Review the Chart

Preview your patients' charts

In Patient Lists, there are two ways to view patient information without opening the chart:

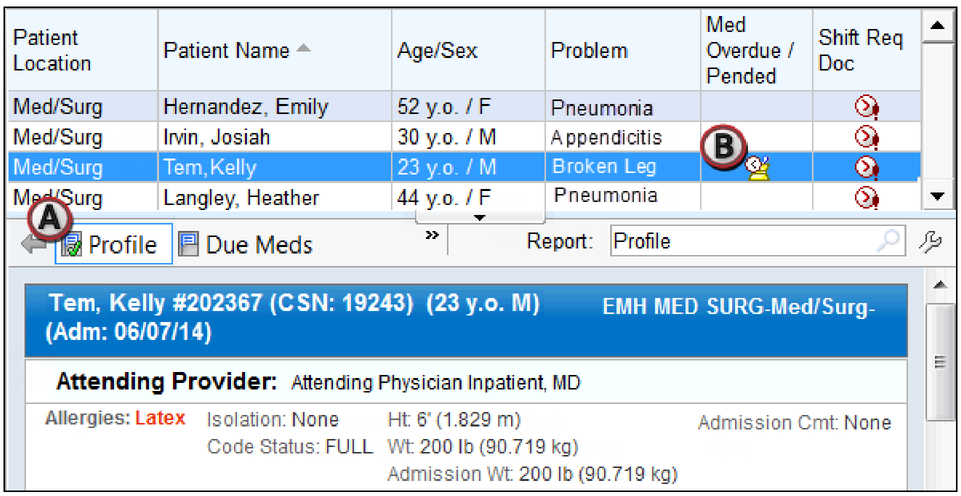
A. Select a patient to view a report in the bottom pane. Click the report toolbar buttons to switch reports.

While viewing a report you'll use often, click and then click **Add Current** to add it to the report toolbar for quick access. Enter a short display name so more buttons can appear on the toolbar.

B. Use the icons in columns to identify patients with overdue meds, outstanding documentation, unacknowledged orders, and more.

Double-click a patient's row to open his chart.

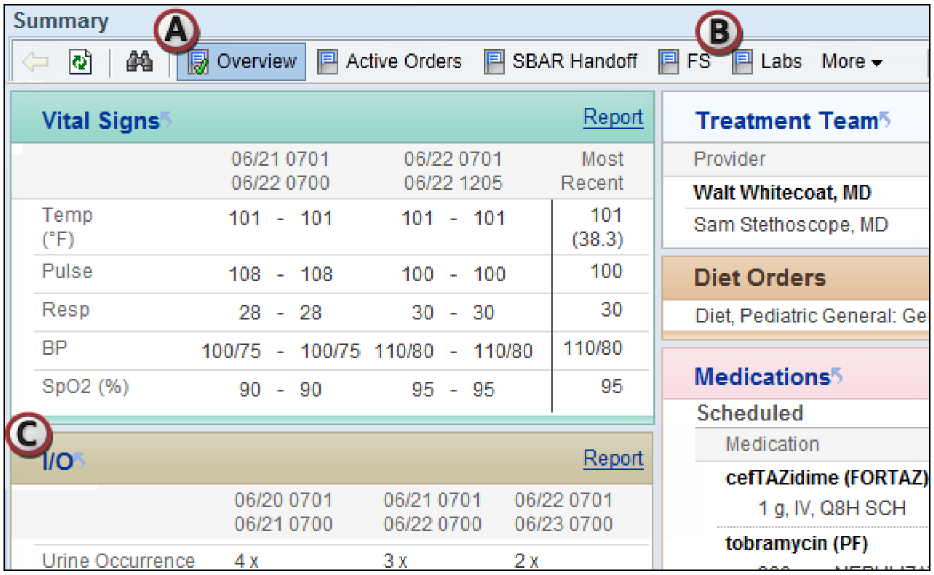
Quickly identify your patient's PRN and scheduled meds along with their frequencies, doses, routes, and last administration times using the **Due Meds** report.



Review a patient's chart at a high level

In Patient Lists, double-click a patient's row to open the chart to the Summary activity.

