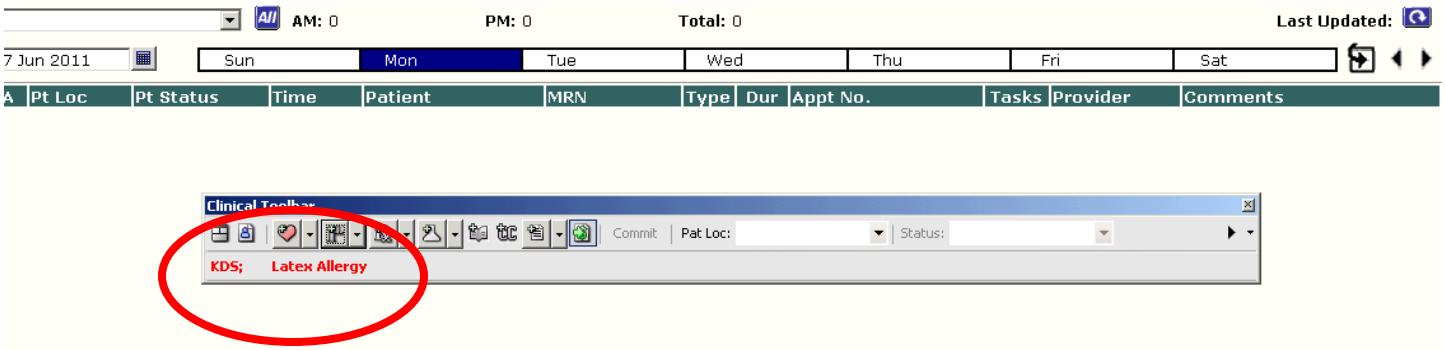


The **Patient Banner** contains demographic information on the patient, including their name, medical record number, sex, age, date of birth, phone number, allergies, and PCP. This box also contains two important buttons: the yellow FYI box and the small blue "i" icon.

Allows useful information to be added to the patient's chart that can be viewed by the clinical staff or front office, such as "patient is hard of hearing" or "patient is a drug seeker." If the box is gray, the field is empty.


The information icon is where the patient's demographic information is stored, including insurance, pharmacy, language preferences, etc. If you click on the information icon, the **Patient's Profile Dialog Box** will open. Most of the information flows over from Experior automatically.

The **Patient's Profile Dialog Box** is where the user can access the FYI box and enter **Chart Alerts,** which contain import clinical information for the provider's, such as medication or food allergies, etc. Chart alerts appear in red on the **Floating Clinical Toolbar**.

