

Basic PowerChart

Reference Guide

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Indiana University Health

Basic PowerChart Reference Guide

Prepared by IS Clinical Education

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See last page for change details

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Introduction

Intended Audience



This reference guide addresses multiple functions in Cerner PowerChart. It is important that you only perform actions that align with your current job description.

Research Coordinators

As mentioned above, this is a reference guide that is intended for numerous audiences and for this reason does not follow the workflow of any particular venue or workplace. You must decide, in consultation with supervisors and fellow research coordinators, which sections are applicable to your field of work.

Cerner PowerChart

Cerner PowerChart is an Electronic Medical Record (EMR) system. Its purpose is to provide electronic access for multiple users to enter and review patient information at the same time.

Icon Legend

The following icons will be used throughout the guide to visually assist you:

Item	Description
	The light bulb icon displays extra information that may be helpful to learners.
	The exclamation mark icon indicates a “ warning ” message directed to the learner.
	The hammer icon is used on skill sheets for the “ apply your skills ” sections. Instructor Supported, not instructor led.

Obtain Cerner Remote Connectivity

Introduction

In order to access PowerChart, a user needs to set up a “gateway” to connect to IU Health’s network. This section describes how to accomplish this task. There are many variables and this guide will not cover all possibilities, but will focus on the most common and most direct methods.

Prepare to Connect

A new user will need to contact Data Security to begin this process.

Step	Action
1.	<p>Submit a Research Access Request via email to scanmyolar@iuhealth.org.</p> <p><i>When approved for the new user, Data Security will</i></p> <ul style="list-style-type: none">• <i>Create an IU Health NT ID and Password.</i>• <i>Create an Cerner Account Username and Password.</i>• <i>Email the new user the account information created.</i>
2.	<p>Verify the version of Citrix receiver on the computer being used.</p> <p>On a PC</p> <ol style="list-style-type: none">a. Click the Start menu.b. Click the Control Panel command.c. Set the View by drop-down to Small icons (top, right corner of Control Panel).d. Select Programs and Features.e. Find the Citrix Receiver.f. Check for the version in the Version column. <i>The version must be 4.0.0 or at least 14.0.0</i>g. Close Control Panel. <hr/> <p>Note: If the device being used has the incorrect version of Citrix Receiver, Contact your local Help Desk.</p> <hr/> <p>On a MAC</p> <ol style="list-style-type: none">a. Go to the Applications folder.b. Right-click the Citrix Receiver application icon.c. Select the Get info command. <i>The version will be displayed and must be version 11.9 or at least 12.1 or above – you do not want 12.0</i> <hr/> <p>Note: If the device being used has the incorrect version of Citrix Receiver, Contact your local Help Desk.</p> <hr/>

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Obtain Cerner Remote Connectivity, Continued

Connect to the IU Health Network

Depending on the network connection of a workstation, there are 4 primary options available for connecting to the IU Health network.

Option 1 - IU Backbone – *requires no MFA*

Step	Action
1.	
2.	
3.	

Option 2 - IU SSL VPN HSN – *requires no MFA*

Step	Action
1.	
2.	
3.	

Option 3 - IU Secure Wireless – *requires MFA*

Step	Action
1.	Open a browser.
2.	Navigate to at https://nsgate.iuhealth.org . <i>The Indiana University Health login portal displays.</i>
3.	Enter the assigned IU Health NT ID (Username) and Password.
4.	If logon fails, a. Verify correct Username and Password . b. Attempt again.
5.	If logon still fails, proceed to Option 4 - IU SSL VPN .

Continued on next page

Obtain Cerner Remote Connectivity, Continued

Connect to the
IU Health
Network
(continued)

Option 4 - IU SSL VPN – requires MFA

Step	Action
1.	Connect via IU or IU Health VPN.
2.	Open a browser.
3.	Navigate to at https://nsgate.iuhealth.org . <i>The Indiana University Health login portal displays.</i>
4.	Enter the assigned IU Health NT ID and Password.
5.	If logon fails, c. Verify correct Username and Password. d. Attempt again.
6.	If still unable to connect, contact your local Help Desk.

Note: If a user encounters issues not covered in this process, please contact the IU Health Help Desk at (317) 962-2828 or helpdesk@iuhealth.org.

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Obtain Cerner Remote Connectivity, Continued

Access PowerChart from a Device other than a PC

If accessing PowerChart from a device other than a PC, documentation is available on the following Web site: <http://docs.iuhisclinicaleducation.org/files>. Search for the “[Remote Access Update-Citrix Upgrade](#)” Clinical IS Update document.




This document will aid in connecting to the correct Citrix Receiver for your device. Devices included are: MACs and MAC laptops.

Continued on next page

Obtain Cerner Remote Connectivity, Continued

Option 1: Access PowerChart via IU Health Applications

From an IU Health computer system network connected workstation, it is possible to login to Cerner directly.

Step	Action	
1.		Double-click the IU Health Applications icon on the desktop. <i>The IU Health Applications window displays.</i>
2.		Double-click the IU Health Application Portal icon. <i>The Citrix XenApp – Applications window displays.</i>
3.		Click the Cerner Internal Redirect icon. <i>The Welcome to CernerWorks! window displays.</i>
4.	Click the PowerChart PROD icon. <i>The Cerner Millenium login screen displays.</i>	
5.	Enter a Cerner Username and Password.	
6.	Click OK. <i>PowerChart opens and Message Center is displayed.</i>	

Continued on next page

Obtain Cerner Remote Connectivity, Continued

Option 2: Access PowerChart via Remote Connectivity

If the workstation being used to access PowerChart is not on the IU Health System computer network, PowerChart must be accessed using NSGate, a portal into the network. There are several steps involved in using NSGate.

Submit a Research Access Request

Send a Research Access Request to scanmyolar@iuhealth.org (Data Security). In response, Data Security will complete the following three (3) tasks:

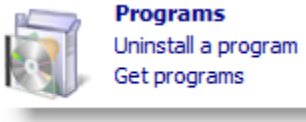
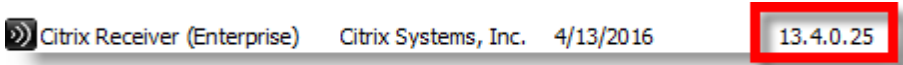
- Create both an IU Health NT ID and a Password.
- Create both a Cerner Account Username and a Password.
- Will send an email to the applicant containing the above mentioned accounts/accesses.

Verify the Citrix Receiver Version on the User's Computer

It is imperative that the correct Citrix Receiver version is on the computer being used to access NSGate. It will not function otherwise.

Note: If the device you are using has the incorrect version of Citrix Receiver, Contact your local Help Desk.

Verify the Citrix Receiver Version on a PC

Step	Action
1.	Click the Start button. <i>The Start menu displays.</i>
2.	Click the Control Panel command on the right side of the menu. <i>The Control Panel window displays.</i>
3.	Click the Programs link. 
4.	Click the Programs and Features link.
5.	Look for the Citrix Receiver application in the Name column. <i>The Citrix Receiver version on a PC must be at least 4.0.0 or 14.0.0. In the example shown, below, the version is 13.4.0.25. This version will not work.</i> 
6.	Close the Control Panel window.

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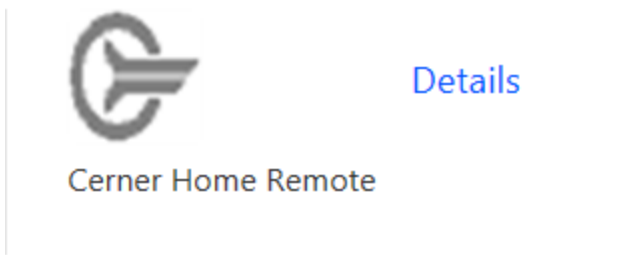
Obtain Cerner Remote Connectivity, Continued

Option 2: Access PowerChart via Remote Connectivity (continued)

Verify the Citrix Receiver Version on a MAC

Step	Action
1.	Go to the Applications folder.
2.	Right-click the Citrix Receiver application.
3.	Click the Get info button. <i>The Citrix Receiver version on a MAC must 11.9 or 12.1 or above. If version 12.0 is displayed, this version will not work.</i>

Use NSGate to Access PowerChart

Step	Action
1.	Open a browser window. There is an NSGate icon present on the desktop a. Double-click the NSGate icon. Or, there is no NSGate icon on the desktop b. Open Internet Explorer. c. Navigate to the https://nsgate.iuhealth.org Web site.
2.	Log in using an assigned IU Health User name and Password .
3.	Click the Cerner Home Remote icon.  <i>The Welcome to CernerWorks! window displays. The initial loading time via Cerner Home Remote will take somewhere between 40 seconds and 2 minutes. Once loaded, it will operate at regular speeds.</i>
4.	Click the PowerChart PROD icon. <i>The Cerner Millenium login screen displays.</i>
5.	Enter a Cerner Username and Password .
6.	Click OK . <i>PowerChart opens and Message Center is displayed.</i>

Message Center

Message Center Tabs

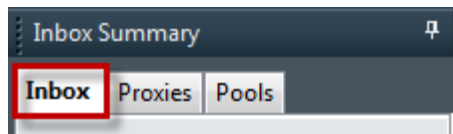
Message Center is where staff communicates with each other from within the patients' charts. Messages that are sent from one clinic staff to another, i.e. – from a provider to an MA or from a nurse to a provider, become a part of the clinical notes section of the patients' charts. The Messages button can be accessed from anywhere within PowerChart.



The Inbox Summary pane contains 3 tabs: **Inbox**, **Proxies**, and **Pools**.



Inbox Tab

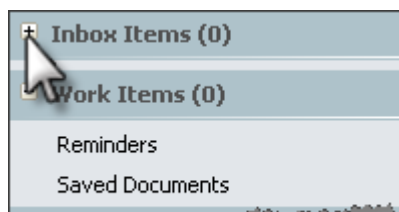


The Inbox tab contains messages that are addressed to the user. It consists of 3 categories of messages: Inbox Items, Work Items, and Notifications.

Category	Contents
Inbox Items	General Messages, Orders, Results, and Documents folders containing messages specifically sent to the user.
Work Items	Reminders and Saved Documents folders containing items for follow-up by the user.
Notifications	Notify Receipts, Trash, and Sent Items folders.

Within each category are folders and sub-folders that display both pending and total messages (i.e. – 2 unread messages out of 2 messages).

Click the plus sign (+) next to a category to expand and view additional folders within the category.

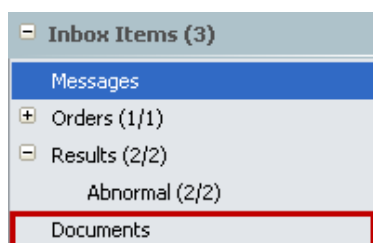


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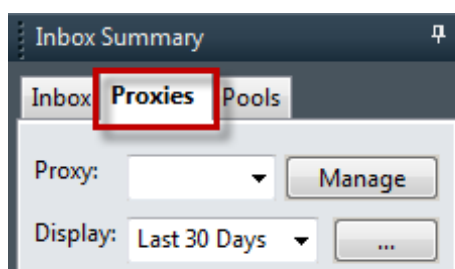
Message Center, Continued

Message Center Tabs (continued)

The expansion button (plus sign), sub-folders, and item counts do not display when there are no items present.

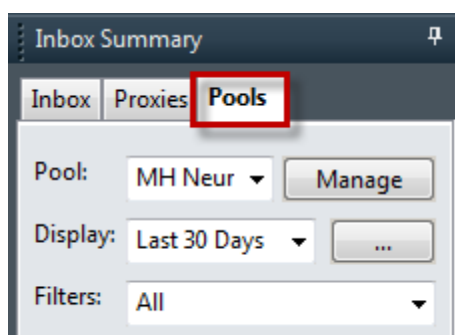


Proxies Tab



The **Proxies** tab allows a user to access the Inbox of another user and perform any activities for which authorization has been granted.

Pools Tab



The **Pools** tab allows multiple users who are members of the pool to have access to a shared mailbox. All pool members can view all items in the mailbox. An item in the mailbox is considered complete when any one of the pool members processes and deletes the item.

Note: Refer to your standard of practice before making changes in Message Center.


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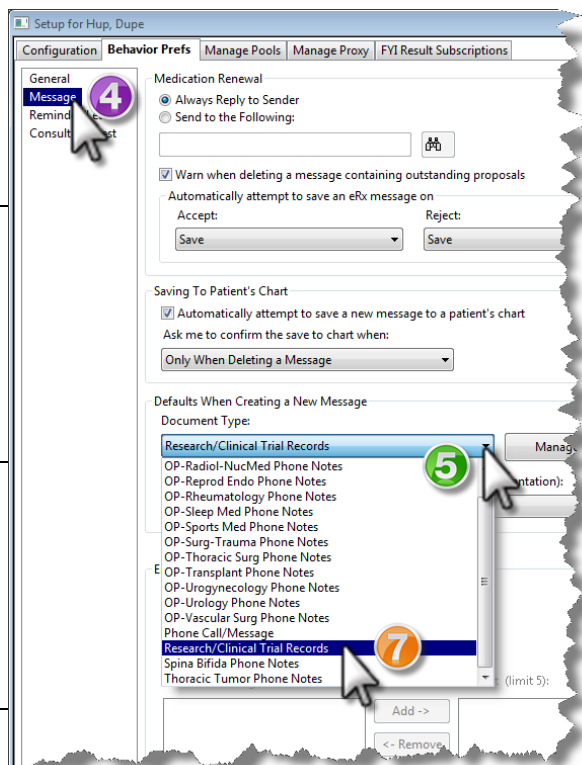
Message Center, Continued

Set the Message Type Preference

Check with your supervisor before changing the Message Type Preference. The need to change or not change this preference will depend on your role and location.

The Message Type Preference determines in which folder a newly created message is stored in the Clinical Notes section of the patient's chart.

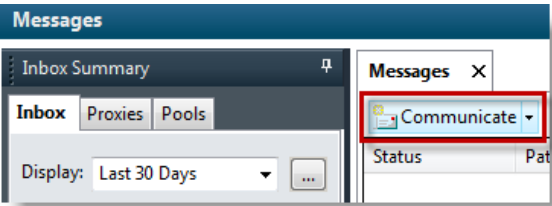

Step	Action
1.	Be sure the Message Center is open. a.  If not, click on the Messages toolbar button.
2.	Click on the Inbox menu at the top of the window.
3.	Click on the Manage Preferences command. <i>The Setup dialog box opens, with the user's name in the title bar and the Behavior Prefs tab displayed.</i>
4.	Click on the Message band in the navigation pane, to the left. <i>Message Behavior Preferences display to the right.</i>
5.	Click on the Document Type drop-down list in the Defaults When Creating a New Message section.
6.	Scroll to locate the correct <default message
7.	Select the <default message folder for your location> option.
8.	Click on the OK button. <i>The Commit Progress notice box displays a message, "Settings saved successfully."</i>
9.	Click on the OK button in the bottom, right corner. <i>Now, when the user creates a new message, the As field, to the right of the Save to Chart text box, defaults to Research/Clinical Trial Records.</i>



Continued on next page

Message Center, Continued

Send a New Message from the Inbox

Step	Action
1.	<p>Click the Communicate button located within Message Center.</p>  <p><i>A new message displays.</i></p>
2.	Type the first few letters of the patient's last name in the Patient field.
3.	 Click the Search button (binoculars).
4.	Conduct a thorough search.
5.	Select the correct patient in the top results pane.
6.	<p>Select the most recent encounter for the patient and your location.</p> <p>Note: A new encounter will need to be created if there are no existing encounters for the current location. Instructions for this task are found in the next section, "Create a Phone Encounter."</p>
7.	Click OK .
8.	Click in the To field.
9.	Type <staff member name>.
10.	<p>Enter a concise, specific message title in the Subject field.</p> <p>Note: It is recommended to change the subject so that it reflects the specific nature of the message. This becomes the title of the message in the recipient's Inbox.</p>
11.	Type the needed communication in the Message field.
12.	Click the Send button.
13.	<p>Click the Refresh button.</p> <p><i>The sent message displays in three locations:</i></p> <ul style="list-style-type: none"> <i>b. The recipient's Inbox</i> <i>c. The sender's Sent folder.</i> <i>d. Clinical Notes in the patient's chart.</i>

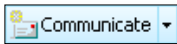



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Message Center, Continued

Create a Phone Encounter

It is best to associate a new message with the most recent encounter for the clinic location. When no previous encounter for the clinic exists, a phone message encounter needs to be created.

Note: Appropriate routing of electronic prescriptions, outside order requisitions, and order tasks are all dependent on the clinic location associated with the encounter. If misrouted, orders and tasks may be missed and result in patient care delays.

Step	Action
1.	 Click the Communicate button. <i>The New Message window displays.</i>
2.	Enter the last name of the patient in the Patient field.
3.	 Click the Search button (binoculars).
4.	Conduct a thorough search.
5.	Select the correct patient in the top results pane.
6.	Do NOT select an encounter (bottom, right pane).
7.	 Click the Add Encounter button, in the bottom, right corner of the Patient Search box:
8.	Enter location search criteria in the Facility Name field.
9.	 Click the Search (ellipsis) button.
10.	Select the correct Organization from the search list.
11.	Click the OK button. <i>The Phone Message Encounter conversation opens.</i>
12.	Right-click on a blank grey area of the conversation.
13.	Select the Highlight Required Fields command. <i>Required fields are now highlighted in yellow.</i>
14.	Complete all required and any other relevant fields.
15.	Click the OK button. <i>The New Message window is re-displayed.</i>
16.	Complete and send message. <i>See the “Send a New Message from the Inbox” section on the previous page.</i>

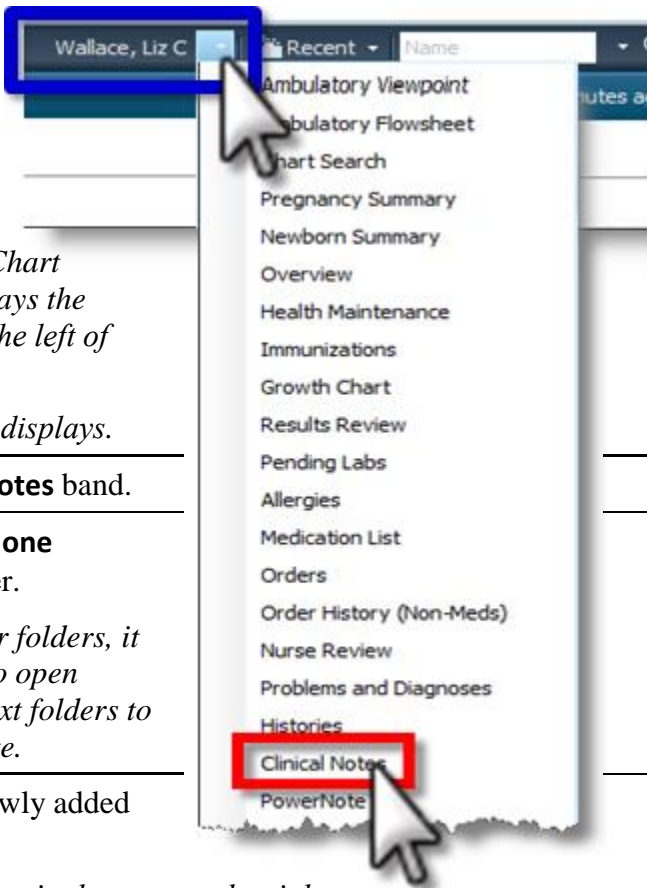
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Message Center, Continued

Reply to a Message

Step	Action
1.	Double-click to open an inbox message.
2.	Click on the Reply button.
3.	Enter response at the top of the Message field.
4.	Click the Send button.
5.	Click the Refresh button.

View a Phone Call/Message in Clinical Notes

Step	Action
1.	<p>Click the Patient Chart Access drop-down arrow.</p> <p><i>When a message is selected in the Inbox, the Patient Chart Access button displays the patient's name, to the left of the Recent button.</i></p> <p><i>The patient's chart displays.</i></p> 
2.	Click the Clinical Notes band.
3.	<p>Double-click the Phone Call/Message folder.</p> <p><i>When opening other folders, it may be necessary to open several layers of next folders to reach a specific note.</i></p>
4.	<p>Double-click the newly added message.</p> <p><i>The message displays in the pane to the right.</i></p>

Continued on next page

Message Center, Continued

Message Center Pools A pool allows groups dedicated to particular tasks to share an inbox and provides one message center address to direct messages for a specific purpose or set of purposes, regardless of which workers eventually handle those messages.

