

Review the Chart

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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.

Patient Location	Patient Name ^	Age/Sex	Problem	Med Overdue / Pended	Shift Req Doc
Med/Surg	Hernandez, Emily	52 y.o. / F	Pneumonia		
Med/Surg	Irvin, Josiah	30 y.o. / M	Appendicitis		
Med/Surg	Tem, Kelly	23 y.o. / M	Broken Leg		
Med/Surg	Langley, Heather	44 y.o. / F	Pneumonia		

Profile Due Meds » Report: Profile


Tem, Kelly #202367 (CSN: 19243) (23 y.o. M) EMH MED SURG-Med/Surg- (Adm: 06/07/14)

Attending Provider: Attending Physician Inpatient, MD

Allergies: **Latex** Isolation: None Ht: 6' (1.829 m) Admission Cmt: None
Code Status: FULL Wt: 200 lb (90.719 kg)
Admission Wt: 200 lb (90.719 kg)

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.

- 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.
- Click a toolbar button to view other reports, like Labs.
- 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.

Summary

Overview Active Orders SBAR Handoff FS Labs More ▾

Vital Signs [Report](#)

	06/21 0701 06/22 0700	06/22 0701 06/22 1205	Most Recent
Temp (°F)	101 - 101	101 - 101	101 (38.3)
Pulse	108 - 108	100 - 100	100
Resp	28 - 28	30 - 30	30
BP	100/75 - 100/75	110/80 - 110/80	110/80
SpO2 (%)	90 - 90	95 - 95	95

I/O's [Report](#)

	06/20 0701 06/21 0700	06/21 0701 06/22 0700	06/22 0701 06/23 0700
Urine Occurrence	4 x	3 x	2 x

Treatment Team [Report](#)

Provider

Walt Whitecoat, MD
Sam Stethoscope, MD

Diet Orders

Diet, Pediatric General: Ge

Medications [Report](#)

Scheduled

Medication

ceftazidime (FORTAZ)
1 g, IV, Q8H SCH

tobramycin (PF)

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.

The screenshot shows a patient's chart interface. At the top right, a search bar contains the text "hypertension". Below it, a sidebar titled "Search" lists various categories: All (52), Problems (1), Notes (12), Meds (14), Labs (22), Imaging, Procedures, and Other Orders (3). The "Meds" category is selected. A bubble is shown over the "lisinopril (PRINIVIL) 20 MG tablet" result, displaying details such as "Take 1 tablet by mouth daily., Starting 7/30/2013, Until Wed 7/30/14, Print" and "Dispense: 30 tablet". The main chart area shows the patient's summary, including allergies (Penicillins), registries (Hypertension Registry), and a list of orders. The "Order Details" section shows an order for "lisinopril (PRINIVIL) 20 MG tablet" ordered on 08/27/13, with a diagnosis of "HTN (hypertension)".

Search tips:

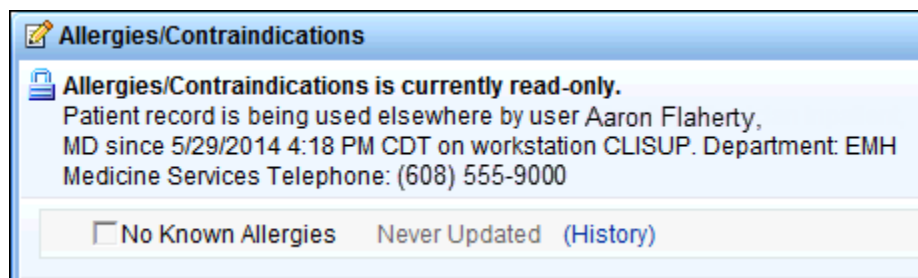
- Use the **Search** field to open activities. As you type, a list of matches appears. Click the name of the activity that you want to open.
- Enter a search term in quotation marks to find results that include only that exact phrase. If you don't enter quotation marks, you also see results for common 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.




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




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	Ordered	
150 mg, IV, Once		
sodium chloride 0.9 % flush 3 mL	Given	
3 mL, IV, Q8H	08/15 0500	



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.

Treatment Team Sticky Notes	Sticky Notes to Physicians
Comment	Comment
Patient's mother would like to be present for evening Respiratory treatment. Please call to notify her of treatment (608) 271-9000. Katie Walker 06/01/14 Last edited by Linus Lumen, RN on 06/01/14 at 1804	Patient's mother was here before work; would like update from MD. Please call after rounds, (608) 271-9000. Pat Manning 06/01/14 Last edited by Linus Lumen, RN on 06/01/14 at 1805



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.

- To expand or collapse the data, click an interval link. For example, click 24 Hrs to see 24 hours of data in each column.
- 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.
- To view a different date, click the arrows next to the date. Or, enter a specific date in the **Date** (📅) field.
- 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.





