



EAST TENNESSEE STATE
UNIVERSITY

QUILLEN ETSU PHYSICIANS

Module 1: Daily Schedule & Clinical Desktop

Provider Training Module
Allscripts Touchworks EHR

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

June 2018

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

The screenshot shows the Allscripts interface for the 'Daily Schedule' page. The 'Daily' tab is highlighted and circled in red. The page displays a search bar for 'SELECT PATIENT', a provider dropdown set to 'ALLSCRIPTS,Provider', and a date selector for '01 Jun 2018'. The schedule is shown for 'FRI' (Friday). A table lists appointments, with one entry for 'TEST, TONY' at '01:30 PM' with a duration of '30' and '5' tasks. A 'Clinical Toolbar' is floating over the table, containing various icons and a close button (an 'x' icon) circled in red. The toolbar also includes fields for 'Commit', 'Pat Loc', and 'Status'. At the bottom, there are buttons for 'Edit Clin Summary', 'Patient Profile...', 'Appt Details...', 'Patient Appts...', 'Print Sched...', 'Print Chart...', and 'New Task...'. The Allscripts logo is in the bottom left corner.

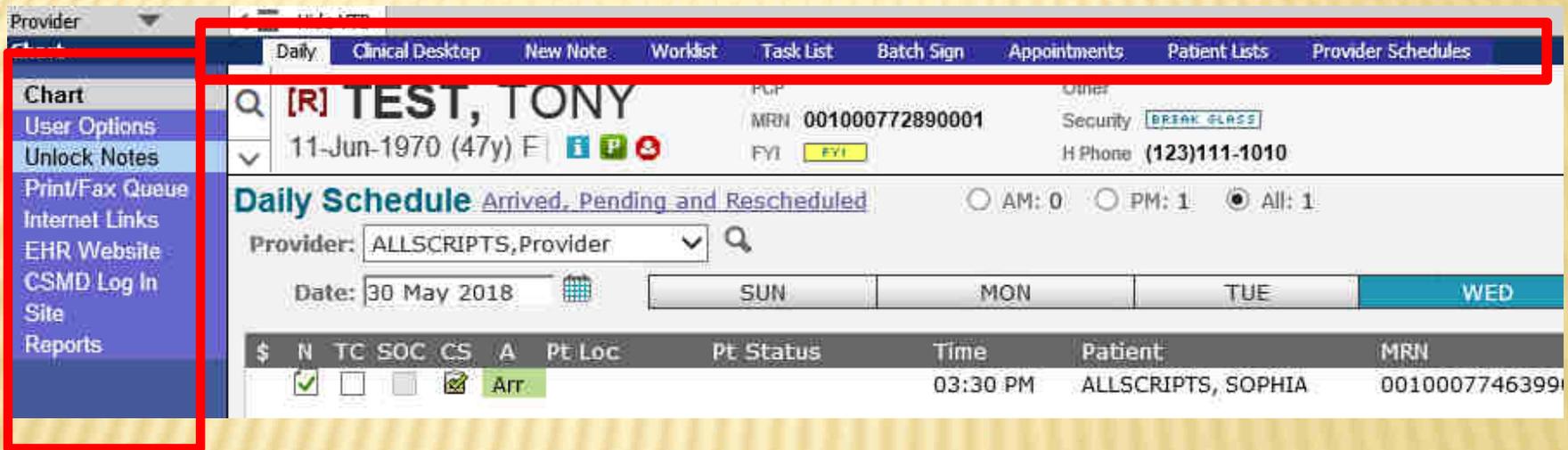
\$	N	TC	SOC	CS	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Tasks	Comments
<input type="checkbox"/>	Arr		01:30 PM	TEST, TONY	001000772890001	AC	30	5	TESTING PLEASE IGNORE					

