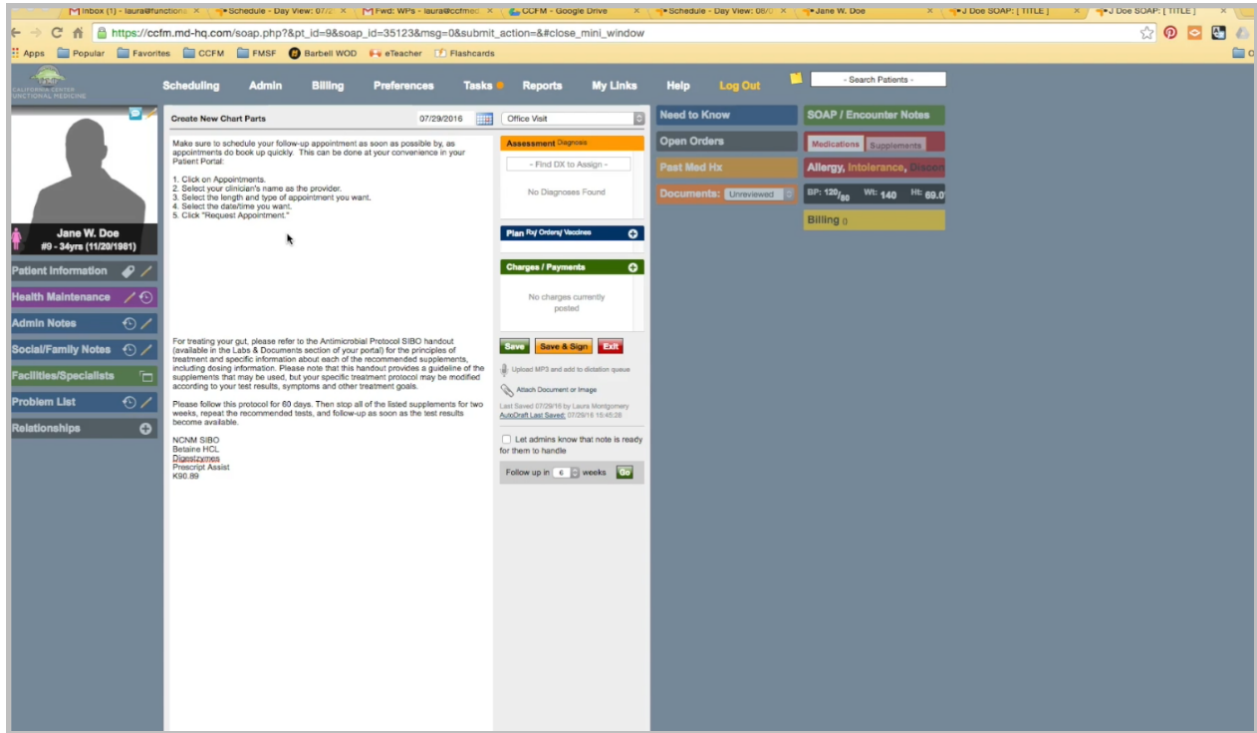


Back-end Systems: Using the EHR: Part Seven - Create, Manage, and Use Chart Parts



The screenshot shows a web-based EHR system interface. The top navigation bar includes tabs for 'Scheduling', 'Admin', 'Billing', 'Preferences', 'Tasks', 'Reports', 'My Links', 'Help', and 'Log Out'. A search bar for patients is on the right. The main content area is titled 'Create New Chart Parts' and is for patient 'Jane W. Doe' (ID: #9 - 34yrs (11/20/1981)).

Left Sidebar (Patient Information):

- Patient Information
- Health Maintenance
- Admin Notes
- Social/Family Notes
- Facilities/Specialists
- Problem List
- Relationships

Main Content Area:

Create New Chart Parts (07/29/2016) [Office Visit]

Make sure to schedule your follow-up appointment as soon as possible by, as appointments do book up quickly. This can be done at your convenience in your Patient Portal:

1. Click on Appointments.
2. Select your clinician's name as the provider.
3. Select the length and type of appointment you want.
4. Select the date/time you want.
5. Click "Request Appointment".

