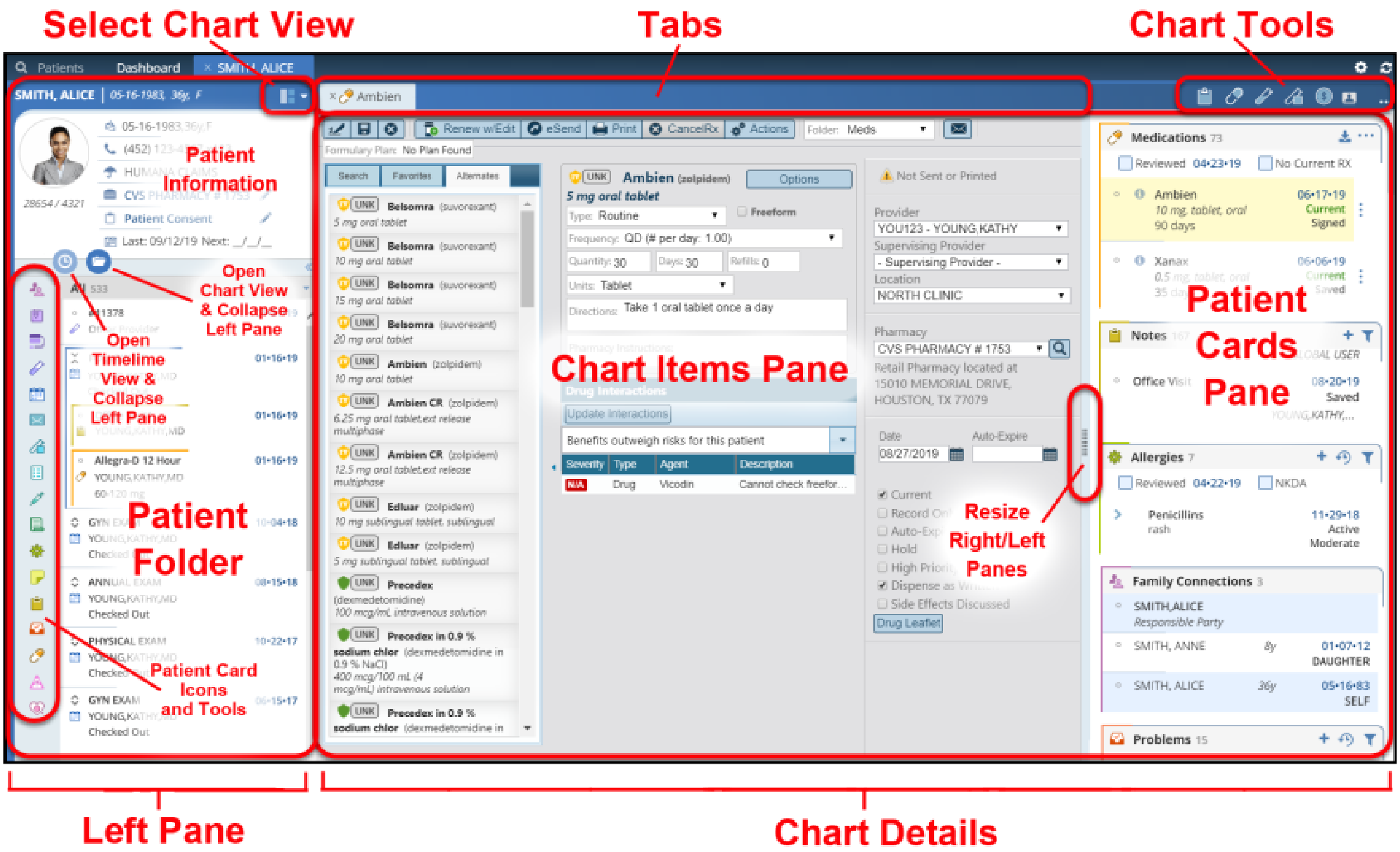


Setup:

- *Use the **On Open Patient Chart - Popup Alert if HW Overdue** user preference to display an alert for overdue HealthWatcher items. **Tools| User Preferences | HealthWatcher Tab**.*
- *Use the **On Open Patient Chart - Popup Alert if New Plans are Recommended for Patient** user preference to display an alert if an existing HealthWatcher plan is recommended for the patient based on items in the patient's chart list. **Tools| User Preferences | HealthWatcher Tab**.*

Click below to jump to a topic in this help file.

Screen Elements

Chart Tools

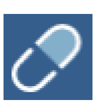
The six most frequently-used icons are displayed as the default:

- **Notes**
- **Medications**
- **Orders**
- **Results**
- **Charge Slips**
- **Telemedicine**

Click the ellipse to open a drop-down menu to access additional icons. Each icon clicked on the drop-down menu is added to the frequently-used icon list.

Chart Tools Icons

 **Notes** – Add a new patient note to the patient's chart.

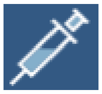
 **Prescriptions** – Add a new prescription to the patient's chart.