“Floating” Clinical Toolbar

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

TOOLBARS

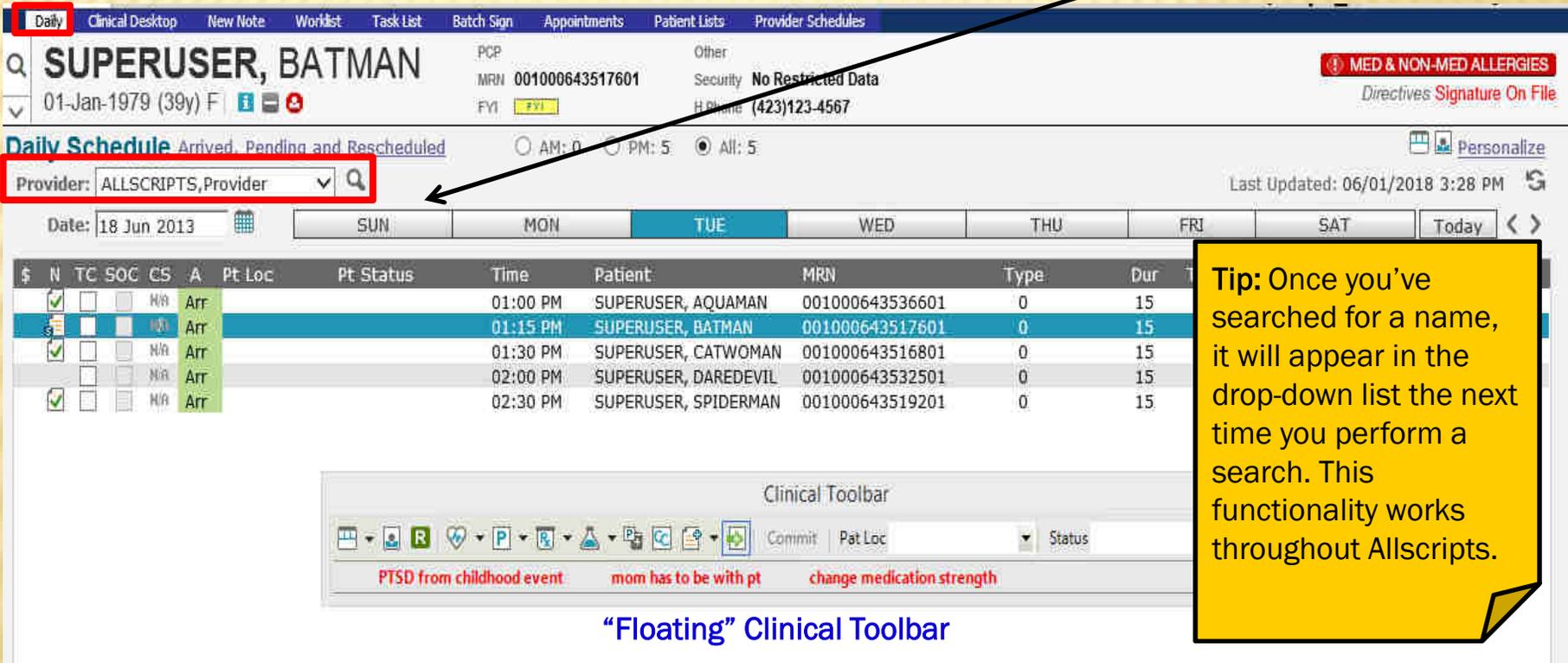
There are two toolbars in Allscripts; the **horizontal toolbar (HTB)** and the **vertical toolbar (VTB)**. The HTB contains all the tabs that you will need for patient documentation.



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

DAILY SCHEDULE

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



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

"Floating" Clinical Toolbar

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

DAILY SCHEDULE

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

The screenshot displays a medical software interface. At the top, a navigation bar includes tabs for 'Daily', 'Clinical Desktop', 'New Note', 'Worklist', 'Task List', 'Batch Sign', 'Appointments', 'Patient Lists', and 'Provider Schedules'. Below this, a user profile for 'SUPERUSER, BATMAN' is shown, including fields for PCP, MRN (001000643517601), FYI (FYI), Other, Security (No Restricted Data), and H Phone ((423)123-4567). The main window is titled 'Daily Schedule' and shows a 'Provider' dropdown set to 'ALLSCRIPTS,Provider' and a 'Date' of '18 Jun 2013'. A table of providers is visible with columns for 'N', 'TC', 'SOC', 'CS', 'A', 'Pt Loc', and 'Pt St'. A 'Search Window -- Webpage Dialog' is overlaid on the table, titled 'Schedulable Providers'. It has a 'Search For:' field containing 'ALLSCRIPTS' and a list of provider names including 'ALLSCRIPTS,Cardiologist', 'ALLSCRIPTS,Dermatologist', 'ALLSCRIPTS,Family Medicine', 'ALLSCRIPTS,InfectiousDisease', 'ALLSCRIPTS,Internist', 'ALLSCRIPTS,Midlevel Provider', 'ALLSCRIPTS,Obstetrician/Gynec', 'ALLSCRIPTS,Pediatrician', 'ALLSCRIPTS,Provider', 'ALLSCRIPTS,Psychiatry', 'ALLSCRIPTS,Resident', 'ALLSCRIPTS,SurgeryMD', and 'ALLSCRIPTS17,Provider'. The 'OK' button at the bottom of the dialog is highlighted with a red box.