Lab Results Since Admission						
Go to now	3/18/2014		03/18/14 - Today			
			24 Hrs	8 Hrs	4 Hrs	1 Hr 15 Min All
	03/16	03/17	03/18	03/19	03/20	
24 Hrs:	0700	0700	0700	0700	0700	
▼ CHEM PROFILE						
Potassium			4.8			Potass...
BUN			51			BUN
Creatinine, Ser			4.3			Creati...
Glucose			150	224	200	Glucose
▼ CBC						
Auto WBC				12.5	12.5	Auto...
Hemoglobin				12.6	13.0	Hemo...
Hematocrit				49	49	Hemat...



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.

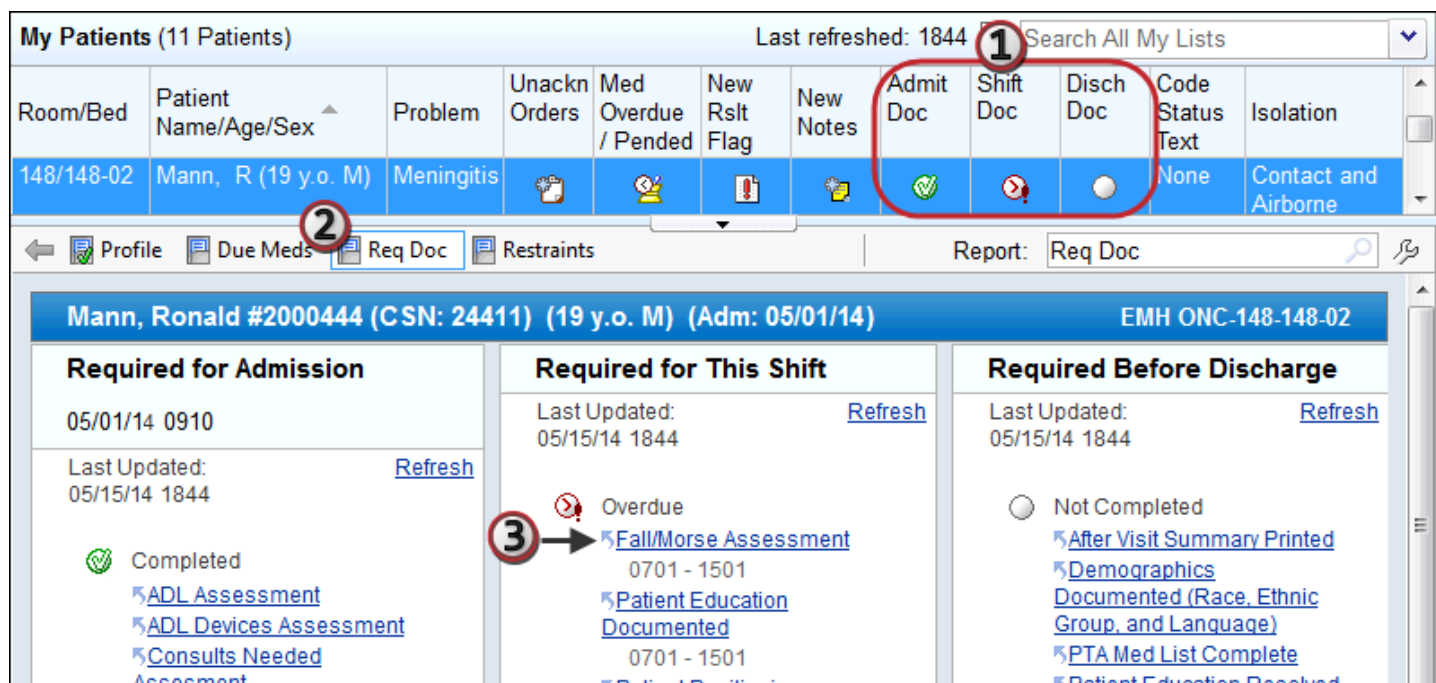
Identify and complete required flowsheet documentation

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.



My Patients (11 Patients) Last refreshed: 1844 1 Search All My Lists

Room/Bed	Patient Name/Age/Sex	Problem	Unackn Orders	Med Overdue / Pending	New Rslt Flag	New Notes	Admit Doc	Shift Doc	Disch Doc	Code Status Text	Isolation
148/148-02	Mann, R (19 y.o. M)	Meningitis								None	Contact and Airborne

Mann, Ronald #2000444 (CSN: 24411) (19 y.o. M) (Adm: 05/01/14) EMH ONC-148-148-02

Required for Admission

05/01/14 0910

Last Updated: 05/15/14 1844 [Refresh](#)

Completed

- [ADL Assessment](#)
- [ADL Devices Assessment](#)
- [Consults Needed Assessment](#)

Required for This Shift

Last Updated: 05/15/14 1844 [Refresh](#)

Overdue

[Fall/Morse Assessment](#) 0701 - 1501

[Patient Education Documented](#) 0701 - 1501

[Patient Positioning](#)

Required Before Discharge

Last Updated: 05/15/14 1844 [Refresh](#)

Not Completed

- [After Visit Summary Printed](#)
- [Demographics Documented \(Race, Ethnic Group, and Language\)](#)
- [PTA Med List Complete](#)
- [Patient Education Resolved](#)

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.