 **Lab Orders** – Add a new lab order to the patient's chart.

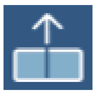
 **Lab Results** – Add a new lab result to the patient's chart.

 **Charge Slips** – Add a new charge slip to the patient's chart.

 **Telemedicine** – Opens **AdvancedTelemedicine**, where you can view and start telemedicine appointments for the patient.

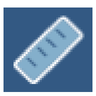
 **Immunizations** – Track and schedule immunizations for the patient.

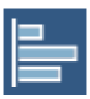
 **Documents** – Add a new document to the patient's chart.

 **Upload** – Add a new upload to the patient's chart.

 **Scan** – Add a new scan to the patient's chart.

 **HealthWatcher** – Add a new HealthWatcher plan to the patient's chart.

 **Growth Chart** – Track weight, length, head circumference, and BMI charts for pediatric patients.

 **Flowsheets** – View patient data that has been captured over time. Flowsheets can be set up to use patient data taken from EHR patient note and subnote fields, and lab results, and custom data to see changes over time.

 **Patient Education** – View assigned documents and links, and add new ones for the patient.

 **Chart Print** – Set up options for printing all or part of the patient's chart.

 **Chart Maintenance** – Link chart items or fix incorrectly linked chart items in the patient's chart.

Left Pane

The left pane includes:

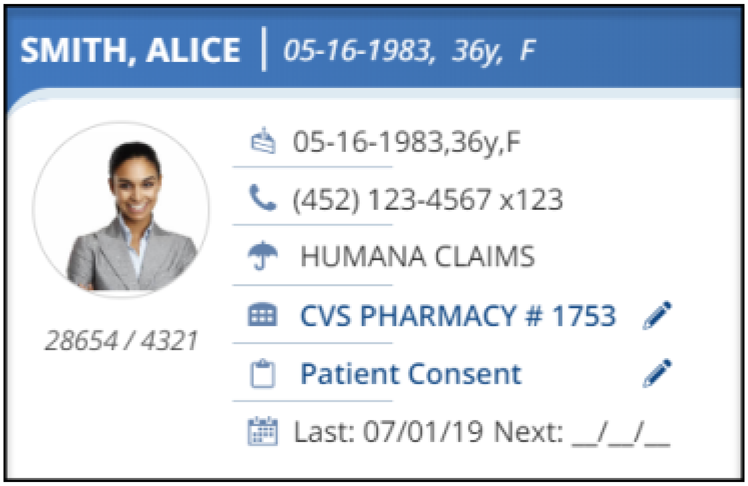
- Patient information
- Patient card icons and tools
- Patient folder
- **Timeline** view

Patient Information

The Patient Information pane displays limited patient information such as DOB, insurance, and internal ID/patient ID.

Click anywhere in the Patient Information pane to open the patient **Demographics** tab to view complete patient information.

> ***Note***: *The patient's inactive status displays if the patient has been assigned an inactive status in the* ***Patient Information*** *screen in PM. You can hide inactive patient statuses in EHR by going to* ***Tools | User Preferences*** *|* ***Chart*** *tab and selecting* ***Hide patient status in Patient Card****.*

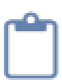


 – Date of birth, age, and sex

 – Preferred phone

 – Insurance

 – Open the **Pharmacy Search** screen.

 – Open the **Patient Consent** screen.

 – Last and Next scheduled appointments

Patient Card Icons and Tools

Patient Card types are indicated by icons. Each Patient Card icon has tools for the associated Patient Card.

 – **Advanced Directives**

 – **Allergies**

– **Documents**

– **Encounters** (Appointments)

– **Family Connections**

– **Healthwatcher**

– **Immunizations**

– **Implantable Devices**

– **Medications**

– **Messages**

– **Notes**

– **Orders**

– **Plan Summary**

– **Problems**

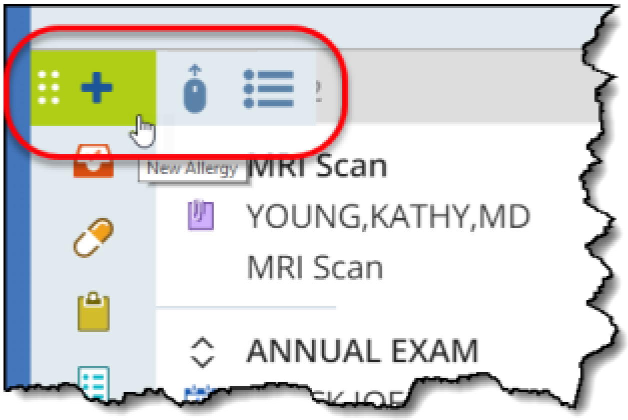
– **Quick Memo**

– **Results**

– **Risk Factors**

Patient Card Tools

Each Patient Card icon has tools for finding and viewing patient cards, and adding chart or patient information items.