Assessment/History

- Find DX to Assign -

No Diagnoses Found

Plan Ref Order/Notes

Charges / Payments

No charges currently posted

Save Save & Sign Exit

Upload MP3 and add to dictation queue

Attach Document or Image

Last Saved: 07/29/16 by Laura Montgomery
AutoChart Last Saved: 07/29/16 15:45:28

☐ Let admins know that note is ready for them to handle

Follow up in: 4 weeks [90]

Right Sidebar (SOAP / Encounter Notes):

- Need to Know
- Open Orders
- Past Med Hx
- Documents: Unreviewed
- BP: 120/80
- WT: 140
- HR: 68.0
- Billing

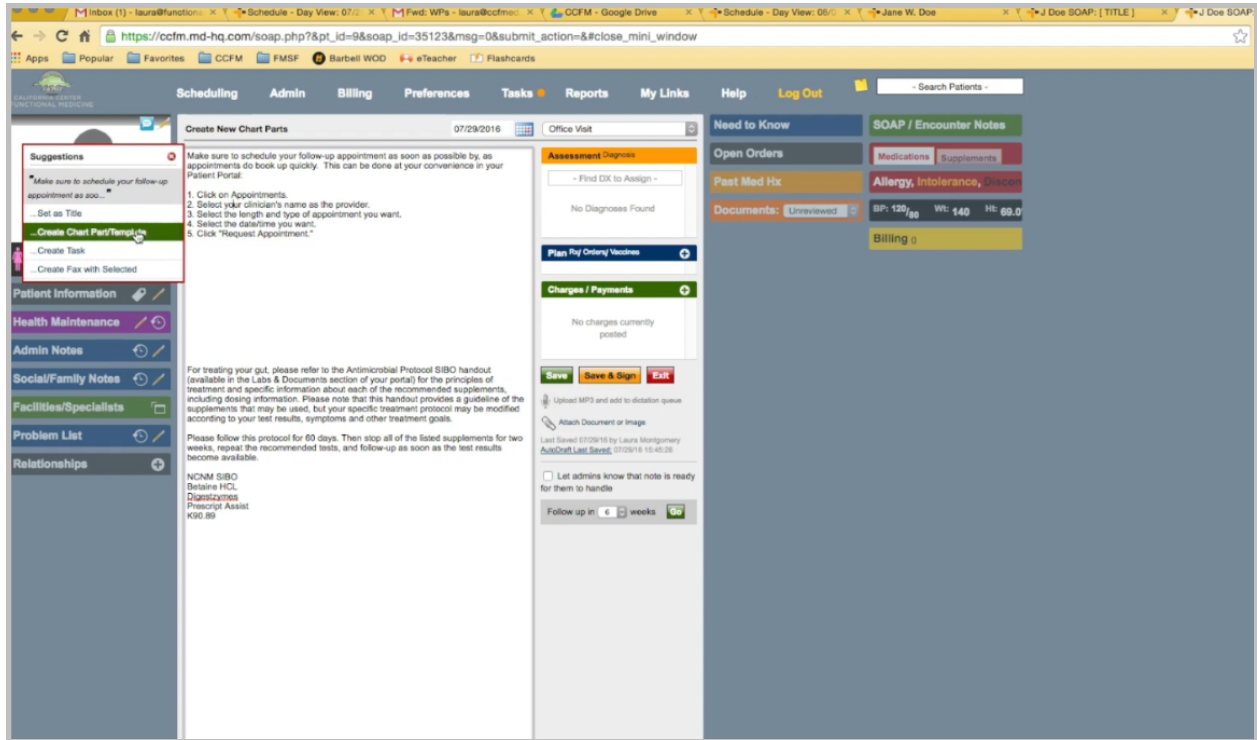
Bottom Section (Text to be added to Chart Part):

For treating your gut, please refer to the Antimicrobial Protocol SIBO handout (available in the Labs & Documents section of your portal) for the principles of treatment and specific information about each of the recommended supplements, including dosing information. Please note that this handout provides a guideline of the supplements that may be used, but your specific treatment protocol may be modified according to your test results, symptoms and other treatment goals.