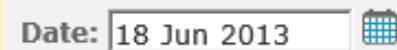
DAILY SCHEDULE

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

1. Click on the day of the week



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



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

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



DAILY SCHEDULE ICONS

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

Provider: ALLSCRIPTS,Provider Last Upd

Date: 18 Jun 2013 SUN MON **TUE** WED THU FRI

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



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



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



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



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



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

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

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

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

PATIENT BANNER

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

The screenshot displays a patient banner for "SUPERUSER, BATMAN" with the following details:

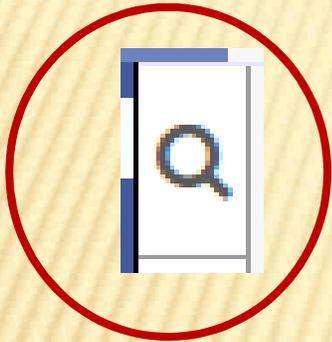
- PCP: [Empty]
- Other: [Empty]
- MRN: 001000643517601
- Security: BREAK GLASS
- FYI: FYI
- H Phone: (423)123-4567
- Medications: MED & NON-MED ALLERGIES
- Directives: Signature On File

Below the banner is the "Daily Schedule" section, showing a table of appointments for Tuesday, June 18, 2013. The patient "SUPERUSER, BATMAN" is highlighted in the table.

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

PATIENT BANNER - SEARCHING

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



Select Patient -- Webpage Dialog

Select Patient

Org: ETSU [Personalize](#)

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

Patient: Name Include InActive

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

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

PATIENT BANNER – FYI ICON

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

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

[R] SUPERUSER, BATMAN

01-Jan-1979 (39y) F

PCP

MRN 001000643517601

Other

Security BREAK GLASS

H Phone (423)123-4567

FYI [FYI]

FYI -- Webpage Dialog

FYI

NOTE: Entries in the box below are not part of the patient’s medical or billing record and should not be used as such. The current version is saved in the system and is accessible by other users.

Brings service animal to visit.

OK Cancel

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

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

PATIENT BANNER – INFORMATION ICON

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

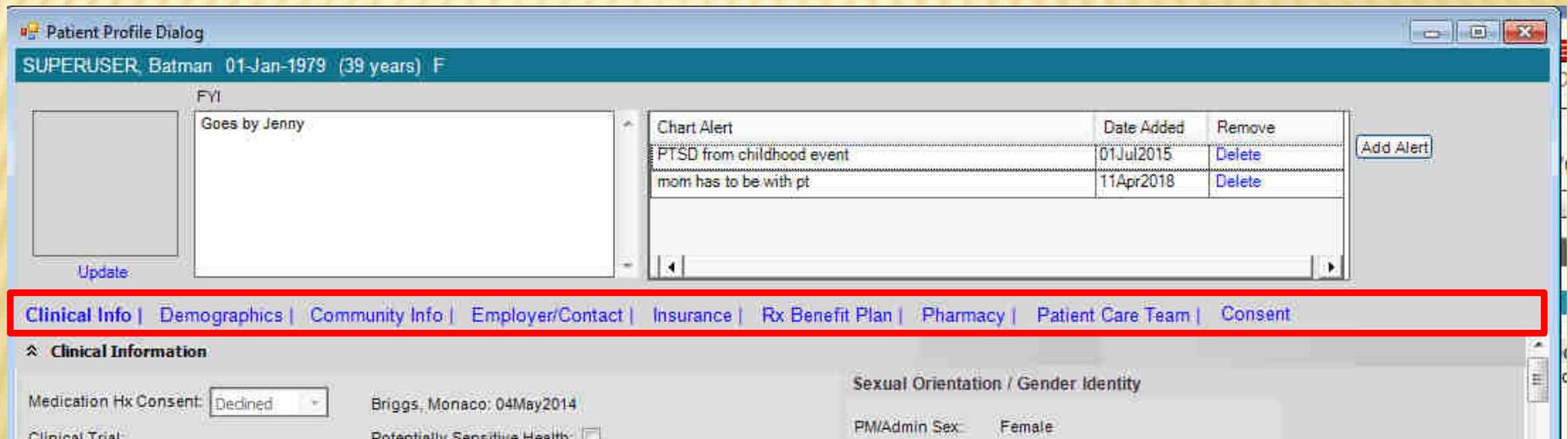


The patient banner displays the following information:

Navigation	Primary Information	Secondary Information	Other
Daily Clinical Desktop New Note Worklist Task List Batch Sign Appointments Patient Lists Provider Schedules	SUPERUSER, BATMAN	PCP	Other
01-Jan-1979 (39y) F 	MRN 001000643517601	Security No Restricted Data	
	FYI 	H Phone (423)123-4567	



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



The Patient Profile Dialog box for SUPERUSER, Batman (01-Jan-1979, 39 years, F) contains the following sections:

- FYI:** Goes by Jenny
- Chart Alerts:**

Chart Alert	Date Added	Remove
PTSD from childhood event	01Jul2015	Delete
mom has to be with pt	11Apr2018	Delete
- Navigation Links:** Clinical Info | Demographics | Community Info | Employer/Contact | Insurance | Rx Benefit Plan | Pharmacy | Patient Care Team | Consent
- Clinical Information:** Medication Hx Consent: Briggs, Monaco: 04May2014
- Sexual Orientation / Gender Identity:** PM/Admin Sex: Female

INFORMATION ICON – CHART ALERTS



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

Add Alert

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

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.

The dialog box titled "Add/Edit Patient Chart Alerts" contains the following sections:

- Alerts:**
 - Selected Items:** A list with checkboxes for "Hearing Impaired" and "Latex Allergy", both of which are checked.
 - Available Items:** A list with checkboxes for "Blind Patient", "Dr. requires 1 hour block", "Dr. requires 30 min block", "Iodine Allergy", "KDS" (checked), and "Patient does not speak English".
- Adhoc Alert:** A text input field with an "Add" button next to it.

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog.

The Chart Alerts will appear on the Clinical Toolbar.



INFORMATION ICON – PATIENT CARE TEAM

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

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

⤴ Patient Care Team

Add Provider/Agency Add Patient Caregiver/Resource Show Inactive

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

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

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

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

Quick Search Advanced Search Browse Favorites

Quick Search

⤴ Search Results

Showing 7 results

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

THE CLINICAL DESKTOP

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

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

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

01-Jan-1979 (39y) F

Daily Schedule Arrived, Pending and Rescheduled AM: 0 PM: 5 All: 5 Personalize
Provider: ALLSCRIPTS, Provider Last Updated: 06/01/2018 4:07 PM

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

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

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

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

01-Jan-1979 (39y) F

ETSU - Clinician

Hearing Impaired Latex Allergy

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

All Problem List Rec: 29Dec2017

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

HMP/Reminders Growth Chart

Vital Signs Meds Med Flowsheet Ord

VitalSigns/Findings

Data Includes: All

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

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

THE CLINICAL DESKTOP

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

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

SUPERUSER, DAREDEVIL | PCP: ADAMS MD, JOHN | Other: | Security: No Restricted Data | MED & NON-MED ALLER

01-Jan-1979 (39y) F | MRN: 001000643532501 | FYI: FYI | H Phone: (423)123-4567

ETSU - Clinician

Clinical Toolbar

Hearing Impaired | Latex Allergy

Component 1

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

Component 2

Data Includes: All		12 Apr 2018	11 Apr 2018	25 Oct 2017
Item Name	Select	10:51 AM	11:24 AM	9:43 AM
Temperature	<input type="checkbox"/>	98.2 F	98.4 F	98.6 F, Oral
Systolic	<input type="checkbox"/>	122	120	

PROBLEM TAB

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

The screenshot displays the EHR interface for a patient named SUPERUSER, DAREDEVIL. The 'Problem' tab is selected and highlighted with a red box. The interface shows a list of active and past medical history problems. A yellow callout box provides a tip about using different sort options.