New Patient Card Tools

Hover over a Patient Card icon to display available tools for that card.

Rearrange Icons – Drag to rearrange an icon in the list.

New – Open a new chart item or medical information item.

- New chart items such as notes and prescriptions open in the chart item area of the Chart Details pane.
- New medical information items such as allergies and problems (except **Implantable Devices**) open on the left pane. **Implantable Devices** opens in the chart items area of the Chart Details pane.

Scroll to the Card – Jump to the patient card on the Chart Details pane.

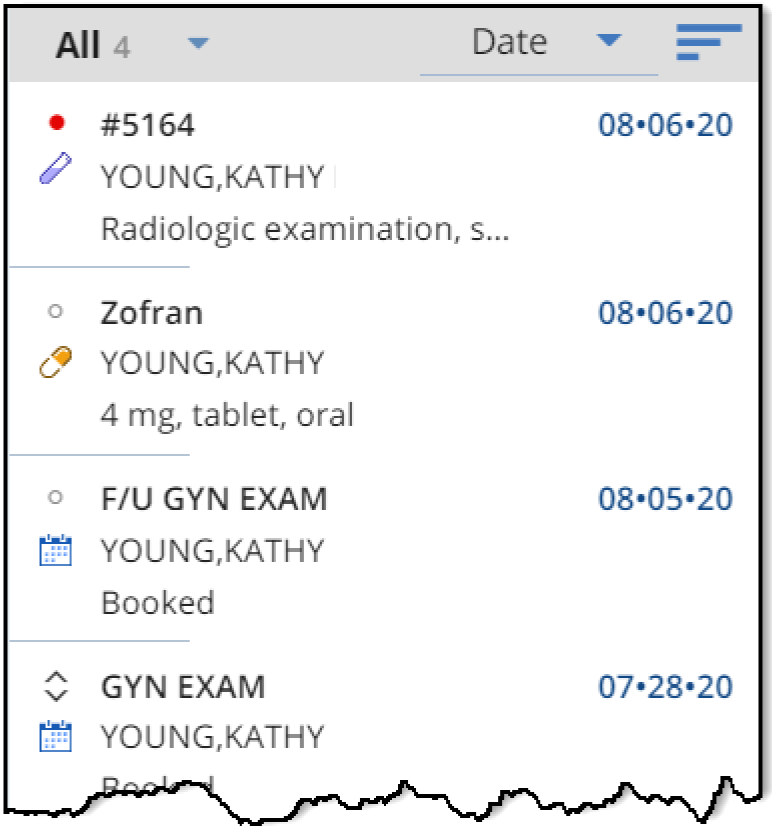
List View – Open the patient card in list view. List view items display in the chart item area of the Chart Details pane so you can still view other patient cards.

Open Medications Tab – Open the **Medications** tab on the Chart Details pane. Only available on the **Medications** patient card icon.

Patient Folder View

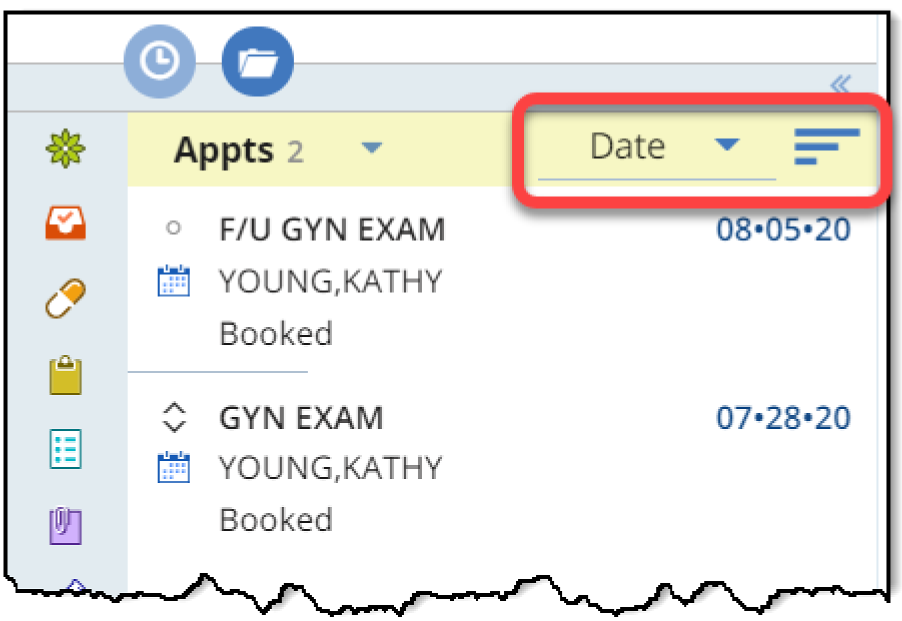
The Patient Folder view displays chart and information items that can be assigned to a folder.

– Click to open the patient folder view. Click the icon again to collapse the left pane.



Sort Items in a Folder

You can sort items in Patient Folder view.



