EMR Web Training Script

Course:	Navigating Through the Patient's Chart: Flowsheet, Orders, Documents
Learning Objective:	To understand the purpose and basic functionality of the Flowsheet, Orders and Documents tabs on the Patient chart in the Centricity EMR application
Video Length:	9 minutes, 17 seconds

The purpose of this course is to understand the basic functionality of the Flowsheet, Orders and Documents tabs on the Patient chart in the Centricity EMR application.

Flowsheet

The Flowsheet is one of the most powerful features of the EMR. Flowsheets are used to track clinical observations for Patients over time. The electronic Flowsheet is laid out similar to the paper Flowsheet, with which you are most likely familiar. Each row displays an observation term on the left side while each column shows the observations recorded on a given date.

You can change the Flowsheet View by using the drop-down menu on the upper left portion of the Flowsheet tab. You can also set an Attached (Default) View by clicking the [Set Attached View] button.

Directly below the View drop-down menu, there is an option to change the observation view to hours, days, months, weeks, years or latest, by clicking the up or down arrows. In addition, you can either view the observation dates shown or choose a specific date range by clicking the [Date Range] box on the upper right portion of the Flowsheet tab. Then, enter the start date and end date in the appropriate fields.

- Observations in **blue** print were automatically interfaced into the EMR.
- Observations in **black** print were manually entered by an EMR user.
- Triangles are an example of a Tag. Observation values can be tagged as High (triangles point up) or Low (triangles point down). One triangle is less severe than two; while Yellow triangles are less severe than Red.
- If you encounter a symbol or icon that you do not recognize or understand, use the [F1] key or click [Help] to access the online help database for further explanation.

Normal Ranges, among other detail, display in the bottom portion of the EMR window for any given observation value after it is selected (highlighted). Double-click the observation value to view the Lab Report Document from whence it came.

You can print information from the Flowsheet tab by clicking on the [Print] button at the top of the EMR window. On the Print window, there are options to print by All Dates, Date Range or Last Page. Once you have chosen your desired print criteria, click the [Print] button in the bottom right corner. The printer will default to the printer in your Location of Care.

There is also an option to Graph observations from an electronic Flowsheet in the EMR. With the EMR graphing function, it is easy to graph Patient observations to identify trends over time.

1. Select the Flowsheet for which you want to graph the observation values
2. Click the [Graph] button to display the Graph Observations box
3. Choose the Observations you want to graph
4. Select the Date Range: Initial Date and Ending Date
5. Select the Value Range: Minimum and Maximum Values
6. Click [Show Graph]
7. Double click on any data point to see reference information

There is an option to print the graph to use as an effective teaching tool during the Patient office visit. Just click [Print].

Orders

Next to the Flowsheet tab is the Orders tab. The Orders tab displays order information for all orders made on behalf of the Patient. There are 3 Types of Orders: Services, Tests and Referrals.

o Services are orders completed in the clinic and are usually billed by your clinic.
   Services typically include office visits, flu shots, vaccinations, etc.
o Tests are orders for labs or imaging to be performed outside the clinic.
o Referrals are orders to send a Patient to another Provider for a general consultation, procedure or course of treatment not offered by the referring Provider.

The Orders tab is divided into 2 sections; the top section lists orders chronologically, with the most recent at the top while the bottom section displays details for the highlighted order.

The top section of the Orders tab provides the following information:
o Priority – Normal, Stat or Urgent
o Order Diagnosis Flag – indicates order may need a diagnosis
o Order Date
o Type of Order – Service, Test or Referral
o Description of the Order
o Status – Admin Hold, In Process, Complete or Canceled

The column headers are buttons that allow you to sort Orders by Priority, Date, Type, Description, Provider or Status. You can change, send, complete, view, remove and organize Orders using the buttons just above the Orders tab.

When an Order is highlighted in the top section, Order details are displayed in the bottom section. Most importantly, the Prime Diagnosis associated with the Order displays, along with other Order Details. The Order # is a unique number generated when the Order is entered into the EMR and is used to track the Order.