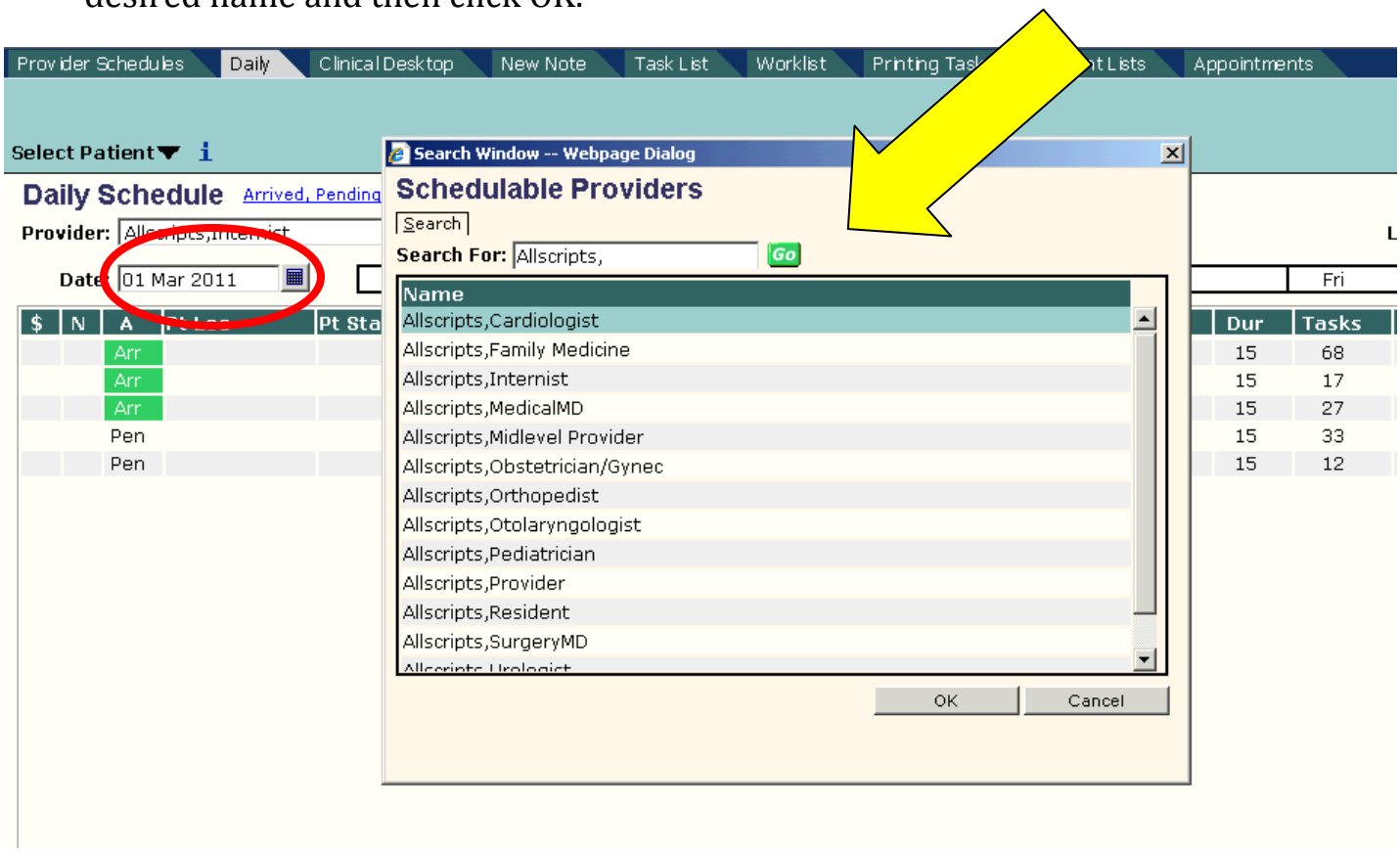


The Daily Schedule

When you first log into Allscripts, you should default to the Daily Schedule page. To pull a provider's schedule on to the page, click on the blue All icon.

Allows the user to search for a provider

In the **Provider Search box**, type in the provider's name and click "Go." If just one name pulls up in the list, click OK. If multiple names appear, click on the desired name and then click OK.



The Daily Schedule page is fairly self explanatory, and it will always default to the current date. **Remember, you should get in the habit of accessing patients through the Daily Schedule.**

Quillen Desktop-EHR ADMINS - Citrix online plug-in

Allscripts - Windows Internet Explorer provided by QITS

File Edit View Favorites Tools Help

http://asehrtest/ETSUahsweb/

Clinical Staff | Hide VTB | Tools | Help | Lock | Logoff

Chart | Provider Schedules | Daily | Clinical Desktop | New Note | Task List | Worklist | Printing Tasks | Lists | Appointments

Chart
Call Process
Charges
Homebase
User Options

Select Patient

Daily Schedule Arrived, Pending and Rescheduled — Personalize

Provider: Allscripts,Internist **AM:** 3 **PM:** 2 **Total:** 5 **Last Updated:** 06/27/2011 11:39 AM

Date: 01 Mar 2011 | Sun | Mon | Tue | Wed | Thu | Fri | Sat

A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Tasks	Comments
Arr			10:00 AM	TEST,FUNTIMES	001000641273801	0	15	68	Rheumatoid arthritis
Arr			11:00 AM	Allscripts,Diana T	ZZZTW07	0	15	17	Follow-up
Arr			11:30 AM	Allscripts,Frank T	ZZZTW10	0	15	27	Medical complaint
Pen			01:00 PM	Allscripts,Kendra	ZZZTW11	0	15	33	Follow-up
Pen			01:30 PM	Allscripts,Theresa T	ZZZTW19	0	15	12	Suture removal

Clinical Toolbar: Commit | Pat Loc: | Status:

Patient Insurance:

Patient Profile... | Appt Details... | Patient Appts... | Print Sched... | Print Chart... | New Task...