1. Select a sort option from the drop-down to view items sorted by **Name**, **Date**, **Type**, **Doctor**, or **Unsigned**.
2. Click   to toggle items between ascending and descending order.

Patient Folder Icons

Items in the Patient Folder display icons so you can easily see the type:

 – **Documents**

 – **Encounters** (Appointments)/Charge Slips

 – **Medications**

 – **Notes**

 – **Orders**

 – **Results**

Additional Icons

Change Folder – Click to select which folder items display. You can select any existing folder or **ALL** patient folders. The Patient Folder header changes color to match the assigned color of the selected folder.

Setup*: Set up default folders and colors in* ***Admin*** | ***System Setup*** | ***Default Folders****.*

 – Indicates item is marked as priority.

 – Indicates item is marked as held.

Signed - Indicates item is signed.

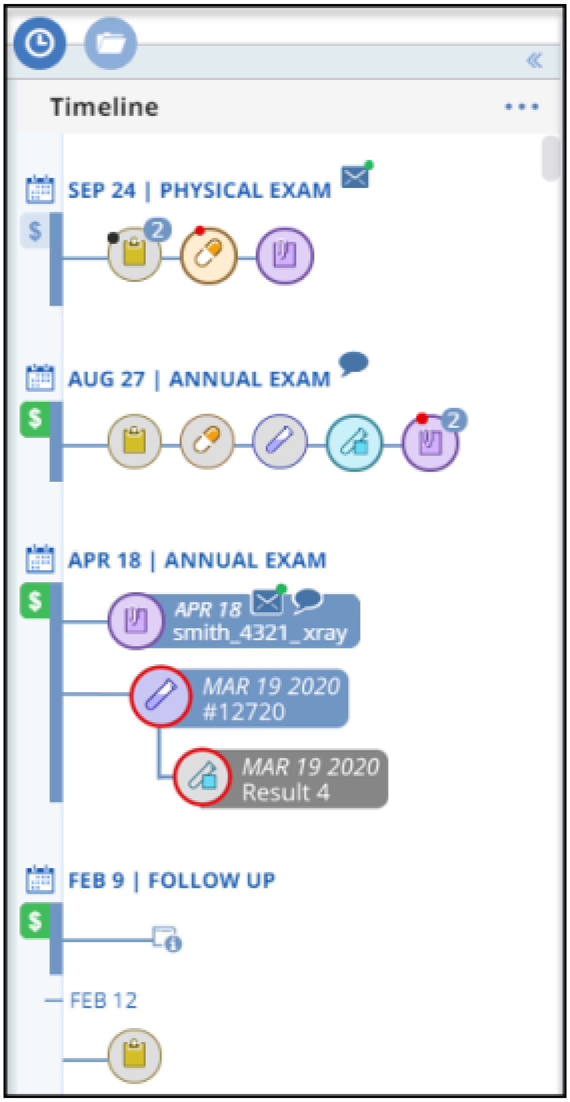
– Click to display a list of linked items. The expand icon only displays on chart items with linked items.

– Click to collapse the list of linked items. The collapse icon only displays on chart items with linked items.

Timeline View

Timeline view is a chart view option where you can easily see information about linked chart items and charge slips, and access additional chart item tools.

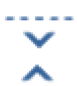
 – Click to open **Timeline** view. Click the icon again to collapse the left pane.

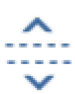


Timeline Icons

Use the following icons to easily navigate the **Timeline** view:

• • • – Click to display the following timeline tools:

 – View the timeline in collapsed mode. Attached chart items are combined on a single line.

 – View the timeline in expanded mode. Attached chart items are moved to individual lines and additional information is displayed.

 – Filter the timeline by date, active providers, inactive providers, no-shows/cancellations.

 – The badge indicates the number of filter selections being used. Click the badge or click the **Reset** button on the **Filter** screen to clear the filter settings.

– The appointment has a saved charge slip. Click to open the appointment/charge slip.

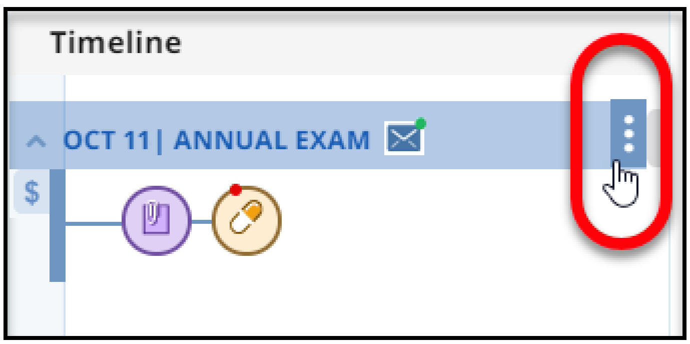
– The appointment has a signed charge slip. Click to open the appointment/charge slip.

– Drag a chart item to link or unlink it to another item on the same or different day. You can only drag chart items in expanded view.