Please follow this protocol for 60 days. Then stop all of the listed supplements for two weeks, repeat the recommended tests, and follow-up as soon as the test results become available.

NCM SIBO
Bersina HCL
Digestives
Prescript Assist
K90 89

To create a new Chart Part, you need to be in an encounter that is unsigned. I've created some text here that I want to make into a Chart Part.



Create New Chart Parts 07/29/2016 Office Visit

Suggestions

- Make sure to schedule your follow-up appointment as soon as possible by, as appointments do book up quickly. This can be done at your convenience in your Patient Portal.
- 1. Click on Appointments.
- 2. Select your clinician's name as the provider.
- 3. Select the length and type of appointment you want.
- 4. Select the date/time you want.
- 5. Click "Request Appointment."

Create Chart Part/Template

Create Task

Create Fax with Selected

Patient Information

Health Maintenance

Admin Notes

Social/Family Notes

Facilities/Specialists

Problem List

Relationships

For treating your gut, please refer to the Antimicrobial Protocol SIBO handout (available in the Labs & Documents section of your portal) for the principles of treatment and specific information about each of the recommended supplements, including dosing information. Please note that this handout provides a guideline of the supplements that may be used, but your specific treatment protocol may be modified according to your test results, symptoms and other treatment goals.

Please follow this protocol for 60 days. Then stop all of the listed supplements for two weeks, repeat the recommended tests, and follow-up as soon as the test results become available.