User: garlandbr Site: ETSU Family Medicine Asso... | Done

4Iron-Start | Allscripts - Windows I...

11:40 AM 6/27/2011

You can **change the date** of the schedule several ways. Underneath the Provider field is the Date field.

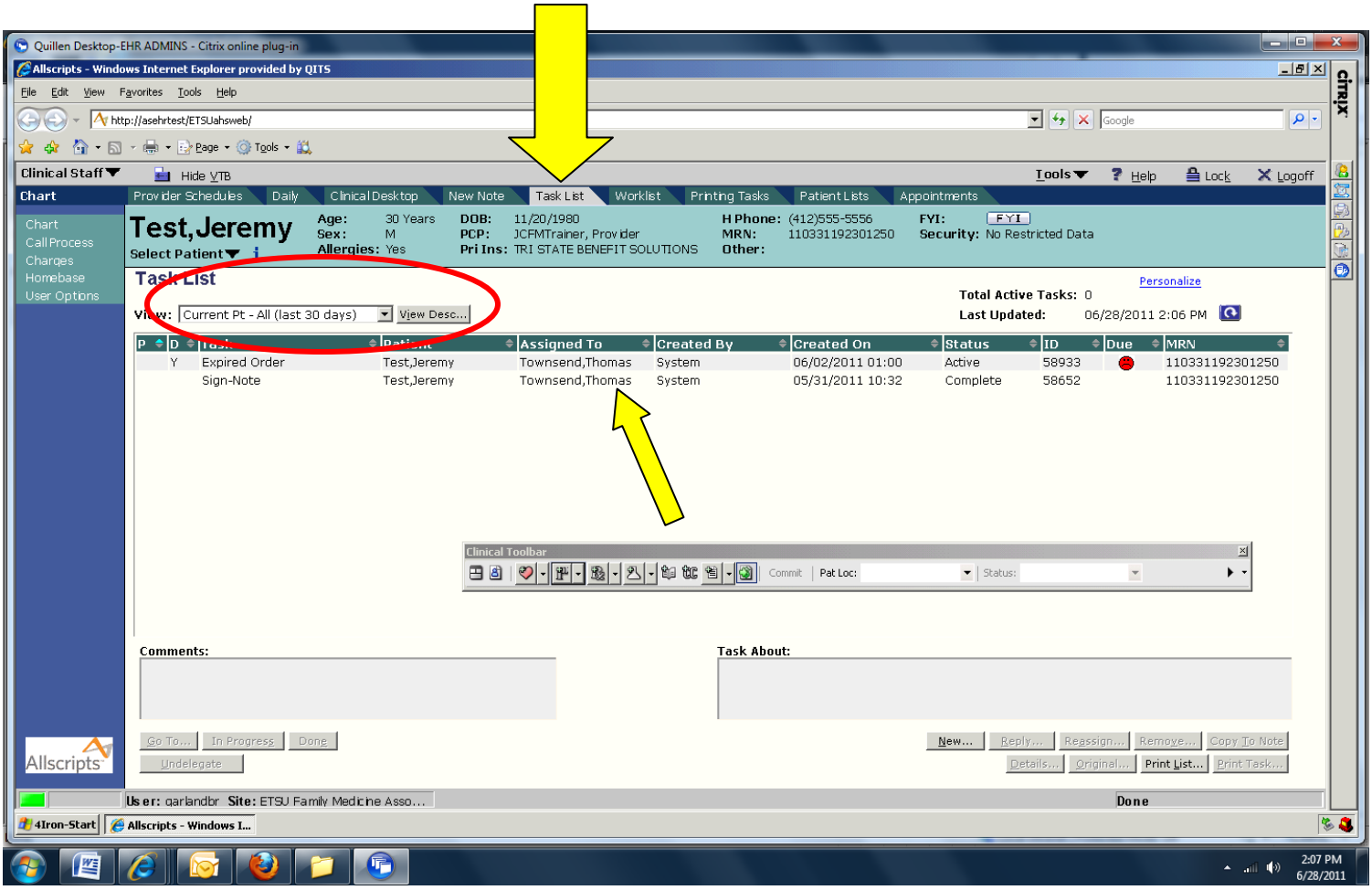
- Clicking on the **calendar icon** next to the date field will pull up a calendar. Click on the desired date, then click OK.
- There are also **tabs across the top of the schedule** with the days of the week if you want to look at another day in the current week.
- If you want to look at the next week (or a previous week), you can click on one of the **two arrows on the right**. These move the schedule forward or backward a week at a time.

