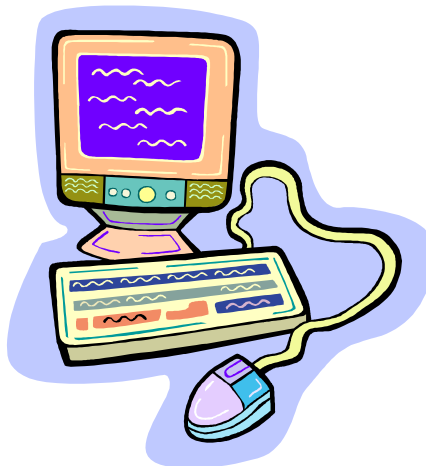

Patient Record Access

Physician User Manual

PROJECT:

SAFETY first

Mountain States Health Alliance

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Mountain States Health Alliance – Disclaimer

The data contained in Clinical Access is actual patient specific data and is being presented for educational purposes only. Any patient information that is viewed during the course of this training session is to be regarded as strictly confidential and no portion may be disclosed to other parties or reproduced in any manner.   Providing confidentiality and security of patient's protected health information is important to MSHA to ensure the highest quality of care and comply with federal and state regulations (MSHA Privacy and Security Program, **Policy Number:** 900-016).

Patient Record
Items covered in this manual:

- Learning Goal and Objectives
- Care*Link* Review
- Clinical Access/Patient Record
  - Logging In
  - The Portal Screen
  - Patient Census
  - Patient Demographics
  - Viewing Results
  - Printing Reports
  - Logging Off
- Questions and Answers
- Evaluation of Learning Activity

Goal:

This training manual provides a basic introduction to Soarian Clinical Access and will provide the skills needed to view patient results.

Objectives:

On completion of this training session participants will be able to

- Access Patient Record through Care*Link*
- Search for a patient utilizing the Find Tool icon
- Select, view and print the patient census
- View patient results and patient record
- Use the Encounter Navigator to change the time frame for results
- Print reports
- Log out of the Patient Record

FIRST

Complete Clinical Access Setup – See the ***Physician's Setup Guide*** for proper steps.

Care*Link* Review

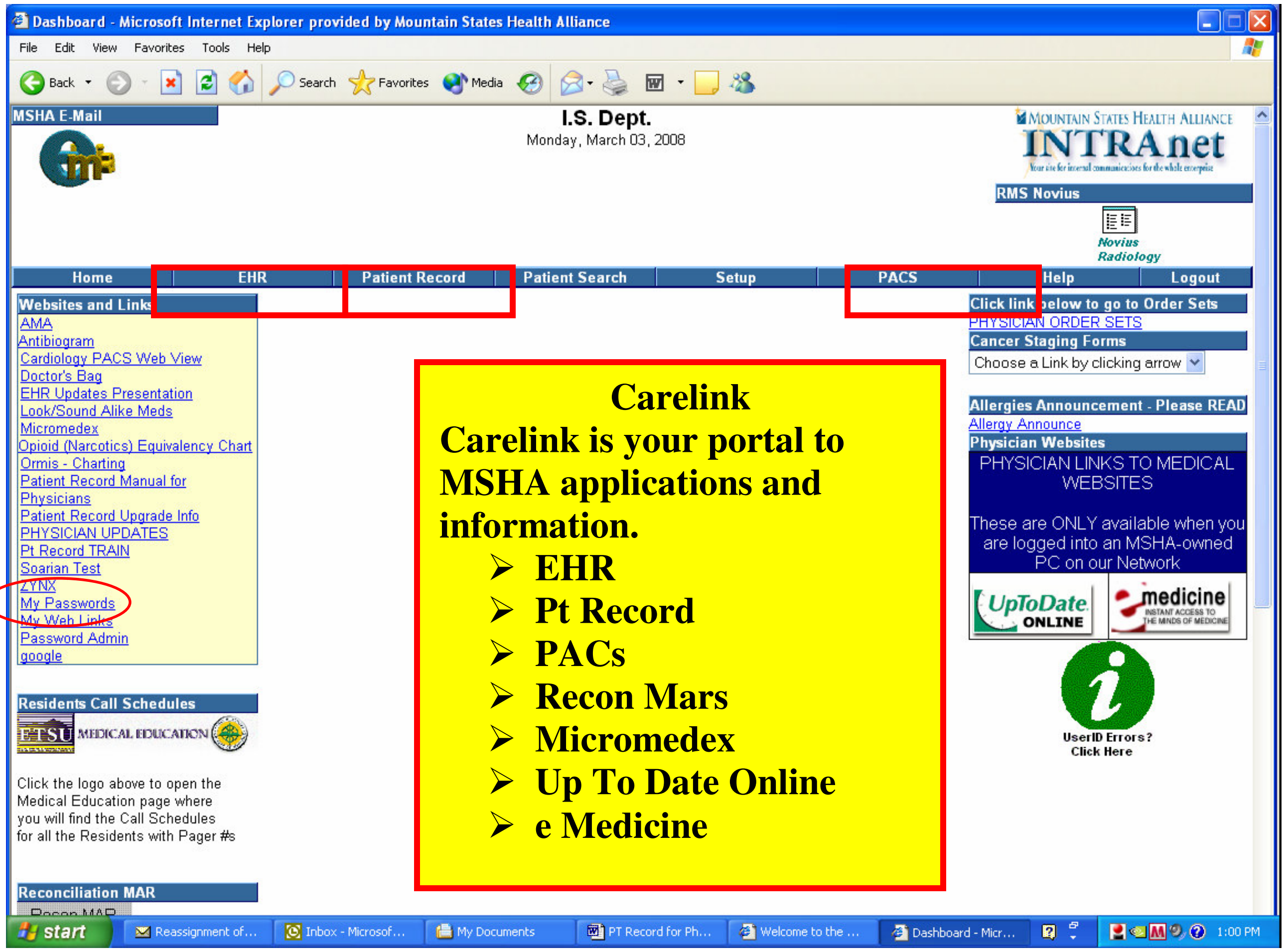
Care*Link* is the portal or doorway that allows you to access all parts of the patient Electronic Health Record (EHR). You must use Care*Link* to access all patient applications being rolled out as part of the EHR.

To access Care*Link* from any MSHA facility:

- Log into the network.
- Double click on the Care*Link* icon on the desktop.
- Sign-in to Care*Link.*

Notes:

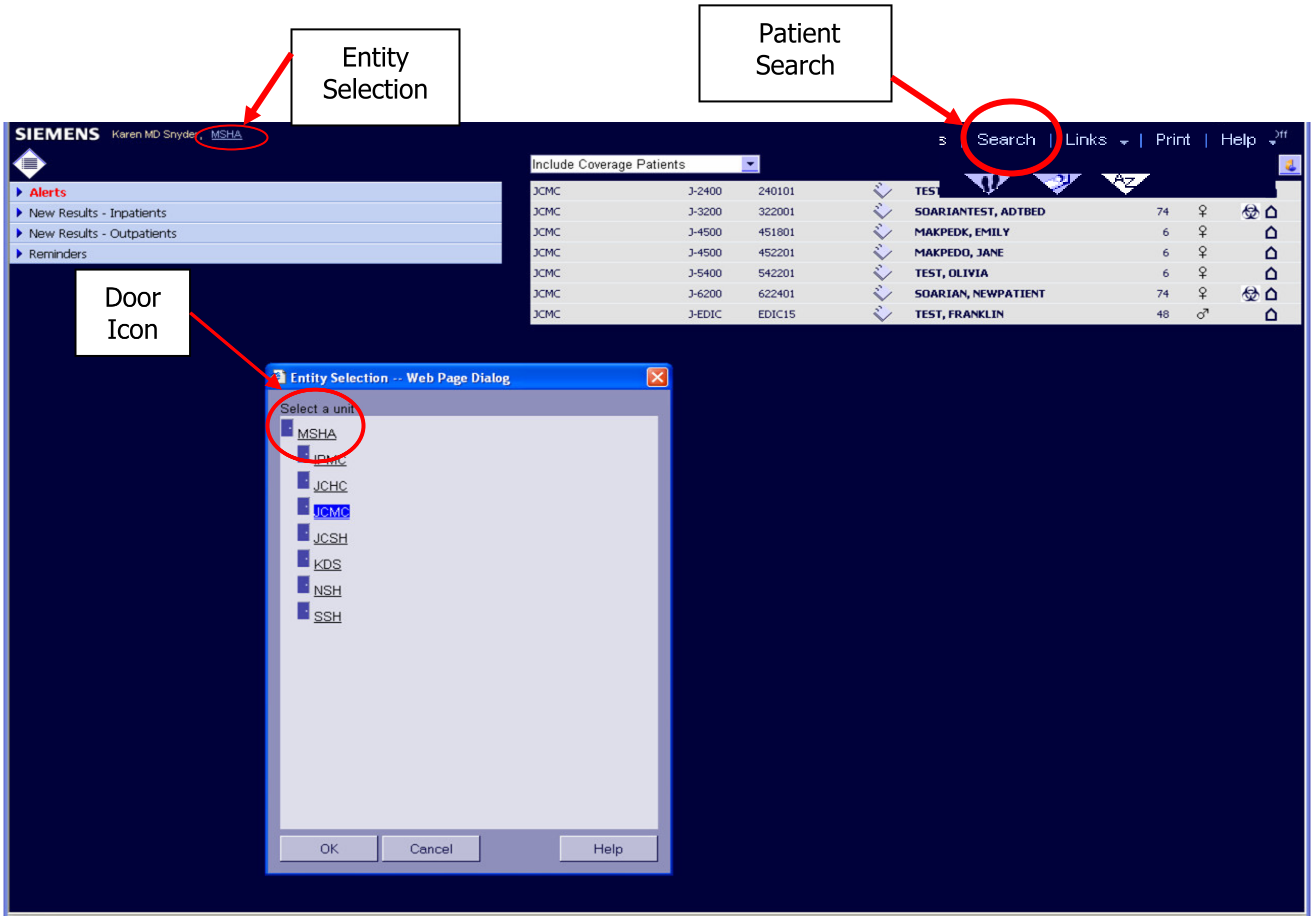
- If you forget your password, call the Response Center at 431-6290 to have it reset.
- You may access the patient record from outside the facility by signing into Care*Link* via the MSHA internet but you must use a token that provides the security required. If you do not have a token, contact the response center to initiate the order. It may take several days to process this request.



Steps to Accessing Patient Record

1. After logging in to Care*Link*, you will see "**Patient Record**" on the blue menu bar at the top of your home page. Click on "Patient Record". Go to step 5.
2. *If you do not see "Patient Record", click on "Setup". Under "Available Topics", scroll down until you see "Patient Record", click on it and then click "Select" and then "Save".*
3. *Go back to "Home."*
4. *Click "Patient Record"*
5. This brings you to the Soarian home page and the MSHA disclaimer.
6. Click **I Agree** to view the Clinical Desktop Portal also called the Soarian Home Page.
7. If you are presented with a sign on page for Pt Record, this means you have not set up your passwords for single sign on. To do that, click on "My Passwords" in the websites and links section; click drop down arrow to choose Patient Record, and enter user name and current password in both password boxes. Click Save and close the window. Log out and back into Carelink and then click on Pt record in the blue menu car and you will automatically signed in.