A. View the Overview report to see a variety of information from the patient's current hospitalization, including medical problems, recent vital signs, I/O values, and lab results.
B. Click a toolbar button to view other reports, like Labs.
C. Click a link in a section header to jump to the activity where you can document the information. For example, click **I/O** to jump to the Intake/Output activity.



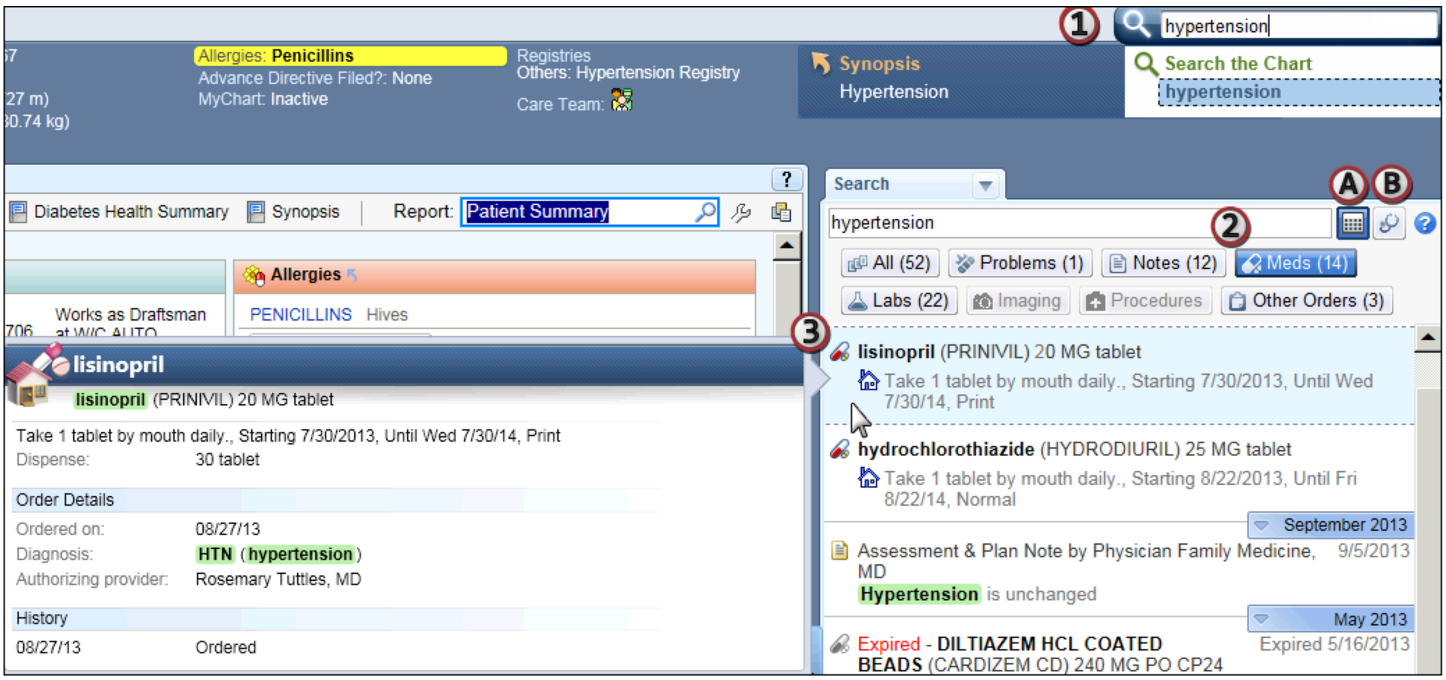
Search a patient's chart

If you're looking for specific patient information but aren't sure where to find it, search the patient's chart. For example, enter "hypertension" to look for problems, clinical notes, medications, and other orders related to that condition.

1. In the patient's chart, enter a keyword in the **Search** field in the upper right and press **Enter**. Results appear in the Search sidebar.
2. Filter the results using the buttons at the top of the **Search** sidebar. For example, click **Meds** to see only the patient's medications related to hypertension.

    a. Click to sort the search results by date.
    b. Click to group the search results by encounter.