The schedule has several other fields we'd like to draw your attention to.

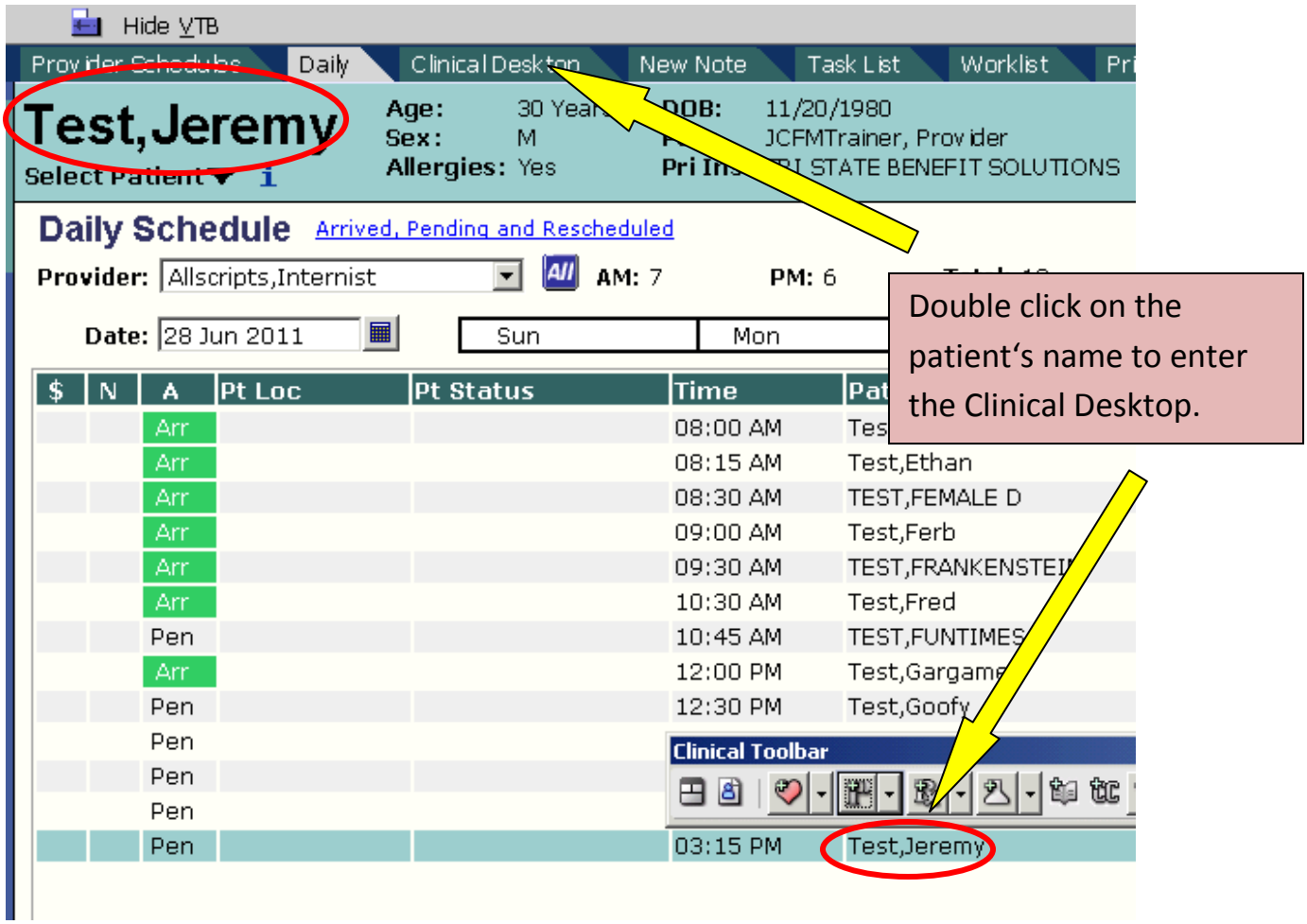
The **"A"** field indicates whether or not a patient has been "arrived" (or checked in) by the Front Desk (using Experior). When the patient has **arrived**, the field will change to green with the letters **Arr**. Patients who have not yet arrived are **Pending** (indicated by the letters **Pen**).