– Click to display chart tools.

The ellipsis displays on appointments in collapsed view, and on appointments and chart items in expanded view.

> ***Hint**: You can also access chart tools by right-clicking anywhere on an appointment or chart item.*



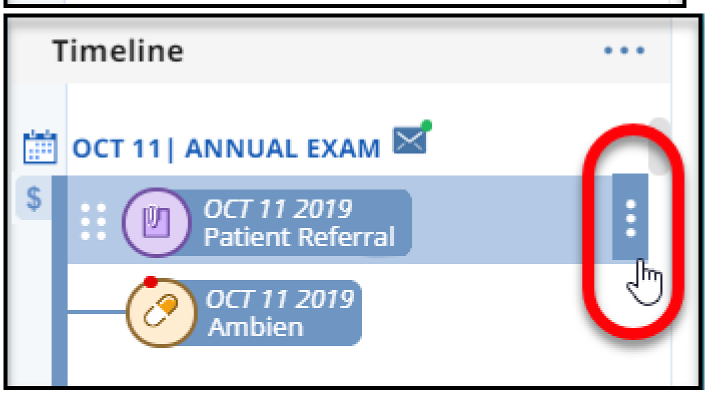


Chart tools include:

Add Linked – Select a chart item to attach to the appointment.

Remove Link – Unlink the selected item from another item or appointment. The selected item updates to display directly from its created date.

Mark Reviewed – Mark the item as reviewed.

Update Medication – (Only available on prescriptions.) Select from the following options:

- **Mark Historic** – Mark the prescription as historic.
- **Mark Current** – Mark the prescription as current.

- **Renew w/Edit** – Create a copy of the current prescription on the **New Prescription** tab where any necessary changes can be made before saving.
- **Quick Renew** – Copy and save a prescription with one click.
    - The **Adverse Drug Interactions** window will open if there are interactions. Click **Done** to close.
    - You will still need to sign/confirm the prescription before sending or printing.
- **Discontinue** – Open the **Discontinue Medications** window where you can mark the medication as discontinued.
- **Allergic** – Mark the drug as discontinued with a reason of **Allergic**, and add the drug to the patient's allergy list.
- **Intolerant** – Mark the drug as discontinued with a reason of **Intolerant**.
- **Ineffective** – Mark the drug as discontinued with a reason of **Ineffective**.
- **View Medication History** – Open the **Prescription History** window to see the patient's medication history.

Sign – Sign the chart item.

Print Preview – Open a print preview for the chart item.

Print/eSend – (Only available on prescriptions.) Open the **Confirm Prescriptions** window where you can sign, print, and esend the prescription. The icon is only active on signed prescriptions.

Toggle Hold – Change the hold status. If the item is not held, click to hold. If the item is held, click to remove the hold.

Toggle Priority – Change the priority status. If the item is not priority, click to mark as priority. If the item is marked as priority, click to remove the priority.

Annotate – Open the **Annotate** screen to add an annotation.

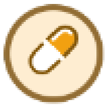
Send Message – Open a new **Message** with the chart item linked.

Attached Item Icons

The types of items attached to the appointment are indicated by icons. Click an icon to open the chart item.

– No attached items. Click to open the appointment/charge slip.

– **Documents**

 – **Medications**

 – **Notes**

 – **Orders**

 – **Results**

Item Details

Hover over an icon to view details about the chart item.

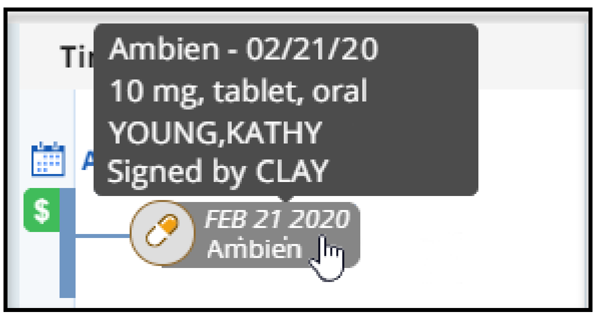


Chart Item Icon Details

Additional details are shown on the chart item icons.

– A badge indicates when more than one of the same chart item type is attached to an appointment.

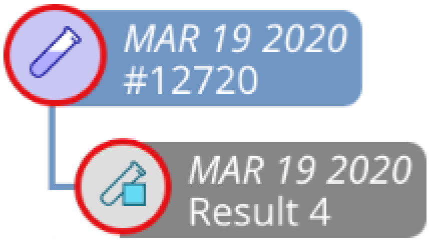
 **Signed** – A thin border and gray background indicates signed chart items.

– In expanded view, signed items display additional information with a gray background.

 **Unsigned** – A thick border and color background indicates unsigned chart items.

– In expanded view, unsigned items display additional information with a blue background.

Out of Range Result – A red outline indicates out of range on a result.



– The red outline also displays on a lab order when an out of range result is linked to the order.

Icons on Attached Items

– The appointment or chart item has an annotation.