NCM SIBO
Biotene HCL
Digestzymes
Probiotic Assist
K90.89

Assessment/Diagnosis

- Find DX to Assign -

No Diagnoses Found

Plan/My Orders/Notes

Charges / Payments

No charges currently posted

SOAP / Encounter Notes

Need to Know

Open Orders

Medications

Supplements

Past Med Hx

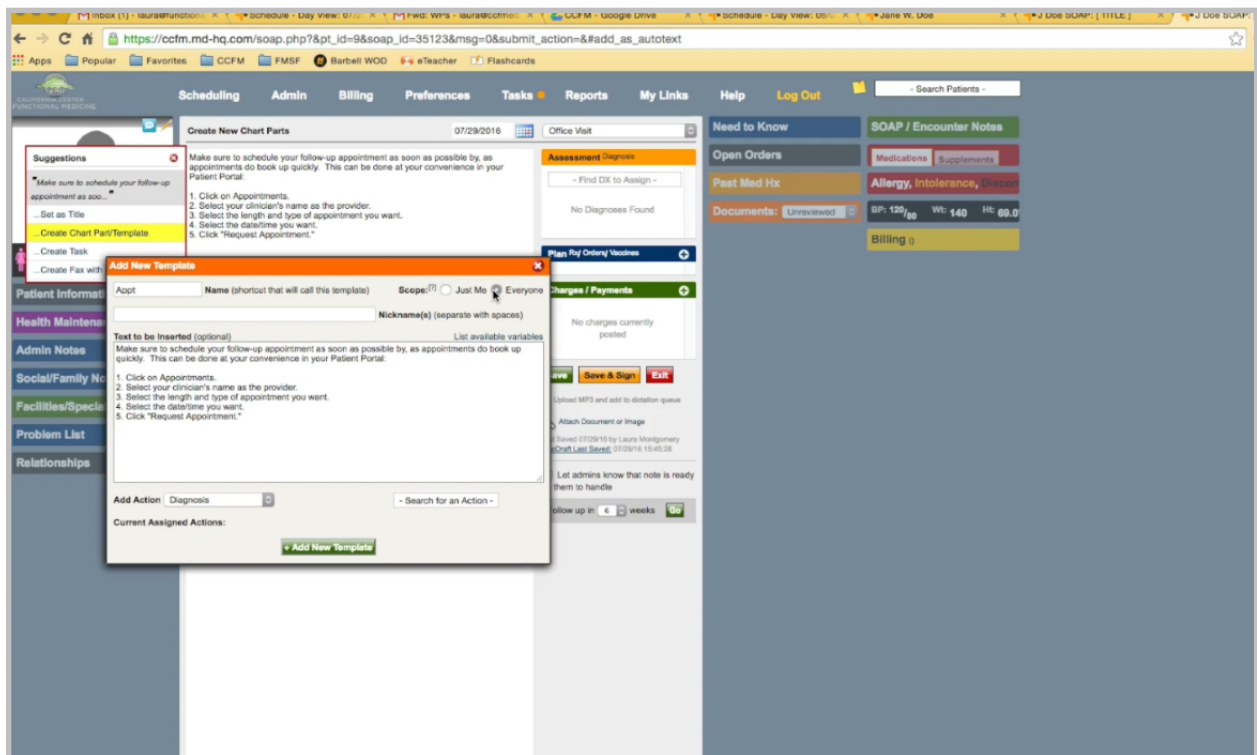
Allergy, Intolerance, Discon

Documents: Unreviewed

BP: 120/80 Wt: 140 Ht: 60.0

Billing

I'll highlight it. Click once, and then Create Chart Part.



Add New Template

Appt Name (shortcut that will call this template)