The **Patient Location** and the **Patient Status** can be put in by the clinical staff once they have been taken back to a room. This is a handy way to let the provider know that the patient is ready to be seen. The patient location should have the room numbers for your particular office. The patient status also has options such as Nurse Ready, Orders in Progress, etc.

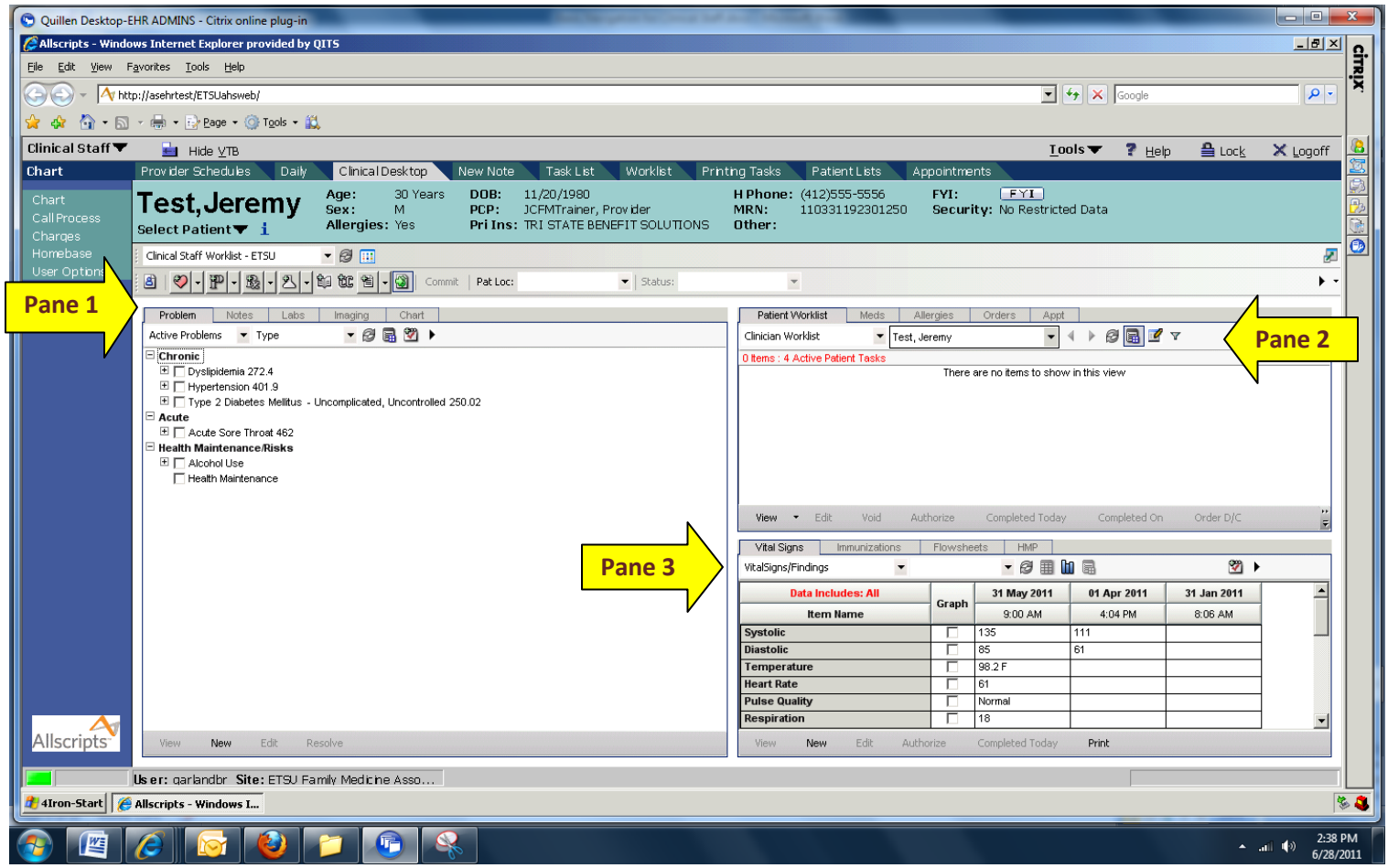
The **Tasks** field is essentially the "To Do" list. On the Daily Schedule page, this will show the number of tasks that are waiting for completion on a particular patient.