Send a Message to a Pool The following is an example of how to send a message to a Refill Pool.

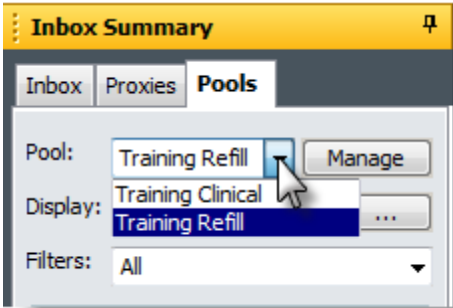
Step	Action
1.	Click the Communicate button. <i>A new blank message opens.</i>
2.	Click the binoculars to the right of the Patient field.
3.	Conduct a Patient Search .
4.	Select the correct patient (top pane, right).
5.	Select the most recent encounter for your location (bottom pane, right).
6.	Click OK . <i>The patient's name displays in the Patient field.</i>
7.	Click the binoculars to the right of the To field. <i>The Address Book displays.</i>
8.	Click the Pool option button.
9.	Enter the Pool name in the search field <i>Example: Scheduling Pool – the actual name of the pool must match whatever is entered in the search field to display in the results field.</i>
10.	Highlight the correct pool name.
11.	Click the Add button.
12.	Click OK . <i>The pool name displays in the To field.</i>
13.	Enter a concise, specific message title in the Subject field.
14.	Enter a message in the body of the Message field.
15.	Click the Send button.

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Message Center, Continued

View Pool Messages

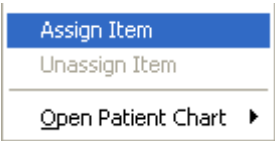

Pool functionality allows users to share responsibility for managing results, documents, and messages for one clinic, department or unit.

Step	Action
1.	Click the Pools tab.
2.	<div>Click the drop-down arrow in the Pool field.</div> <div><i>A list of assigned pools displays.</i></div> <div></div>
3.	<div>Select the specific Clinical pool.</div> <div>Note: Assigning a message alerts other pool members that somebody has taken responsibility to follow-up on this message.</div>

Continued on next page

Message Center, Continued

Assign a Message to Yourself

To...	Then...
Open and respond to a message...	Double-click on the message. <i>The message displays.</i>
Assign the message...	<ol style="list-style-type: none">1. Right-click on the message.2. Select Assign Item from the menu displayed.  <p><i>The user's name displays in the Assigned column in the Summary Pane.</i></p> 

Step	Action
1.	Locate the message regarding Patient 3 .
2.	Right-click on the message.
3.	Click on the Assign Item command.

Unassign a Message

A message may be unassigned by you or by someone else.

Step	Action
1.	Right-click on the message.
2.	Click on the Unassign Item option.

Continued on next page

Message Center, Continued

Introduction to Inbox Proxy

Granting proxy to another user's Inbox allows that user to have access to the folders and functions (i.e. – signing, refusing, and forwarding messages/results) that have been granted within the limitations of their scope of practice. (i.e. A nurse cannot cosign orders on behalf of a physician).

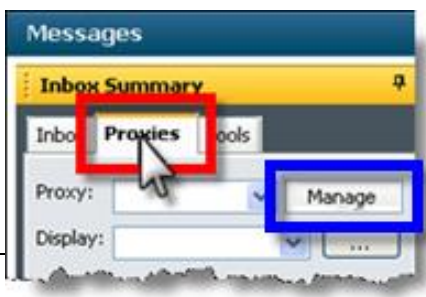
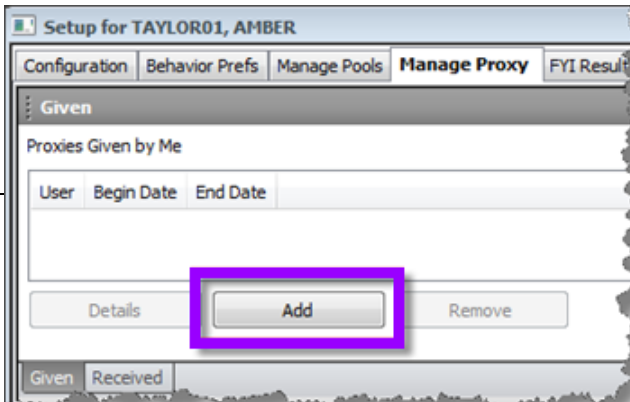
The proxy Inbox has the same look and feel as one's own Inbox; however, all actions taken are on behalf of the individual for whom one is acting as proxy.

Important Notices about Using Proxy



- When signing an inbox item as a proxy, the signature states the user is signing on behalf of the individual's inbox. If an item is reviewed but needs to be left for the original user to review as well, close the notification or move to the next message without deleting.
 - Any activities performed as a proxy are electronically recorded.
-

Set Up a Proxy


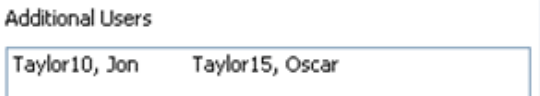


Step	Action
1.	Click on the Proxies tab in the Inbox Summary pane within Message Center. 
2.	Click the Manage button. <i>The Setup window displays and the Manage Proxy tab is selected.</i> 
3.	Click the Add button in the Proxies Given by Me pane.

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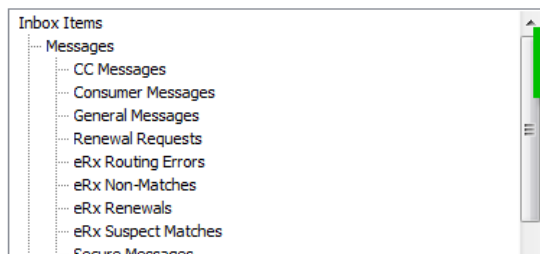
Message Center, Continued

Set Up a Proxy (continued)

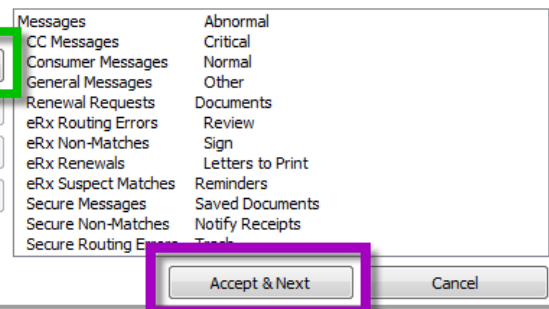
continued from previous page...

4.	Enter the name of the person in the User field to whom is being given proxy. <i>The User field displays the selected name(s).</i> Optional Search Tool <ul style="list-style-type: none">Click the Search button (binocular icon) to search for and select the recipient's name.Multiple users with the same level of access may be granted proxy at the same time.
5.	 Click the down arrow to move the current user to the Additional Users list box. Important: The last user being added must remain in the User text field and NOT moved to the Additional Users list box.
6. Optional Step	Continue to add additional users, if needed. 
7.	Enter the appropriate date and time in the Begin Date field. 
8.	Enter the appropriate date and time in the End Date field. 
9.	Click the Grant All button.

Available Items



Granted Items


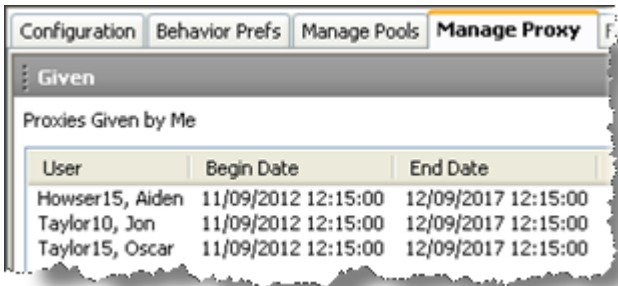


*All Available Items are moved to the Granted Items pane.
See option to grant partial privileges on next page.*

Continued on next page

Message Center, Continued

Set Up a Proxy (continued)


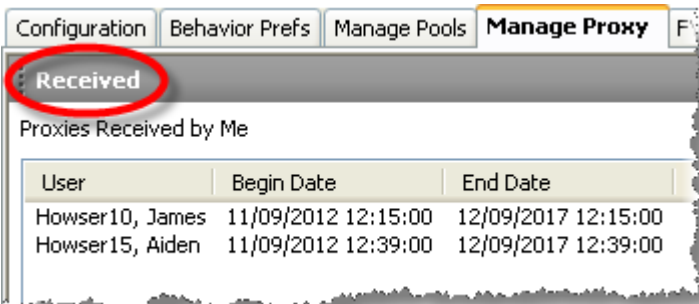
<i>continued from previous page...</i>	
10. Optional Step	Grant Partial Privileges <ul style="list-style-type: none">• Select items from the Available Items pane.• Click the Grant button to move them to Granted Items pane.
11.	 Click the Accept and Next button (<i>button location illustrated on previous page</i>). <i>The selected name(s) display in the Proxies Given by Me pane:</i> 
12.	Click the OK button to close the Setup window. <i>The Commit Progress window displays, stating the settings were successfully saved.</i>
13.	Click the OK button.

Continued on next page

Message Center, Continued

View Proxies Received from Others

Once proxy authorization is granted, a user can view the proxy privileges.




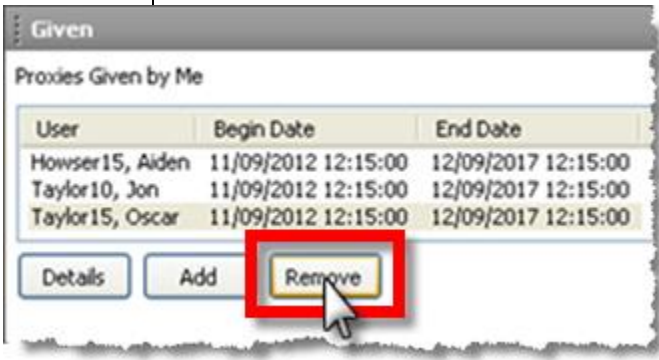






Step	Action									
1.	Click on the Proxies tab in the Inbox Summary pane.									
2.	Click the Manage button. <i>The Setup window displays the Given pane.</i>									
3.	Click the Received tab in the bottom, left corner.  <i>The Received pane displays:</i>  <table><tr><th>User</th><th>Begin Date</th><th>End Date</th></tr><tr><td>Howser10, James</td><td>11/09/2012 12:15:00</td><td>12/09/2017 12:15:00</td></tr><tr><td>Howser15, Aiden</td><td>11/09/2012 12:39:00</td><td>12/09/2017 12:39:00</td></tr></table>	User	Begin Date	End Date	Howser10, James	11/09/2012 12:15:00	12/09/2017 12:15:00	Howser15, Aiden	11/09/2012 12:39:00	12/09/2017 12:39:00
User	Begin Date	End Date								
Howser10, James	11/09/2012 12:15:00	12/09/2017 12:15:00								
Howser15, Aiden	11/09/2012 12:39:00	12/09/2017 12:39:00								
4.	Select a user's name.									
5.	Click the Details button. <i>The Details for Received Proxy pane displays, below, where granted privileges can be viewed.</i>									

Continued on next page

Message Center, Continued

Update Proxy Authorization

The end user can change proxy authorization details.

Step	Action								
1.	Click on the Proxies tab in the Inbox Summary pane.								
2.	Click the Manage button. <i>The Setup window displays.</i>								
3.	<p>Remove an authorization or proxy:</p> <table border="1"> <thead> <tr> <th>To:</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Remove an authorization from a proxy...</td><td> <p>a. Highlight a user's name.</p> <p>b.  Click the Details button.</p> <p>c. Highlight the authorization in the Granted Items pane.</p> <p>d.  Click the Revoke button.</p> </td></tr> <tr> <td>Remove all authorizations from a proxy...</td><td> <p>a. Highlight the user's name.</p> <p>b. Click the Details button.</p> <p>c.  Revoke All button.</p> </td></tr> <tr> <td>Remove the proxy completely...</td><td> <p>a. Highlight the user's name.</p> <p>b. Click the Remove button.</p> </td></tr> </tbody> </table>  <p>Note: Date and time fields may also be modified.</p>	To:	Then...	Remove an authorization from a proxy...	<p>a. Highlight a user's name.</p> <p>b.  Click the Details button.</p> <p>c. Highlight the authorization in the Granted Items pane.</p> <p>d.  Click the Revoke button.</p>	Remove all authorizations from a proxy...	<p>a. Highlight the user's name.</p> <p>b. Click the Details button.</p> <p>c.  Revoke All button.</p>	Remove the proxy completely...	<p>a. Highlight the user's name.</p> <p>b. Click the Remove button.</p>
To:	Then...								
Remove an authorization from a proxy...	<p>a. Highlight a user's name.</p> <p>b.  Click the Details button.</p> <p>c. Highlight the authorization in the Granted Items pane.</p> <p>d.  Click the Revoke button.</p>								
Remove all authorizations from a proxy...	<p>a. Highlight the user's name.</p> <p>b. Click the Details button.</p> <p>c.  Revoke All button.</p>								
Remove the proxy completely...	<p>a. Highlight the user's name.</p> <p>b. Click the Remove button.</p>								
4.	Click the OK button after all changes have been made.								

Schedule Viewer

Scheduling Viewer



The **Scheduling** viewer is accessed through the **Scheduling** button on the Organizer Button Bar. The **Schedule Viewer** is an efficient and easy-to-use scheduling tool. It allows you to see your schedule and those of others in a daily, weekly, or monthly view.

Schedule Viewer is used to perform numerous scheduling tasks, such as:

- Check in appointments.
- Cancel appointments.
- No Show appointments.
- Reviewing your appointments by day, week or month.
- Reviewing appointment comments.
- Check out appointments (not utilized by all clinics).

Schedule Viewer allows users to easily customize the display, such as time intervals and displayed columns.

It can also serve as a list of patients to be seen the current day. In addition, patients' charts can be opened directly from the **Schedule Viewer**.

Scheduling					
Date:	09/21/2012		Recent	Resource:	Cordes, Timothy M
Time	Status	Name	Location	Duration	Description
45					
1300	Checked Out	Barber, Alice	HeartFailure MH	00:30	Follow-up
15					
30	Checked In	Larson, Alex	HeartFailure MH	00:30	Follow-up
45					
1400	No Show	Fields, Andrea	HeartFailure MH	01:00	New Patient - Syncope
15					
30					
45					
1500	Confirmed	Hammond, Jessica	HeartFailure MH	01:00	New Patient - Syncope
15					
30					
45					
1600					
15					
30					

Continued on next page

Schedule Viewer, Continued

Scheduling Viewer
(continued)

Basic demographic patient data can also be viewed by hovering over the patient's name in the **Schedule Viewer**.

Time	Name	Appointment Type
45		
0900	Test, Ashley	AMB New
15		
30	Jones, Sam Z	AMB New
45		
1000	Jones, Sam Z	AMB New
15		
30	Jones, Sam X	AMB New
45		
1100	Wallace, Liz A	AMB Return
15	Wallace, Liz B	AMB Return
30	Wallace, Liz C	AMB Return
45	Wallace, Liz D	AMB Return

Name: Jones, Sam Z; Home phone: 3171234567; Work phone: N/A; MRN: 22800026

Once the rooming process has been completed, select the room number from the Pt: Location drop-down, which notifies the physician that the patient has been roomed and is ready to be seen.

Scheduling

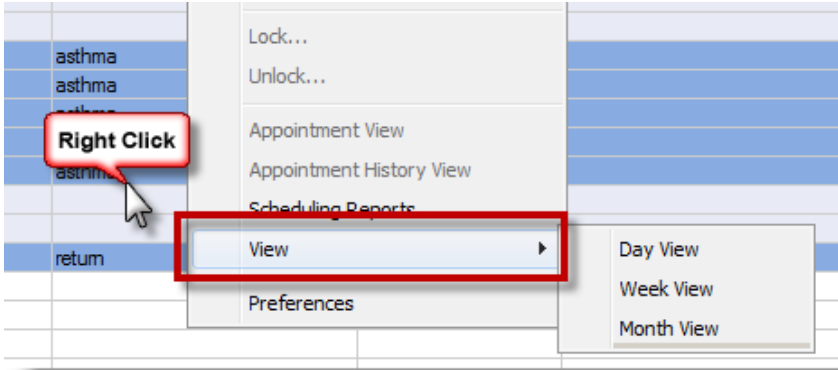
Date: 08/18/2015RecentResource: Miller, DT MD

Time	Name	Appointment Type	Duration	Description	Pt: Location	Comments
30						
45						
0900	Test, Ashley	AMB New	00:30	new		
15						
30	Wallace, Liz A	AMB New	00:30	asthma		
45						
1000	Wallace, Liz B	AMB New	00:30	asthma		
15						
30	Wallace, Liz C	AMB New	00:30	asthma		
45						
1100	Wallace, Liz D	AMB Return	00:15			

Continued on next page

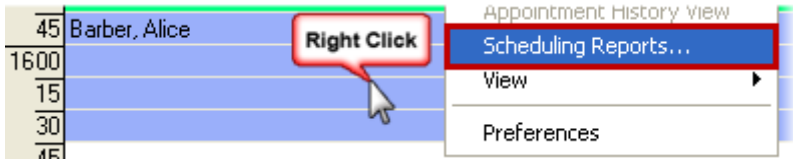
Schedule Viewer, Continued

Change the View of the Schedule Viewer

Step	Action
1.	Right-click anywhere within the Schedule Viewer. 
2.	Hover over the View option.
3.	Select the Week View option.
4.	Right-click , again, anywhere within the Scheduling window.
5.	Hover over the View option.
6.	Select Day View option.

Access Scheduling Reports from Schedule Viewer

Scheduling reports can be viewed and printed from the **Schedule Viewer**.


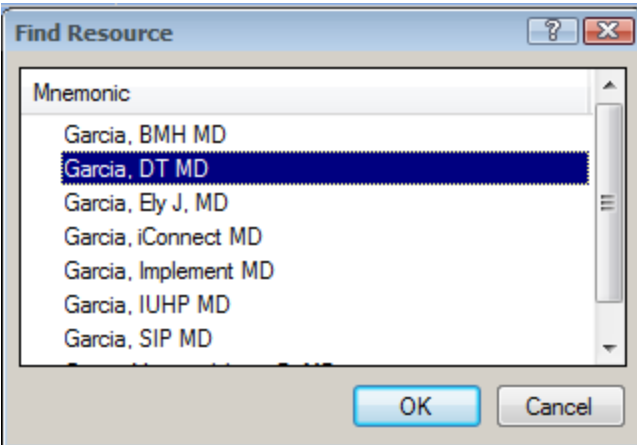
Step	Action
1.	Right-click anywhere in the Schedule Viewer . 
2.	Select the Scheduling Reports command.

Continued on next page

Schedule Viewer, Continued

Search for a Resource

To view the schedule of a resource, follow these steps:

Step	Action
1.	Type “ Garcia ” in the Resource field. <i>Dr. Garcia’s name displays in the Resource field.</i>
2.	Click the Binoculars icon  .
3.	Select the name of the appropriate person. 
4.	Click OK . <i>The selected resource’s schedule displays.</i>

Check-in Patient from Schedule Viewer

A patient may be checked-in in Schedule Viewer, if they are not checked-in by the front desk.

Step	Action
1.	Right-click on the patient’s appointment.
2.	Click on the Check In command. <i>The Check In dialog box displays.</i>
3.	Click the OK button. <i>The appointment turns to a green color in the Schedule Viewer.</i>

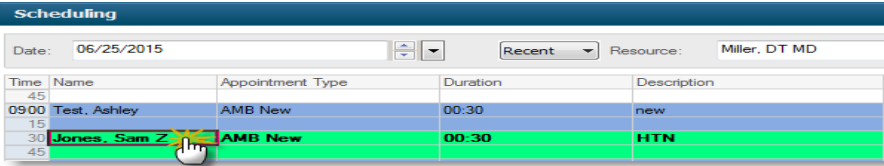
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Schedule Viewer, Continued

Open a Patient Chart from Schedule Viewer

Patient charts can be opened from the **Schedule Viewer**.