3. Hover over a search result to view more details in a bubble.
4. Click a search result to open a full report.



Search tips:

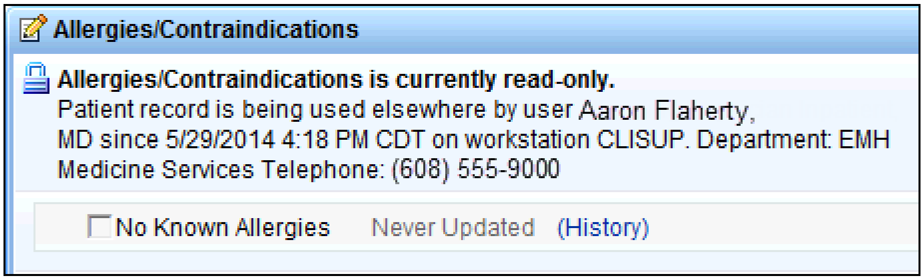
- Use the **Search** field to open activities. As you type, a list of matches appears. Click the name of the activity that you want to open.
- Enter a search term in quotation marks to find results that include only that exact phrase. If you don't enter quotation marks, you also see results for common synonyms and related terms. For example, if you search for arrhythmia, you see results related to arrhythmia, chest pain, and fibrillation.
- Refine your search results by using the AND operator. For example, enter arrhythmia AND pain to see only results related to both terms.
- Click an encounter heading (indicated by) in the Search sidebar to open the encounter report.
- Press **Ctrl** + **Spacebar** to quickly move your cursor to the **Search** field.
- Click in the Search sidebar to see more tips on how to search effectively.

Understand locked chart messages

To prevent you and your colleagues from double-documenting on a patient, the system locks a patient's chart when you're documenting certain clinical information. For example, when you're documenting a patient's allergies, other clinicians can't document on that patient's allergies. When part of a chart is locked, you can still view that part of the chart and document in the rest of the chart.

To avoid locking the chart for other users, leave clinical documentation items when you're not actively documenting in them.

When the chart is locked, a message appears telling you that you can't document in that part of the chart. Here's an example of the type of message that appears in the Allergies navigator section:



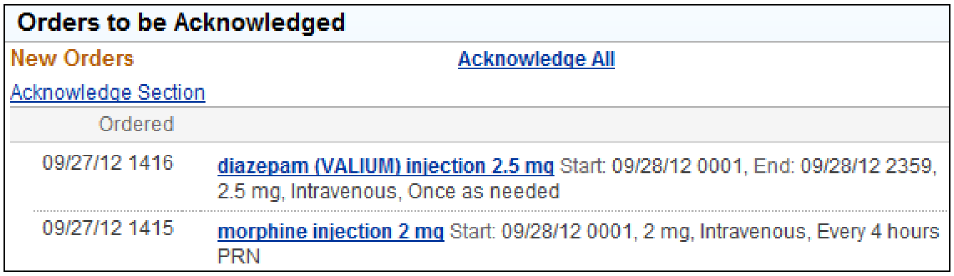
Most chart lock situations are intuitive, like the allergies example above, but this one is less obvious: When someone is editing a patient's problem list, no one can edit that patient's allergies.

If your computer terminates unexpectedly when you're documenting in a patient's chart, contact the help desk to unlock the chart for other users.

Acknowledge orders

Acknowledge new and modified orders to indicate that you have seen them. This does not mean that you will be the one to carry out the order. If you have concerns about the orders, acknowledge them and then contact the physician.

In the **Orders to be Acknowledged** section of the Overview report, click **Acknowledge All** to acknowledge orders and remove them from this section of the report.