To see the tasks, click on the **Tasks List** tab on the HTB. This field will default to the tasks that are assigned to you, but if you click the drop down arrow next to the View field, you can see all of the tasks assigned to a particular patient by clicking on the Current Patient—All. These may be assigned to other members of the office staff or to you, depending on the nature of the task. Tasks include such thing as telephone calls, lab results verifications, and signing notes, to name a few.



From the **Daily Schedule**, *single click* on the patient's name to pull them in to the **Patient Banner**. *Double click* their name to open the **Clinical Desktop**, which is where the "chart" resides.



The **Clinical Desktop** is where you will find the patient's chart. Notice that there are *three* panes on the page.

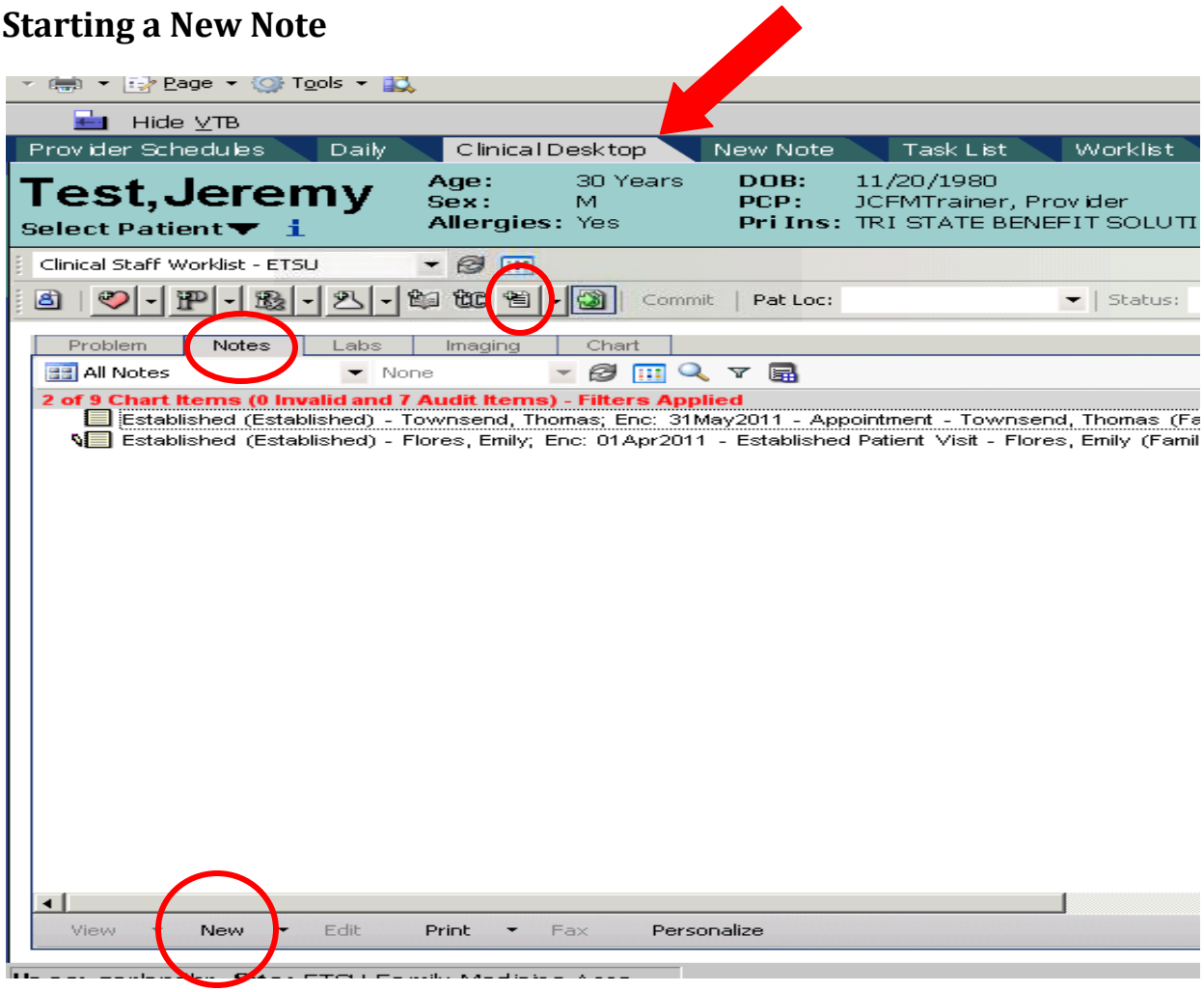
1. In the first pane on the left, you should have the following tabs: Problem, Notes, Labs, Imaging, and Chart. If you are an established patient, there will be items in these sections.
    - The **Problem** tab is where the patient's chronic and acute problems will be listed.
    - The **Notes** tab allows you to view all of the patient's notes. The drop down list allows you to choose the amount of notes you see, either All, by Section, by Encounter, or by Specialty.
    - The **Labs, Imaging, and Chart** tabs are self explanatory, but note that the **Charts** tab allows you several different ways in which you