– The appointment or chart item has an attached message.

> ***Note***: *Only messages that are attached to appointments or chart items display on the timeline. All messages about the patient display on the* ***Messages*** *patient card.*

– Priority.

– On hold.

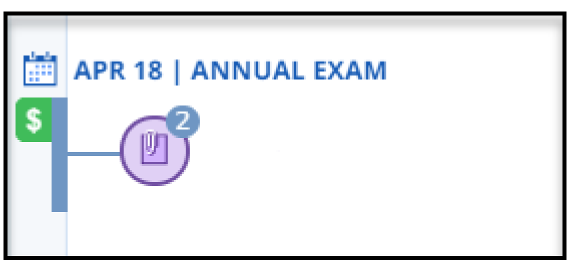
– The message has an action item that is not complete. (Only available on messages.)

View the Timeline Two Ways

You can view the timeline two ways depending on the amount of information you want to see.

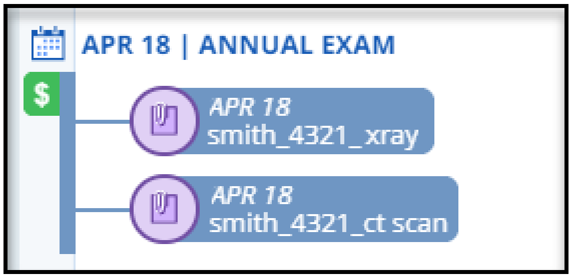
- **Collapsed** – Attached chart items are displayed with chart item icons on a single line.

  Click the chart item icon to display all attached items with additional details.

- **Expanded** – Attached chart items are displayed with chart item icons on individual lines and display additional information.

  To return chart item icons to a single line, click the collapse icon.



Drag a Chart Item to Link or Unlink It

Use the grip  to drag a chart item to unlink it or link to an item on the same or different appointment.

***Important Notes**:*

- *If you move a chart item to a different day, the date on the chart item does not change.*
- *Dragging a chart item does not unlink it from the appointment. Right-click and select **Remove Link** to unlink the item from the appointment.*

All chart items attached to the chart item you are moving will remain attached to the chart item, and move with it.

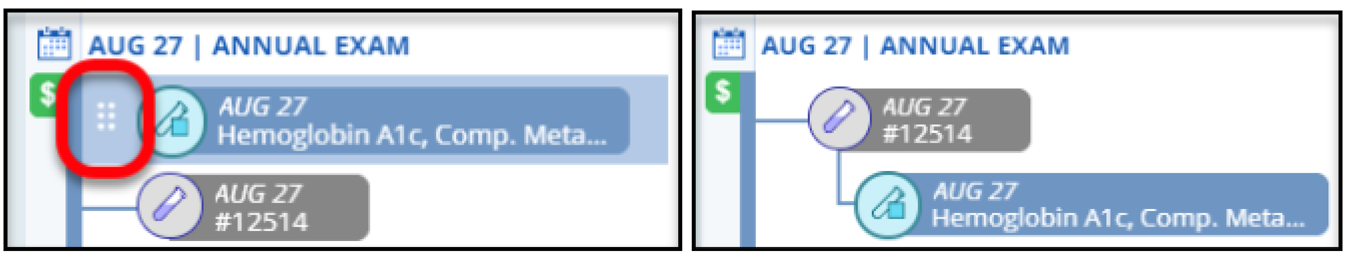


Chart Details Pane

The Chart Details pane can be viewed in several different ways to suit your workflow. Depending on which view option you select, and which chart items you have open, the screen can display two areas, the Patient Cards pane and the Chart Items pane. The two area can display top and bottom, or left and right depending on the layout selected.

Patient chart items and medical information open in the Chart Details pane. Some items open on the associated patient card, other items open in the chart items pane.

***Setup**: You can choose to open chart items in individual tabs so you can have up to ten items open for each patient. Select **Open in New** in **Tools** | **User Preferences** | **Chart** | **Opening Chart Item in Detail Tabs**.*