Orders to be Acknowledged

New Orders — Acknowledge All

Acknowledge Section

Ordered	
09/27/12 1416	diazepam (VALIUM) injection 2.5 mg Start: 09/28/12 0001, End: 09/28/12 2359, 2.5 mg, Intravenous, Once as needed
09/27/12 1415	morphine injection 2 mg Start: 09/28/12 0001, 2 mg, Intravenous, Every 4 hours PRN

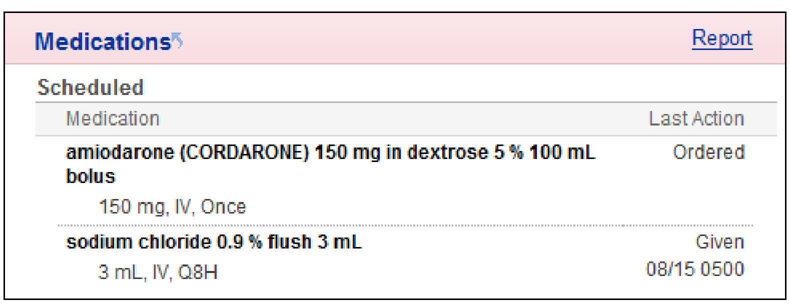
!	Orders are active whether or not you acknowledge them. Acknowledging orders is not the same as releasing them. For more information about releasing orders, refer to the Transfer guide.

i	To see a list of all a patient's current orders, open the Orders activity.

i	When a patient has orders to acknowledge, appears in the **Unack Orders** column of the L&D Grease Board. Double-click the patient to open her chart to the Summary activity and acknowledge the orders.

Review current medications

See an overview of the patient's current medications in the Medications section of the Overview report. A last action of Ordered means the medication has never been given. To jump to the MAR, click the **Medications** link.



Medications — Report

Scheduled

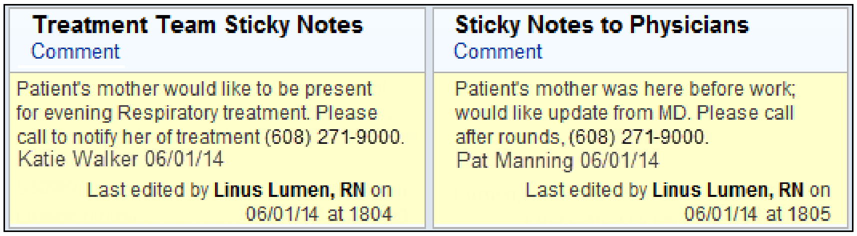
Medication	Last Action
amiodarone (CORDARONE) 150 mg in dextrose 5 % 100 mL bolus 150 mg, IV, Once	Ordered
sodium chloride 0.9 % flush 3 mL 3 mL, IV, Q8H	Given 08/15 0500

i	Identify patients with due and overdue meds from Patient Lists by looking for in the Med Due and Med Overdue columns.

Leave "sticky notes" in the chart

You can leave "sticky notes" for other clinicians at the top of the Overview report. These notes aren't part of the medical record and anyone can permanently delete them at any time.

1. In the Overview report, click the **Comment** link.
2. Enter your note, your name, and the date.



The sticky note automatically records the last person to edit the note. Use the SmartTexts **.me** and **.td** to quickly record your name and today's date so others know who wrote which part of the note.

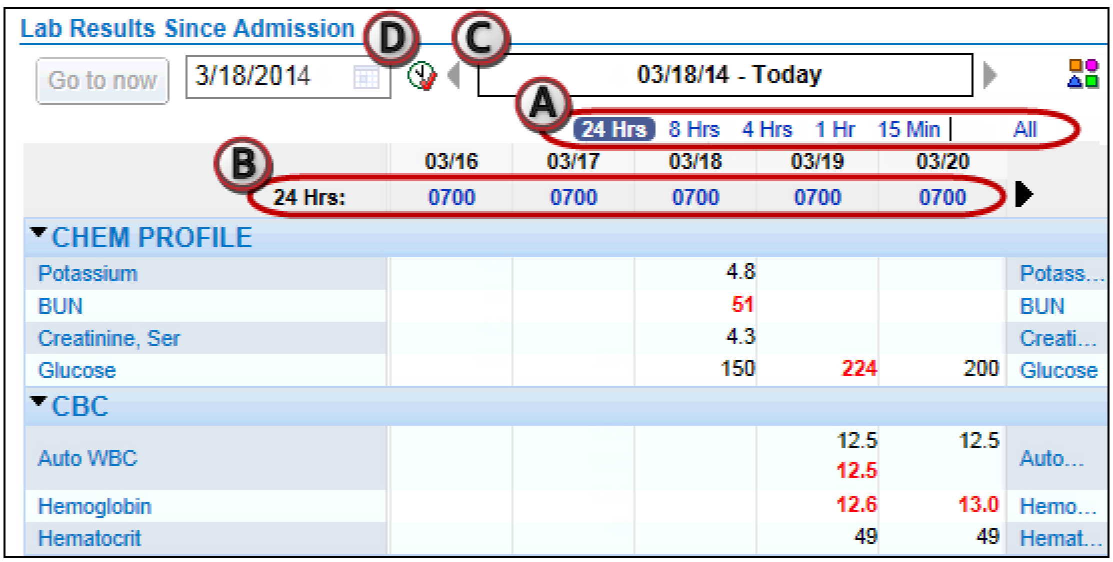
Delete text in a sticky note that's no longer relevant by clicking **Comment**, deleting the text, and clicking **Accept**.