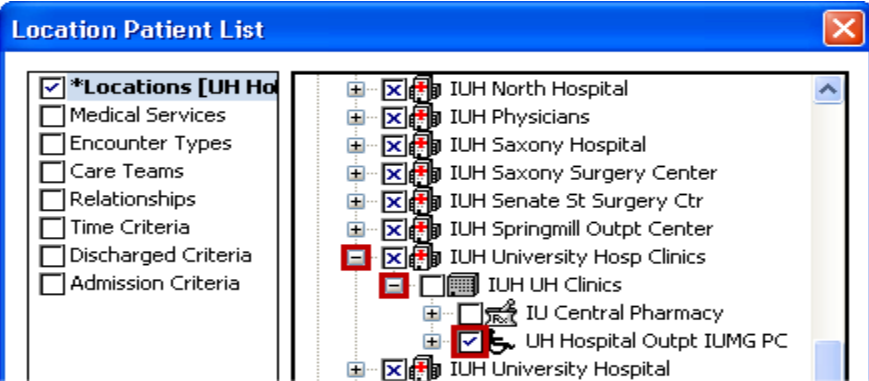
Note: By selecting your patient from the Schedule Viewer, you can ensure you are selecting the correct encounter. Once the patient turns green, it means they are checked in and ready for documentation.

Step	Action
1.	<div><p>Double-click on Patient’s appointment.</p><p><i>The patient’s chart opens to the Ambulatory Viewpoint page.</i></p></div>
2.	<div><p>Click the X on the patient chart tab.</p><p><i>The patient’s chart closes and Schedule Viewer is displayed, again.</i></p></div>

Patient Lists

Create a Location Patient List


Patient lists can be created in order to make tracking patients a much easier task.

Step	Action
1.	 Patient List Click the Patient List button. <i>A list of active patient lists tabs displays.</i>
2.	Click the List Maintenance icon  on the Patient List toolbar. <i>The Modify Patient Lists window displays.</i>
3.	Click the New button in the lower right-hand corner.
4.	Select a Patient List Type (i.e. – Location). 
5.	Click Next .
6.	Click the  (plus sign) to the left of the Location folder on the right. <i>A list of all Indiana University Health facilities display.</i>
7.	Click the  (plus sign) to the left of the facility group . <i>A list of all locations within the chosen facility display.</i>
8.	Click the plus sign  next to the facility name to expand the folder.
9.	Select the location name or clinic by clicking in the checkbox. 

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Patient Lists, Continued

Create a Location Patient List (continued)


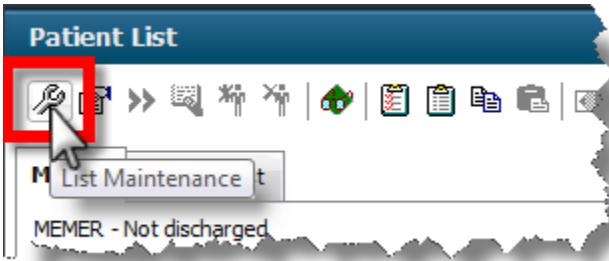
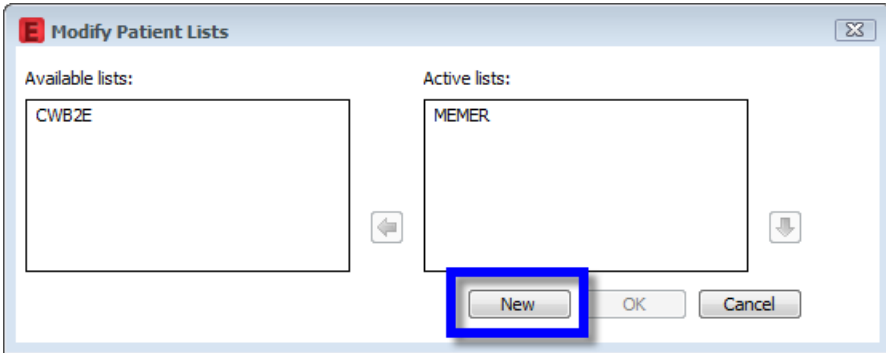
<i>continued from previous page...</i>	
10.	Click Finish . <i>The patient list displays in the Available List pane.</i>
11.	Highlight the clinic name in Available Lists .
12.	Click the Send button  . <i>The list is transferred to the Active Lists pane.</i>
13.	Click OK . <i>The list displays as a tab under Patient Lists.</i>

Continued on next page

Patient Lists, Continued

Create a Custom Patient List

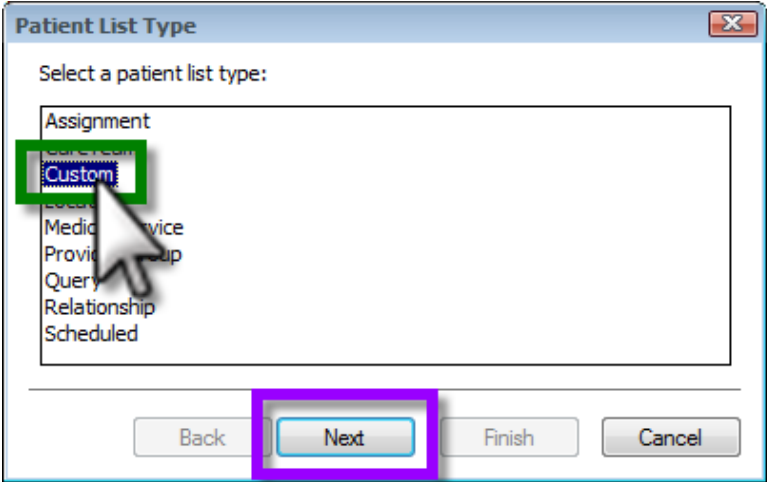
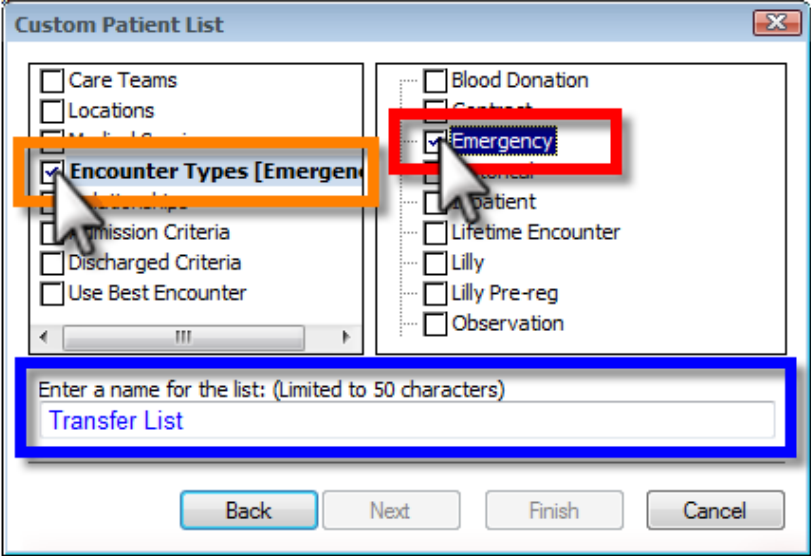
Custom patient lists can be created in order to track specific patients, independent of location, encounter, etc. Each patient must be added to and removed from a custom list individually.

Step	Action
1.	<p>Click on the Patient List button on the View toolbar.</p>  <p>The Patient List window displays.</p>
2.	<p>Click on the List Maintenance button.</p>  <p>The Modify Patient List dialog box displays.</p>
3.	<p>Click the New button.</p>  <p>The Patient List Type dialog box displays (see screen shot on next page).</p>

Continued on next page

Patient Lists, Continued

Create a Custom Patient List (continued)

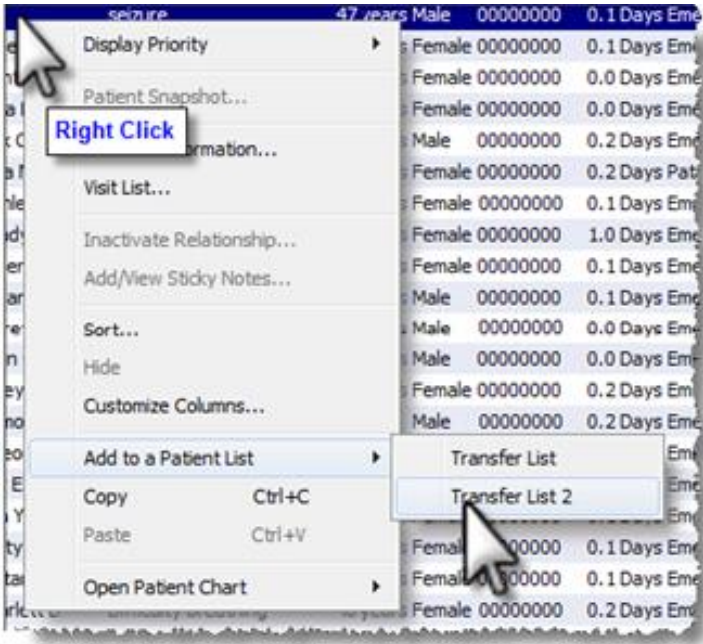
<i>continued from previous page...</i>	
Continued 3.	
4.	Click the Custom option.
5.	Click the Next button. <i>The Custom Patient List dialog box displays.</i> 
6.	Select the Encounter Types checkbox.
7.	Select the Emergency checkbox.
8.	Enter a name for your list, such as “ Transfer List .”
9.	Click the Finish button.

Continued on next page

Patient Lists, Continued

Add a Patient to a Custom List

Each patient must be manually added to a custom list.

Step	Action
1.	<p>Right-click on a patient's record.</p> 
1.	Hover over the Add to Patient List option.
2.	<p>Click on the name of the list to which to copy the patient.</p> <p><i>The patient record is added to and displays on the custom list.</i></p>

Remove a Patient to a Custom List


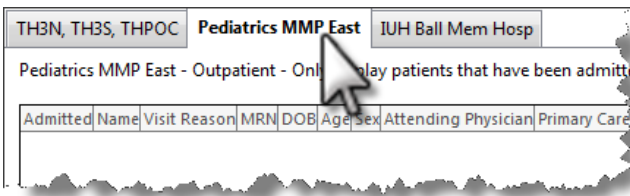

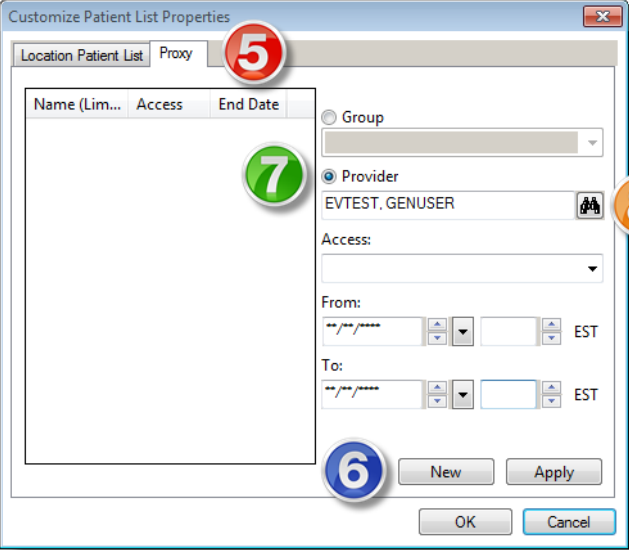
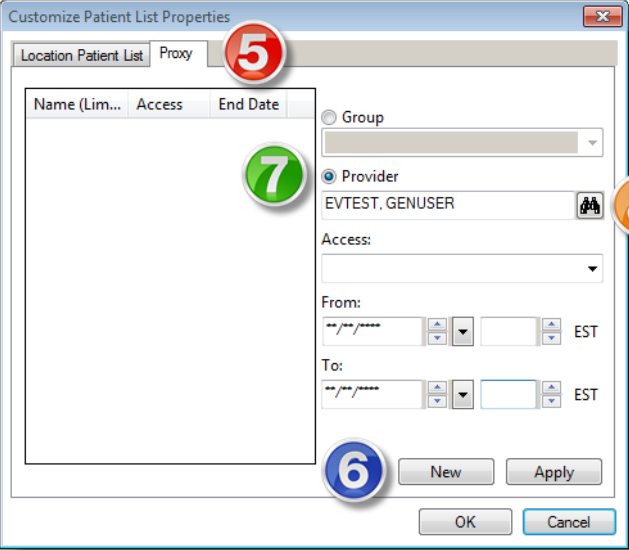
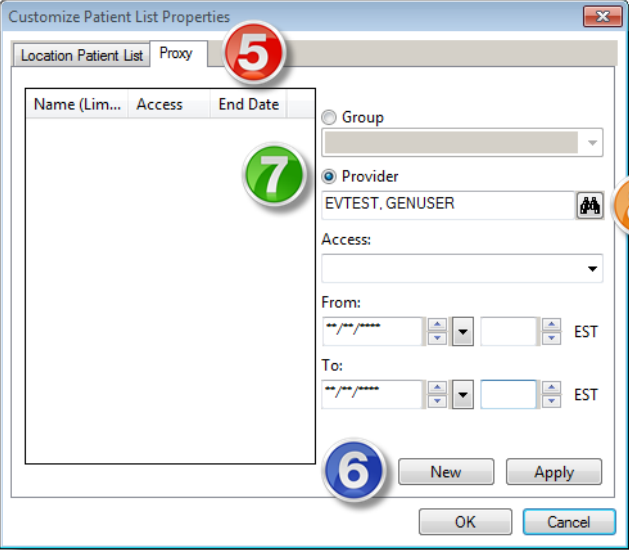
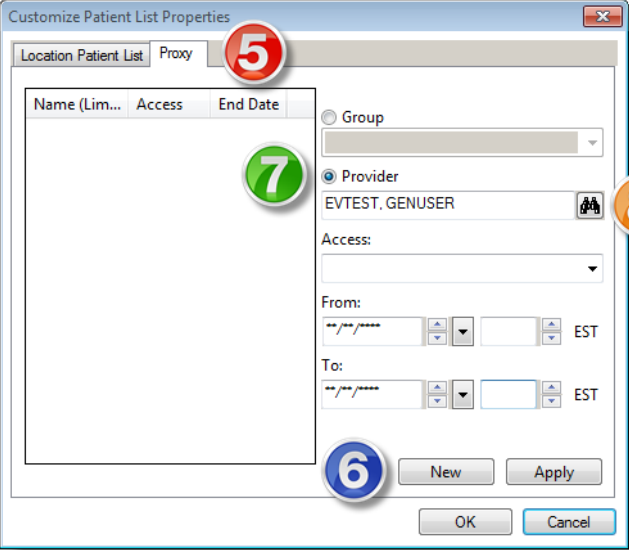
Each patient will remain, indefinitely on a custom list until there are manually removed from the list.

Step	Action
1.	Right-click on a patient's record.
2.	<p>Select the Remove command.</p> <p><i>The patient record falls off the custom list.</i></p>

Continued on next page

Patient Lists, Continued



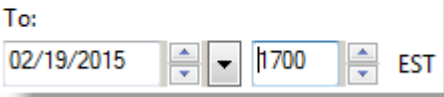
Proxy a Cerner Patient List

Step	Action
1.	Login to PowerChart.
2.	 Click the Patient List button on the PowerChart View toolbar.
3.	Select the patient list tab to be proxied. 
4.	 Click the Properties button. <i>The Customize Patient List Properties dialog box displays.</i>
5.	Click the Proxy tab. 
6.	Click the New button. 
7.	Click the Provider option button. 
8.	Click the Search button (binoculars). 
9.	Search for and select the correct user.
10.	Click the OK button.

Continued on next page


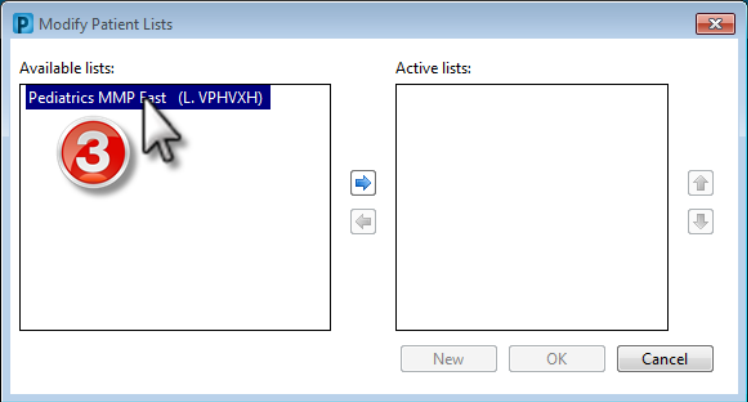
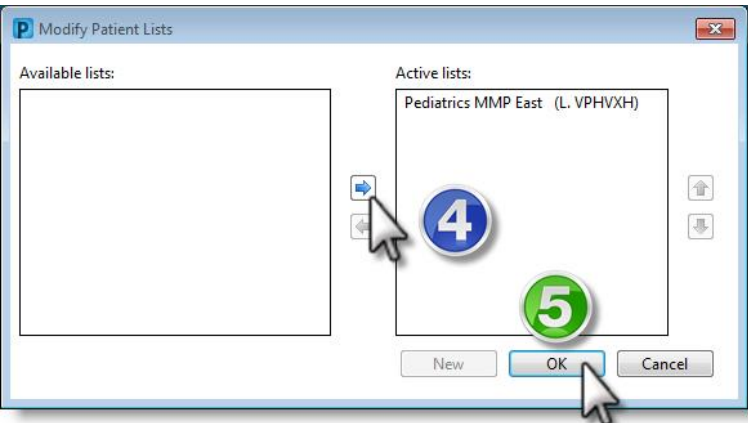
Patient Lists, Continued

Proxy a Cerner Patient List (continued)

<i>continued from previous page...</i>		
9.	Click the Access drop-down list.	
10.	Select the Read option.	
11.	Set the date and time to begin proxy in the From date and time fields.	
12.	Set the date and time to end proxy in the To date and time fields.	
13.	Click the Apply button.	
14.	Click the OK button.	

Patient Lists, Continued



Use a Proxied Patient List

Step	Action
1.	Login to PowerChart.
2.	 Click the List Maintenance button. <i>The Modify Patient List dialog box displays.</i>
3	Select the proxied list from the Available Lists pane on the left. 
4	Click on the Move button (small right-pointing arrow) between the panes. 
5	Click the OK button. <i>The proxied list, and its patients, displays as a tab on the Patient List page.</i>



Continued on next page

Patient Lists, Continued

Inactivate a List

Step	Action
1.	Click the List Maintenance icon  .
2.	Highlight the list name in the Active lists pane.
3.	Click the Remove button  .
	<i>The selected list displays in the Available lists pane.</i>
4.	Click OK .
	<i>The list is removed from Patient Lists.</i>

Delete a List

Step	Action
1.	Click the List Maintenance icon  .
1.	Right-click on the list name in the Available lists pane.
2.	Select Delete Patient List .
	
3.	Click Yes .
4.	Click OK to close the Modify Patient List window.

Tips and Tricks



Patients are automatically discharged at midnight on the day patients are seen in an outpatient clinic.

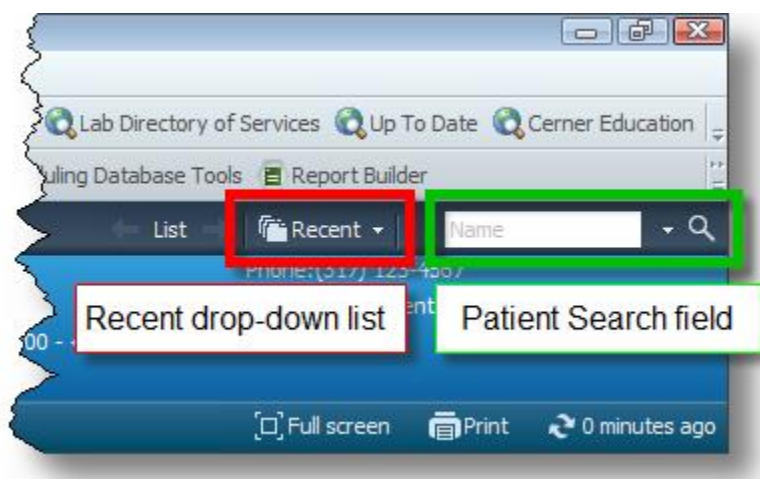
Series (recurring) patients display in your **Patient Location** list for up to 90 days.

Open a Patient's Chart

Overview

There are numerous methods to use to open a patient's chart (see previous section, "Open a Patient Chart from Schedule Viewer").