can view the chart. The *default view* is by specialty. Other options include by Owner, by Problem, by Section, etc.

2. The second pane contains the **Patient Worklist, Meds, Allergies, Orders**, and **Appointments**.
3. The third pane houses patient's **Vital Signs, Immunizations, Flowsheets**, and the **Health Maintenance Profile**. This section contains graphs which tally up the patient's last several visits, for quick reference.

Think of the Clinical Desktop as the open chart. You may have graphs on one side of the chart, and all the past visit notes, labs, imaging reports, etc. on the right-hand side, and you can add information from here, but to actually document a new patient visit, you have to grab a fresh piece of paper, so to speak.

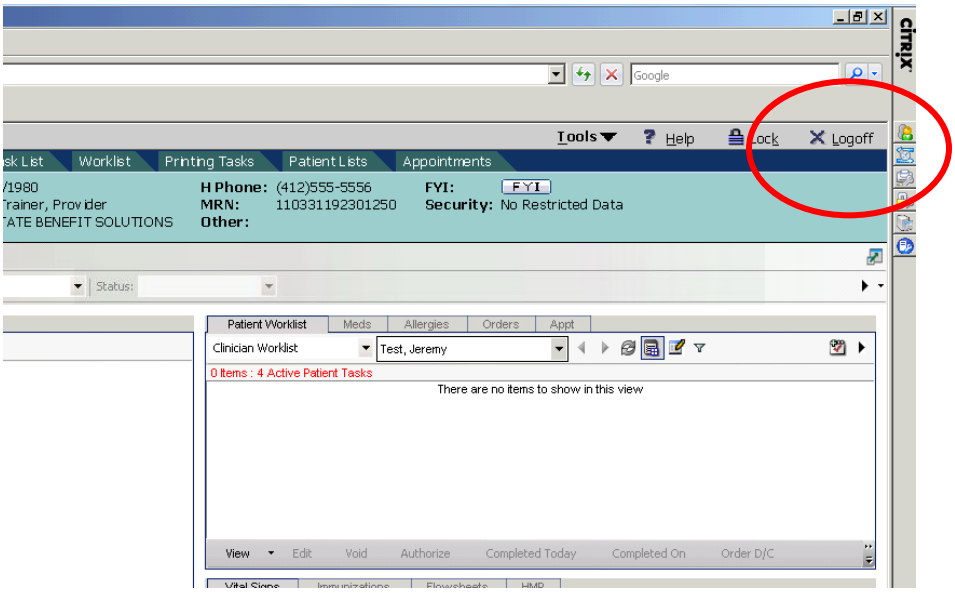