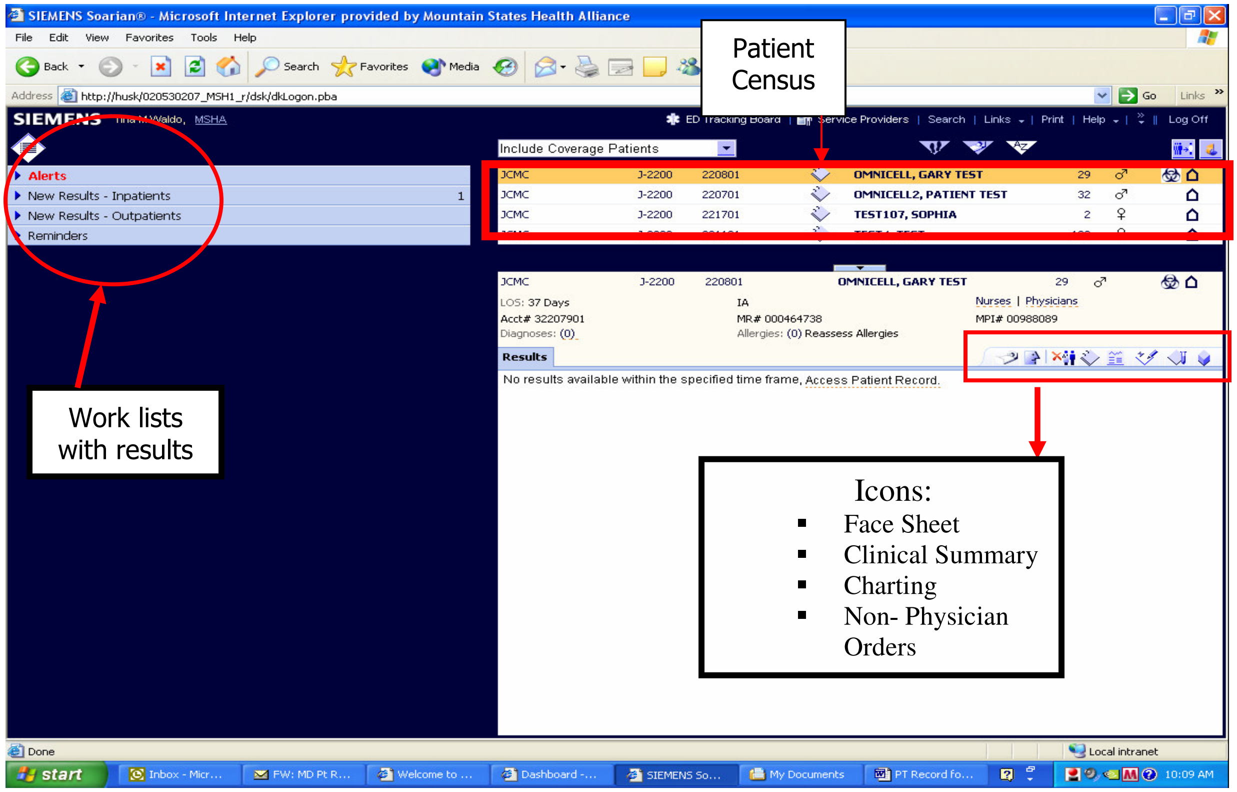
Portal Screen



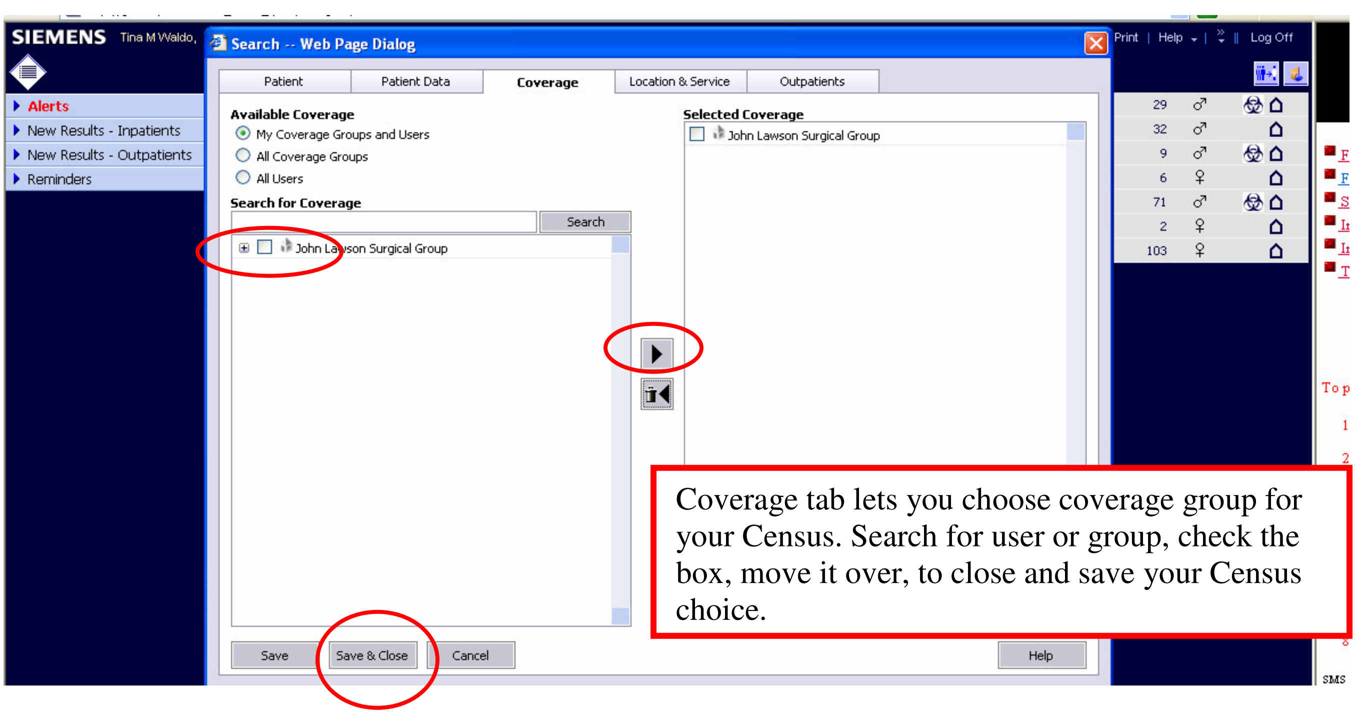
Portal Screen Elements

Entity Selection

- Your User Role determines which entities you can access within the Patient Record.
- Click on the Entity Selection to the right of the user name in the top left corner of the screen.
- A drop down box appears with facilities. Select the facility by clicking on the Door icon beside the facility.
- Select your facility and click OK.
- Your census for that facility will display in the top right corner of the portal screen.
- The census can be sorted by walking order, bed order or patient name by clicking on the down arrow icons above the census.



Coverage Tab
Setting up the "List of patients" in your census:



Viewing the Census List

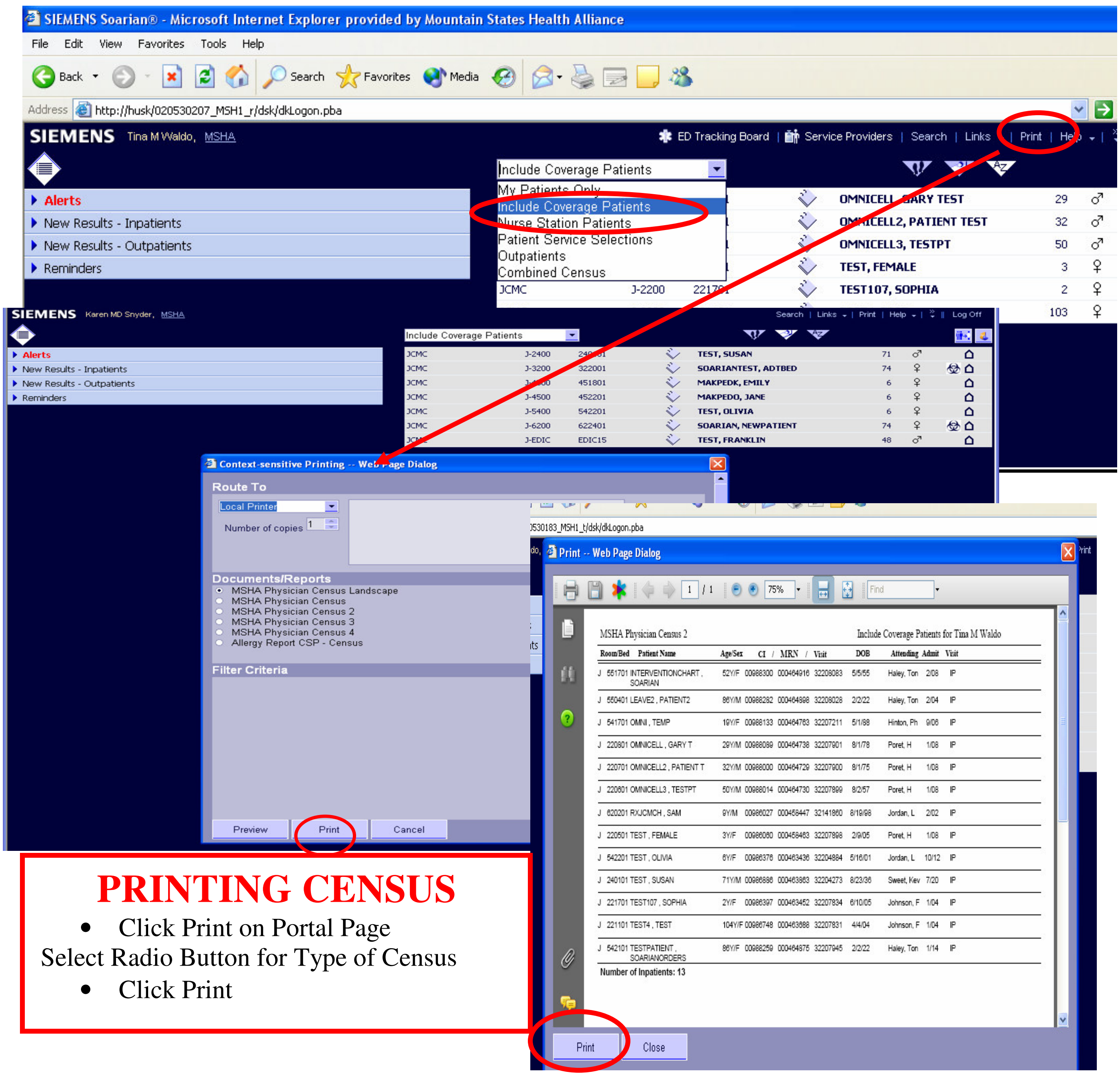
Click on the drop down arrow next to the Census selector in the top center. You may select one of these ***census options***:

- **My patients only**
- **Include coverage patients**

The options of "Nurse Station Patients" and "Patient Service Selections" are not enabled for physician views.

Select the census option you want to view by clicking on it. This will bring up your patient census just below this drop down box.