In many windows, it is possible to right-click on a patient's name and use the Open Patient's Chart command. Two common methods are listed, below, both of which can be accomplished from the Message Center or from another patient's chart.



Open a Patient Chart Using Patient Search

Step	Action
1.	Click in the Patient Search field.
2.	Enter Patient's LastName, FirstName .
3.	Press Enter on the keyboard. <i>The Patient Search dialog box displays.</i>
4.	Select your Patient .
5.	Select the appropriate encounter.
6.	Click OK . <i>The patient's chart opens to the Ambulatory Viewpoint page.</i>
7.	Click the X on the patient chart tab.

Open a Patient Chart Using Recent Drop-down List

Step	Action
1.	Click on the Recent drop-down list. <i>The last 9 charts opened are listed, most recent at the top.</i>
2.	Click the Patient's name. <i>The chart opens to the default section of the chart.</i>

Chart Search

Overview

Chart Search is a search engine within **Cerner** that allows users to search for patient data within a patient's medical record. It will provide near instantaneous search for words, phrases, and clinical concepts found in the patient medical record. It can intelligently match and rank documents so that the most important and useful documents will move to the top of the result list, reducing the time it takes to locate key pieces of clinical data.

Information Searching

Chart Search offers users the ability to search for the following types of information:

- **Text Documents** (not including scanned documents)
 - Clinical Notes
 - Diagnostic Reports
 - Pathology Reports
 - Radiology Reports
- **Discrete Data Measurements**, such as:
 - Vital Signs
 - Body Measurements
 - Labs

The screenshot shows a search interface with a search bar containing 'anticonvulsants'. Below the search bar, it says 'Looking for Results for anticonvulsants?'. A table of results follows, listing dates, medication names, and values. Below the table, there are two text snippets from medical notes, each with a date and location.

anticonvulsants x		
Looking for Results for anticonvulsants?		
2.8 months ago	Gabapentin Lvl	10.7 mcg/mL
5.5 months ago	Gabapentin Lvl	10.5 mcg/mL
8.7 months ago	Gabapentin Lvl	9.3 mcg/mL
8.8 months ago	Gabapentin Lvl	2.3 mcg/mL
11.9 months ago	Gabapentin Lvl	6.8 mcg/mL
1.2 years ago	Gabapentin Lvl	6.4 mcg/mL
1.5 years ago	Gabapentin Lvl	3.9 mcg/mL
1.6 years ago	Gabapentin Lvl	4.7 mcg/mL
1.7 years ago	Gabapentin Lvl	3.8 mcg/mL
1.8 years ago	Phenytoin Level Total	4.4 mcg/mL
... 11 more		
Progress Note-Physician: "Diabetes management" Kolm		
He is currently on Neurontin 900 mg t.i.d. His ophthalmology e		
normal and he is due for a followup visit. ... MEDICATIONS: Glyb		
7.8 years ago May 12, 2002 4:58:00 PM CDT Highland Clinic		
Office/Clinic Note-Physician: "Colonoscopy Pre-Procedure"		
I am not aware of why he is on the Dilantin , and he denies an		
of medications, a variety of vitamins, B12 oral replacement, Fo		
5.8 months ago Sep 16, 2009 5:42:00 PM CDT Highland Clinic		

Items Not Included in Chart Search

Chart Search does **NOT** include the following:

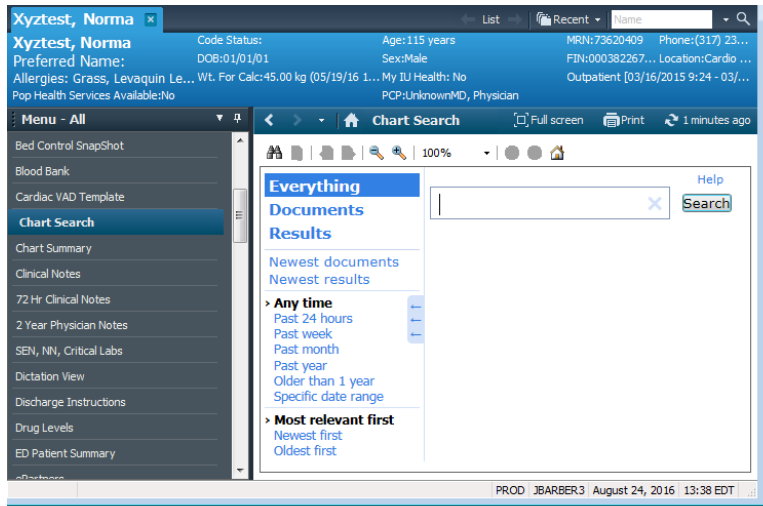
- Orders
- Problems
- Procedures
- Allergies
- Lab panels (currently must search for individual components)

Note: Depending on your search criteria, data may not return for all searches. If you are expecting a return when a certain term/phrase is entered, but nothing returns, use the **Give Feedback** button to communicate with Cerner engineering.

Continued on next page

Chart Search, Continued

Perform a Word or Concept Search

Step	Action
1.	<p>Click the Chart Search band in the Table of Contents in the patient's chart.</p> <p><i>The Chart Search screen displays.</i></p> 
2.	<p>Enter a word or phrase in the Search field.</p> <div style="display: flex; align-items: flex-start;"> <div style="flex: 1; padding-right: 10px;"> <p>Note: Chart Search automatically offers helpful words and phrases when the user begins typing; this is referred to as Search Assist. Results displayed above the line search for concepts.</p> <p>The quotation marks around a word designate a word search.</p> </div> <div style="flex: 2; border: 1px solid #ccc; padding: 5px;"> <p>diabetes</p> <p>diabetes : * diabetes mellitus and related concepts (prototype)</p> <p>diabetes insipidus</p> <p>diabetes insipidus - pituitary: neurohypophyseal diabetes insipidus</p> <p>diabetes insipidus secondary to vasopressin deficiency: neurohypophyseal diabetes insipidus</p> <p>diabetes management plan given</p> <p>diabetes mellitus</p> <p>diabetes mellitus - adult onset: diabetes mellitus type 2</p> <p>diabetes mellitus arising in pregnancy: gestational diabetes mellitus</p> <p>diabetes mellitus insulin-glucose infusion in acute myocardial infarction</p> <p>diabetes mellitus screening</p> <p>diabetes mellitus type I: diabetes mellitus type 1</p> <p>diabetes mellitus type II: diabetes mellitus type 2</p> <p>diabetes mellitus with ketoacidosis: diabetic ketoacidosis</p> <p>diabetes mellitus with neuropathy: diabetic neuropathy</p> <p>diabetes mellitus, adult onset, with hyperosmolar coma</p> <p>diabetes mellitus, brittle</p> <p>diabetes mellitus, disorder associated with: diabetic complication</p> <p>diabetes mellitus, disorder associated with type 2</p> <p>Search for items containing "diabetes"</p> <p>Search for items NOT containing "diabetes"</p> </div> </div>

Continued on next page

Chart Search, Continued

Perform a Word or Concept Search (continued)

continued from previous page...

3. Select a concept from the list displayed or click the **Search** button or press Enter on the keyboard.

A list of matching results displays.

The screenshot shows a search interface with the term 'diabetes' entered. Below the search bar, it indicates 'Matches 1 - 10 of 181'. A table of results is displayed, including columns for time ago, test name, value, status, and reference range. Below the table, there are links to 'Internal Med Staff Initial Consult: "Consult Note, Diabetes"' and 'Endo/Diabetes Staff Progress Note: "diabetes"', followed by a list of insulin orders with dates and times.

Time Ago	Test Name	Value	Status	Reference Range
5.4 days ago	Glucose SerPI QN	266 mg/dL	High	70 - 99
6.4 days ago	Glucose SerPI QN	191 mg/dL	High	70 - 99
7.4 days ago	Glucose SerPI QN	299 mg/dL	High	70 - 99
8.4 days ago	Glucose SerPI QN	279 mg/dL	High	70 - 99
9.5 days ago	Glucose SerPI QN	735 mg/dL	Critical	70 - 99
9.7 days ago	Glucose SerPI QN	1131 mg/dL	Critical	70 - 99
9.7 days ago	Glucose	1000 mg/dL	Abnormal	>Negative
17.5 days ago	Glucose SerPI QN	185 mg/dL	High	70 - 99
18.5 days ago	Glucose SerPI QN	136 mg/dL	High	70 - 99
18.5 days ago	Glucose, POC	133 mg/dL	High	70 - 99

Filter Results

Patient Chart Search returns a prioritized list of results that contain the word or concept searched for. At this point, the user can choose how view the results by using the filtering option located on the left of the screen. Search results can be filtered by:

- Documents – displays both text documents and discrete measurements beginning with the most recent.
- Results – displays only discrete measurements such as labs and vital signs beginning the most recent.

Displayed results can also be sorted by a timeframe (i.e. – Past 24 hours) or by relevance.

Click the black arrow ▼ next to the header to collapse or expand the section.

Click the **Filter this search** arrow to display additional filtering options for the current search. These options include:

- All document types
- All authors
- All locations
- All drug classes
- All drugs

The screenshot shows a dropdown menu titled 'Filter this search:'. It lists various document types and their counts: 'All document types', 'Critical Care Resident Progress Note (5)', 'Primary Care MD Progress Notes (5)', 'Internal Med Staff Progress Note (4)', 'Endo/Diabetes MD Progress Notes (2)', and '...many more'.

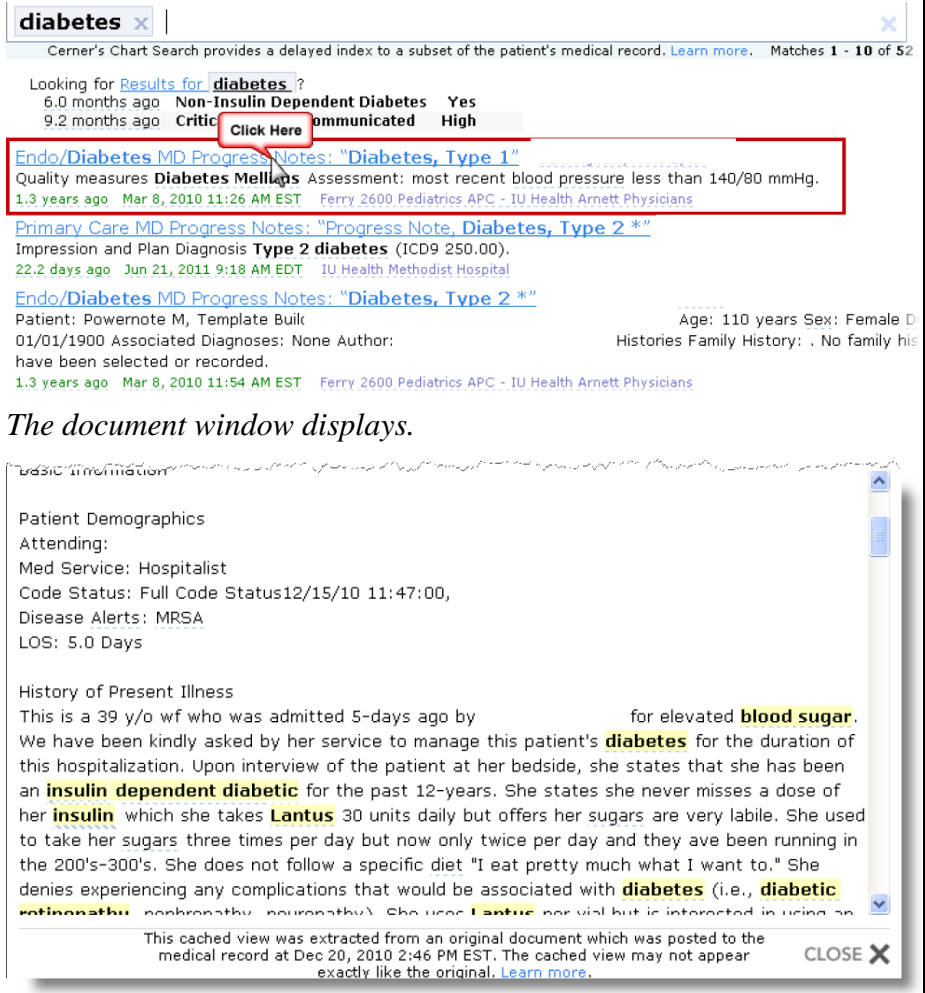

Continued on next page

Chart Search, Continued

View Patient Chart Search Results

The prioritized list of results includes an excerpt from the document and additional details, such as the number of years since the original document was created, the date/time of the original document, and the location where the original document was created.

To view a specific result, follow these steps:

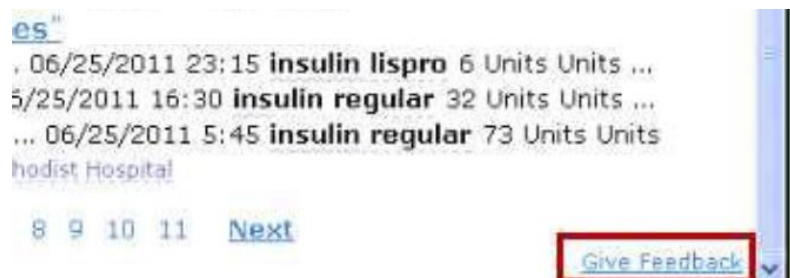
Step	Action
1.	<p>Click on the title of the document.</p>  <p>The document window displays.</p> <p>Basic Information</p> <p>Patient Demographics</p> <p>Attending:</p> <p>Med Service: Hospitalist</p> <p>Code Status: Full Code Status 12/15/10 11:47:00,</p> <p>Disease Alerts: MRSA</p> <p>LOS: 5.0 Days</p> <p>History of Present Illness</p> <p>This is a 39 y/o wf who was admitted 5-days ago by for elevated blood sugar. We have been kindly asked by her service to manage this patient's diabetes for the duration of this hospitalization. Upon interview of the patient at her bedside, she states that she has been an insulin dependent diabetic for the past 12-years. She states she never misses a dose of her insulin which she takes Lantus 30 units daily but offers her sugars are very labile. She used to take her sugars three times per day but now only twice per day and they ave been running in the 200's-300's. She does not follow a specific diet "I eat pretty much what I want to." She denies experiencing any complications that would be associated with diabetes (i.e., diabetic retinopathy, neuropathy, neuropathy). She uses Lantus per vial but is interested in using an</p> <p>This cached view was extracted from an original document which was posted to the medical record at Dec 20, 2010 2:46 PM EST. The cached view may not appear exactly like the original. Learn more. CLOSE X</p>
2.	<p>Click the CLOSE button in the lower right-hand corner of the screen to return to the Chart Search main page.</p> 

Continued on next page

Chart Search, Continued

Feedback Options

The **Give Feedback** link allows users to give feedback in context to a search just performed.



The feedback is routed to the engineering team. If you do not see a result displayed that you expected, click the **Give Feedback** link. The **Semantic Search Feedback** window displays. Enter your feedback and click the **Submit Feedback** button.

A screenshot of the 'Semantic Search Feedback' window. The window has a title bar with the text 'Semantic Search Feedback' and a close button. Inside the window, there is a text input field labeled 'Search was for:' with the value 'diabetes'. Below this is a text input field labeled 'Feedback:' with the value 'term did not return polyuria'. Below that is a text input field labeled 'Contact information (optional):' with the value 'Dr. XYZ (111)111-1111 or XYZ@iuhealth.org'. At the bottom of the window are two buttons: 'Cancel' and 'Submit Feedback'.

Once submitted, the engineering team will consider this for future build.

Disclaimers

Cerner has continued efforts to improve and enhance **Chart Search** features. At this time, **Chart Search** does not include:

- Orders
- Problems
- Procedure
- Allergies

However, documents often contain everything so much of this data is still available in a search. However, it displays as it is documented, not as it recorded in the patient's chart.

Lab panels (i.e. – CBC, BMP) are not searchable. Only individual results are searchable. For a comprehensive look at lab panels, refer to the **Results Review** band in the patient's chart.

Again, when you come across things that you expect to see but don't, use the **Give Feedback** link to let engineering know.

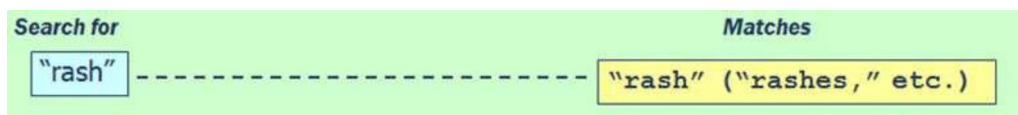
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Chart Search, Continued

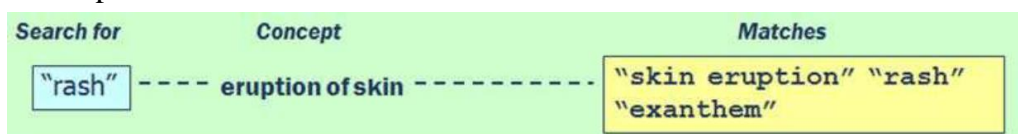
Key Features

Chart Search uses the following key features to quickly perform searches:

- **Word Search** – allows users to find information based on the presence of a specific word. Words can be clinical or non-clinical.



- **Concept search** - allows users to find information based on the clinical concepts that occur in the record. Mapping is based on SNOMED nomenclature. It searches for concepts in the document body and title, including symptoms, diseases, medications and common procedures.
 - For example, a concept search for rash will return any results associated with the term and find documents containing the medical term "skin eruption".



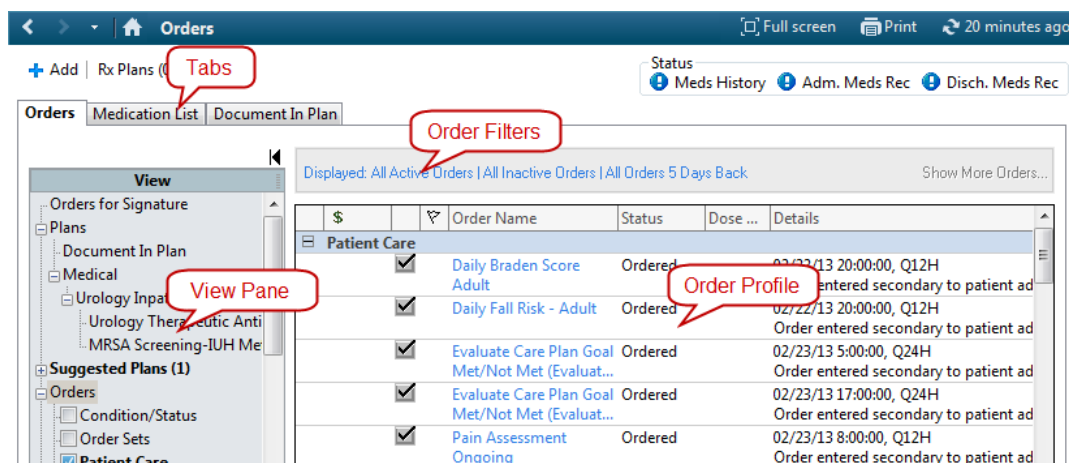
- **Smart ranking** - brings the most relevant search matches to the top of the list of search results.



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View Orders

Orders Section




















Section	Explanation
Tabs	<ul style="list-style-type: none"> • Orders – Screen from which you enter orders in PowerChart. • Medication List – List of medications and continuous infusions ordered for this patient. • Document In Plan – Where nurses evaluate the patient goals.
Order Filters	Displayed – The recommended order filter is Inpatient Preferred . Click the drop-down arrow to select from the list.
View Pane	The View Pane on the left displays a list of PowerPlans and Order Categories. The categories with orders have a checkbox next to them and correspond to the headings in the Orders Profile on the right. When there are orders present in a category, its checkbox is checked. Click an order category to go directly to that section. If a patient has a large number of orders, you may want to hide order categories from view that don't pertain to you or your department. Deselect the checkmark to the left of the order category. This does not remove the orders from the category, but only temporarily hides them.
Order Profile	The Order Profile on the right side of the screen displays the patient's existing orders, the status of the order and some detail information.