Problem Tab Content:

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

Vital Signs Table:

Item Name	Select	12 Apr 2018	11 Apr 2018	25 Oct 2017	07 Jul
		10:51 AM	11:24 AM	9:43 AM	9:23
Temperature	<input type="checkbox"/>	98.2 F	98.4 F	98.6 F	98 F
Systolic	<input type="checkbox"/>	122	120		125
Diastolic	<input type="checkbox"/>	87	70		82
Heart Rate	<input type="checkbox"/>	87	88		70
Pulse Quality	<input type="checkbox"/>				
Respiration	<input type="checkbox"/>				19
Respiration Quality	<input type="checkbox"/>				
Height	<input type="checkbox"/>				5 ft 9 in
Weight	<input type="checkbox"/>				175 lb
BMI Calculated	<input type="checkbox"/>				25.84kg
BSA Calculated	<input type="checkbox"/>				1.95m2
O2 Saturation	<input type="checkbox"/>				
Pain Scale	<input type="checkbox"/>				
Last Blood Sugar	<input type="checkbox"/>				
LMP	<input type="checkbox"/>				16Dec05
Mammogram	<input type="checkbox"/>				
How many times in the...	<input type="checkbox"/>				
How many times in the...	<input type="checkbox"/>				
Do you have a fever?	<input type="checkbox"/>				

PROBLEM TAB

Problem Notes Labs Radiology Procedures/Pathology Chart Worklist

All Problem List Rec: 29Dec2017

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

New Edit **Resolve** Impression Reconcile Reconcile Hx

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

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

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

NOTES TAB

The screenshot displays a medical software interface for a patient named SUPERUSER, DAREDEVIL. The patient's date of birth is 01-Jan-1979 (39y). The interface shows a list of notes categorized by specialty (Family Medicine, General Surgery, Internal Medicine). The 'Notes' tab is highlighted in red. The 'Edit' button in the bottom toolbar is also highlighted in red.

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

All Notes by Specialty None

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

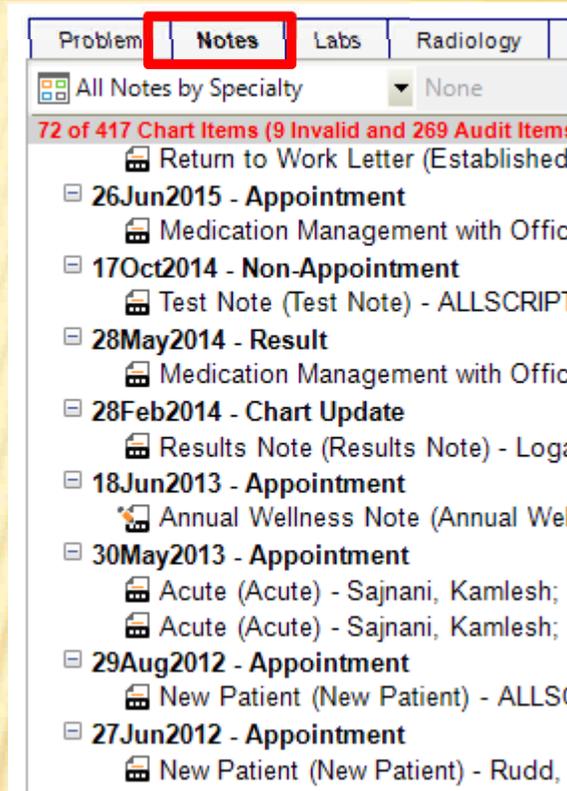
- Family Medicine
 - 24Aug2017 - Chart Update
 - Communication Note (no co-sign) (Communication Note (no co-sign)) - Gibbs, Hailey; Enc: Return to Work or School - Gibbs, Hailey; Enc: Gibbs, Hailey (Family Medicine)
 - 21Jan2015 - Chart Update
 - Established (Established) - ALLSCRIPTS, Family Medicine;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

View New Note **Edit** Print Fax Task

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

Tip: If your patient is seen by other providers within the MEAC organization or at one of the 3 Family Medicine clinics, their notes will be available on the Clinical desktop.

NOTES TAB - ICONS



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



Unfinalized note icon: This note still requires a signature



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



sArchive – document was part of the original paper chart

NOTES – VIEW MODE VS. EDIT MODE

The screenshot shows the 'Note Viewer' window for a patient named SUPERUSER, Daredevil, born 01-Jan-1979 (39 years), Female. The note is titled 'Acute' and is owned by Sajnanj, Kamlesh, with a status of 'Final'. The content is organized into several sections: 'Health Management' (Health Maintenance), 'Chief Complaint' (1. Palpitations), 'Active Problems' (Chronic: 1. Type 2 Diabetes Mellitus 250.00), 'Past Medical History' (Chronic: Anemia 285.9, Asthma 493.90, Esophageal Reflux 530.81, Gout 274.9, Hyperlipidemia 272.4), and 'Social History' (Problems: Alcohol Use, Drug Use 305.90). The interface includes a menu bar at the bottom with options like Sign, Edit, Audit, Document Hx, Task, Attach to Result, Print, Fax, Invalidate, 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.