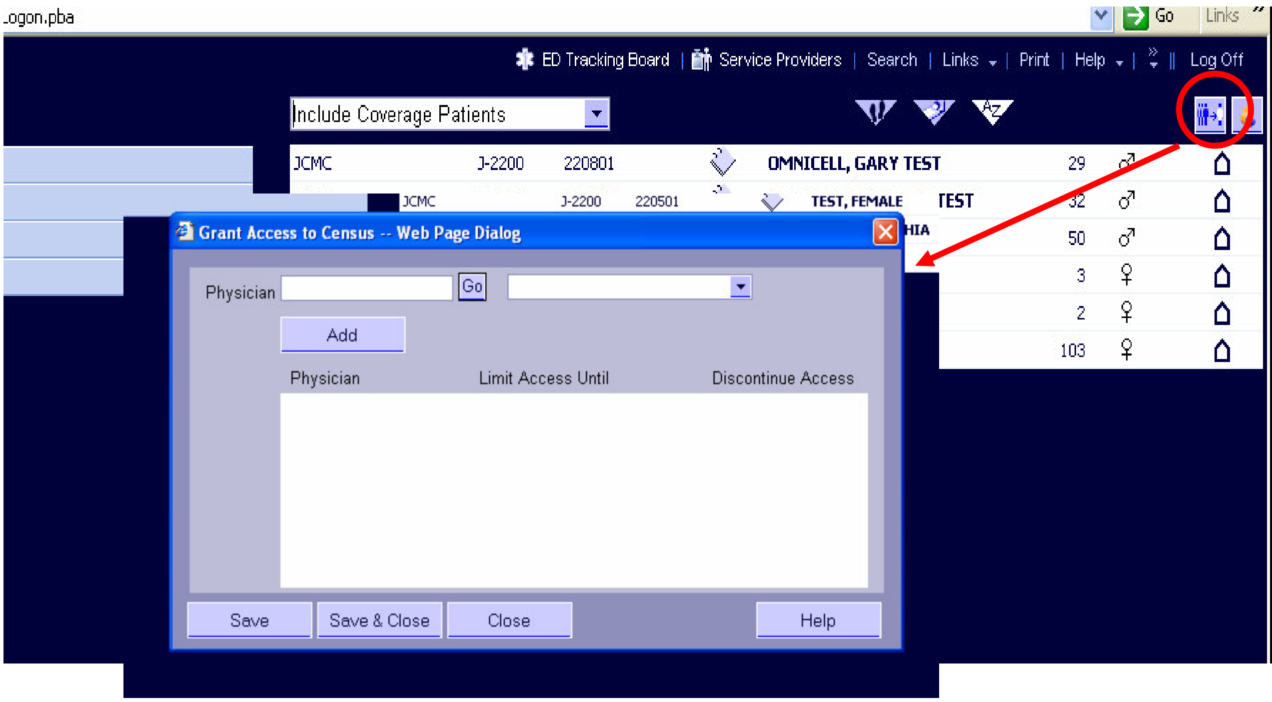
- Outpatients will pull only your patients registered for outpatient services
- Combined Census allows you to view patients on a nurse station registered for a specific service



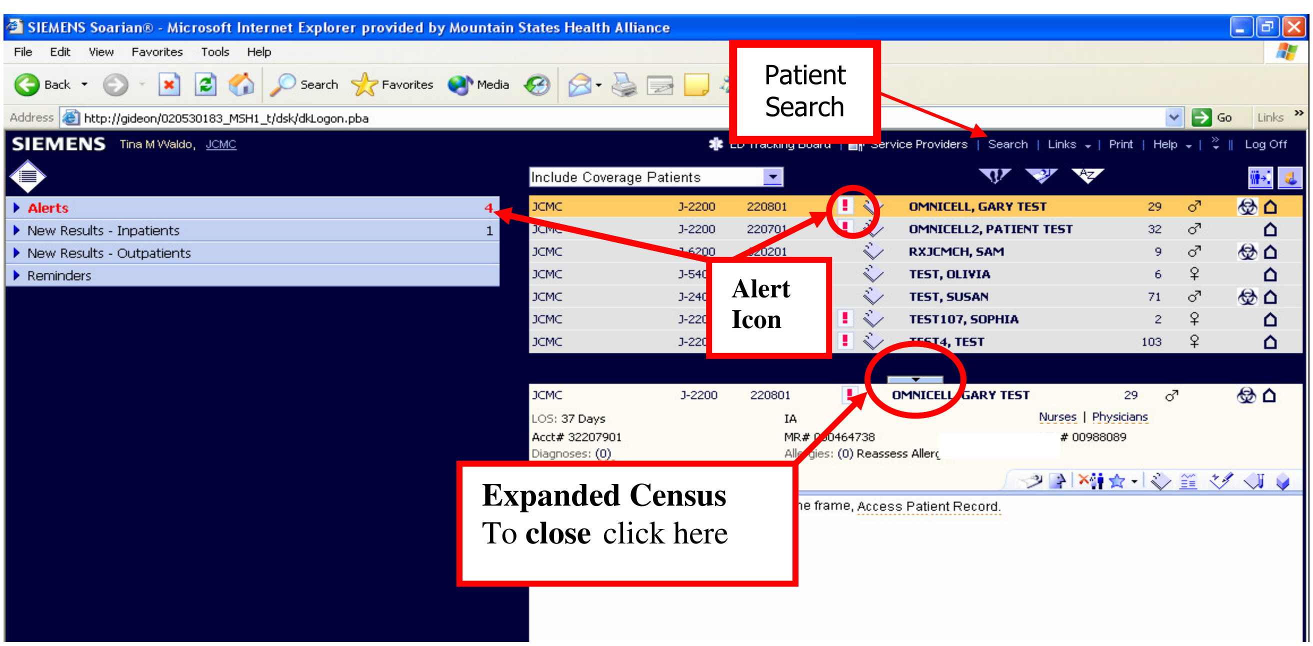
Granting access to your Census

- Select the Grant Icon.

You will select the person who will get access and length of time they will need access to your list of patients.

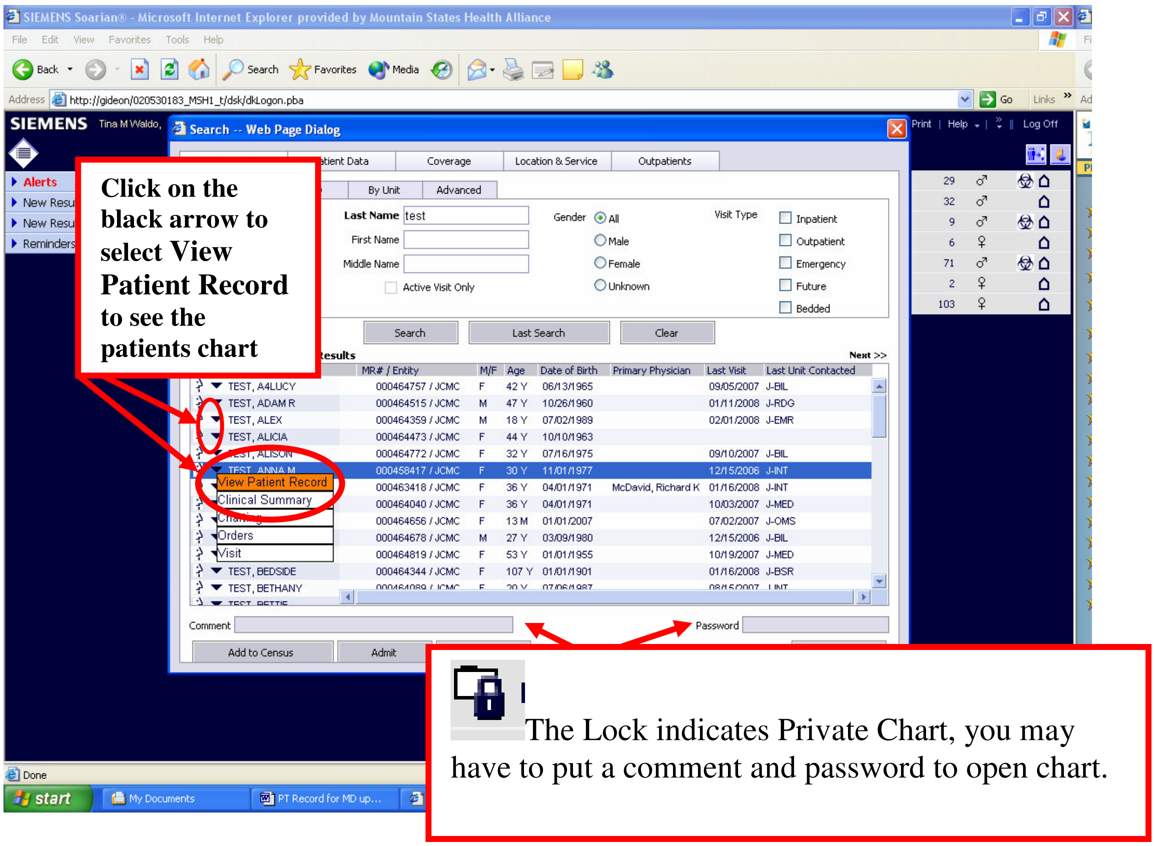


Finding Patient Data



Patient Search

You may need to locate a patient that does not display on your patient census. There are various ways to search for patients. You have the ability to search for patients based on specific patient details, such as "Last Name", "Patient Data", "Coverage", "By ID", and "By Unit". Once you find a patient, you can view the patient record.
You may be prompted to enter a reason and a password. Enter the reason and ***your*** **Patient Record** password (this is the password that you logged on with).



<u>Other Tabs Behind the Patient Search Tool</u>

Find Patient Data Tab

This tab may be useful if you know a specific result you are searching for on a specific date.
To make it easier to locate your patient,

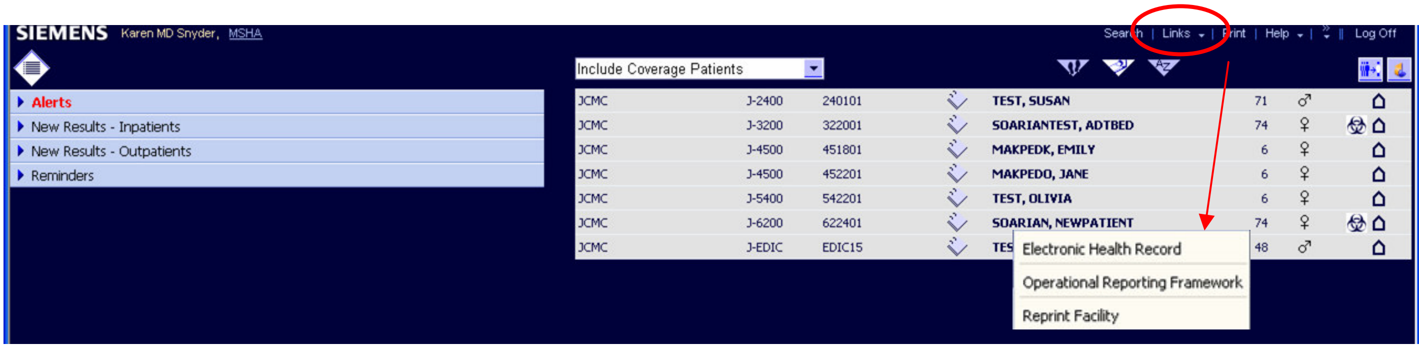
- Click on the Census button near the top of this screen. This will populate your current patient list in the drop down box.
- Select your patient by clicking on their name.

-To find Outpatient Data, click on the Search Tab and put in the search criteria such as name, gender, and visit type and click Search. It will populate the well with patients that met these criteria. Select the patient and click on the black arrow.
From here you can select View Patient Record and it will open the chart.

All the results for that specific test and service for this patient during the date range you selected will display in the box below. If there are no results as specified during that time, you will get a message box displaying "No results found".

Links Tab

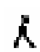
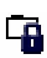
"Links" will take you to E.H.R.



Patient Census Icons

Collapsed Census View

The collapsed patient census on the Clinical Desktop has the following fields:

-  Indicates that the patient belongs to the Outpatient category.
- Entity Name - Indicates the name of an entity/unit within the healthcare organization, to which the patient is associated.
- Location - Indicates the unit and room where the patient is located.
- Patient's Name – Indicates the name of the patient in the 'Last Name, First Name, Middle Initial
-  Indicates that you **cannot release information** on this patient.
- Patient Age - Indicates the age of the patient. The application displays the age based on the following criteria.

If the patient is	Then age is indicated by
less than seven days old	'**d**' for days. For example, 2 d.
from eight days to eight weeks old	'**w**' for weeks. For example, 3 w
nine weeks to two years old	'**m**' for months. For example 14 m.
more than two years old	the number of years. For example, 3.