Continued on next page

View Orders, Continued

Order/Order Review Icons

Icon	Name	Description
	Add Order	Initiates the order entry process.
	Document Medication by Hx	Enter prescriptions or medications patient is currently taking at home.
	Pharmacy verification	Medication has not been verified by a pharmacist.
	Caduceus	Physician needs to co-sign the order.
	Nurse Review	Indicates an order that has not been reviewed by a nurse.
	Stat Order	Indicates a Stat order that requires a nurse review.
	Inpatient/Outpatient	Identifies inpatient/outpatient orders on the Add Orders dialog box.
	Prescription	Identifies a prescription order on the Add Orders dialog box.
	Reference Text	Displays to the left of an order and indicates that additional data, such as age-specific information and test preps, is available.
	Checkmark	Located to the left of an order, the checkmark indicates that the order has been signed and is active.
	PowerPlan	Indicates orders that are grouped together - two or more orders grouped together for ease in ordering.
	Additional Details	One or more details must be completed.
	Additional Details (Highlighted)	Same icon as above but displays differently when the order is highlighted.
	Next detail	Takes you to the next detail whether it's required or not.
	Previous detail	Takes you to the previous detail whether it's required or not.
	Next req'd field	Takes you to the next required field that is missing data.
	Next order	Takes you to the next order. This button is enabled if you have more than one order with required fields.

Continued on next page

View Orders, Continued

Communication Types

These following Communication Types are available to those placing orders and are an indication of the origination of an order:

1. **Written:** Orders written on paper order sheets (i.e. Downtime orders). *This is also the communication type that is associated with **orders entered directly by the provider via CPOE.***
2. **RVVO:** Repeat Verify Verbal Order. These orders will automatically route to the provider for co-signature. The dictation number should always be used for verbal orders to ensure they are routed to the correct provider. Verbal orders should only be used in urgent/emergent situations, as was the process prior to CPOE.
3. **RVTO:** Repeat Verify Telephone Order. These orders will automatically route to the provider for co-signature. The dictation number should always be used for telephone orders to ensure they are routed to the correct provider. The provider should stay on the phone as you enter the verbal telephone order into Cerner in order to address any alerts which may display during the order entry process.

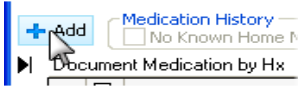
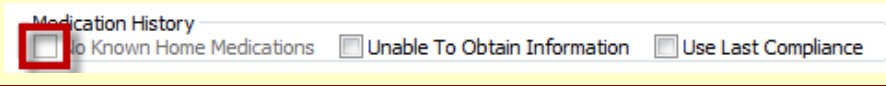

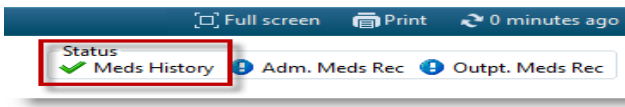
Note: Order Communication Types “4” and “5,” below, refer to IU Health clinical policies.

4. **Protocol Sign Req’d:** Used when approved protocol orders require the provider’s co-signature (**medications, IV Fluids, labs, and/or tests, including radiology orders**), e.g., Skin and Wound Care Protocol, *if medication(s) are added.*
5. **Protocol:** Orders that have been approved and do NOT contain medications, IV Fluids, labs, and/or tests, e.g., Skin and Wound Care Protocol, *if no medications are included.* These **do NOT** route to the provider for co-signature.
6. **CPOE Initiate:** Used when the nurse **initiates a PowerPlan from a planned state.** Because the provider signed these orders when placing them in a planned state, they **do NOT route to the provider for co-signature.** If there is a question, or if the nurse encounters warnings when initiating the orders, the nurse should validate with the provider which orders are appropriate.
7. **Unit Routine:** Used to cancel/reorder existing orders to reschedule them to meet unit routines. Also used to discontinue phases of Multiphase PowerPlans. These do NOT route to the provider for co-signature.

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Document Medications by History

Document Medications by History

Step	Action
1.	Click the Medication List band.
2.	Click the Document Medication by Hx button.
3.	<p>Click the Add button.</p>  <p>The Add Order window displays.</p> <p>Note: If the patient has no known medications, you will click the checkbox for No Known Home Medications</p> 
4.	Type “ multivitamin ” in the Search field.
5.	Select the multivitamin . <i>The Order Sentences window displays.</i>
6.	Select 1 Tablet, Orally, Daily .
7.	Click OK .
8.	Click Done .
9.	Complete the Details , Order Comments , and Compliance tabs with any required information.
10.	<p>Uncheck the Leave Med History Incomplete – Finish Later box.</p>  <p><i>Unchecking this box will trigger the Status icon for Meds History (as viewed from the Medication List and Orders page) to update from a blue circle with an exclamation point to a green checkmark. This is the only visual indicator to the provider that the med list is updated and ready for reconciliation.</i></p> 

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Document Medications by History, Continued

Document Medications by History
(continued)

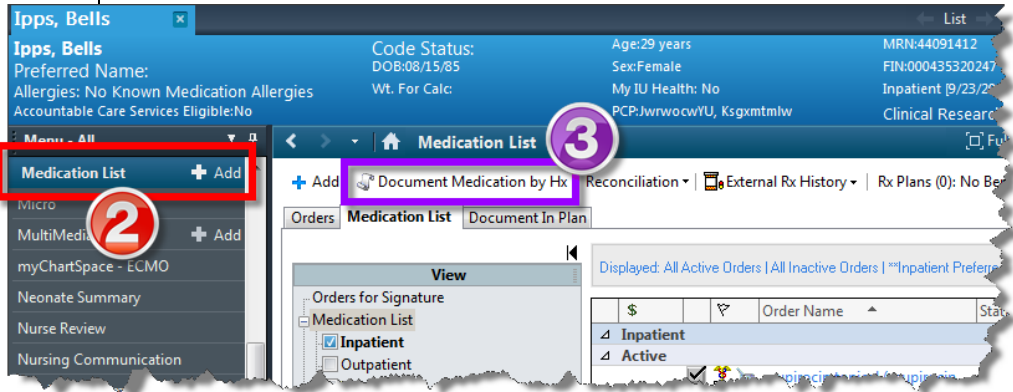
<i>continued from previous page...</i>	
11.	Click the Document History button. <i>The historical medication is saved to the patient's Active Documented Medications by Hx list.</i>

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Document Medications by History, Continued

List a Study Drug in Cerner

An example of a medication by history could be a study drug. A drug that a patient is taking, but has not be prescribed within the electronic medical record. Having it documented provides transparency for other clinicians involved in the patient's care.

Step	Action
1.	Open a patient's chart in PowerChart.
2	Click the Medication List band.
 <p>The Medication List page displays.</p>	
3	Click the Document Medication by Hx button in the Medication List. <i>The Document Medication by Hx list displays.</i>
4	Click the Add button.
5.	Type " Study Med " in the Find box.
6.	Click on the Study Medication option. <i>A second window will open.</i>

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Document Medications by History, Continued

List a Study Drug in Cerner (continued)

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7. Click the **Done** button.

The selected study medication is selected and displays in the Medication List pane and the Details pane, below presents fields which are required.

Study Medication (Study Drug 1A... Document Study Drug 1A23, 123456789, 1, Orally, 2x/day Mon Wed Fri, ...)

Details for Study Medication (Study Drug XXX/Placebo)

Details | Order Comments | Compliance

Dose: 1 Route of Administration: Orally Frequency: BID Duration: 3 Weeks

Description: Study Drug XXX/Placebo IRB #: 1234567890

PRN: [dropdown] Type Of Therapy: ☐ Acute ☒ Maintenance

Dispense Quantity: [text] Special Instructions: [text area]

Dispense Quantity Unit: [dropdown]

Requested Start Date/Time: 03/12/2015 1327

Stop Date/Time: **/**/****

0 Missing Required Details

9 Document History Cancel

8. Complete the **Details** section by adding:

- Dose
- Route of Administration
- Frequency
- Description (if blinded randomized study drug, enter “Name of study drug/Placebo”)
- IRB #
- Special instructions or order comments may be added here, if necessary.

9

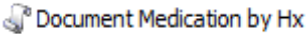
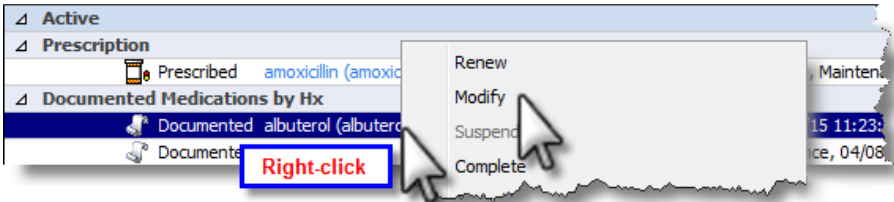
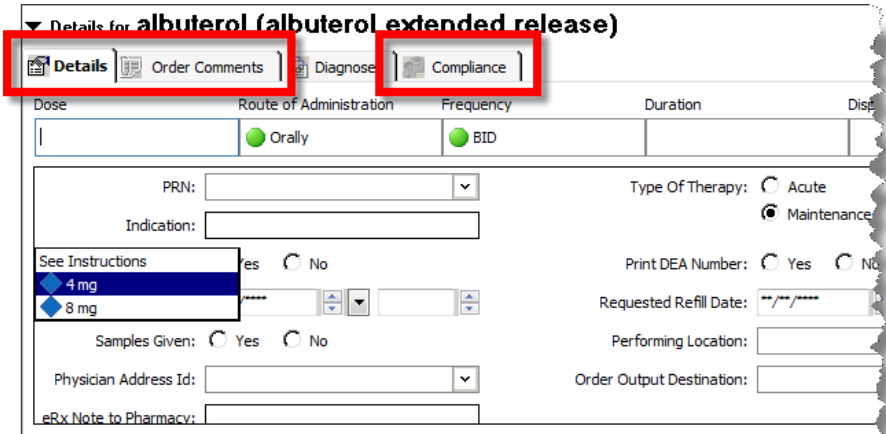
Click the **Document History** button.

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Document Medications by History, Continued

Modify Historical Medications

Modifying medications allows clinicians to modify historical medications that have been entered into the system instead of having to **Cancel/DC** the medication and begin the process again. **Modify** allows you to correct a historical medication entry or add details to the medication.


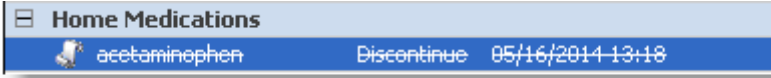
Step	Action
1.	Click the Document Medication by Hx button.  <i>The Document Medication by Hx window is displayed.</i>
2.	Right-click on the medication you need to update.
3.	Select Modify from the menu. 
4.	Update the Details , Order Comments and Compliance tabs as needed. 
5.	Click the Document History button. <i>The historical med is saved to the patient's Active Documented Medications list.</i>

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Document Medications by History, Continued

Cancel / Discontinue an Historical Medication

- **Complete:** Acute medications (antibiotics, prednisone tapers, etc.) that were prescribed for a short duration, and have exceeded the end date. Complete should also be used to remove duplicate historical medications
- **Cancel/DC:** Prescriptions that the patient states they are no longer taking because a provider told them to stop taking.
- **DOCUMENT COMPLIANCE: Not Taking:** Prescriptions that the patient is not taking, for any reason other than specific instruction from a provider.

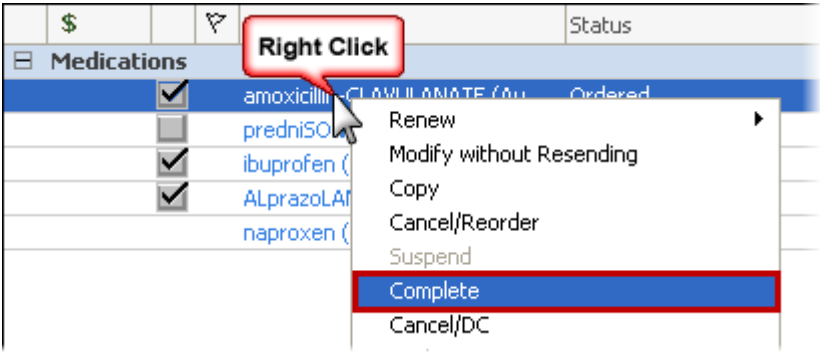
Step	Action
1.	Click the Document Medication by Hx button.  <i>The Document Medication by Hx window displays.</i>
2.	Right-click on the multivitamin .
3.	Select Cancel/DC . <i>When cancelling or discontinuing historical meds, the Ordering Physician window does not display.</i>
4.	Click OK . <i>A strikethrough line displays through the medication.</i> 
5.	Click the Document History button. <i>The historical med is saved to the Inactive Medication list.</i>

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Document Medications by History, Continued

Complete a Medication

Use **Complete** for medications that are supposed to be taken for a finite amount of time (i.e. antibiotics).

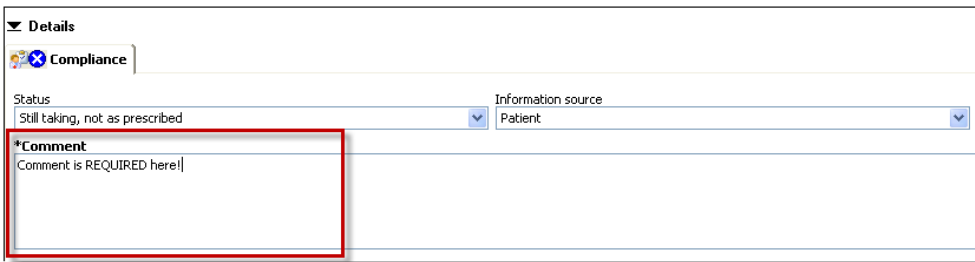
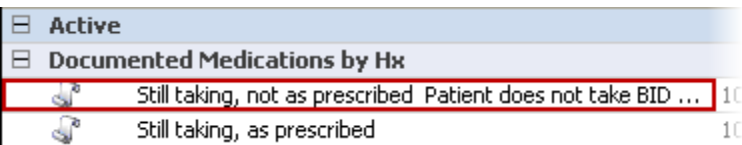
Step	Action
1.	Right-click the antibiotic on the medication list.
2.	Select Complete from the menu. <div></div>
3.	Click the Sign button.

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Document Medications by History, Continued

Add/Modify Compliance

Compliance can also be added or modified per the **Add/Modify Compliance** option.

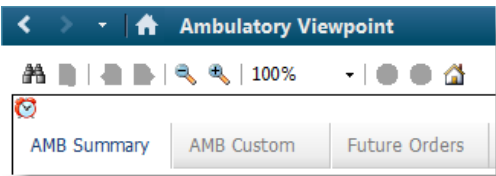
Step	Action
1.	Click the Document Medication by Hx button.
2.	Right-click on the medication to be modified.
3.	Select Add/Modify Compliance . <i>The Compliance tab displays below.</i>
4.	Make the necessary additions or changes.
5.	Type a comment regarding the modification in the Comment box.  Note: The Comment field is a required field if you choose the status Still Taking, not as prescribed . Users cannot sign the modification until this field is completed.
6.	Click the Document History button when finished. <i>The Compliance Status is updated on the Medication List.</i> 

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Ambulatory Viewpoint

Overview

The **Ambulatory Viewpoint** page can be used as a basic navigational tool and accessed through the PowerChart menu. There are three tabs across the top of the page; **AMB Summary**, **AMB Custom**, and **Future Orders**.



AMB Summary Tab

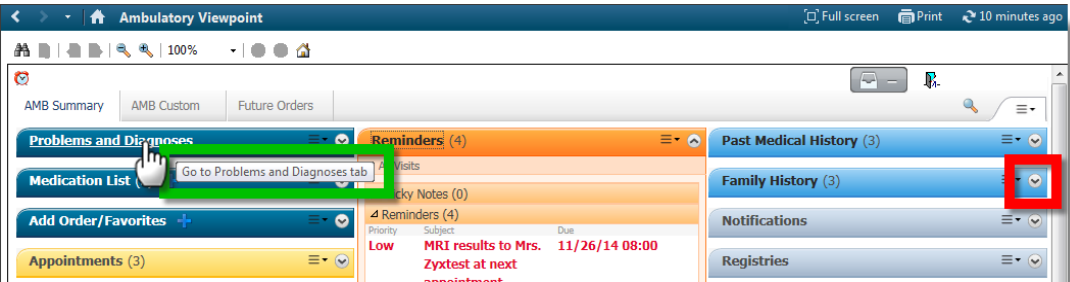
The Ambulatory Summary tab provides a snapshot summary of the patient’s record. It allows clinicians to take action, such as add orders, problems, diagnoses and medical histories directly from this view.

The Ambulatory Summary tab is divided into 3 columns. Each column contains components to access and document patient data. User-based customization is available allowing the user to rearrange components on the page and to define the default expand/collapse behavior for each component.

Each component header (i.e. – **Vitals and Measurements**) is a hyperlink that launches the user to the appropriate section in the patient chart. The user can hover over any of the headers to see, in a tooltip, where clicking on that header will take them in the patient’s chart.

Vitals and Measurements takes the user to **RESULTS REVIEW**.

Vitals and Measurements + ▾			
	Today	Previous	
BP	134/71 11/29/12	120/60 10/31/12	121/61 10/31/12
HR	70 11/29/12	60 10/31/12	60 10/24/12
Temp	37.5 11/29/12	37 10/31/12	37 10/24/12



Ambulatory Viewpoint, Continued

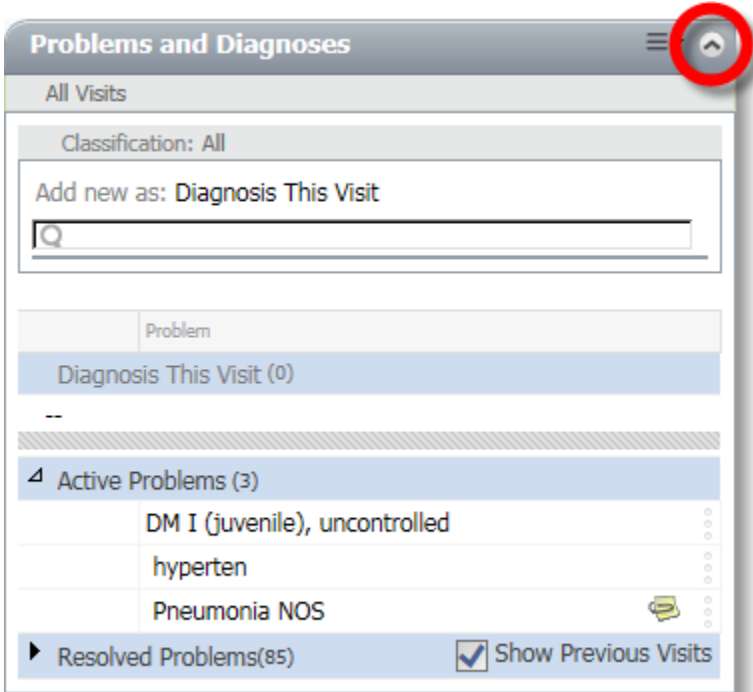
Problems and Diagnoses Component

The **Problems and Diagnoses** component is an enhanced version of the Problems and Diagnoses band and displays the following three categories:

- **Diagnosis This Visit** – the problem being addressed at the current visit (i.e. – pain)
- **Active Problems** - the patient’s active problem list (i.e. chronic conditions such as diabetes)
- **Resolved Problems** - the patient’s Past Medical History (i.e. – a kidney stone)

Note: Diagnosis is to be entered by the Provider.

To display the Problems and Diagnoses section In Ambulatory Viewpoint:

Step	Action
1.	<div>Click the Expand arrow on the right side of the band. </div>

Continued on next page

Ambulatory Viewpoint, Continued

Medication List Component

The **Medication List** component displays the patient's current medications. It allows users to **Renew**, **Cancel/DC**, and **Complete** prescriptions from the **Ambulatory Summary** view.

Note: The **Medication List** component is only for renewing, canceling, or completing medications. Reminder: This training addresses multiple functions in Cerner PowerChart. It is important that you only perform actions that align with your current job description.

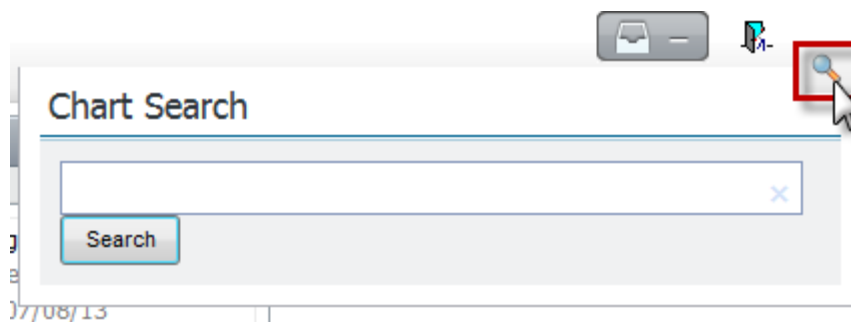
Review Medications



Chart Search Functionality

Chart Search functionality displays at the top of the **Ambulatory Summary** view. It functions the same way as using the **Chart Search** band in the Table of Contents.