The screenshot shows the 'Note and Chart View' window for the same patient. The note is titled 'Annual Wellness Visit' and is owned by ALLSCRIPTS, Provider, with a status of 'Needs Input'. The interface is more complex, featuring a left-hand navigation pane with categories like 'Quality Measures Form', 'Patient Care Team', 'Health Management', 'Active Problems', 'Screening & Management', 'ROS (If applicable)', 'Past Medical History', 'Social History', 'Family History', 'Surgical History', 'Current Meds', 'Allergies', and 'Immunizations'. The main content area displays the 'Quality Measures Form' with a table of items to be reviewed, such as 'Have you ever had a...', 'Have you had a flu shot this...', 'Have you had colorectal...', 'Colorectal Cancer Screening:...', 'Have you had a mammogram...', 'Mammogram: who...', 'Last Pap smear?', 'Pap Smear: where / when?', 'DXA (bone) scan done in last...', and 'Have you had a diabetic...'. Below this is a 'Patient Care Team' table and a 'Quality Measures Form' section with a 'PHQ-9/MOCA' form and another 'Patient Care Team' table. The interface includes a menu bar at the bottom with options like View, Recompile, Sign, Spell Check, Copy Forward, and Show Uncapied Form Data.

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

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

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

LABS TAB

Problem	Notes	Labs	Radiology	Pro
---------	-------	-------------	-----------	-----

Labs None

10 of 484 Chart Items (10 Invalid and 303 Audit Items) -

-  Hemoglobin A1C - Done: 22-Jul-2015 - Log
-  CBC Automated Differential - Done: 22-Jul
-  CBC Manual Differential - Done: 10-Jul-201
-  Basic Metabolic Panel (BMP) - Done: 08-
-  Thyroid Panel w TSH - Family Medicine (O
-  Drug Screen Urine, Rflx Confirmation (FM
-  Thyroid Panel w TSH - Family Medicine (O
-  * Culture, Urine - Done: 11-Jun-2014 - Undr
-  * Vitamin D, 25 Hydroxy, Total , D2 , D3 - I

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



Normal lab that has been verified



Normal lab that has not been verified



Abnormal lab that has been verified



Abnormal lab that has not been verified

sLaboratory Results

Scanned lab



Lab that has been resulted back manually

Procedures

Problem Notes Labs **Procedures** Radiology Chart Worklist

Procedures None

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

Diagnostics

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

Chart

Problem Notes Labs Procedures Radiology **Chart** Worklist

All by Section by Sub-Section None

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

Notes

- Office Notes
- Follow-Up (Follow-Up)
- Follow-Up (Follow-Up)
- Follow-Up (Follow-Up)
- Follow-Up (Follow-Up)
- Established (Established)
- Acute (Acute) - ALLSCRIPTS; Provider; Enc: 17Apr2014 - Chart Update - ALLSC
- Established (Established) - ALLSCRIPTS; Provider; Enc: 17Apr2014 - Chart Upda
- Follow-Up (Follow-Up) - Jemigan, Thomas; Enc: 14Apr2014 - Appointment - Jemi
- Established (Established) - Vadlamudi, Ramya; Enc: 16Mar2014 - Chart Update -

Problem Provider Section Specialty All by Section by Sub-Section Imaging Labs Patient Information

Radiology

Problem Notes Labs Procedures **Radiology** Chart Worklist

Imaging None

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

Diagnostics

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

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

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

WORKLIST TAB

The screenshot displays a software interface for a clinician's worklist. At the top, there are tabs for 'Worklist', 'Problem', 'Notes', 'Labs', 'Procedures/Pathology', 'Radiology', and 'Chart'. Below these is a 'Clinician Worklist' section with a dropdown menu currently showing 'TEST, BOBBY'. A red box highlights this dropdown menu. Below the dropdown, there is a list of items, with one item selected: 'Unauthorized - Requires Signature'. This item is highlighted in blue and contains the following text: 'Clotrimazole 1 % External Cream, APPLY 2-3 TIMES DAILY TO AFFECTED AREA(S); Therapy: 29Nov2017-(Last: 16May2018) Requested for: 16May2018, Last Rx: 16May2018; Status: UNAUTHORIZED - Requires Signature Ordered'. Below this, there is a detailed prescription record: 'Rx By: ALLSCRIPTS, Provider; Dispense: 0 Days; # 1 X 15 GM Tube; Refill: 0; For: PMH: History of tinea corporis; DAW = N; Sent To: TEST PHARMACY; Last Updated By: Livingston, Amanda; 5/16/2018 8:56:29 AM'. At the bottom of the interface, there is a row of buttons: 'Verify', 'Authorize', 'Authorize All', 'Update Provider', 'Review', and 'Print Results'. A red box highlights this entire row of buttons.