Scope: ☐ Just Me ☒ Everyone

Nickname(s) (separate with spaces)

Text to be inserted (optional)

Make sure to schedule your follow-up appointment as soon as possible by, as appointments do book up quickly. This can be done at your convenience in your Patient Portal.

1. Click on Appointments.

2. Select your clinician's name as the provider.

3. Select the length and type of appointment you want.

4. Select the date/time you want.

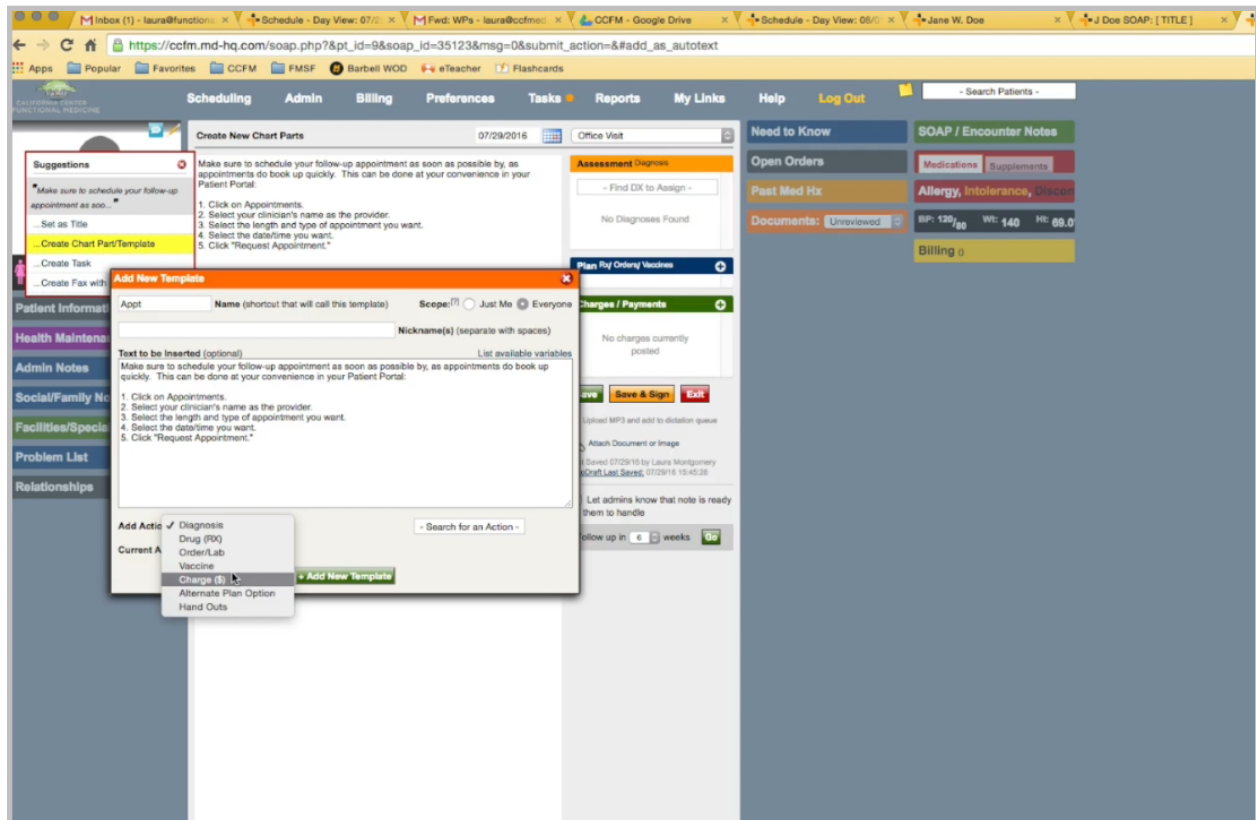
5. Click "Request Appointment."