Starting a New Note



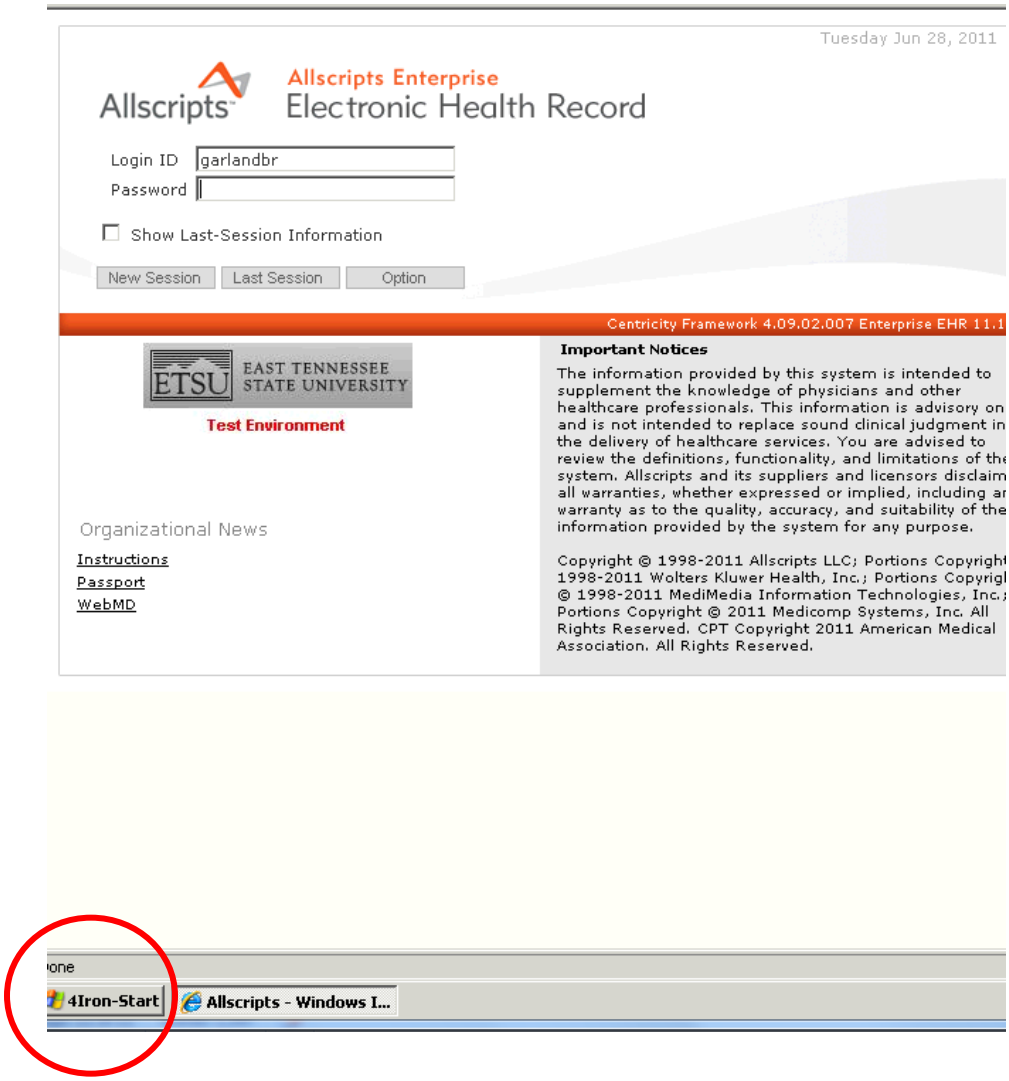
The “fresh piece of paper” for a new note is accessed from one of three areas: (1) by clicking on the Note tab, then New, on the bottom panel; (2) from the Note icon on the Clinical Toolbar; or (3) from the Note tab on the HTB. Details about creating a note are found in our handout “Basic Charting for Clinical Staff.”

Logging Off

When leaving the system, you will need to log off in *two* places. Please remember NOT to simply “x” out.



To properly log off (and prevent server hang ups), click on Logoff in the upper right-hand corner of your screen.



Then, when you get back to the Allscripts log-in screen, click on the golf club-themed Start menu in the lower left-hand side of the screen, and click Log Off.