Note: It only displays discrete results and terms.



Type your search term in the **Search** field. *Matching items display as you type.*

Continued on next page

Ambulatory Viewpoint, Continued

AMB Custom Tab

The Ambulatory Custom tab allows users to customize the following components:

- Allergies
- Patient Information
- Pregnancy History
- Procedure History.

Future Orders Tab

Future lab order functionality enables providers and support staff to enter departmental lab orders with a future date or timeframe for activation at a future office visit or IU Health Outreach Lab.

After future orders have been placed, the future orders tab is where these orders are shown, activated, or cancelled/DC'd.

Order	Grace Period	Order Date	Provider	Ordering Location	Details
Overdue (0)					
4 Due (2)					
Hemoglobin	03/11/2015 - 03/15/2015	03/13/2015	HOWSER01, CANDACE		Blood, Routine, Results Needed: Routine, ONCE, *Est. 03/13/15 +/- 2 Days, Order for future visit
AST	03/13/2015 - 04/17/2015	03/13/2015	HOWSER01, CANDACE		Blood, Routine, Results Needed: Routine, ONCE, *Est. 03/13/15 due within 5 Weeks, Order for future visit
4 Upcoming (1)					
Hemoglobin	03/18/2015 - 03/22/2015	03/13/2015	HOWSER01, CANDACE		Blood, Routine, Results Needed: Routine, ONCE, *Est. 03/20/15 +/- 2 Days, Order for future visit

Note: This reference guide addresses multiple functions in Cerner PowerChart. It is important that you only perform actions that align with your current job description

Continued on next page

Ambulatory Flowsheet

Overview

Ambulatory Flowsheet is a view-only comprehensive overview of the patient's care. You will see items such as Vital Signs, Body Measurements, labs, and data from AdHoc forms.

The screenshot displays the Ambulatory Flowsheet interface. On the left is a 'Menu - All' sidebar with various options. The 'Ambulatory Flowsheet' option is highlighted. The main area shows a table of patient data for the date range 17 May 2014 13:47 - 22 May 2014 13:47. The table is organized into sections: Body Measurements, Vital Signs, Blood Pressure #1, Dependent Habits, and Clinic Visit Screening. Each section contains a list of items with checkboxes and corresponding values for two time points: 05/21/14 13:48 and 05/21/14 13:47.

Ambulatory Flowsheet		05/21/14 13:48	05/21/14 13:47
Body Measurements			
<input type="checkbox"/> Height			165 cm
<input type="checkbox"/> Calculated Height			65 Inches
<input type="checkbox"/> Weight			65.3 kg
<input type="checkbox"/> Calculated Weight			143.7 lb
Weight Method			Actual - Standing
<input type="checkbox"/> BSAM2			1.73 m2
<input type="checkbox"/> BMI			24 kg/m2
<input type="checkbox"/> BMI	24.0		
<input type="checkbox"/> Ideal Body Weight			61.41 kg
Vital Signs			
<input type="checkbox"/> Temperature Cel		36.7 DegC	
<input type="checkbox"/> Temperature Far Calculated		98.1 DegF	
Temperature Method		Axillary	
Patient Condition		Appropriate, Calm	
<input type="checkbox"/> Heart Rate		80 bpm	
Heart Rate Method		Auscultation	
<input type="checkbox"/> Respiratory Rate		16 br/min	
Respiratory Rate Method		Observation	
<input type="checkbox"/> SpO2		99 %	
O2 Delivery Device		Room air	
Blood Pressure #1			
<input type="checkbox"/> Systolic Blood Pressure #1		100 mmHg	
<input type="checkbox"/> Diastolic Blood Pressure #1		L 53 mmHg	
<input type="checkbox"/> BP #1 MAP Calculated		69 mmHg	
BP # 1 Location		Arm, Upper Left	
Dependent Habits			
Alcohol Use			Denies
Tobacco Use			Never Smoker
Clinic Visit Screening			
<input type="checkbox"/> Pain Score	0		

Results Review

Open the Results Review Section

The Results Review section contains data that is populated from multiple sections of the patient's chart.

Step	Action
1.	Open the patient's chart.
2.	Click the Results Review band. <i>The Results Review section displays with the Lab Results tab open.</i>

The screenshot shows the 'Results Review' section of the software. The left sidebar has a 'Menu - All' dropdown with 'Results Review' highlighted. The main window has a 'Results Review' header with 'Full screen', 'Print', and '0 minutes ago' options. Below the header is a 'Lab Results' tab selected, showing a table of lab results for 'Lab/POC Results Flowsheet'. The table has columns for 'Blood Gases' and 'Molecular Diagnostic Tests'. The 'Blood Gases' section shows results for pH, PCO2, PO2, Base Excess, Bicarb, O2 Sat, and Patient Temperature. The 'Molecular Diagnostic Tests' section shows results for MRSA PCR and MSSA PCR. The results are displayed in a table format with columns for the test name, the date and time of the result, and the result value.

How to Interpret Font Color of Results

Each result displays in one of two formats:

- **Black text** = Non-critical results
- **Red text** = Critical, High/Low and Abnormal results.

Available Results to View

Results can come from charted data, completed forms, even feeds from other systems. The following are examples of information that can be found in **Results Review**:

- Vital Signs
- Admission History Flowsheet
- Perioperative Flowsheet
- Anesthesia Flowsheet



1 minutes ago

Note: To view the most up-to-the-minute information, click the **Refresh** button frequently.

Continued on next page

Results Review, Continued

Use Results Review Tabs (Filters)

Each tab acts as a filter and displays only that specific type of clinical result – i.e., the Lab Results tab only displays lab results.

Results Review

Clinical Assessments

Psychosocial

Patient Education

Wound Care

OB Flowsheet

Advance Directive

Neonatal

Lab Results

Vital Signs

Significant Events

Results

Neurophysiology

Radiology

Pathology

Diagnostics

Glucose Data

Respiratory Care

Flowsheet: Lab/POC Results Flowsheet

Level: Lab/POC Results Flowsheet

Table

Group

List

March 26, 2016 14:42 EDT - October 26, 2016 14:42 EDT (Clinical Range)

Navigator

Blood Gases

Molecular Diagnostic Tests

Showing results from (04/30/16 - 06/06/16)

Show more results

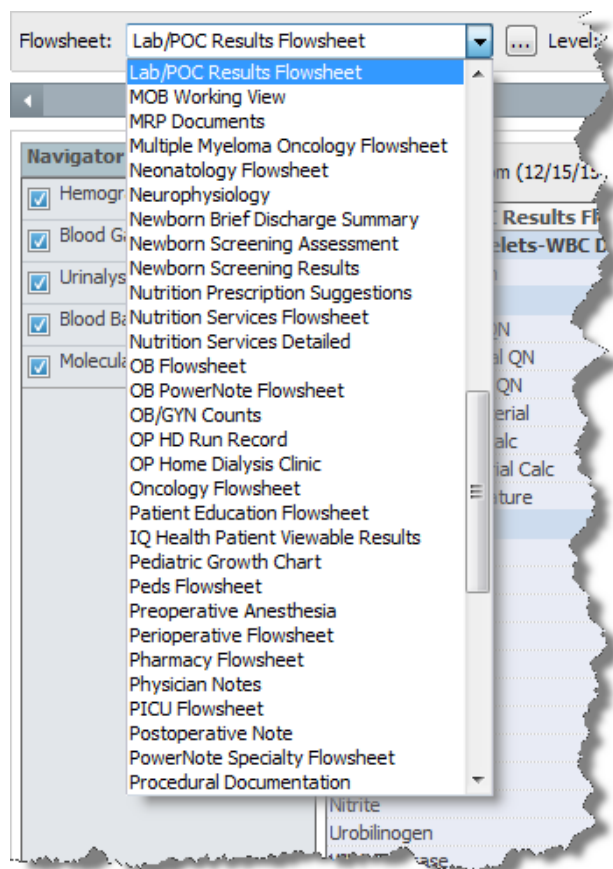
Lab/POC Results Flowsheet	06/06/16 17:42 EDT	04/30/16 02:59 EDT
Blood Gases		
<input type="checkbox"/> pH Bld Arterial QN		* C <7.00
<input type="checkbox"/> PCO2 Bld Arterial QN		* C 19 mmHg
<input type="checkbox"/> PO2 Bld Arterial QN		H 170 mmHg
Base Excess Bld Arterial		incalculable mmol/L
Bicarb Bld Arterial Calc		incalculable mmol/L
<input type="checkbox"/> O2 Sat Bld Arterial Calc		H 100 %
<input type="checkbox"/> Patient Temperature		37.0 DegC
Molecular Diagnostic Tests		
MRSA PCR	* A Positive	
MSSA PCR	A Positive	

Continued on next page

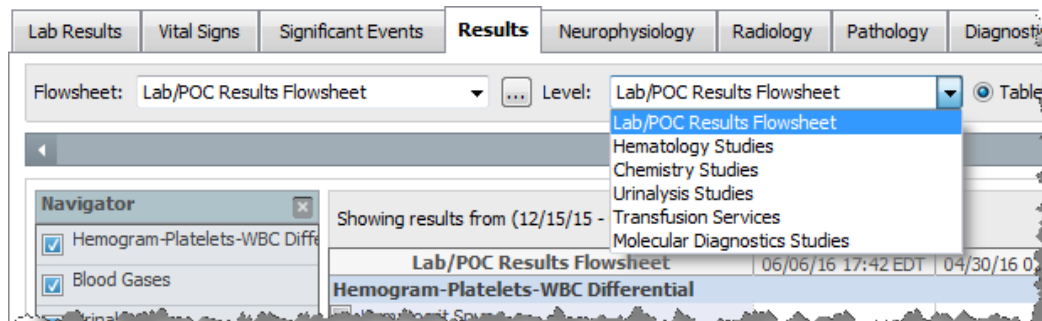
Results Review, Continued

Flowsheet Type Specialty filters allow the user to quickly reduce the results being viewed to only those for a particular discipline – i.e., Anesthesia or Diabetic Clinic Flowsheet.

Step	Action
1.	Click the Flowsheet field drop-down arrow.
2.	Select a specialty filter. <i>The results are reduced to those returned for that specialty.</i>



Level Filters Level filters allow the to reduce the results to those for a particular discipline.

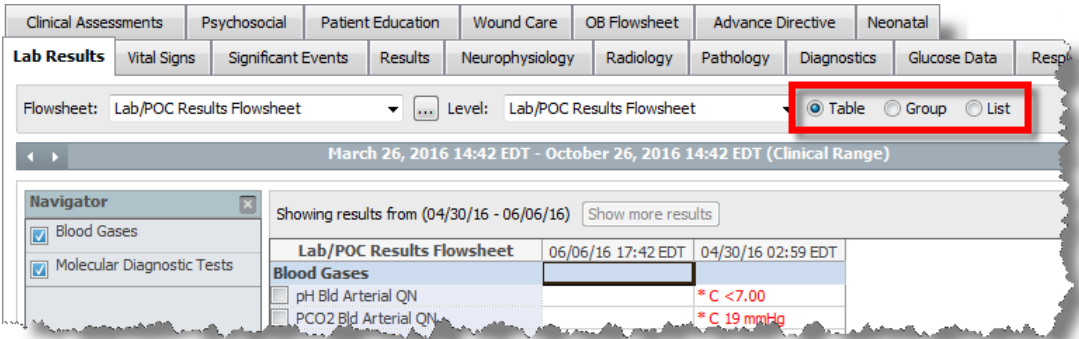


Step	Action
1.	Click the Level field drop-down arrow.
2.	Select a specialty filter. <i>The results are reduced to those returned for that specialty.</i>

Continued on next page

Results Review, Continued

Display Options Results can be displayed in a Table, Group, or List format, based upon a user’s preference. The default view is Table, which displays a separate column for the set of results from each lab draw.



Step	Action
1.	Click the Group option button. <i>The lab results display in a Group format with the set of results from each lab draw grouped together.</i>
2.	Click the List option button. <i>The lab results display in a List format, displaying all labe results in a vertical column, the most recent at the top.</i>
3.	Click the Table option button. <i>The lab results display in the default Table format.</i>

Continued on next page

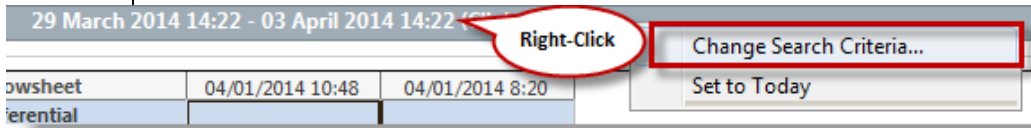
Results Review, Continued

Expand Search Criteria on the Information Bar

On the **Results Review** band, the Clinical Range Information Bar defaults to the last 100 results (every piece of data, such as pulse, counts as a result). Therefore, all results may not be displayed, depending on how numerous a patient's results are. The Search Criteria, as displayed on the Clinical Range Information Bar, can be modified to look as far back as needed.

When setting search criteria, four (4) types are available:

1. Clinical Range
2. Posting Range
3. Result Count
4. Admission Date to Current Date

Step	Action
1.	Right-click on the Clinical Range Information Bar . 
2.	Select the Change Search Criteria command. <i>The Search Criteria dialog box displays.</i>
3.	Select a Result Lookup type.
4.	Modify the remaining criteria in order to return the results.
5.	Click the OK button.

Quickly Modify the Displayed Search Criteria

The search criteria range can also be quickly modified, using the expansion arrows on the left and right sides of the Clinical Range Bar:



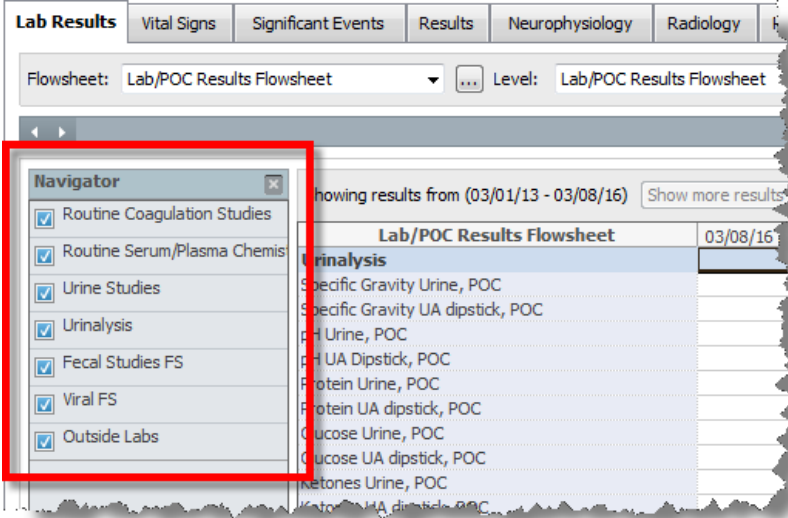
Step	Action
1.	Click on the left and right arrows to shorten and expand the displayed type of search criteria.

Continued on next page

Results Review, Continued

Use the Navigator

The Navigator provides quick access to the categories of available results. Check or uncheck the boxes to the left of each category to hide or view the category.

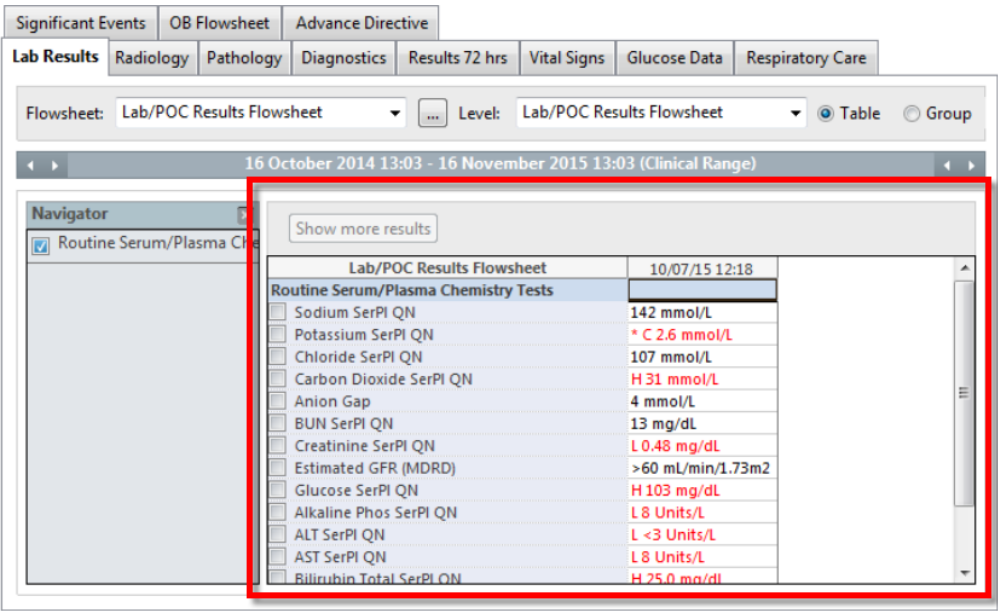
Step	Action
1.	<div>Click a category near the bottom of the Navigator. <i>The results pane to the right, scrolls to the section clicked.</i></div> <div></div>
2.	<div>Click the category check box to the left of the same category. <i>The results category is hidden.</i></div>
3.	<div>Click the same category check box a second time. <i>The results category is re-displayed.</i></div>
4.	<div>Click the the category at the top of the Navigator pane. <i>The results pane to the right, scrolls to the top category.</i></div>

Continued on next page

Results Review, Continued

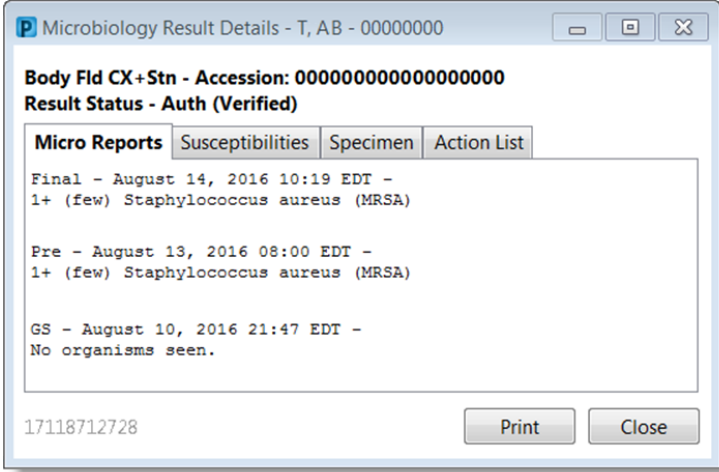
The Results Pane

Displays the results based on the tab, flowsheet and category selected.



View Result Details

More detail for any result can be viewed, including the result history and action list.

Step	Action
1.	Right-click on a result.
2.	<p>Select the View Details command.</p>  <p>The Result Details window displays.</p>
3.	Click the Close button.

Continued on next page

Results Review, Continued

Print Results Results may be printed from any of the Results Review flowsheets, utilizing either of the following two (2) options:

- Print an entire flowsheet
- Print a selected section of a flowsheet

Print an Entire Flowsheet

Step	Action
1.	Select the tab with the results to print.
2.	Click the Print button at the top, right of the Results Review window.
3.	Verify the appropriate printer.
4.	Click the OK button.


Print Specific Results

Step	Action
1.	Select the tab with the results to print.
2.	Select the specific results, using one of these methods: <ul style="list-style-type: none">a. Click and Dragb. Ctrl + Clickc. Click + Shift + Click
3.	Click the Print button at the top, right of the Results Review window.
4.	Verify the appropriate printer.
5.	Click the OK button.

Continued on next page

Results Review, Continued

Graph Results Numeric results may be displayed as a graph to quickly identify trends. These graphed results may also be printed.