Add Action: - Search for an Action -

Current Assigned Actions:

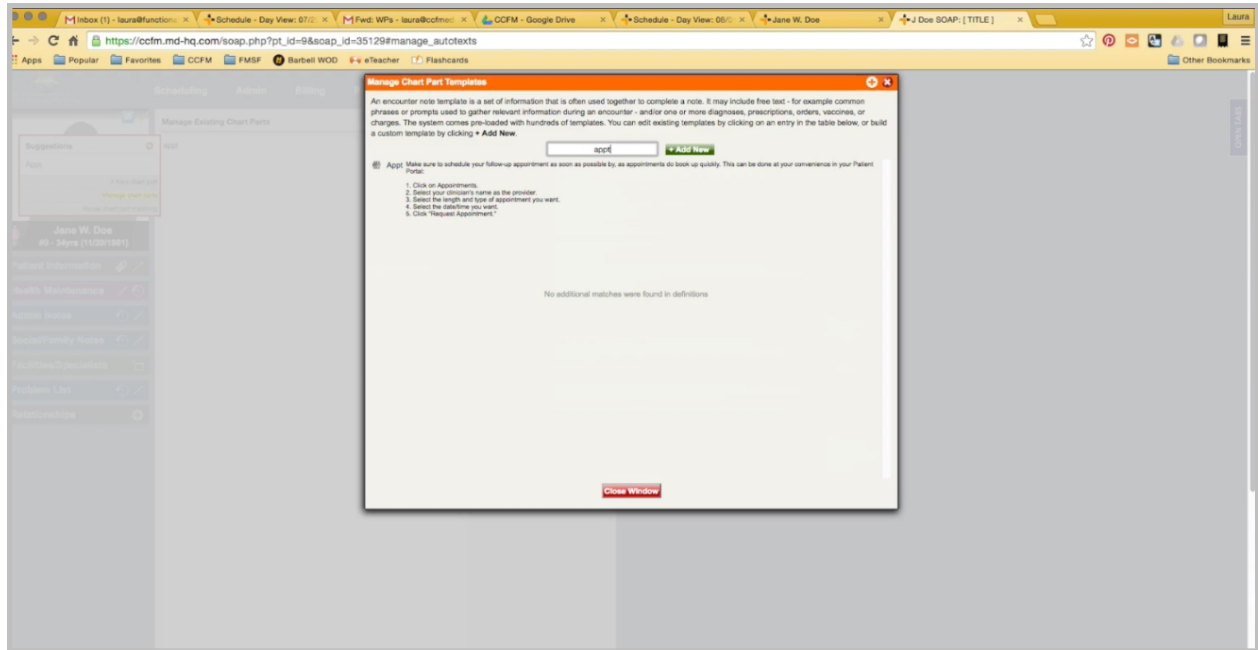
Add New Template

I can write a name here. You can select that only you can see the Chart Part or all users can see the Chart Part, which is recommended. We usually recommend leaving nicknames blank. You should make the name of the Chart Part so that everyone will know how to search for it. Adding a lot of nicknames here means the more suggestions will pop up as you type regular notes, which can sometimes be cumbersome.

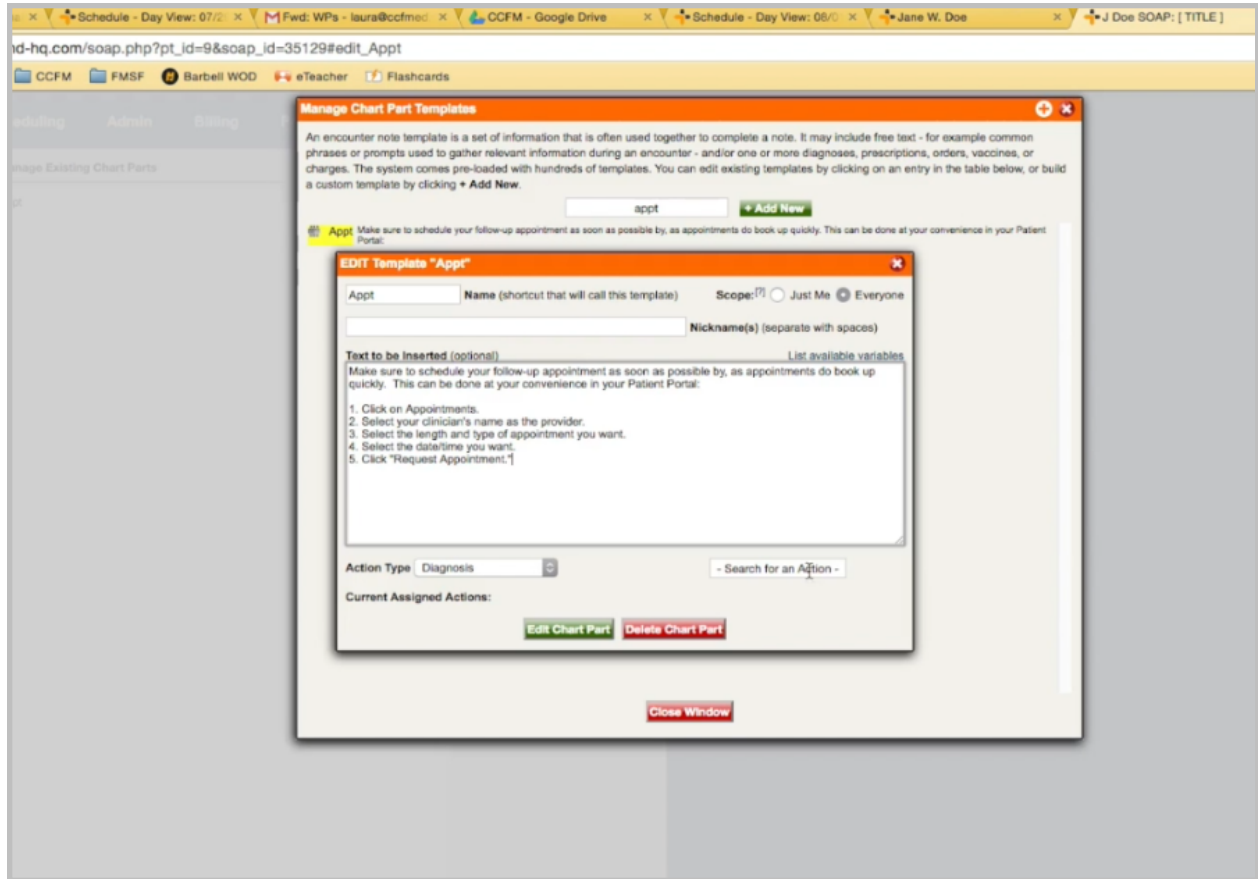


You can edit anything that you like here. At the bottom, you can choose to add a diagnosis, a prescription, testing, charges, supplements, or handouts.