Review lab results

To see a patient's lab results since admission, open the Labs report in the Summary activity. It opens to the All view, which shows all data recorded. You can control how much data you see.

A. To expand or collapse the data, click an interval link. For example, click 24 Hrs to see 24 hours of data in each column.
B. To drill down for more detail in a specific interval, click a column header link. A + sign appears next to a value if there is more data in the interval, and a ! sign appears if one of the hidden results is abnormal.
C. To view a different date, click the arrows next to the date. Or, enter a specific date in the **Date** ( ) field.
D. To know which results are new, click each time you finish your review. The next time you open Results Review, new results will be marked with an icon.

!	When values are hidden, I/O cells show the total for that interval. All other cells show the last value documented in that interval.



i	In an interval view, the column headers show the start time of the interval. In the All view, they show the time the data was recorded.

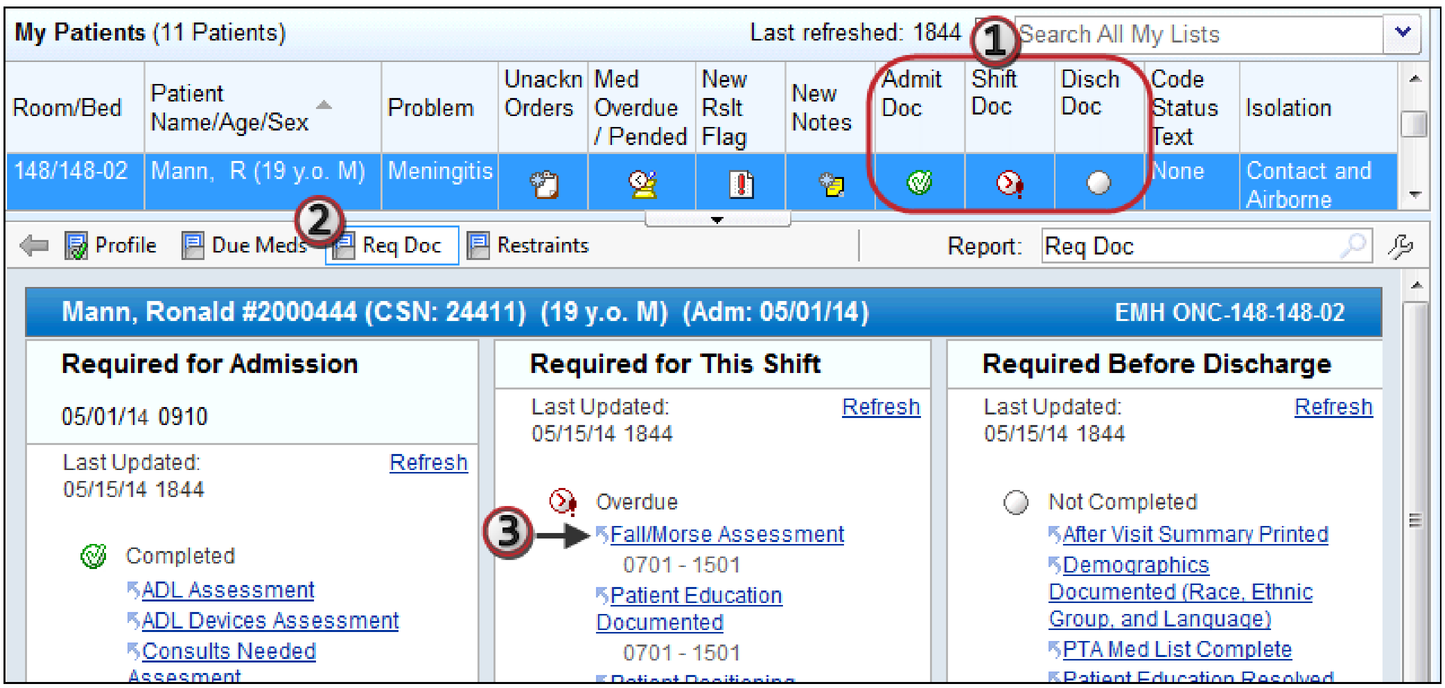
Identify and complete required flowsheet documentation