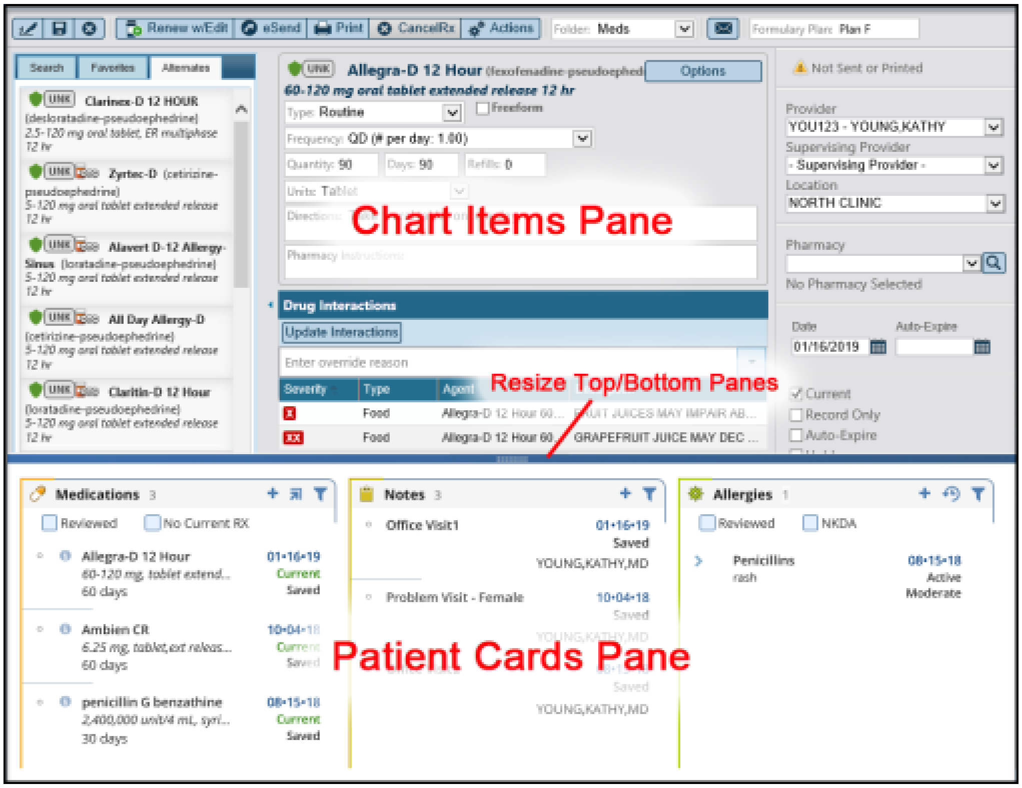
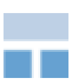


Chart Details View Options

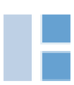
Select how you want the Chart Details pane to display.

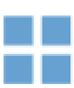
 **Chart Split View** – Click to select a configuration to view the Chart Details pane. The Chart Split View icon changes to display the card configuration you have selected.

 **Cards on Top** – Patient cards display on the top and chart items display on the bottom.

 **Cards on Bottom** – Patient cards display on the bottom and chart items display on the top.

 **Cards on Left** – Patient cards display on the left and chart items display on the right.

 **Cards on Right** – Patient cards display on the right and chart items display on the left.

 **Expand Cards** – Patient cards display in the entire area and chart items are collapsed.

 Collapse Cards – Patient cards are collapsed and chart items display in the entire area.

Collapse cards is automatically overridden if you click the  **Scroll to the Card** icon to jump to a specific patient card.

Split Equally – Return to the **Cards on Top** configuration with the top and bottom of the screen having equal space.

Resize – Drag the move grip to resize the Chart Details pane. Click to hide the patient cards and view only the patient chart item, and click again to return to the previous setting.

Click to Collapse/Expand Views – Click to collapse the left pane for more space to display Chart Details.

Click to Toggle/Collapse/Expand Views – Click either icon to collapse the left pane for more space to display Chart Details.

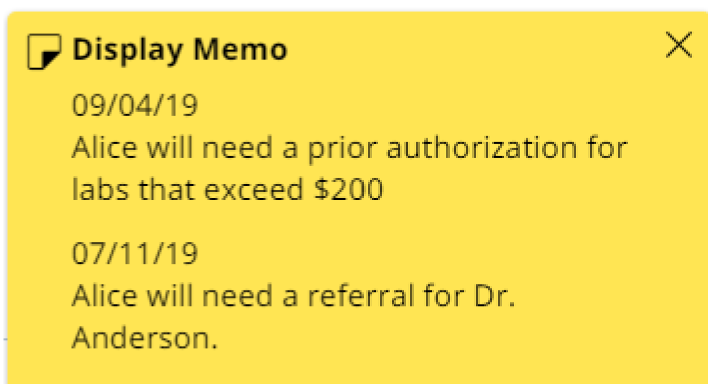
Click one of the icons again to expand the left pane.

– Folder view.

– **Timeline** view.

Display Memos

In the **Display Memo** pane you can view memos that are marked **Display**. The **Display Memo** pane displays when you open or refresh a patient chart.



X – Temporarily hide the pane.