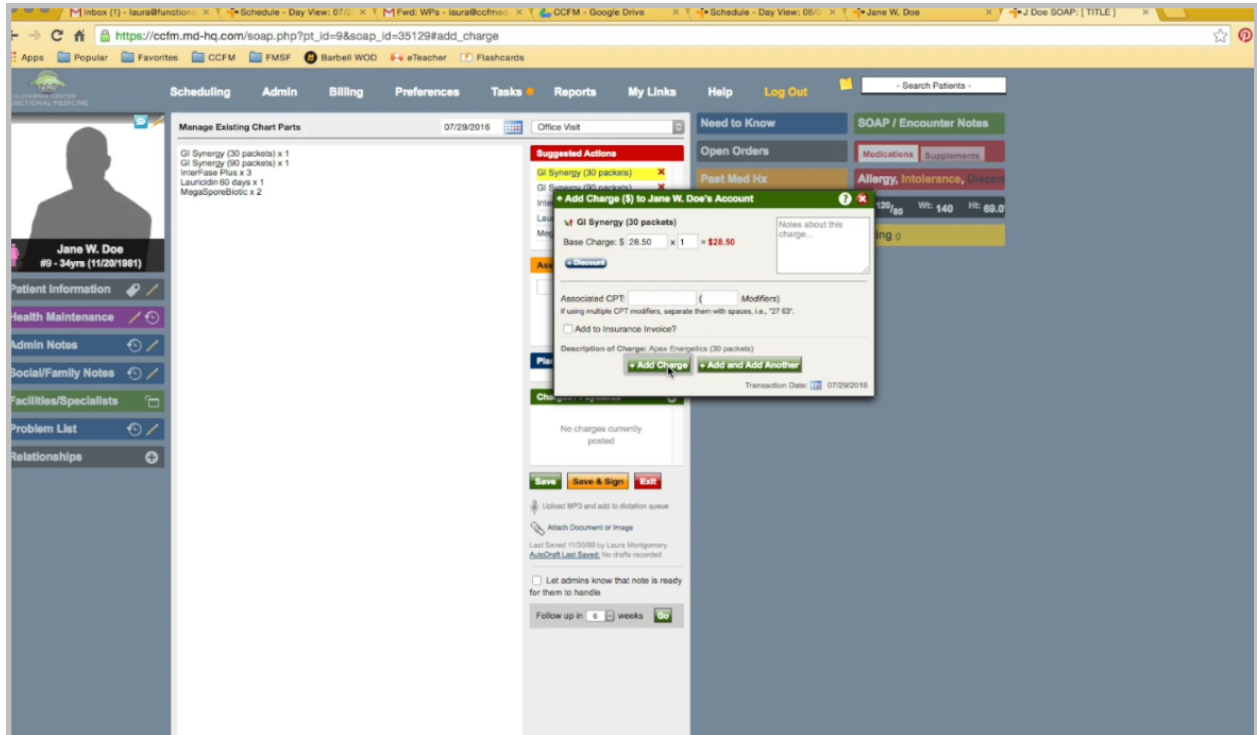
If I wanted to add a supplement, for example, I type them here until each one pops up, and then Add New Template.