To help you see at a glance what required documentation you need to complete, check these color-coded icons Patient Lists:

- = Complete
- = Incomplete, but not due soon
- = Due soon
- = Overdue

These icons indicate whether you need to complete documentation to meet compliance or hospital regulations:

1. In Patient Lists, look at the icons in the **Admit Doc**, **Shift Doc**, and **Discharge Doc** columns.
2. If documentation is incomplete, view the Req Doc report in the bottom pane for details on what's missing. (Note: You can also view this report in the sidebar while working in a patient's chart.)
3. Click a link in the report to jump to the activity where you can complete the missing documentation. When you access Flowsheets from a report link, the required documentation icons appear in the row automatically.



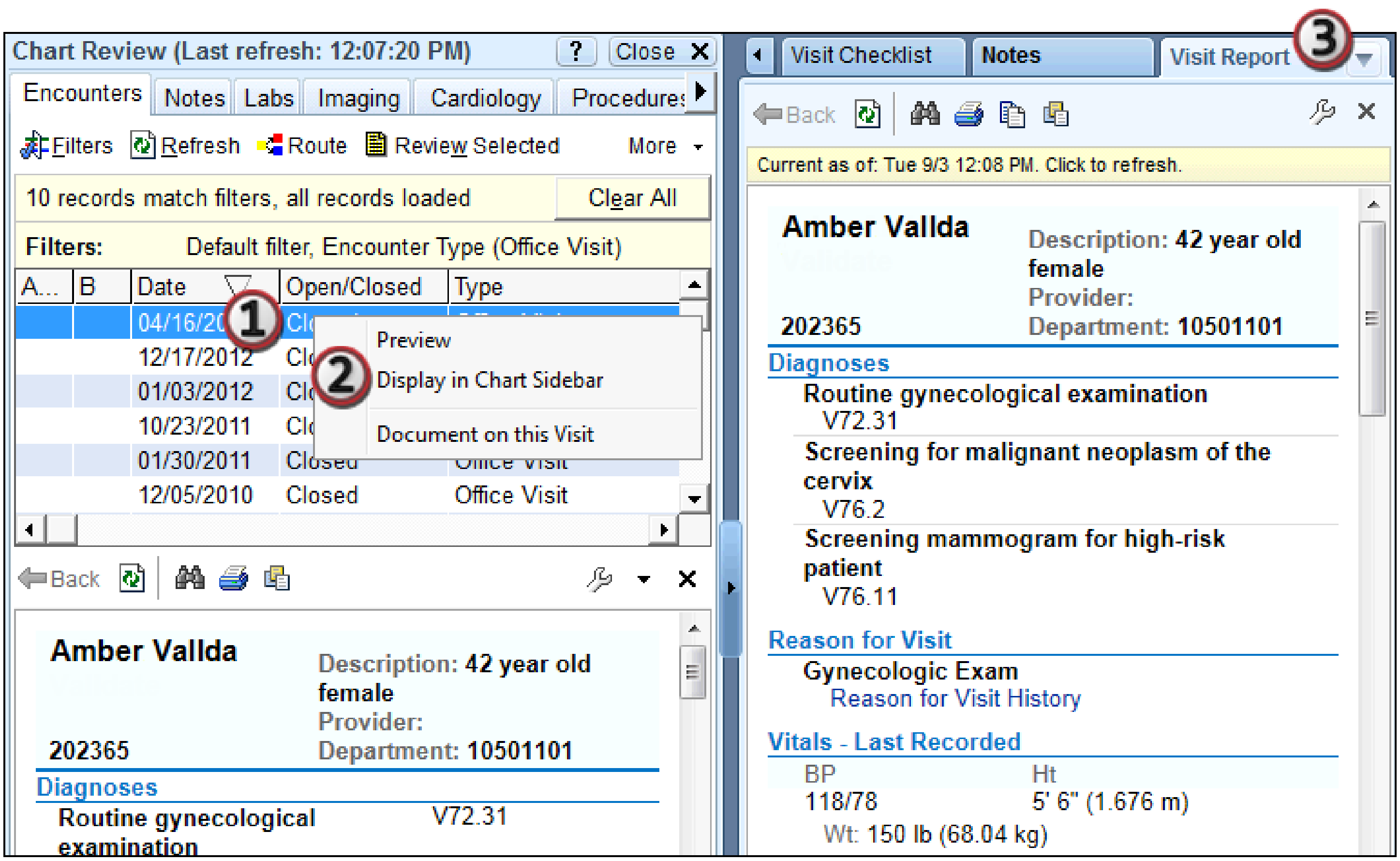
Keep clinical information on hand in the sidebar