Remove Memos from the Display Memo Pane

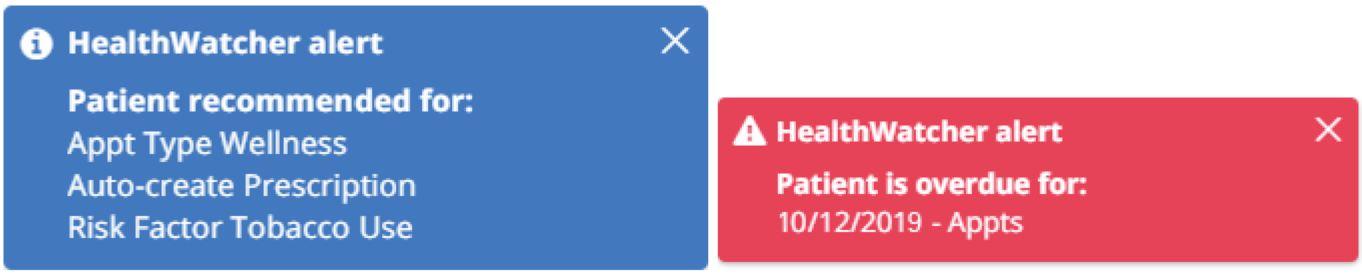
You can remove memos from the **Display Memo** pane in two ways:

- **Edit the Memo**
    1. Expand the memo on the **Memos** patient card and click **Edit**.
    2. Set the **Type** to anything other than **Display**. The memo remains in the patient chart but is not visible in the **Display Memo** pane.

- **Delete the Memo**
    1. Expand the memo on the **Memos** patient card and click **Delete.** The memo is permanently deleted from the patient chart.

HealthWatcher Alert

Recommended or overdue healthwatcher items display in the **HealthWatcher Alert** pane when you open or refresh a patient chart.



> ***Note**: The **HealthWatcher Alert** pane only displays if you have one or both of the following user preferences selected:*
>
> - ***On Open Patient Chart - Popup Alert if HW Overdue***
> - ***On Open Patient Chart - Popup Alert if New Plans are Recommended for Patient***

The **HealthWatcher Alert** displays the following information:

- **X** – Temporarily hide the alert.
- **HealthWatcher item** – The **Title** from the HealthWatcher item.
- **Date** – The **Due** date from the HealthWatcher item.

Remove HealthWatcher Items from the HealthWatcher Alert Pane

You can remove memos from the **HealthWatcher Alert** pane in two ways:

- Change the HealthWatcher item status.
    1. Click the healthwatcher item on the **HealthWatcher** patient card to open it.
    2. On the Change Status field change the status to one of the following:
        - **Complete**
        - **Canceled/NA**
        - **Non-compliant**
    3. Click **Save**.

- Delete the HealthWatcher item.
    1. Click the healthwatcher item on the **HealthWatcher** patient card to open it.
    2. Click **Delete**. The healthwatcher item is permanently deleted from the patient chart.

Patient Cards Overview

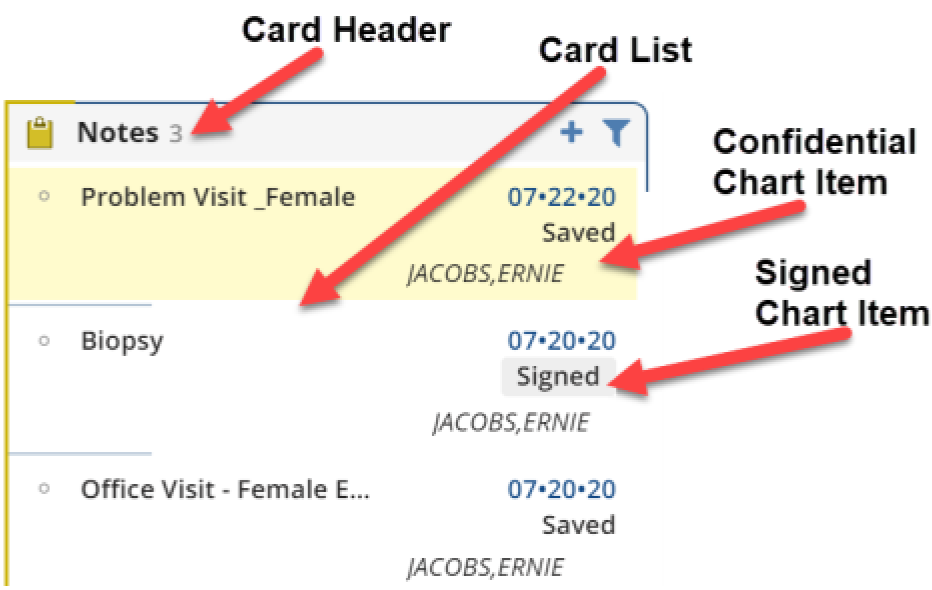
Patient Cards give you a quick view of recent patient chart items and medical information.

- The Patient Card header displays the chart item type and the number of that type in the patient chart.
- The card list displays limited information about the item such as date created, provider, and item status.

Click an item on a Patient Card list to open the item in the Chart Details pane.

Chart items marked **Confidential/My Eyes Only** are highlighted yellow.

Signed chart items display the **Signed** status in bold with gray highlight.



For detailed information about each patient card type, see the **Patient Cards** help file.

Move Patient Cards

You can move Patient Cards to display in any order on the Chart Details pane.

⠿ – Hover over a Patient Card header and the type icon changes to a move grip icon. Drag the grip to move the card.

Related Topics

- **Chart Overview**
- **Patient Cards**