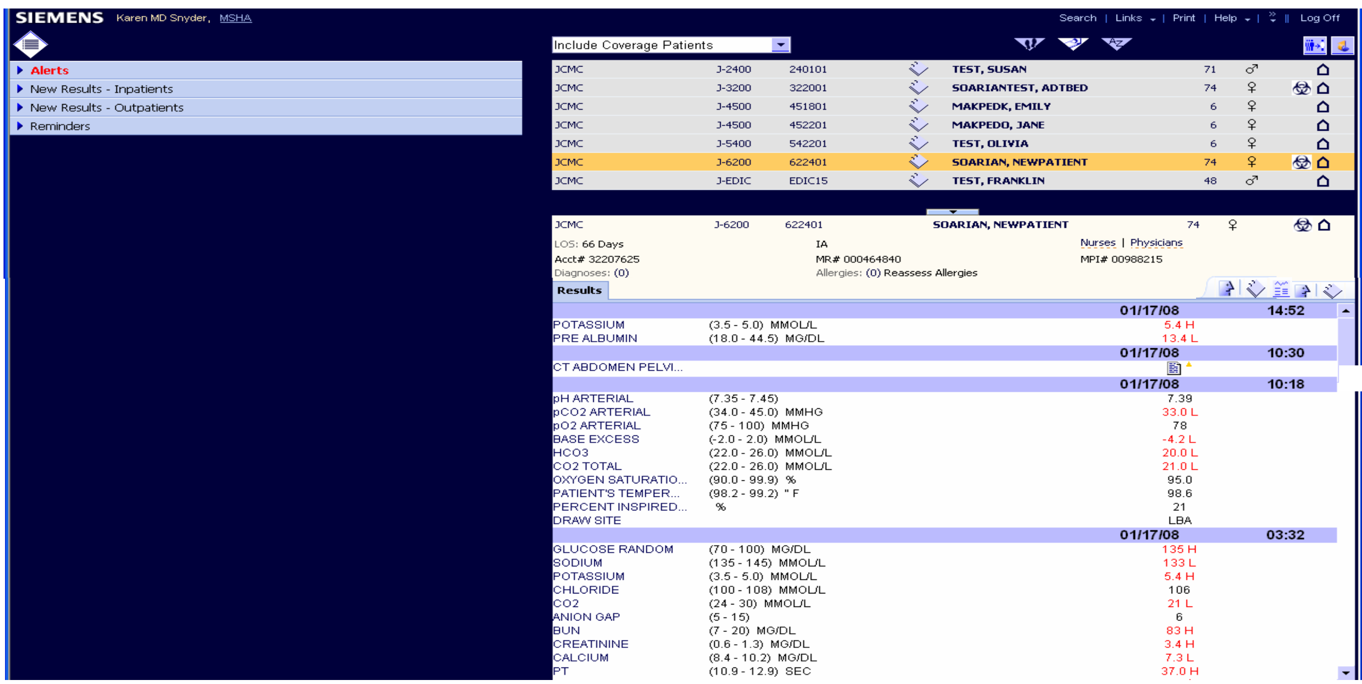
- Patient's Gender – Is indicated by the ♂ male ♀ female symbol

- Links to the Patient Record.

- - Indicates that the patient has an isolation status.
- - Patients with secured information. This indicator will display on all psychiatric patients
- - (Red Box) Indicates that the patient has critical results from the last 24 hours.
- - (Green Box) Indicates that the patient has new clinical results.

You can expand or collapse a patient record in the census by clicking the patient name in that record. An expanded patient record displays the patient demographics.

Expanded Patient Census View



Click a patient's name in the Census on the Clinical Desktop portal. The patient record expands and displays the following information.

- **First row**
  - Entity name
- Healthcare unit, room number where the patient is currently located
- Patient's name
- Patient's age
- Patient's sex

- Indicates that the patient belongs to the Outpatient category.
- Indicates that you **cannot release information** on this patient.
- Patients with secured information.
- Indicates that the patient has an isolation status.
- Indicates that patient is currently in facility

■ **Second row**

- LOS – Indicates the duration of the patient's stay
- IA – Type of admission (IA, OA, EA)
- Nurses / Physicians
    - Nurses associated with patient
    - Physicians - To view the physicians treating the patient.

■ **Third Row**

- Account# - Patient number generated internally by the application.
- MR# - Medical record number
- MPI# - Corporate identifier number

■ **Fourth Row**

- Diagnosis
- Allergy

Results

- Shows the most recent results for this patient

Click the following to access patient-related information.

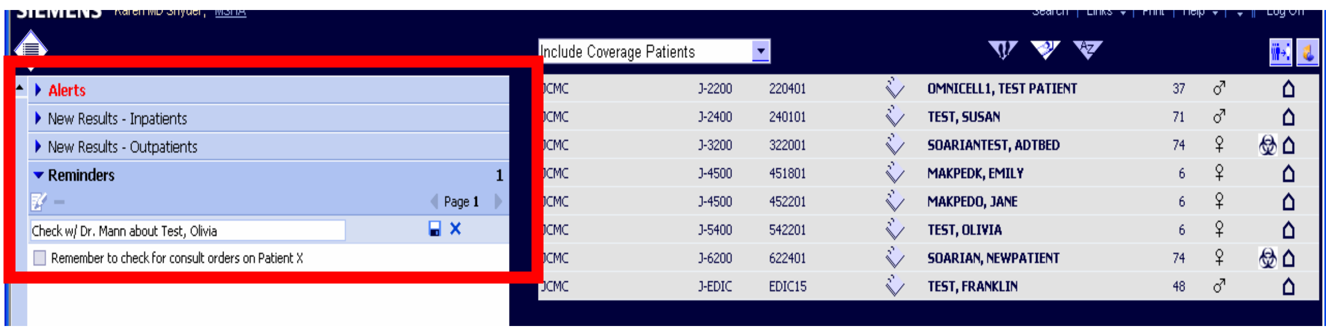
- Face Sheet – Patient Demographic Data
- Click to access the Patient Record
- Click to access the Clinical Summary

Worklists

The left side of the Portal Screen displays the **Worklist** area.

1. Select the **New Results - Inpatients Worklist** to view new results for inpatients on the selected census. Results are managed from the Patient Record screen.
2. Select the **New Results - Outpatients Worklist** to view new results for outpatients on the selected census. Results are managed from the Patient Record screen

   1. Click to open a Worklist. The worklist expands to display patient's name with a darker background as a link to the patient Record information.
   2. Use or use the scroll bar to scroll through the pages of visits.
   3. Click to close the Worklist.
   4. Select the **Reminders Worklist** to maintain information to remember. Reminders are maintained directly in the Reminders worklist.



Click to open **Reminders Worklist.**

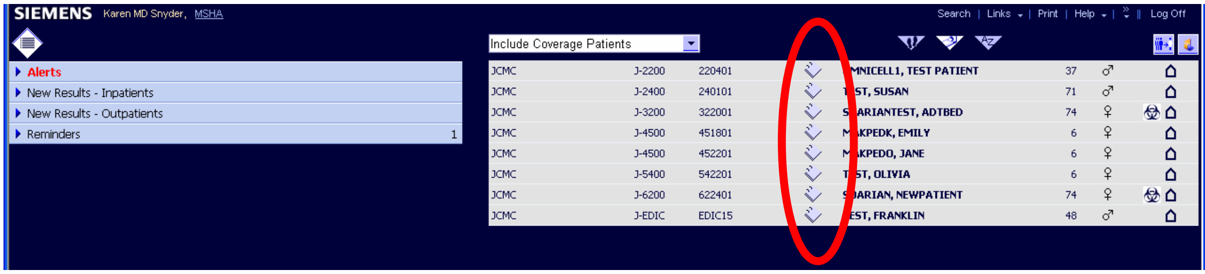
1. To enter a new reminder, type the text of the reminder into the blank text entry field at the top of the Reminders Worklist.

Click to add the text entered in the previous step to the list of reminders.

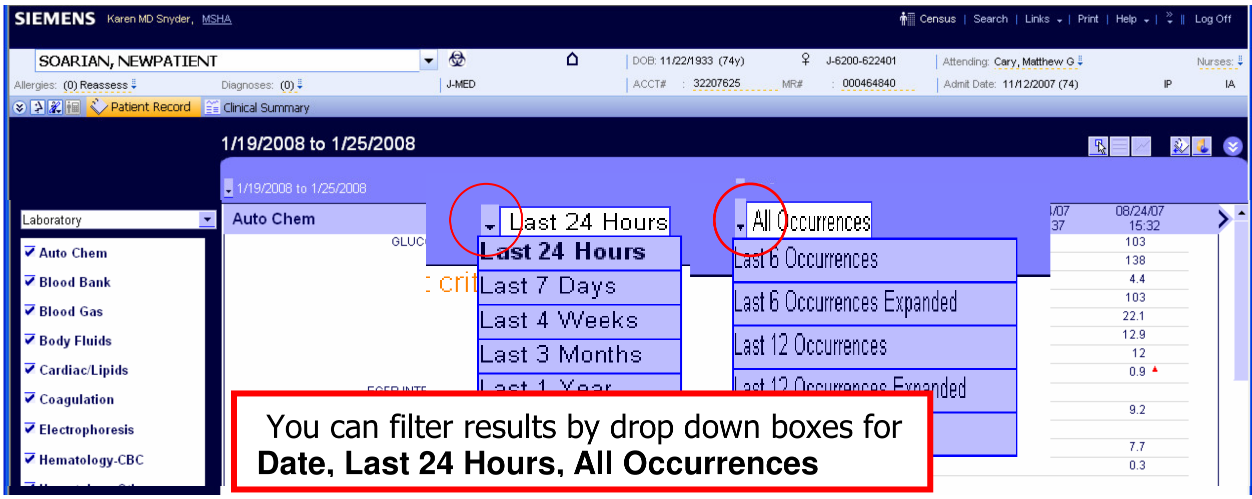
Or click the to cancel. Each reminder appears with a check box.

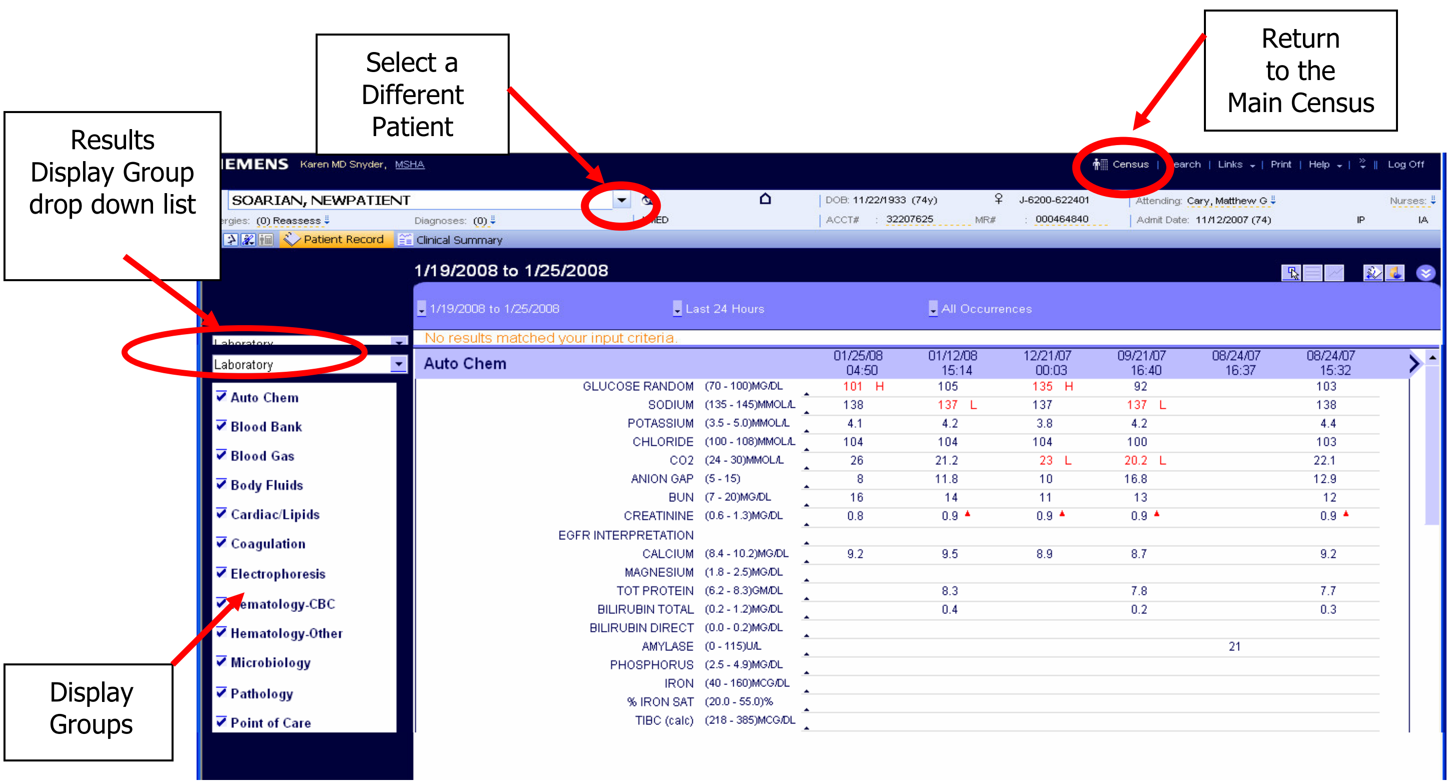
2. Select a check box for a reminder and click to edit the selected reminder. The text of the selected reminder will appear in the text entry field at the top of the Reminders Worklist. When editing a reminder, the buttons at the top of the Reminders Worklist change. Click to save the edits or click to cancel the edits.
3. Select the check boxes for reminders to be removed, then click to remove the selected reminders from the Reminders Worklist, if appropriate.
4. Click to close the Reminders Worklist.