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.

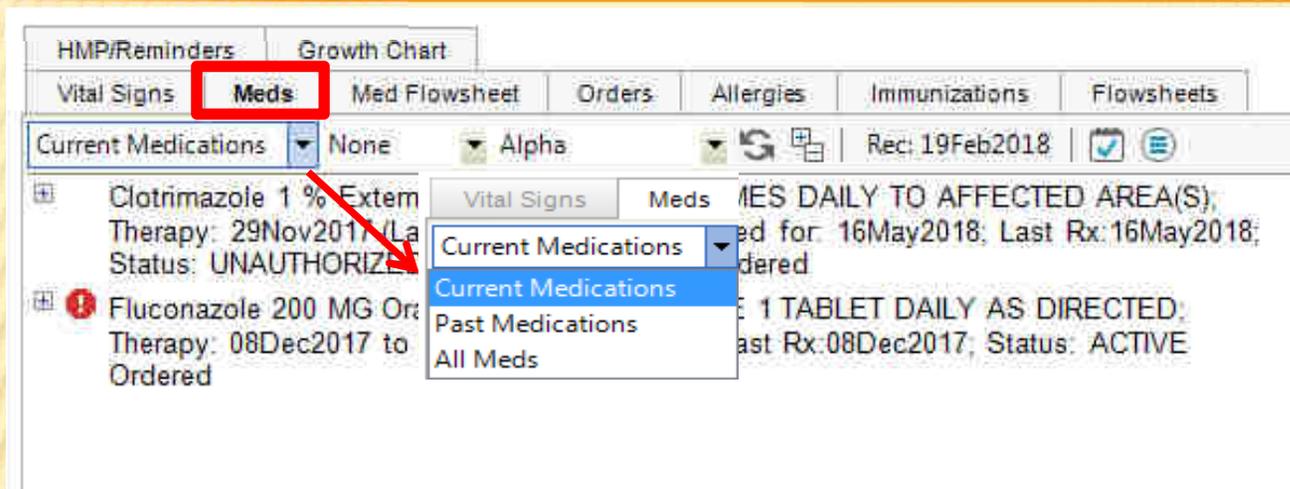
VITALS TAB

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"/>			

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

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

MEDS TAB



The Meds tab allows you to do the following:

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

ORDERS TAB

Vital Signs Meds Med FlowSheet **Orders** Allergies Immunizations FlowSheets

Current Orders None Alpha

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

Current Orders
Current Orders
Past Orders
All Orders

Laboratory Radiology Follow Up/Referral Education Edit Print Req

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

ALLERGIES TAB

Growth Chart

Vital Signs Meds Med Flowsheet Orders **Allergies** Immuniz

All Type Rec: 25May2018

Medication

- * Alfalfa Flavor POWD : Asthma
- * Sulfa Drugs : Allergy : Anaphylaxis
- * Phenergan TABS : Confusion
- Ciprofloxacin HCl TABS
- Flagyl TABS
- Haldol
- Latex Exam Gloves MISC

Non-Medication

- * Eggs : Anaphylaxis
- * Soy : Asthma
- Apple : Abdominal pain
- Banana : Leg Cramps
- Dust Mite
- Mango

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

Immunizations Series: All Statuses

Data Includes: All Show Age Last Given

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

New Immunization 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

FlowSheets

BFM Anticoagulation

Family Medicine

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

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

HMP/REMINDERS TAB

HMP/Reminders

Health Management Problem

Filter Applied: Suppress Other Orders

Item	Sche...	Se	Goal	Most Recent	Date	5y...	To Do	Incompl...
Weight		<input type="checkbox"/>	New	160 lb	14...			
BMI		<input type="checkbox"/>	New	24.33 kg/m ²	14...			
BSA		<input type="checkbox"/>	New	1.86 m ²	14...			
Head Circumference		<input type="checkbox"/>	New	9.449 IN	14...			
<input checked="" type="checkbox"/> Cancer		<input type="checkbox"/>						
Activity, normal								
EKG (Performed At...								
Repeat Blood...								
Xray Abdomen								
Xray Chest								
<input checked="" type="checkbox"/> Community acquired...								
Ace Bandage								
<input checked="" type="checkbox"/> Urinalysis (DIPSTICK...								
<input checked="" type="checkbox"/> Diabetes mellitus								
HumaLOG 100...								
Insulin Syringe								
1 month Follow up								