Chart Review (Last refresh: 12:07:20 PM) ? Close X

Encounters Notes Labs Imaging Cardiology Procedures

Filters Refresh Route Review Selected More

10 records match filters, all records loaded Clear All

Filters: Default filter, Encounter Type (Office Visit)

A...	B	Date	Open/Closed	Type
		04/16/2012	Open	Office Visit
		12/17/2012	Closed	Office Visit
		01/03/2012	Closed	Office Visit
		10/23/2011	Closed	Office Visit
		01/30/2011	Closed	Office Visit
		12/05/2010	Closed	Office Visit

Back Refresh Print Copy

Amber Vallda Description: 42 year old female
202365 Provider: Department: 10501101

Diagnoses

- Routine gynecological examination V72.31
- Screening for malignant neoplasm of the cervix V76.2
- Screening mammogram for high-risk patient V76.11

Reason for Visit

- Gynecologic Exam Reason for Visit History

Vitals - Last Recorded

BP	Ht
118/78	5' 6" (1.676 m)
Wt: 150 lb (68.04 kg)	

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.

Chart Review (Last refresh: 7:30:42 PM) ? Close ×									
Encounters Notes Labs Imaging Cardiology Procedures Meds Media Letters Episodes Referrals Other Orders SnapShot									
 Filters  Refresh  Route  Review Selected  Synopsis  Preview  Encounter More ▾									
2 records match filters, all records loaded Hide Admin/Future Clear All									
Filters: Default filter									
A...	B	Date ▾	Open/Closed	Type	Department	Specialty	Provider	D	CSN
		02/04/2014	Open	Procedure	GI		Colon Oscopy, MD	E	18694
		02/04/2014	Open	ED to Hosp-Admis...	EMH MED SURG		Stethoscope, Sam, MD		18692
		01/06/2014	Closed	Appointment	EMC FM	Fam Med	Family Medicine, Outp...		18729



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.

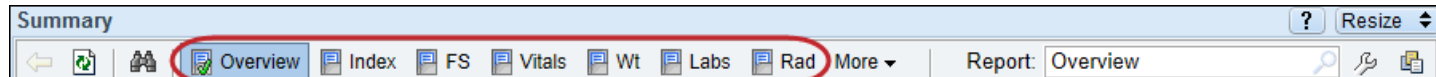
To save a filter for future use, click **Save** and give it a name. If you want your filter to be applied automatically next time you open Chart Review for any patient, select the **Apply by default** check box. Other clinicians can't see your filters.



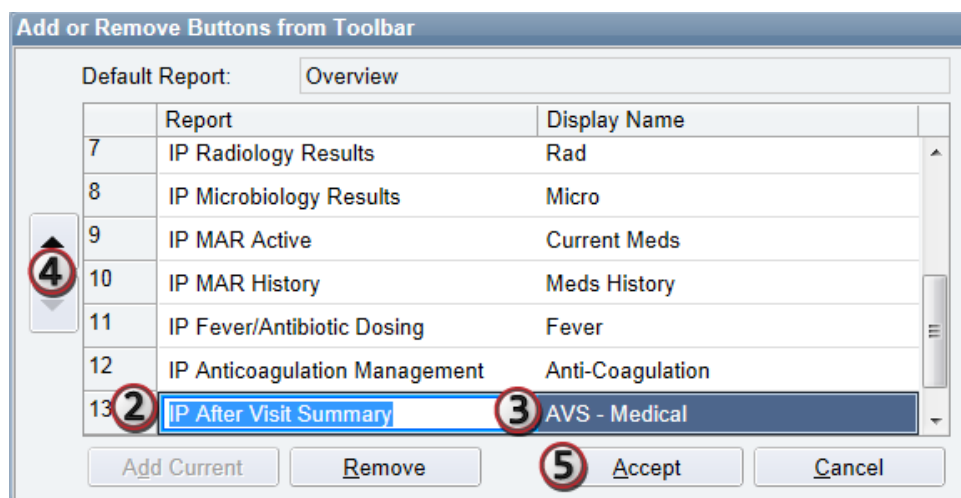
If you need to add orders or documentation to an encounter while reviewing, right-click the encounter and select **Edit or Addend** to quickly open it.

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**.

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