The Patient Record



Once your page opens click on chart icon to the left of the patient name.





Patient Record

Results

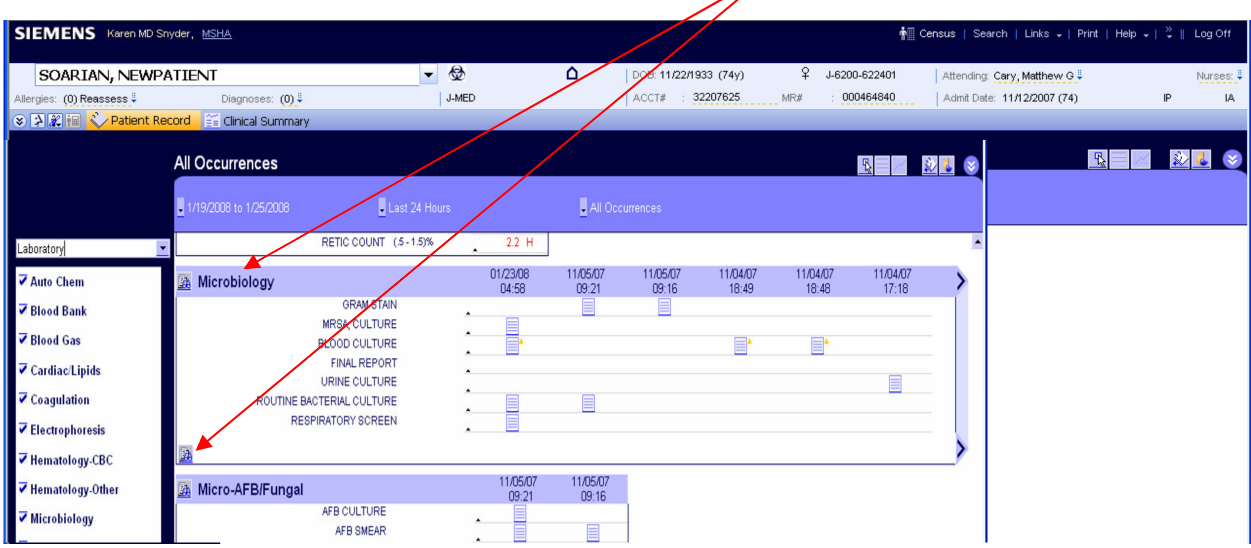
- Click  at the end of the patient's name to select a different patient without returning to the Census Screen.
- Click 

in the top right to return to the Census.
- Click the **Results Display Group** drop down list and select a different flowsheet to display other Patient Record information and display groups.
  - **Flowsheets** that are available to view in the Result View.
    - **Laboratory** – Displays as default flowsheet. Displays lab results. All lab results from 1998 to present are available in Clinical Access.
    - **Diagnostic Imaging** – Displays CT, Mammography, MRI, Nuc Med, PET Scan, Radiology, Special Procedure and Ultrasound results. All DI results from 2001 to present are available.
    - **Dictated Reports** – H&P, Consults, Discharge summary, OP notes, Other
    - **Cardiology**
    - **Patient Data** – Immunizations, Ht and Wt
    - **Height & Weight**
    - **24 hour flowsheet** – Displays all results

Labs

Microbiology-

if microbiology is selected; you have the option of "**show all**" microbiology reports. .

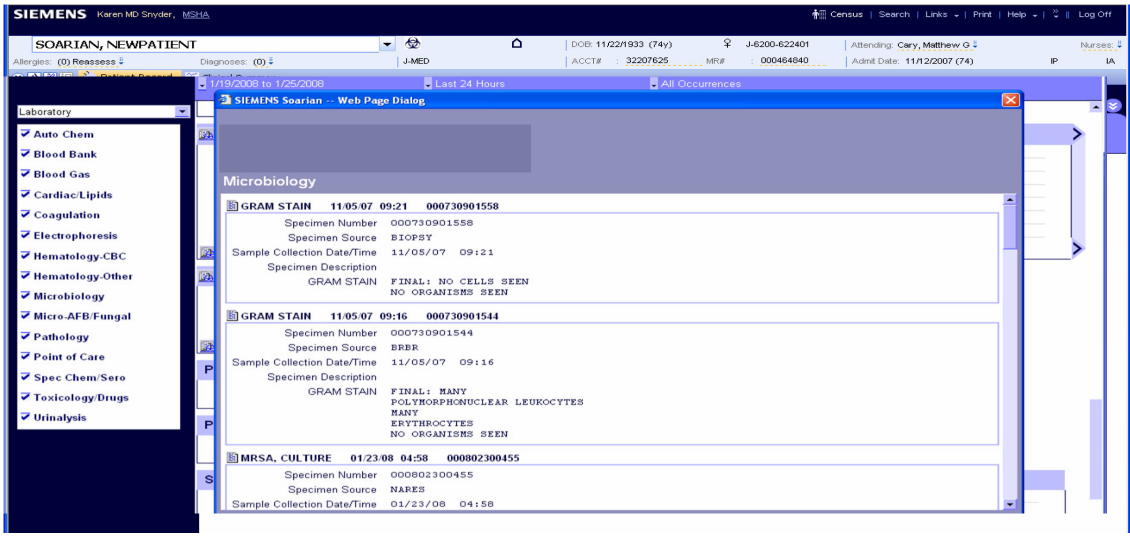


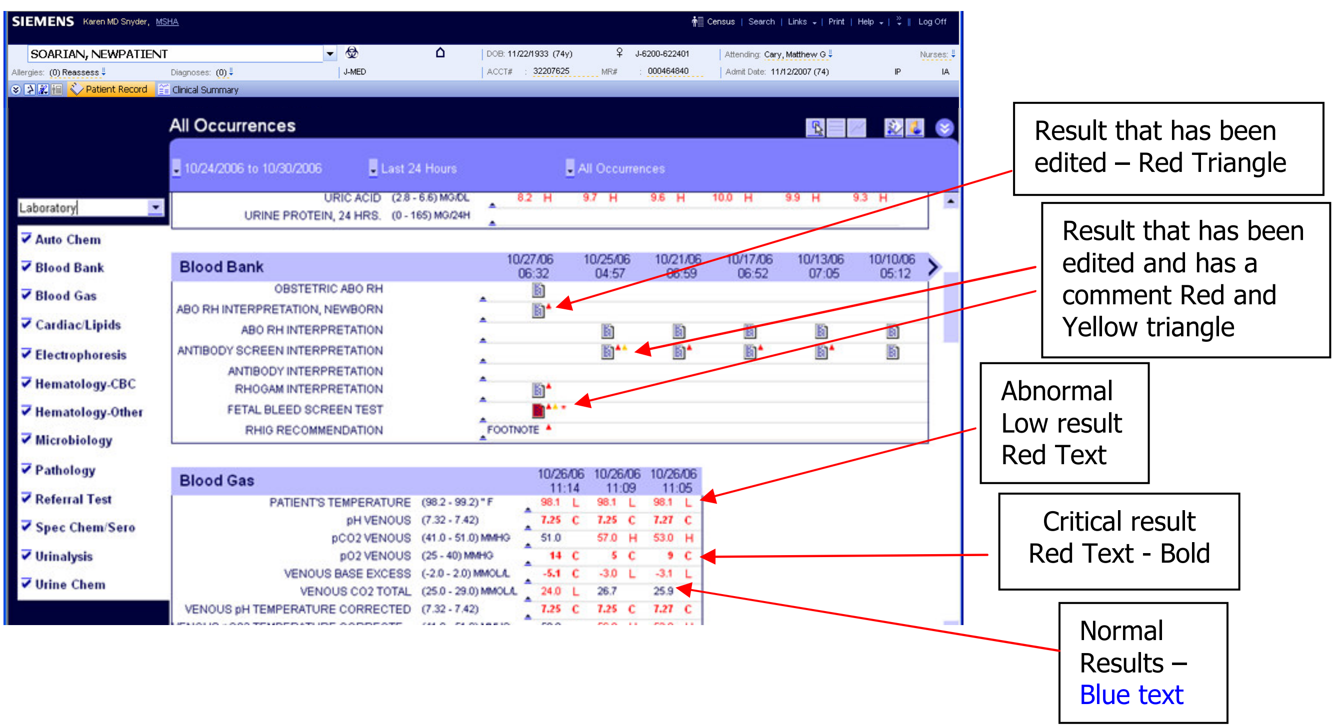
Patient Record

Labs

Microbiology results will be displayed concurrently

The Result View section displays patient record information in groups by category. The following indicators will appear in the Result View:

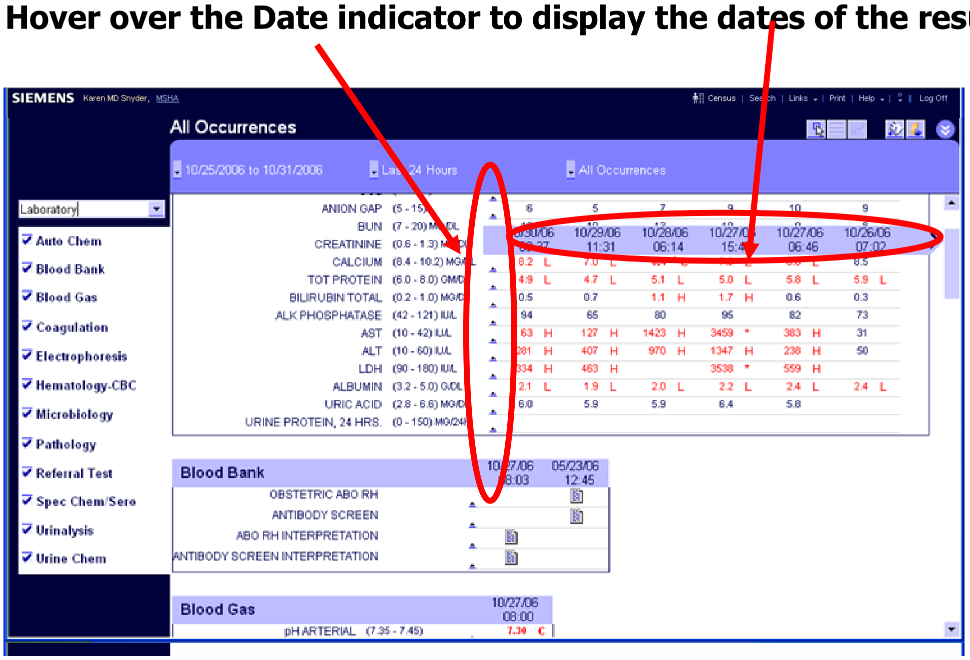




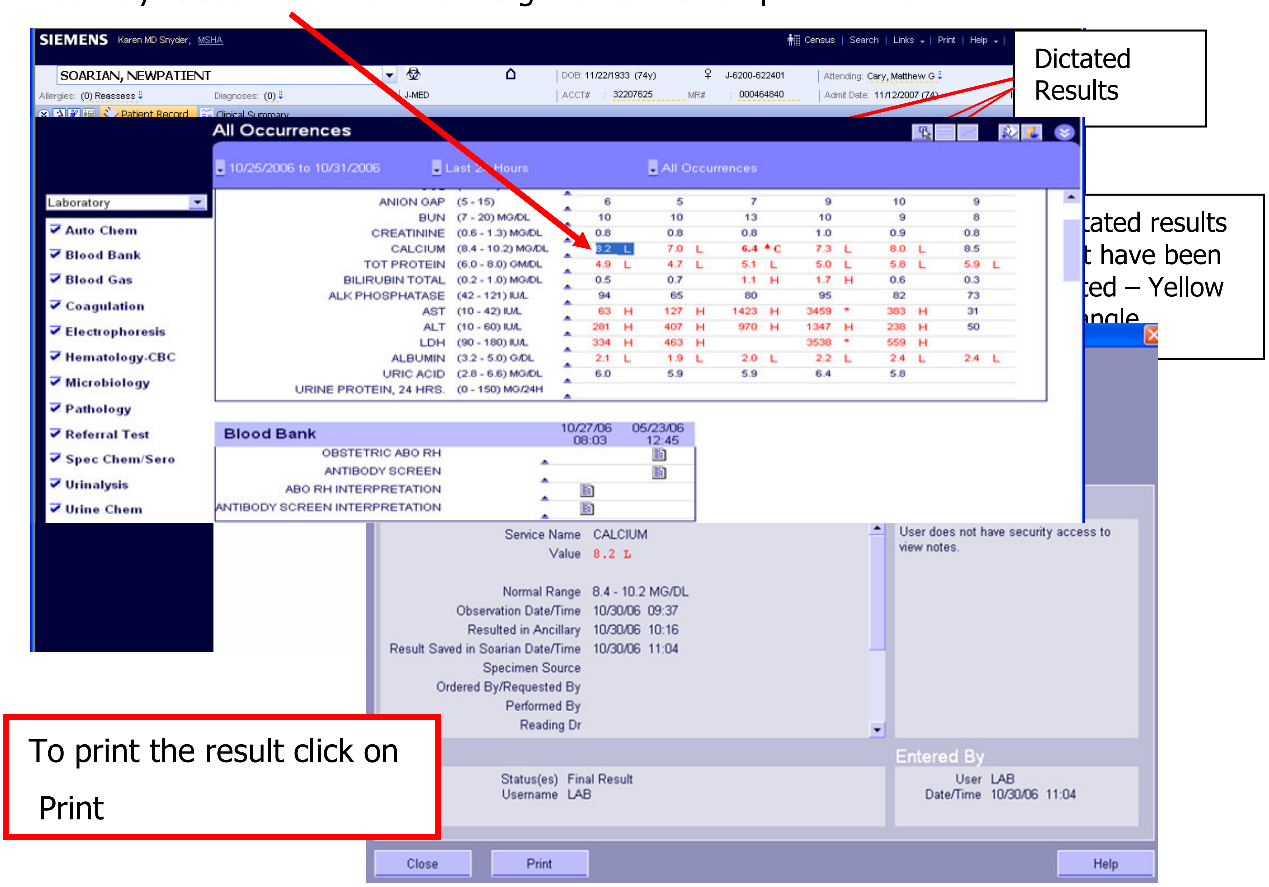
Patient Record

Labs

Hover over the Date indicator to display the dates of the results



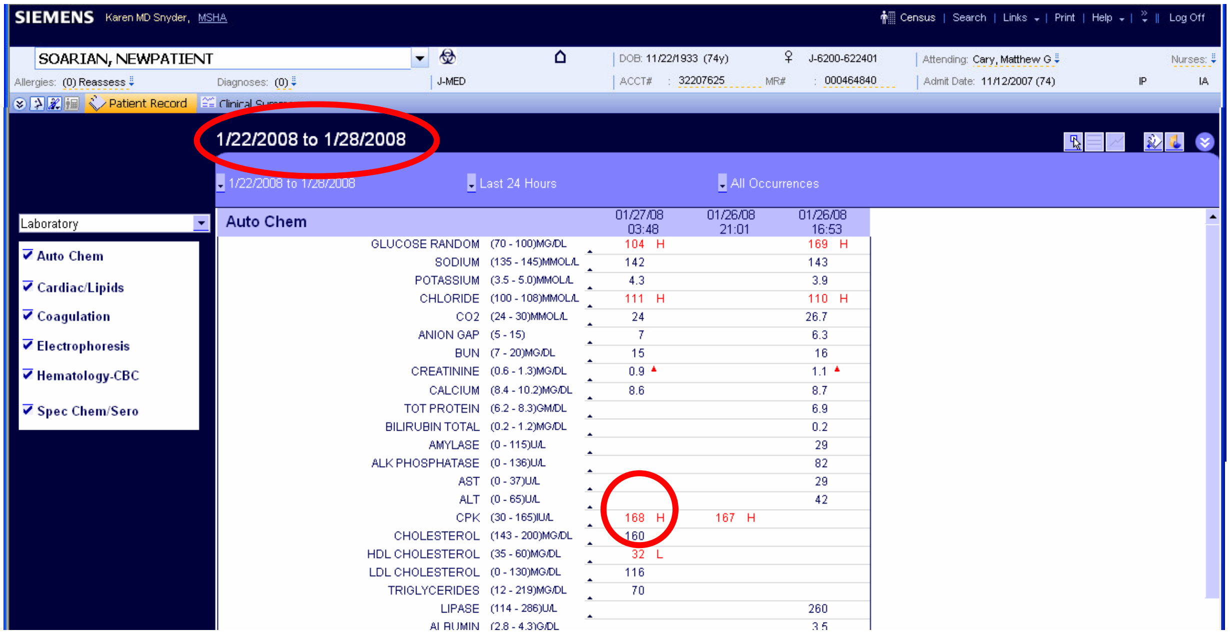
You may "double click" a result to get details on a specific result



Patient Record

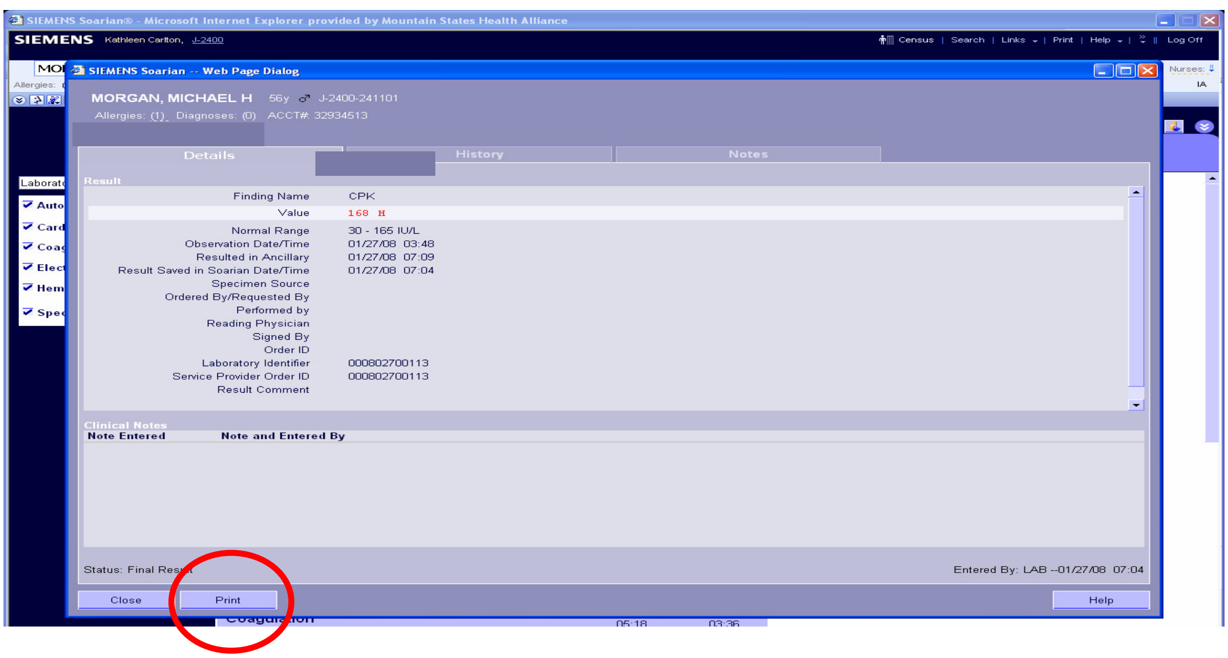
A note about printing!

To print the Results for a single visit – first click on the Current Date option



4. Click **Print** to print or **Close** to close the face sheet.

Once the date is displayed you may select a specific result to print by clicking on the result.Then click on print



Log out of Patient Record

Click on "Log Off" in the top right corner

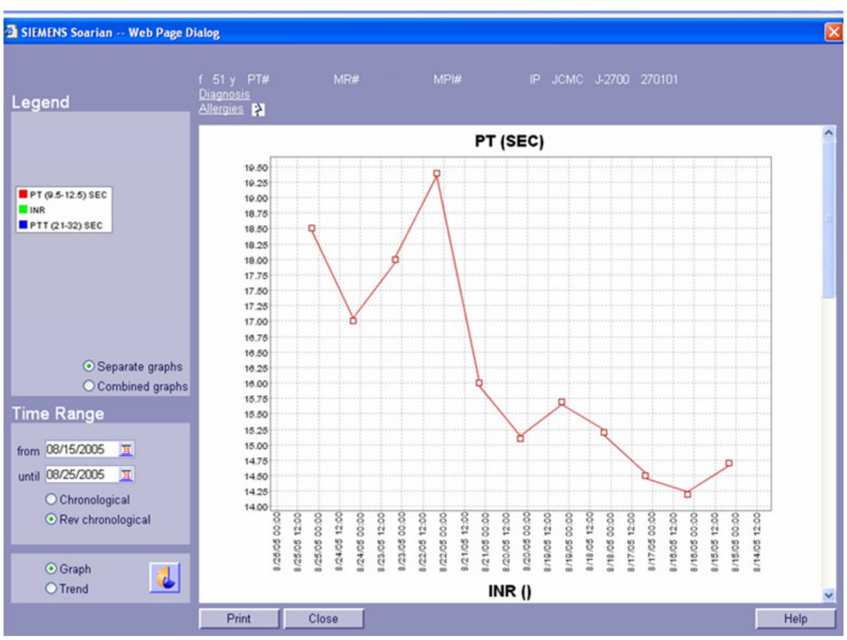
Patient Record

Labs

To Graph or Trend Patient Information

- Click on the enable graph & trend icon
  - A check box will appear to the right of each item that can be graphed or trended. Select the check box for the information to be graphed or trended, (maximum of five selections).
- To display a graph of the selected information, click
- To display the trends of the selected information, click

Example of Graphed Results:



1. In the **Legend** section, view the explanation for which color has been associated to each patient record item in the graph.
2. In the **Legend** section, select from the following options.
   - Select **Separate Graphs** to present each patient record item in its own graph.

Select **Combined Graphs** to present all patient record items in one combined graph.

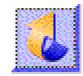
3. In the **Time Range** section, perform the following steps to set the time range to present on the graph.

a. Click the **From** to set the date from when to begin the graph.