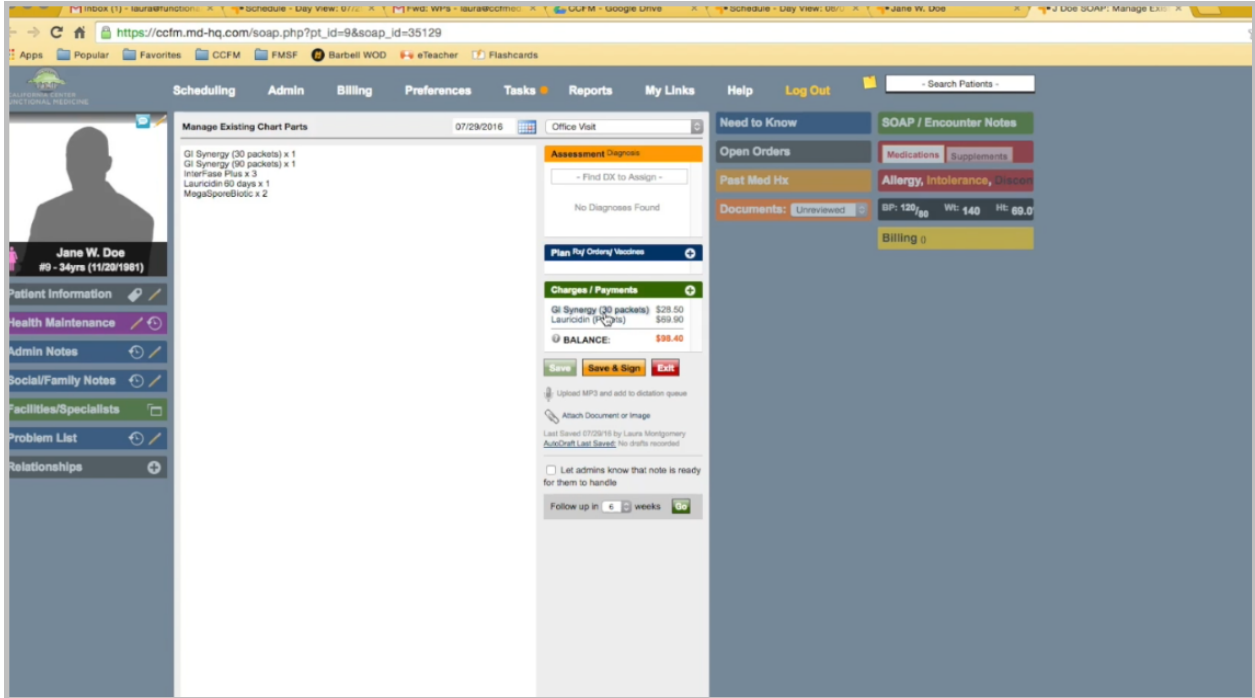
To manage an existing Chart Part, if you want to make changes, type in the name for the Chart Part, Manage Chart Parts. You can search for it again here.



Click to pull it up, and then you can make any changes you want to the text, add or remove items here, and you can either delete it or edit it.



To use an existing Chart Part, type in the name of the Chart Part. Select the one you want. If it includes items, such as this one, you can click on each individual item to add that to the encounter.



The screenshot displays the Kresser Institute EMR interface. The top navigation bar includes links for Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out. A search bar for patients is located on the right. The main content area is titled 'Manage Existing Chart Parts' and shows a list of items: 'GI Synergy (30 packets) x 1', 'GI Synergy (90 packets) x 1', 'InterPhase Plus x 3', 'Lauricidin 60 days x 1', and 'MegaSporebiotic x 2'. A 'Charges / Payments' section shows a total balance of \$38.40. The right sidebar contains various clinical tools such as 'Need to Know', 'Open Orders', 'Past Med Hx', 'Documents', 'SOAP / Encounter Notes', 'Medications', 'Supplements', 'Allergy, Intolerance, Diets', 'BP', 'Wt', 'Ht', and 'Billing'.

If I don't want these three items, I don't even need to red X them out. As soon as I save the note, when I go back in, those items will be gone. Only the items stay that are added.