To view the details of an Order, click the [View] button just above the Orders tab itself. Information on the Order Detail window includes:

o   Clinical Notes
o   Authorization Numbers
o   Up to 4 diagnosis associated with the Order
o   Reason for cancellation, if applicable
o   Date the Order was last changed
o   Attachments sent to the Provider or insurance company
o   Letters sent to the Provider, insurance company or Patient
o   Administrative Comments, which may contain test appointment information

In the EMR, Test and Referral Orders print when the Order or Clinical List Changes are signed. To print an Order from the Orders tab, highlight the Order – to select multiple Orders to print at one time, highlight each Order while holding down the [Ctrl] key – click the [Print] button at the top of the EMR window. The system defaults to the Orders folder, the Selected Order and the clinic Printer. Click [Print].

You are also able to fax an Order. Highlight the Order and click [Print] at the top of the EMR window. The system defaults to the Orders folder, the Selected Order and the clinic Printer. In order to fax, you must change the Printer to [Biscom Fax Printer] *(it's the last one on the drop-down menu).* Then, click [Print] and complete the fax window recipient, sender and fax information. Finally, click [Fax].

The EMR attempts to fax the Order four times. The Fax Status tab on your Desktop displays the details of the Fax submission. There is no printed or email confirmation that the Fax transmitted successfully.

Documents

Documents are permanent documentation in a Patient chart. There are over 100 document types in the EMR. Common document types are Phone Notes, Office Visits, Lab Reports, Transcriptions and Clinical List Updates.

The Documents tab is divided into three sections:

1) The All Documents file folder on the upper left section of the Document tab organizes Documents alphabetically by type and allows the user to quickly filter for a particular type of Document like Office Visit, Phone Note, Lab Report, Imaging, Hospital Documents, etc.

2) The upper right section shows Documents by Date, Summary, Provider, Location and Status in chronological order. These column headers are actually buttons that allow you to sort the Documents by Date, Name, Summary, Provider and Status. You can sort on 2 fields by holding down the [Shift] key while selecting them. This section also indicates attachments and appends to the Document. And, there are buttons above the Documents that are used to open, edit, sign, append, route, remove and organize Documents.

   Documents that appear on your Desktop have been routed to you for a purpose. It is advisable to sign Documents such as Lab Reports and Imaging Reports from the Documents tab on your Desktop by clicking the [Sign] button – although you can sign Documents from within the Patient chart if further follow-up is needed.

   Should you need to route/send a Document to another EMR user electronically, highlight the Document you want to route and click the [Route] button above the Documents tab. Identify the user(s) you wish to route the document to and click [Route]. You may need to use buttons to select a [New] user, [Remove] a user or [Change] routing information like priority, reason or to add comments, which Comments are NOT a permanent entry in the Patient chart.

3) Finally, the lower section of the Documents tab displays the details of the highlighted Document including routing comments, attachments and a full document viewer button that opens the Document in a new window.

Other symbols on the Document tab that you should be familiar with are:

🖉 means the Document has not been signed

📎 means there is an Attachment (launches a pdf file)

🗐 means the Document was Appended with information after it was signed

📄 represents the Appended document
If it is necessary to print a document, the process for doing so is exactly the same as printing from the Flowsheet or Orders tab. Highlight the Document(s) you want to print – to select multiple Documents to print at one time, simply highlight each Document while holding down the [Ctrl] key – and click the [Print] button at the top of the EMR window. The system defaults to the Documents folder, the Selected Document and the clinic Printer. Click [Print].

The process for faxing a Document is exactly the same as faxing an order. Highlight the Document you wish to Fax electronically and click the [Print] button at the top of the EMR window. The system defaults to the Documents folder, the Selected Document and the clinic Printer. Select the [Biscom Fax Printer] from the drop-down menu *(it's the last one).* Click [Print]. The Fax window appears so that you can choose the Fax Recipient, Sender and Comments.

Again, the EMR attempts to fax the Document four times. The Fax Status tab on your Desktop displays the details of the Fax submission. There is no printed or email confirmation that the Fax transmitted successfully.

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