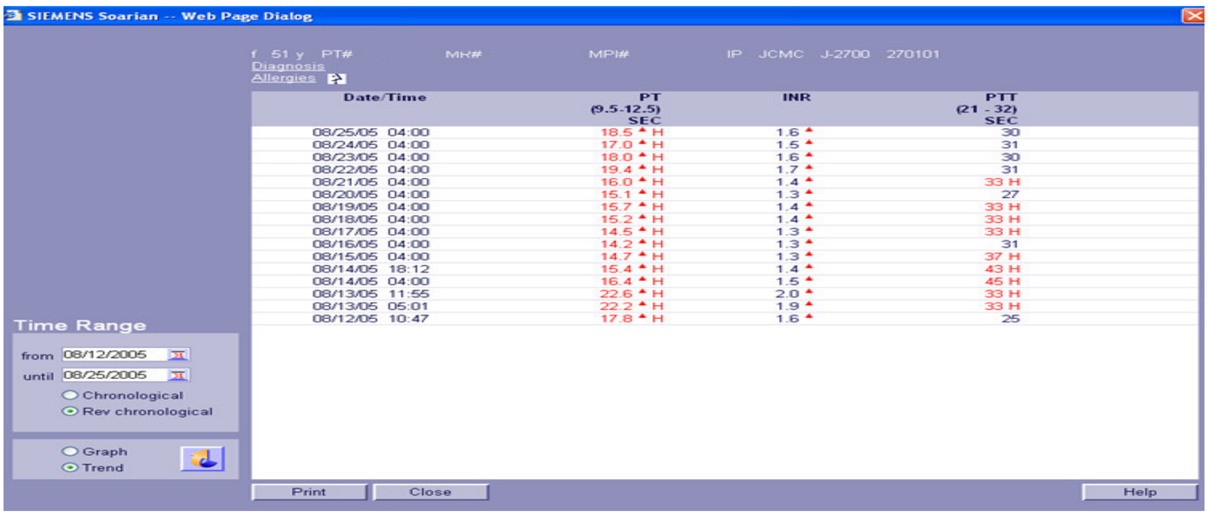
b. Click the **To** to set the end date for the graph.

c. Select either of the following options:

- Select **Chronological** to present the graph with information displayed chronologically.
- Select **Rev Chronological** to present the graph with information displayed in reverse chronological order.

In the lower left-hand section, select the **Trend** option to switch from the graphical presentation to the trend presentation. Click Refresh 

Example of Trended Results:



Date/Time	PT (9.5-12.5) SEC	INR	PTT (21 - 32) SEC
08/25/05 04:00	18.5 H	1.6	30
08/24/05 04:00	17.0 H	1.5	31
08/23/05 04:00	18.0 H	1.6	30
08/22/05 04:00	19.4 H	1.7	31
08/21/05 04:00	16.0 H	1.4	33 H
08/20/05 04:00	15.1 H	1.3	27
08/19/05 04:00	15.7 H	1.4	33 H
08/18/05 04:00	15.2 H	1.4	33 H
08/17/05 04:00	14.5 H	1.3	33 H
08/16/05 04:00	14.2 H	1.3	31
08/15/05 04:00	14.7 H	1.3	37 H
08/14/05 18:12	15.4 H	1.4	43 H
08/14/05 04:00	16.4 H	1.5	45 H
08/13/05 11:55	22.6 H	2.0	33 H
08/13/05 05:01	22.2 H	1.9	33 H
08/12/05 10:47	17.8 H	1.6	25

Indicators

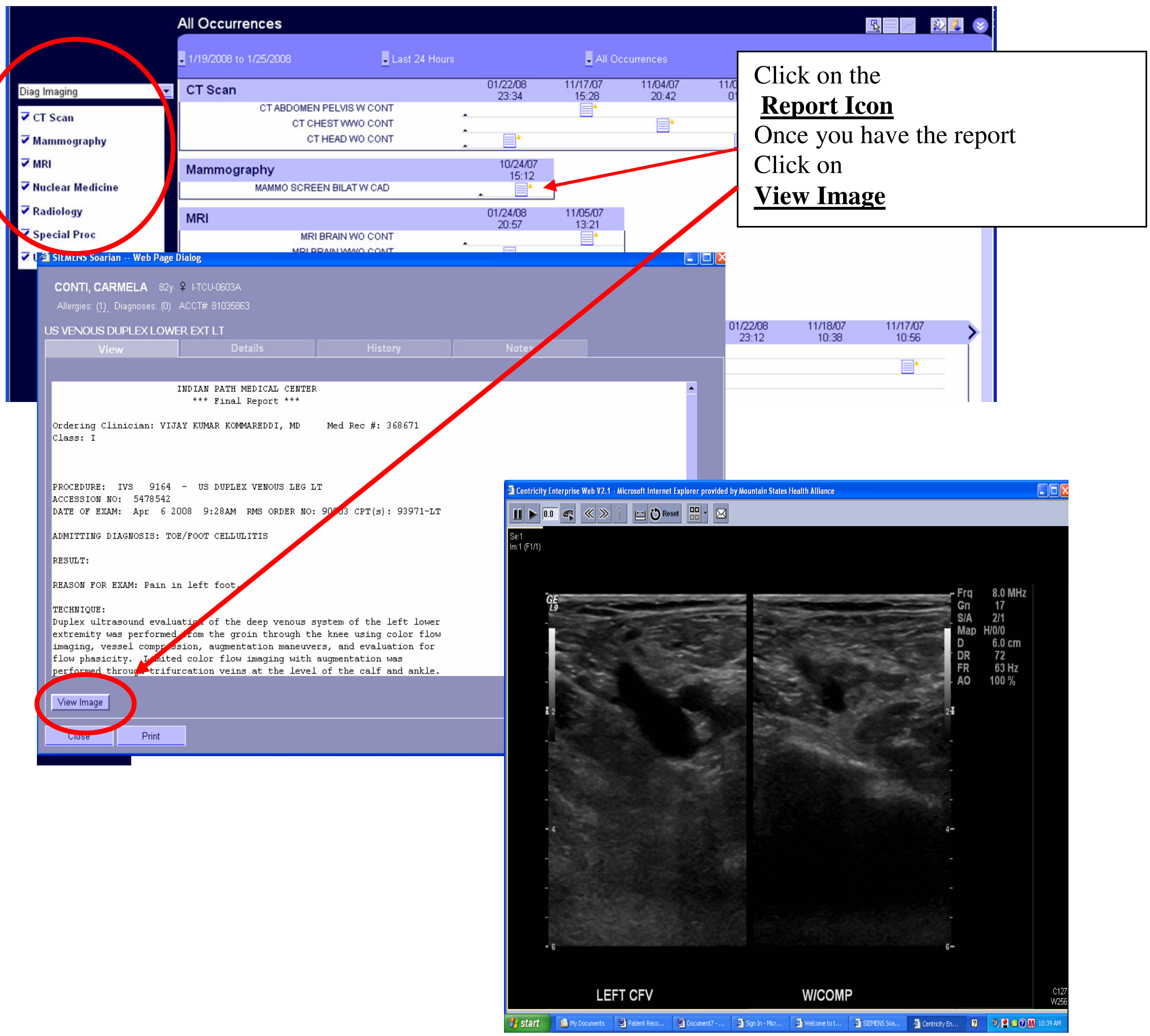
Indicator	Description
Yellow Triangle	Information has been edited
Red Triangle	Comment added or a note written
Blue Text	Normal Range
Red Text H	Abnormal High
Red Text L	Abnormal Low
Red Bold Text C	Critical Result
	Dictated/Text report

Patient Record

Diagnostic

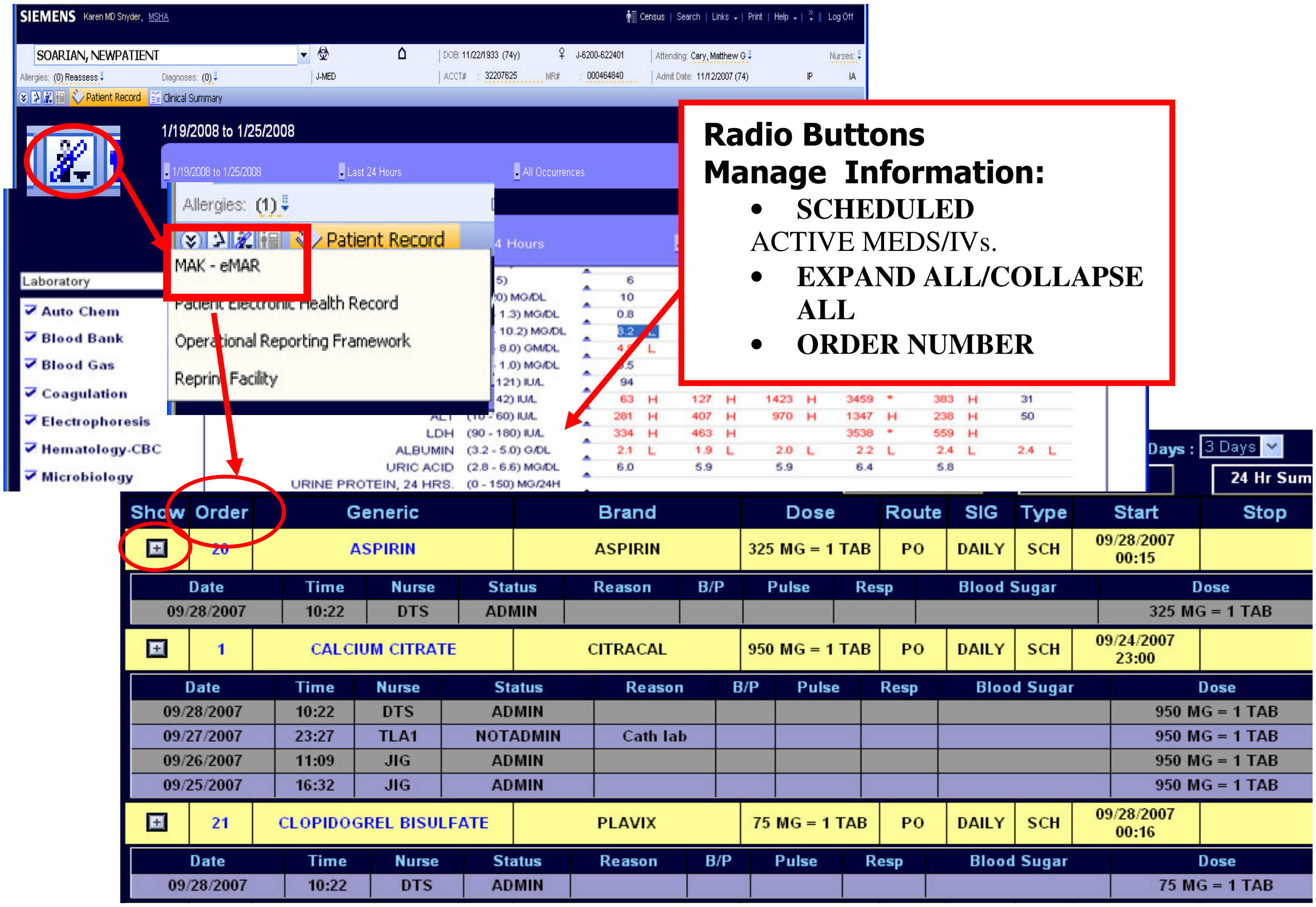
From the Display group drop down list you can select Diagnostic Imaging

Click on the Document Icon and pull up the report. You have the option to Print or View the actual Image as it is stored in PACs application.