Step	Action
1.	Select the tab with the results to be graphed.
2.	Select the checkboxes to the left of any results to be graphed. <i>Multiple checkboxes may be selected for one graph.</i>
3.	 Click the Graph icon in the top, left of the Results Review window. <i>The Flowsheet Graph displays the selected result(s) in graph format.</i>
4.	Optional Step 4 for Multiple Results Charted Click the Combine button. <i>Multiple results are displayed on one grid, rather than two or more.</i>
5.	Optional Step 5 for Multiple Results Charted Click the Split button. <i>Multiple results are split into individual graphs.</i>
6.	Click the Close button.

Health Maintenance

Overview

The Health Maintenance band provides a snapshot of generally recommended screening procedures and immunizations to maintain health and detect common problems for a healthy adult. The recommendations are specific to male or female and are based on age and sex. In addition, whenever a problem or diagnosis is documented in PowerChart, applicable expectations display on the Health Maintenance band. Expectations can also be manually added.

Note: IU Health's recommended Healthy Adult screenings and immunization schedules are based on recommendations from the U.S. Preventative Services Task Force (USPSTF).

The **Health Maintenance** band is divided into two sections:

Health Maintenance

Pending Expectations + Add **a** **Present - December 2022** ☒ Show satisfiers Sort by: Status

Breast Cancer Screening High Due 12/03/2012 Q 3 yr Qualified
Order: Outside MM Mammogram Screening Order: MM Mammogram Consult Postponed Refused Mammogram Exam Performed
Cancel Permanently

Colorectal Screening High Due 12/03/2012 Variable Qualified
Order: Outside Colonoscopy Order: AMB FIT Testing Kit Postponed Refused
Occult Blood Stool Performed Colonoscopy Done- 1 yr f/ju Colonoscopy Done- 3 yr f/ju Colonoscopy Done- 5 yr f/ju
Colonoscopy Done- 10 yr f/ju Cancel Permanently

Lipid Screening High Due 12/03/2012 Variable Qualified
Order: AMB Lipid POC Order: Cholesterol SerPI QN Order: LDL Measured SerPI QN Order: Lipid Panel SerPI QN
Order: Outside Cholesterol SerPI QN Order: Outside LDL SerPI QN Order: Outside Lipid Panel SerPI QN Postponed
Refused Lipid Panel Performed Cancel Permanently

Zoster Vaccine High Due 12/03/2012 One-time only Qualified
Order: Zoster Vaccine live Postponed Refused Vaccine Given Cancel Permanently

Influenza Vaccine High Not Due Until 09/01/2013 Seasonal Last Satisfied By: VPHVXH, LYB1 11/30/2012
Order: Influenza virus vaccine, inactivated Postponed Refused Vaccine Given Cancel Permanently

Recently Satisfied Expectations **b** **December 2010 - Present** ☐ Show all canceled records

Expectation	Status	Satisfy Type	Administration ...	Satisfy Reason	Priority	Last Satisfied By	Approximate D...	Comments
Pertussis	Other Satisfier	Order	11/30/2012		High	Busha, Ann M, MD		
Pertussis	Other Satisfier	Order	11/30/2012		High	Busha, Ann M, MD		
Pneumococcal	Other Satisfier	Order	11/30/2012		High	Busha, Ann M, MD		
Tetanus/Td Vacc...	Satisfied	Order	11/30/2012		High	Busha, Ann M, MD	11/30/2022	

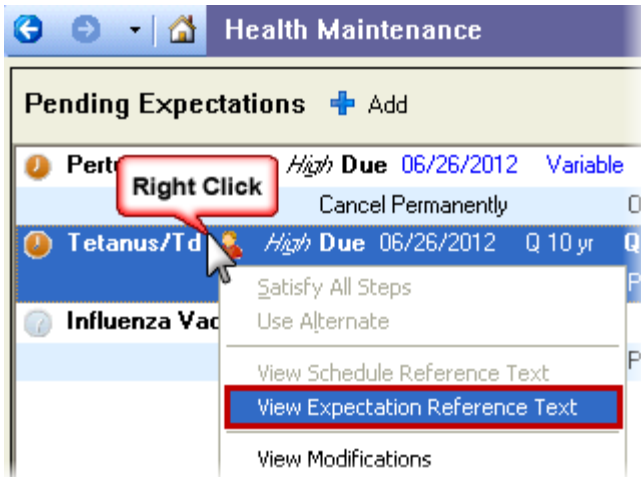
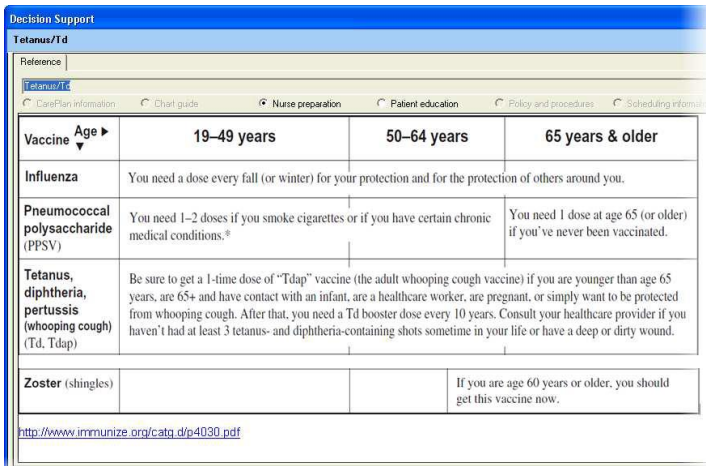
Part	Function
a Pending Expectations	<p>Displays tests, procedures, and immunizations recommended for the patient starting from the current date to 10 years into the future. From this section, the user can satisfy a Pending Expectation by clicking on the appropriate Satisfier.</p> <p>Note: The display default is set to Show satisfiers and to sort by Status.</p>
b Recently Satisfied Expectations	<p>Displays Expectations that have been completed and documented in the last 2 years.</p> <p>Note: The last 2 years of Satisfied Expectations also pulls into PowerNote.</p>

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Health Maintenance, Continued

Health Maintenance Reference Text

Reference text is available for Health Maintenance schedules. Reference text is accessed by highlighting and right-clicking on a schedule.

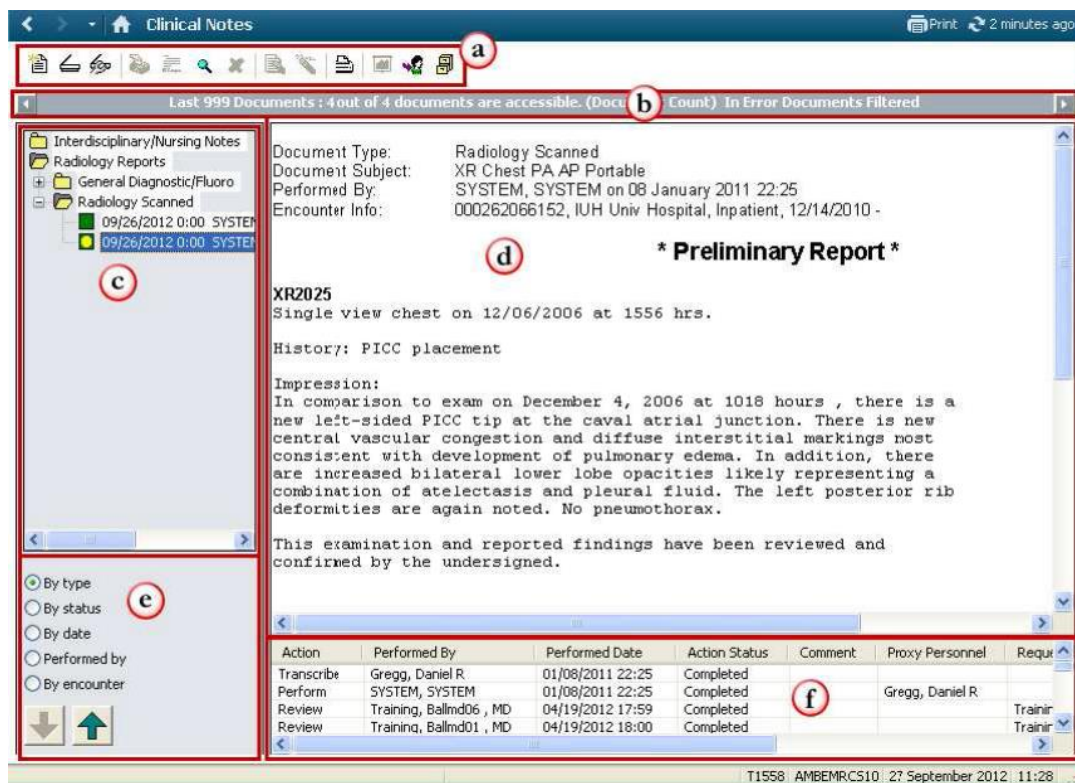
Step	Action
1.	Click on the appropriate schedule (i.e. – Tetanus) to highlight it.
2.	Right-click the highlighted schedule.
3.	<p>Select View Expectation Reference Text from the menu displayed.</p>  <p>A Decision Support screen for the selected schedule displays.</p> 
4.	Click the OK button to close the Decision Support window.

Clinical Notes

Overview

Clinical Notes are used for reviewing scanned documents and Progress Notes. Documents currently stored in Clinical Notes for viewing include:

- Registration Documents
- Consent Forms
- Progress Notes



	Part	Function
a	Clinical Notes Toolbar	Allows users to Add, Modify , or In Error a Clinical Note .
b	Search Criteria Bar	Allows the user to select a different time frame for which to view documents/notes.
c	Navigation Pane	Provides a view of documents/notes contained within folders for a patient encounter.
d	Results Pane	Displays a selected document/note.
e	Sort Options	Allows users to sort all documents/notes by the selected criteria
f	Details	Displays the activities that have occurred during a document/note's lifecycle.

Continued on next page

Clinical Notes, Continued

Sort Options

e

Clinical Notes are stored in folders displayed in the Navigator Pane. Users can sort available documents by using the sort options in the bottom left-hand corner of the screen (see figure above, letter “e”).

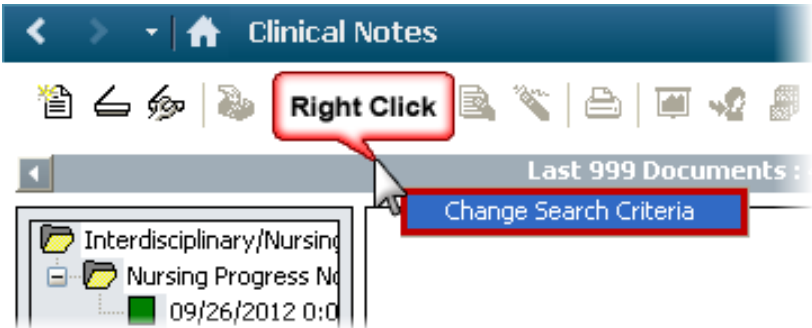
The options include:

- By type
- By status
- By date
- Performed by

Change Search Criteria

b

Search criteria filters can be changed if a document/note needing to be viewed is not displaying in the Navigator Pane.

Step	Action
1.	Right-click the blue Search Criteria Bar .
2.	Click Change Search Criteria .  <i>The Document Lookup window displays.</i>

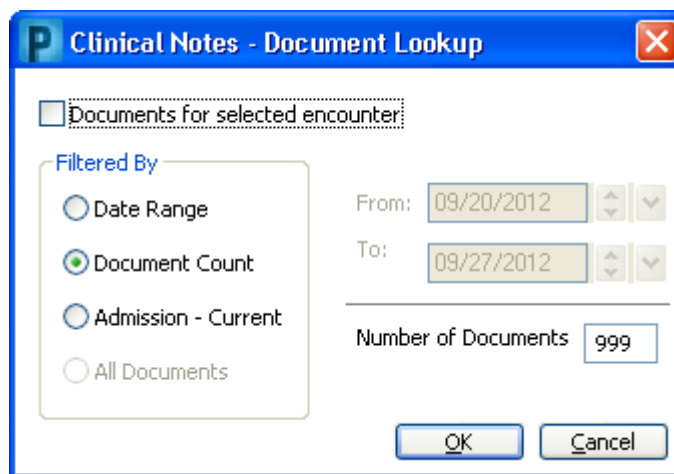
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Clinical Notes, Continued

Change Search Criteria (continued)

continued from previous page...

3. Change the desired search criteria.



Clinical Notes can be filtered by:


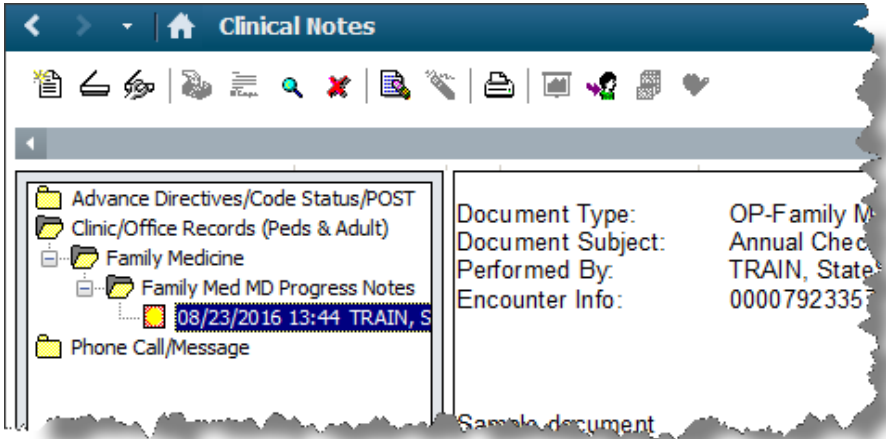


- Date Range
- Document Count
- Admission-Current
- **All Documents** for a selected encounter if the **Documents for selected encounter** checkbox is checked

4. Click **OK** to save.

Continued on next page

Clinical Notes, Continued

View a Clinical Note

Step	Action
1.	<p>Click the Clinical Notes band in the Table of Contents.</p> <p><i>A list of all available folders display based on the search criteria filter.</i></p>
2.	<p>Double-click the applicable folder  icon.</p> <p><i>The folder opens to displays it's contents – clinical note documents or more folders.</i></p> <p><i>In the example, below, in order to open the highlighted note, it was necessary to open</i></p> <ol style="list-style-type: none"> <i>First, the Clinic/Office Records (Peds & Adult) folder.</i> <i>Then Family Medicine folder.</i> <i>And finally, Family Med MD Progress Notes folder to access the clinical note in the last folder.</i>  <p>Note: If No Results Found displays in the document tree, change the search criteria via the blue Search Criteria Bar.</p>
3.	<p>Double-click each successive sub-folder  icon until the clinical notes being searched for are listed beneath the opened folder.</p>
4.	<p>Double-click the clinical note.</p> <p><i>The note displays in the Results Pane to the right (letter “d” - , diagram in Clinical Notes, Overview, above).</i></p>

Continued on next page

Clinical Notes, Continued

Set Document Type Preference

It is most often beneficial to set a specific type of document as the default clinical note. The type of note selected, when creating a new clinical note, determines in which folder the new note is stored in the Clinical Notes page on the patient's chart.

In the following example, the guide illustrates how to set Research/Clinical Trial Records as the default document type.

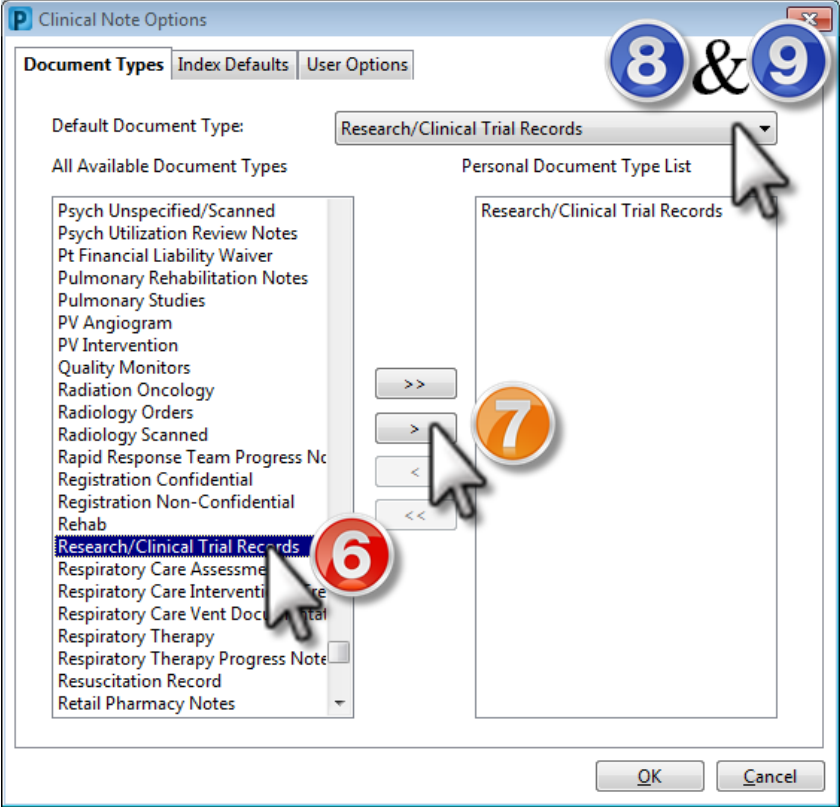

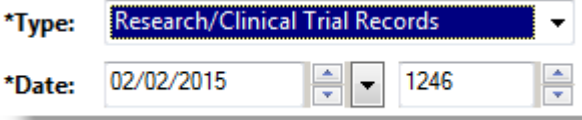
Step	Action
1.	Open a patient's chart.
2.	Click on the Clinical Notes band. <i>The Clinical Notes page displays, to the right.</i>
3.	Click on the Documents menu at the top of the window.
4.	Click on the Options command. <i>The Clinical Note Options dialog box displays.</i>
5.	Scroll to locate the Research/Clinical Trial Records option in the All Available Document Types list (<i>screen shot, next step, next page</i>).

Continued on next page

Clinical Notes, Continued

Set Document Type Preference (continued)

continued from previous page...

<p>6</p>	<p>Click to select the Research/Clinical Trial Records type.</p> 
<p>7</p>	<p>Click the single right-pointing arrow between the two panes. <i>The selected Research/ Clinical Trial Records type is moved into the Personal Document Type List pane, on the right.</i></p>
<p>8</p>	<p>Click on the Default Document Type field drop-down arrow.</p>
<p>9</p>	<p>Click to select the Research/Clinical Trial Records option.</p>
<p>10.</p>	<p>Click on the OK button.</p> <p> <i>When the Add button is clicked to create a new clinical note, the Type field defaults to Research/Clinical Trial Records.</i></p> 


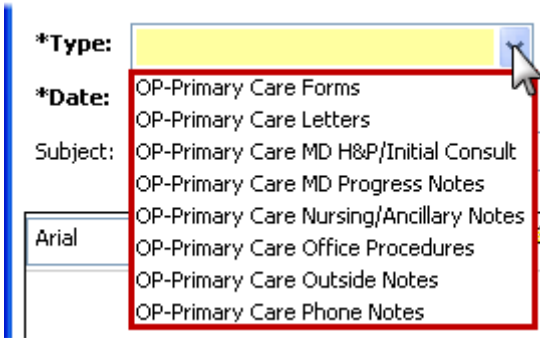
Continued on next page

Clinical Notes, Continued

Add a Clinical Note

Clinical Notes can be used for documenting letters to patients or for notes that are not facilitated by a form, procedure, or other notes.

Note: Be sure to select the correct document type. The document type selected determines where the note is saved and stored.