You can keep a report visible while you're charting by pinning it to your sidebar. For example, it might be useful to keep a summary of the patient's last visit in the sidebar while you complete your charting for the current visit. This keeps more information in view and reduces your need to move between different activities and reports.

1. In Chart Review, identify a report that you want to view while you chart. For example, locate a summary of the patient's last visit on the **Encounters** tab.
2. Right-click the row for this report and select **Display in Chart Sidebar**. A **Visit Report** tab appears in the sidebar on the right side of the screen.

> Click ▶ between the activity on the left and the sidebar to temporarily hide the sidebar. Click ◀ to view the sidebar again. You can also resize the sidebar, making it wider or narrower, by clicking and dragging its left edge.

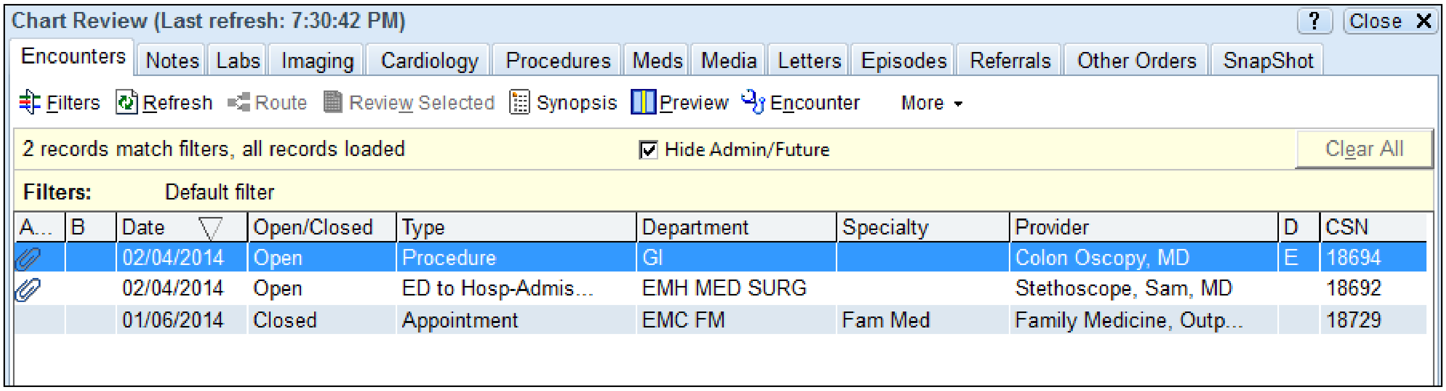
3. If your computer has two monitors, consider moving the sidebar to the second monitor. To do so, click the arrow on the **Visit Report** tab at the top of the sidebar and select **Move to Floating Window**. The sidebar opens in a separate window that you can move.
   - Click **Return to Sidebar** to return the sidebar to its original position if you have it open as a floating window.