Patient Medications

Clicking on icon (man with chain links) allows you to go view other patient specific forms



Show	Order	Generic	Brand	Dose	Route	SIG	Type	Start	Stop
+	20	ASPIRIN	ASPIRIN	325 MG = 1 TAB	PO	DAILY	SCH	09/28/2007 00:15	

Date	Time	Nurse	Status	Reason	B/P	Pulse	Resp	Blood Sugar	Dose
09/28/2007	10:22	DTS	ADMIN						325 MG = 1 TAB

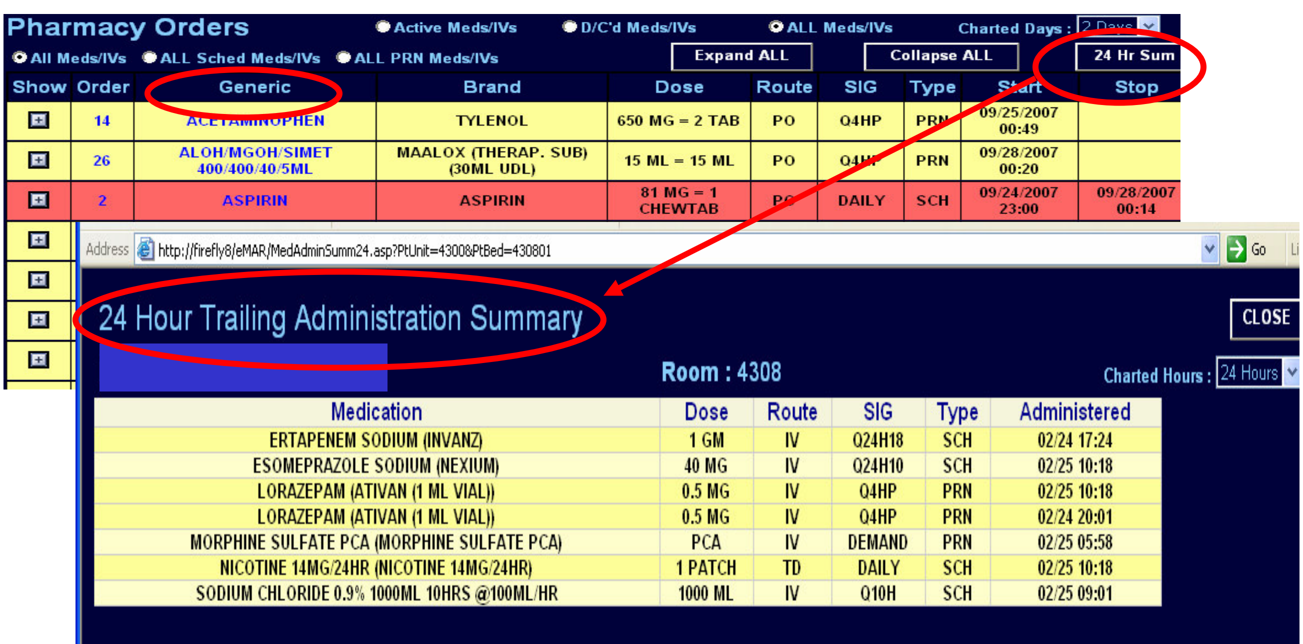
Show	Order	Generic	Brand	Dose	Route	SIG	Type	Start	Stop
+	1	CALCIUM CITRATE	CITRACAL	950 MG = 1 TAB	PO	DAILY	SCH	09/24/2007 23:00	

Date	Time	Nurse	Status	Reason	B/P	Pulse	Resp	Blood Sugar	Dose
09/28/2007	10:22	DTS	ADMIN						950 MG = 1 TAB
09/27/2007	23:27	TLA1	NOTADMIN	Cath lab					950 MG = 1 TAB
09/26/2007	11:09	JIG	ADMIN						950 MG = 1 TAB
09/25/2007	16:32	JIG	ADMIN						950 MG = 1 TAB

Show	Order	Generic	Brand	Dose	Route	SIG	Type	Start	Stop
+	21	CLOPIDOGREL BISULFATE	PLAVIX	75 MG = 1 TAB	PO	DAILY	SCH	09/28/2007 00:16	

Date	Time	Nurse	Status	Reason	B/P	Pulse	Resp	Blood Sugar	Dose
09/28/2007	10:22	DTS	ADMIN						75 MG = 1 TAB

24 Hour Summary



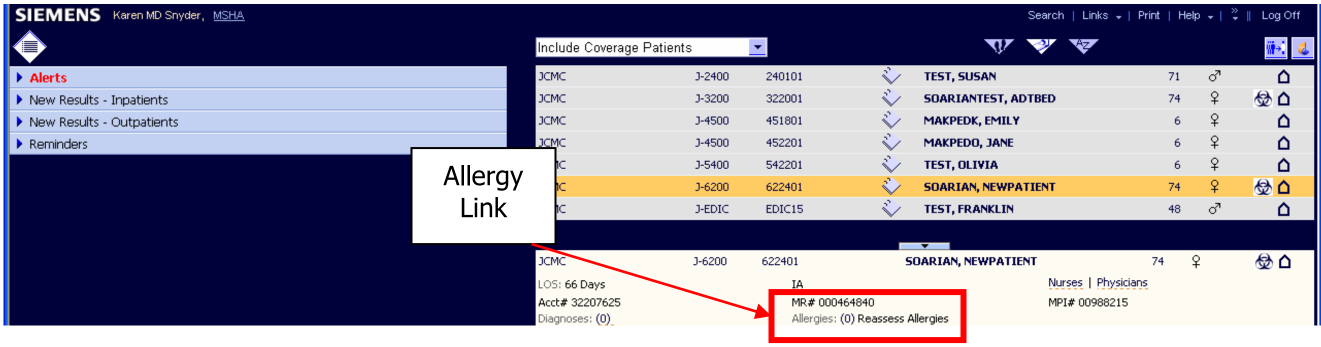
Show	Order	Generic	Brand	Dose	Route	SIG	Type	Start	Stop
+	14	ACETAMINOPHEN	TYLENOL	650 MG = 2 TAB	PO	Q4HP	PRN	09/25/2007 00:49	
+	26	ALOH/MGOH/SIMET 400/400/40/5ML	MAALOX (THERAP. SUB) (30ML UDL)	15 ML = 15 ML	PO	Q4HP	PRN	09/28/2007 00:20	
+	2	ASPIRIN	ASPIRIN	81 MG = 1 CHEWTAB	PO	DAILY	SCH	09/24/2007 23:00	09/28/2007 00:14

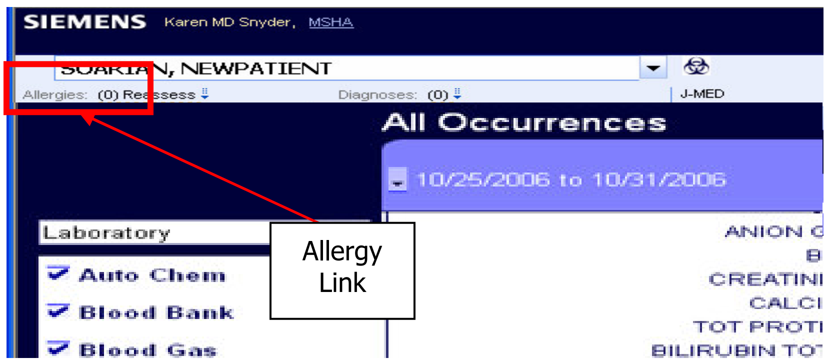
Medication	Dose	Route	SIG	Type	Administered
ERTAPENEM SODIUM (INVANZ)	1 GM	IV	Q24H18	SCH	02/24 17:24
ESOMEPRAZOLE SODIUM (NEXIUM)	40 MG	IV	Q24H10	SCH	02/25 10:18
LORAZEPAM (ATIVAN (1 ML VIAL))	0.5 MG	IV	Q4HP	PRN	02/25 10:18
LORAZEPAM (ATIVAN (1 ML VIAL))	0.5 MG	IV	Q4HP	PRN	02/24 20:01
MORPHINE SULFATE PCA (MORPHINE SULFATE PCA)	PCA	IV	DEMAND	PRN	02/25 05:58
NICOTINE 14MG/24HR (NICOTINE 14MG/24HR)	1 PATCH	TD	DAILY	SCH	02/25 10:18
SODIUM CHLORIDE 0.9% 1000ML 10HRS @100ML/HR	1000 ML	IV	Q10H	SCH	02/25 09:01

Allergy Link

Allergies will be keyed into SMS/Invision and will be linked here. You won't be able to key in allergies.

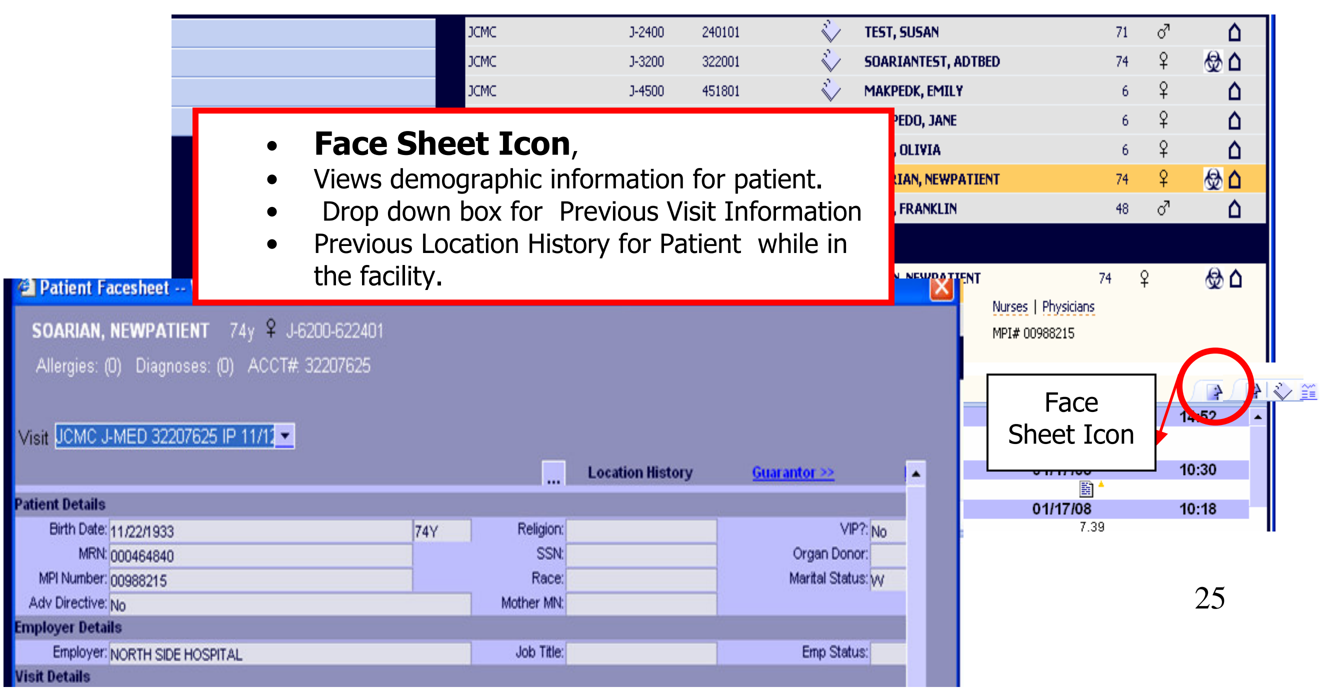
Located on Portal Page and Results Page





Patient Demographic/Face Sheet Information

1. Click on patient name in the census to open preview of patient record.
2. To view a patient's Face Sheet, press the icon  that resembles a profile of a face. Face sheets cannot be modified.

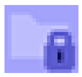


Clinical Access Icons

 Sort by Pt Location, Last Name or Bed

Census - to display the Census/Worklist screen

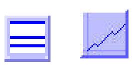
 Patient is an outpatient

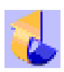
 Confidential Visit - Release NO Information about this visit per patient request.

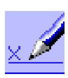
 Patients with secured information. This indicator will display on all psychiatric patients

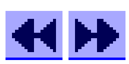
 Face Sheet – Patient Demographic Data

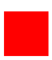
Navigate to Patient Record

 Display Graphs or Trends from selected services

 Refresh screen

 Sign patient results to verify they have been viewed and remove from your worklist

 Use to scroll through the pages of visits in the worklist

 (Red square) On the portal screen, indicates that the patient has critical results from the last 24 hours

 (Green square) On the portal screen, indicates that the patient has new clinical results