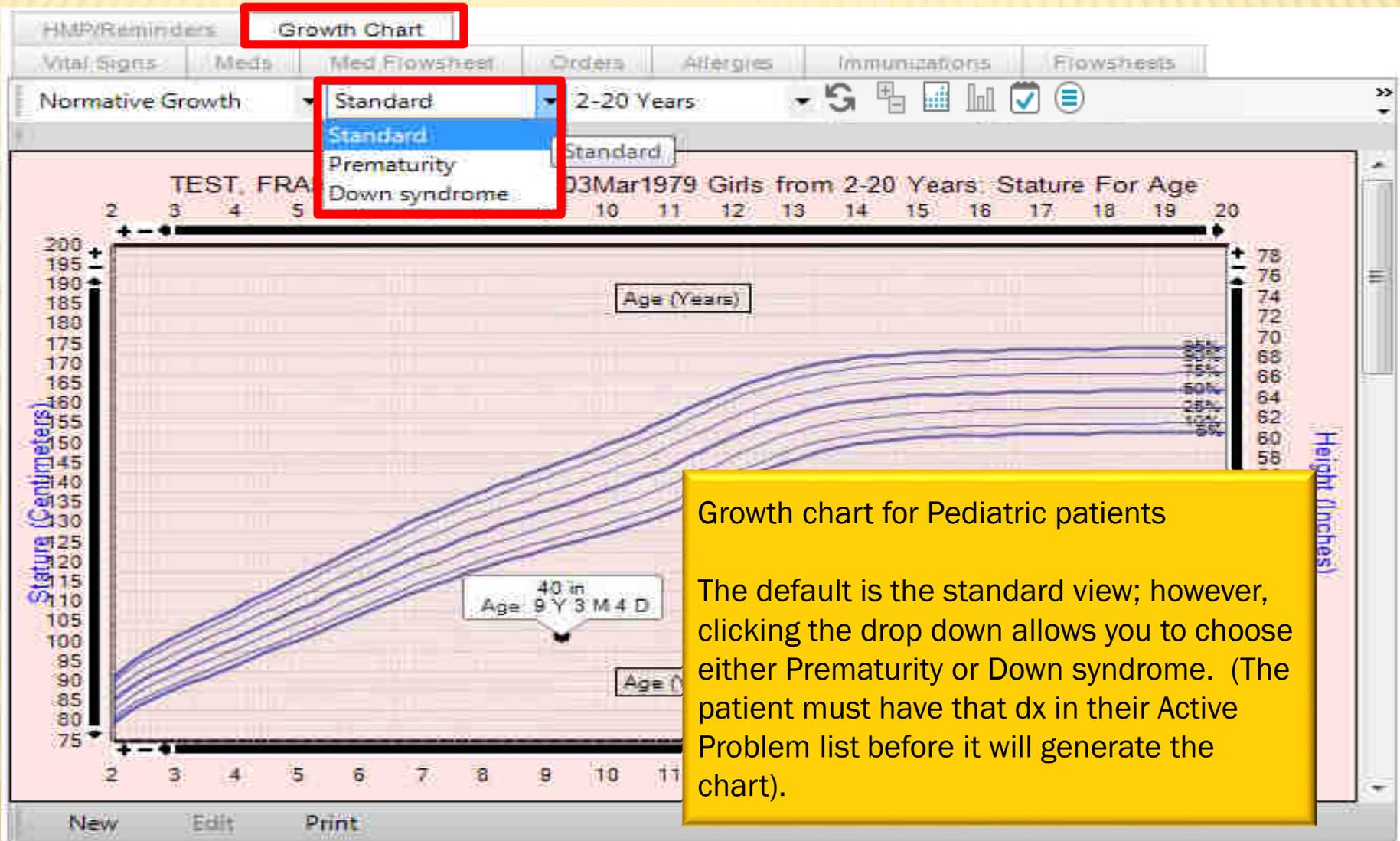
Order Create Reminder Edit Last Done Done Today Renew w/ Changes

HMP—Health Management Profile

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

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

GROWTH CHART TAB





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PLEASE PROCEED TO THE NEXT MODULE – DOCUMENTING HISTORY