View prior admissions and visits (in Chart Review)

View information about a patient's past visits, notes, images, and more in the Chart Review activity.

1. Select the Encounters tab to view past visits.
2. Select a row to see a summary of the visit. (Click **Preview** if it doesn't appear.)
3. Select other tabs, like Notes, to view other information.



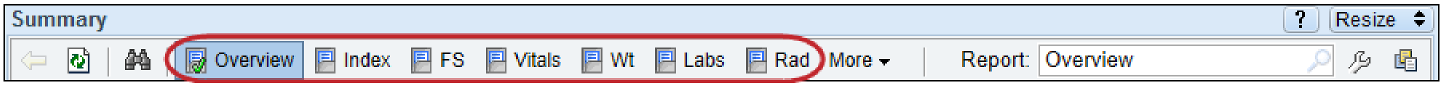
Click **Filters** to narrow down the data. Choose to see only visits in a certain specialty or date range, for example. The filter options and criteria you see are based on the information in the patient's chart, so they vary by patient.

To save a filter for future use, click **Save** and give it a name. If you want your filter to be applied automatically next time you open Chart Review for any patient, select the **Apply by default** check box. Other clinicians can't see your filters.

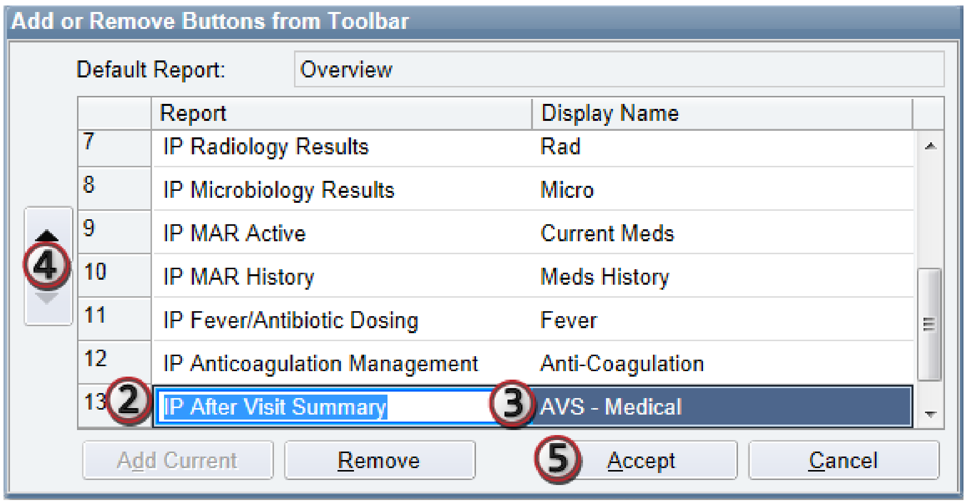
If you need to add orders or documentation to an encounter while reviewing, right-click the encounter and select **Edit or Addend** to quickly open it.

Personalize your report toolbar

Move quickly between your commonly used reports by adding buttons to the report toolbar in different activities. You can also remove unnecessary buttons, change their order, or give them different names.



1. Click . The Add or Remove Buttons from Toolbar window opens.
2. In the **Report** field, enter the report that you want to appear as a button on the toolbar.
3. In the **Display Name** field, enter a name for the report. This name appears as the button name. Enter a brief name, if possible, so more buttons can fit on the toolbar.
4. Use the and buttons to change the order in which the buttons appear on the toolbar.
5. Click **Accept**. The report buttons appear on the toolbar.



To add the report you are currently viewing to the toolbar, click , and then click **Add Current**.

To remove report buttons, click , select a report, and click **Remove**.

This guide is based on Epic 2014.