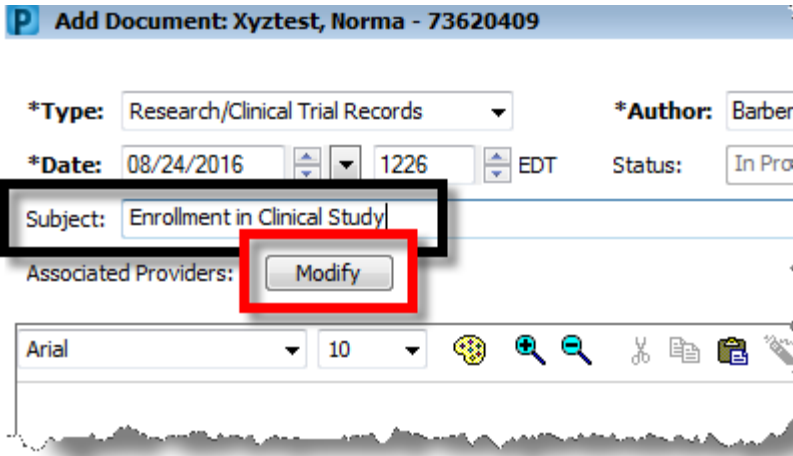
Step	Action
1.	Click the Add icon  located in the Clinical Notes toolbar. <i>The Add Document window displays.</i>
2.	Designate the note Type to be used: <ol style="list-style-type: none"> Accept Default Document Type (<i>see above section</i>). Skip to step 3. Select a different Type: <ol style="list-style-type: none"> Click the drop-down arrow in the Type field. Select the appropriate note type from the list displayed. 
3.	Verify the author's name is the person who is signed into PowerChart .
4.	Change the author's name, if needed.
Optional 5.	Search for and select the appropriate physician's name if the scanned document needs to route to the provider's Inbox to be reviewed and signed.
6.	Enter definitive, succinct subject for the note in the Subject field.
7.	Type the note detail in the white free text area.
8.	Click Sign . <i>The View New Document window displays.</i>
Optional 9.	Select the checkbox next to " Remember my selection and do not display this message again " to automate that all new notes display upon signing.
10.	Click Yes . <i>The new note displays in the Result Pane, to the right.</i>

Continued on next page

Clinical Notes, Continued

**Request Review
of Treating
Provider**

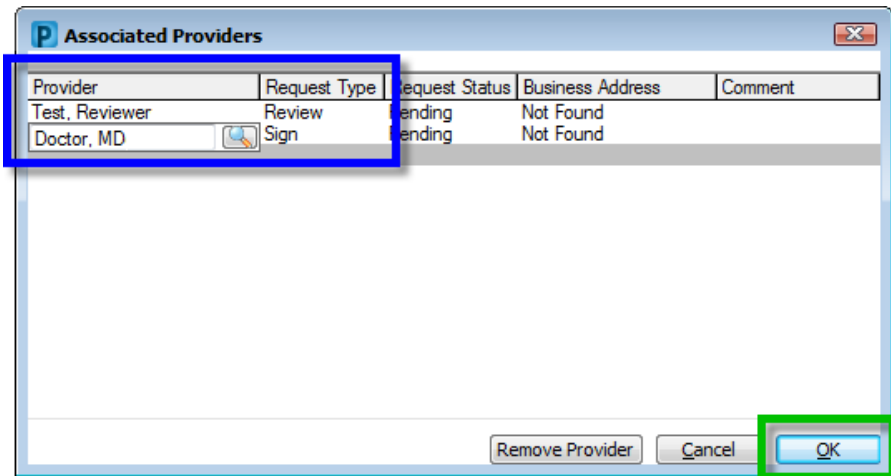
Any clinical note can be forwarded to other clinicians for review and signature. For example, upon completion of a clinical research enrollment a note can be forwarded to the treating physician to inform them of the patient’s enrollment and to the principal investigator for study oversight.

Step	Action
1.	Start a new clinical note.
2.	<div>Enter a definitive, concise Subject.</div> <div></div>
3.	<div>Click the Modify button.</div> <div><i>The Associated Providers dialog box displays (see screen shot, next page).</i></div>

Continued on next page

Clinical Notes, Continued

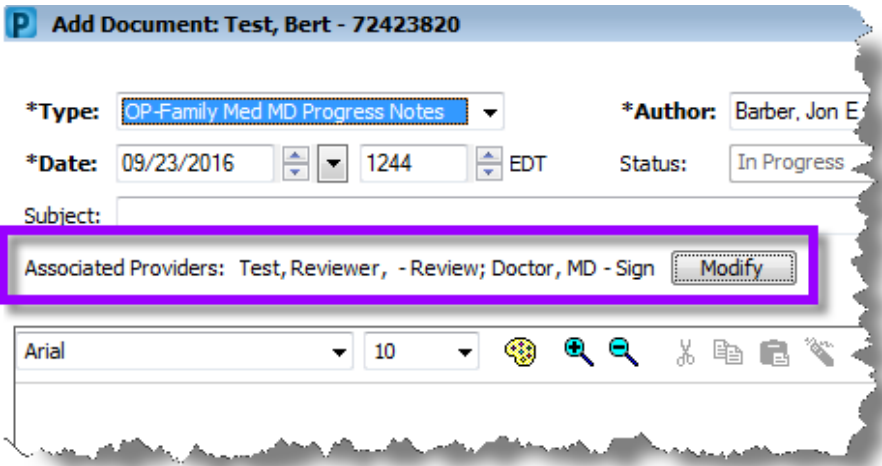
Request Review of Treating Provider (continued)

continued from previous page...	
Event	<p><i>The Associated Providers dialog box displays.</i></p> 
4.	<p>Click the Search button (small blue magnifying glass) in the Provider column.</p> <p><i>The Provider Selection dialog box displays.</i></p>
5.	<p>Search for the Reviewer.</p> <p><i>The Provider Selection dialog box displays.</i></p>
6.	Select the reviewer .
7.	<p>Click the OK button.</p> <p><i>The Provider Selection dialog box closes.</i></p>
8.	Click the Search button a second time.
9.	Search for the Provider .
10.	Select the provider to sign the note.
11.	<p>Click the OK button.</p> <p><i>The Provider Selection dialog box closes.</i></p>
12.	<p>Click the OK button.</p> <p><i>The searched for reviewer and provider's names display next to the Associated Providers label (see screen shot, next page).</i></p>

Continued on next page

Clinical Notes, Continued

Request Review of Treating Provider (continued)

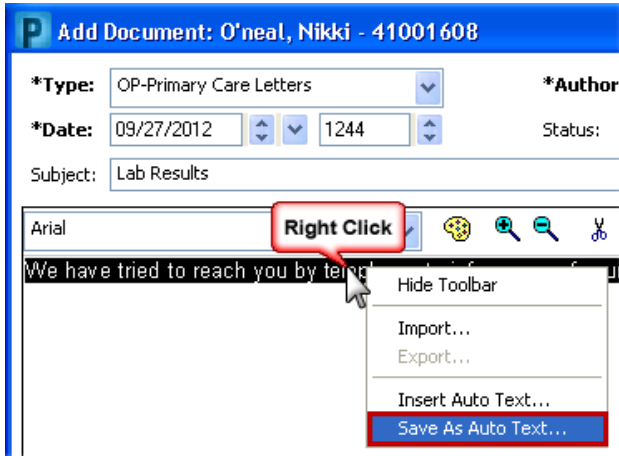
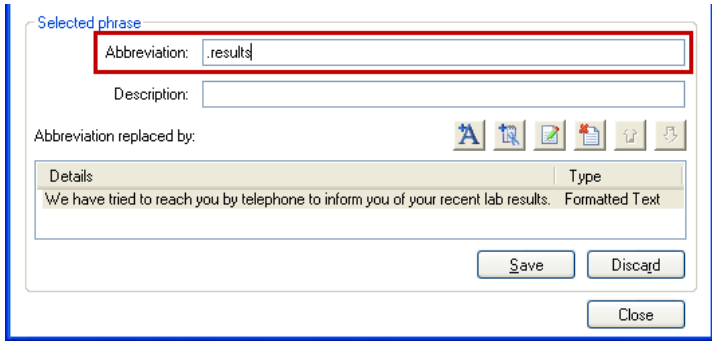
<i>continued from previous page...</i>	
Event	<p><i>The searched for reviewer and provider's names display next to the Associated Providers label.</i></p> 
13.	Complete the clinical note.
14.	<p>Click the Sign button.</p> <p><i>The associated provider receives an inbox message to review the clinical note.</i></p>

Continued on next page

Clinical Notes, Continued

Create Auto Text

Auto Text is a time-saving feature. It allows the user to set up key words or phrases that can easily be accessed to quickly populate a note being created.

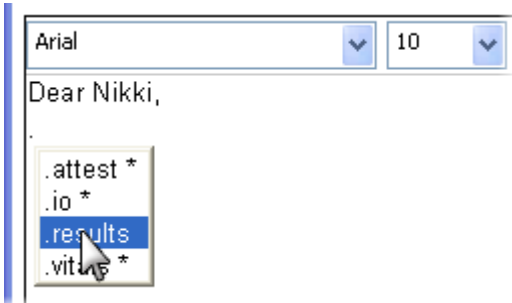
Step	Action
1.	Add a new Clinical Note .
2.	Type the text to be saved as Auto Text in the body of the note.
3.	Highlight the entered text.
4.	Right-click the highlighted text.
5.	<p>Select Save as Auto Text from the menu.</p>  <p><i>The Manage Auto Text window displays with the typed text under Details in the Abbreviation replaced by field.</i></p>
6.	<p>Type a name for the auto text beginning with a period. (i.e. – .results) in the Abbreviation field.</p>  <p>Note: Enter a Description for more clarification when inserting Auto Text.</p>
7.	Click the Save button.
8.	Click the Close button when finished.

Continued on next page

Clinical Notes, Continued

Insert Auto Text

Once **Auto Text** has been created, it can easily be accessed and inserted for quicker documentation of **Clinical Notes**, **PowerNotes**, and **Messages**.

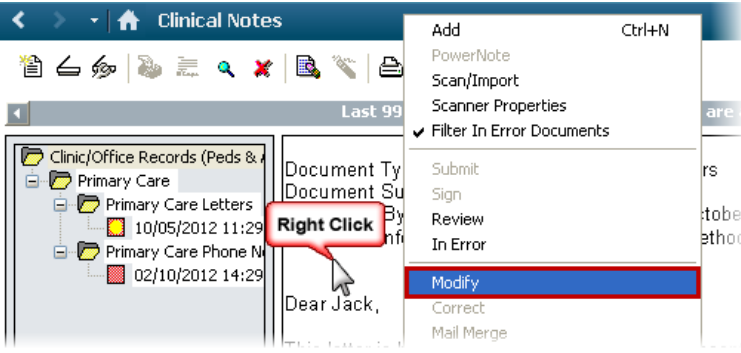
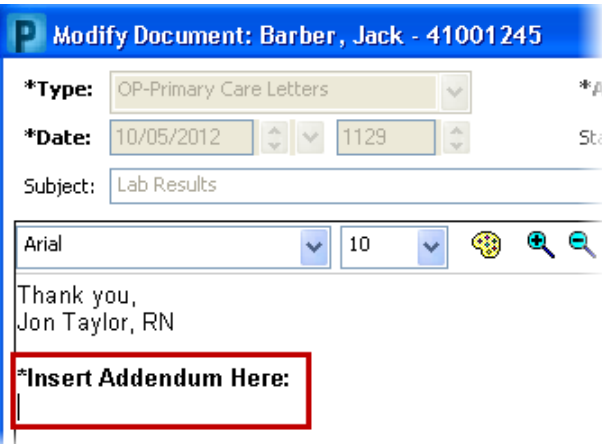
Step	Action
1.	Place the cursor in the location to insert the Auto Text .
2.	Type a period, (“.”). <i>The Auto Text abbreviation list displays.</i> Note: Users can also right-click and select Insert Auto Text .
3.	Double-click on the appropriate abbreviation.  <i>The auto-text is placed in the body of the note.</i> Note: This same list of auto text is also available in PowerNotes and Message Center .

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Clinical Notes, Continued

Modify a Clinical Note

Once a **Clinical Note** has been created, it can be modified to add additional information.

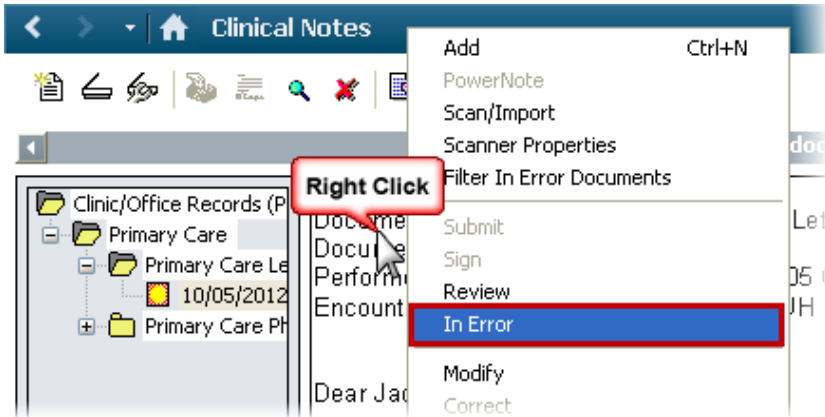
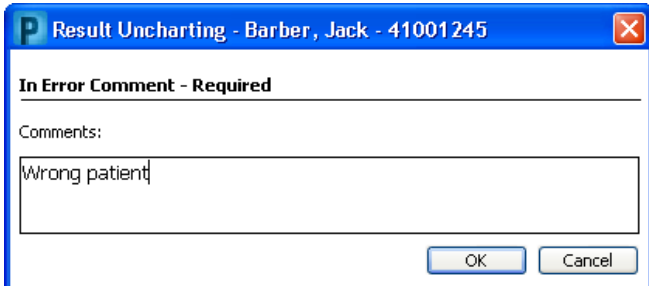
Step	Action
1.	Open the Clinical Note to be modified.
2.	Right-click on the note text. 
3.	Select Modify .
4.	Enter the additional note below the “ Insert Addendum Here ” instructions. 
5.	Highlight any original text to be removed.
6.	Click the Strike through button on the toolbar.
7.	Click Sign when finished.

Continued on next page

Clinical Notes, Continued

Mark a Clinical Note In Error

Clinical notes entered in error (i.e. – on the wrong patient) can be uncharted.

Step	Action
1.	Open the Clinical Note to be uncharted.
2.	Right-click on the body of the note.
3.	<p>Select In Error.</p>  <p><i>The Result Uncharting window displays.</i></p> <p>Note: Rather than right-click and clicking In Error, the user may simply click the red ✖ on the Clinical Notes toolbar.</p>
4.	<p>Type a reason for uncharting the note in the Comments field.</p> 

Continued on next page

Clinical Notes, Continued

Mark a Clinical Note In Error (continued)

continued from previous page...

5.

Click **OK** when done.

The open note displays ***In Error Report*** and a Result Comment at the top of the note.

Last 999 Documents : 2 out of 2 documents are accessible. (Document)

Document Type: OP-Primary Care Letters

Document Subject: Lab Results

Performed By: Taylor10, Jon on 05 October 2012 11:34

Encounter Info: 000262176985, IUH Methodist Hosp, Outpatient, 05/03/2012 -

* In Error Report *

Result Comment by Taylor10, Jon on 05 October 2012 15:14

Wrong patient

Dear Jack,

Note: The uncharted note displays a red icon with an X on it in the Navigator Pane when the filter “**Filter In Error Documents**” is not selected.

Clinic/Office Records (Peds & Adult)

Primary Care

Primary Care Letters

10/05/2012 11:29 Taylor1

Primary Care Phone Notes

02/10/2012 14:29 Taylor,

Continued on next page

01-13-17


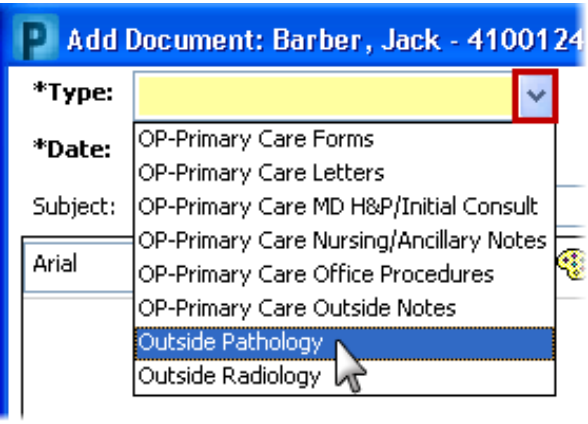
Version 2

Page 85

Clinical Notes, Continued

Scan Documents into Clinical Notes

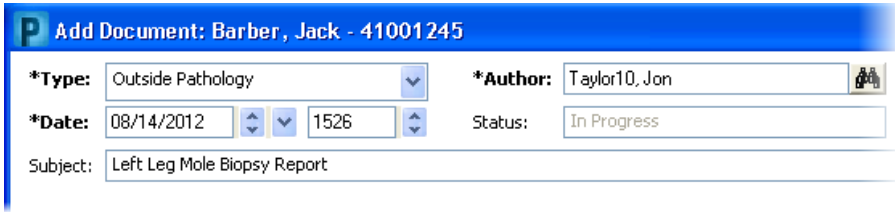
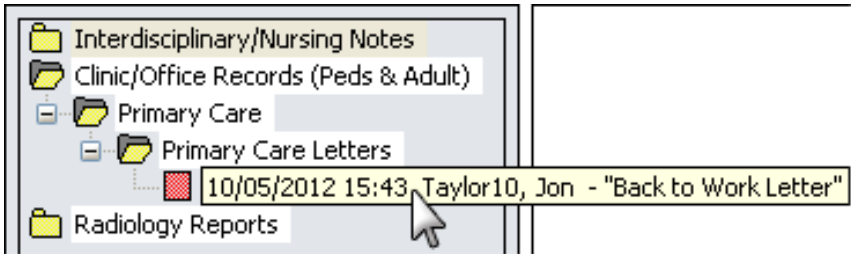
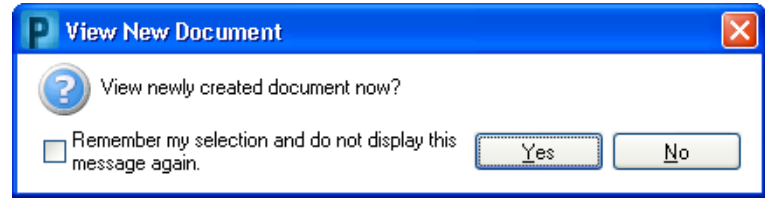
Paper documents obtained during the clinic visit or documents received from non-IU Health facilities may be scanned into PowerChart from the Clinical Notes band. At the end of this process the user will be given the option to forward this note to another for review.

Step	Action
1.	Click the Scan icon  in the Clinical Notes toolbar. <i>The Add Document window displays.</i>
2.	Click the drop-down arrow in the Type field. <i>A list of note types displays.</i>
3.	Select the appropriate note type (i.e. – Outside Pathology). 
4.	Verify the author's name is the person who is signed into PowerChart. Note: Select the appropriate physician's name if the scanned document needs to be signed by a provider.
5.	Enter the original date of the document being scanned in the Date field. Note: The date may be outside the parameters of the selected encounter's date of service. A future date cannot be selected.

Continued on next page

Clinical Notes, Continued

Scan
Documents into
Clinical Notes
(continued)

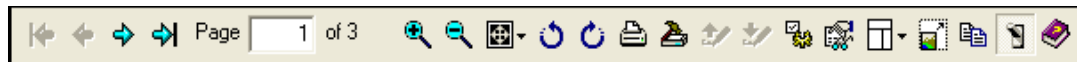
<i>continued from previous page...</i>	
6.	<p>Type a brief title in the Subject field.</p>  <p>Note: It is particularly important to give each document a definitive Subject when scanning documents. The Subject displays when using the “hover” feature in Clinical Notes, which facilitates document searching in the future.</p> 
7.	Load the document into the appropriate scanner.
8.	<p>Click the Scan button located in the lower right-hand corner.</p> <p><i>The document displays in the Add Document window.</i></p>
9.	<p>Verify the scanned document displays correctly.</p> <p>Note: Click the Cancel button if the document needs to be rescanned.</p>
10.	<p>Click the Sign button when finished.</p> <p><i>The View New Document window displays.</i></p> 
11.	<p>Make the decision to view or not to view the scanned document.</p> <ul style="list-style-type: none"> Click Yes to “View the newly created document now”. Click No to close the window.

Continued on next page

Clinical Notes, Continued

Options for Viewing Scanned Documents

When viewing scanned documents, use the document control options at the **bottom of the screen** to move from page to page, zoom in and out, or rotate the document as necessary.



Histories

Overview

The **Histories** band is a single area to document and review the following patient historical data:

- **Pregnancy**
- **Past Medical**
- **Procedure**
- **Family**
- **Social History**

A screenshot of the 'Histories' band interface. At the top is a dark blue header with a home icon and the text 'Histories'. Below the header is a row of five tabs: 'Pregnancy' (which is highlighted with an orange border), 'Past Medical', 'Procedure', 'Family', and 'Social History'.

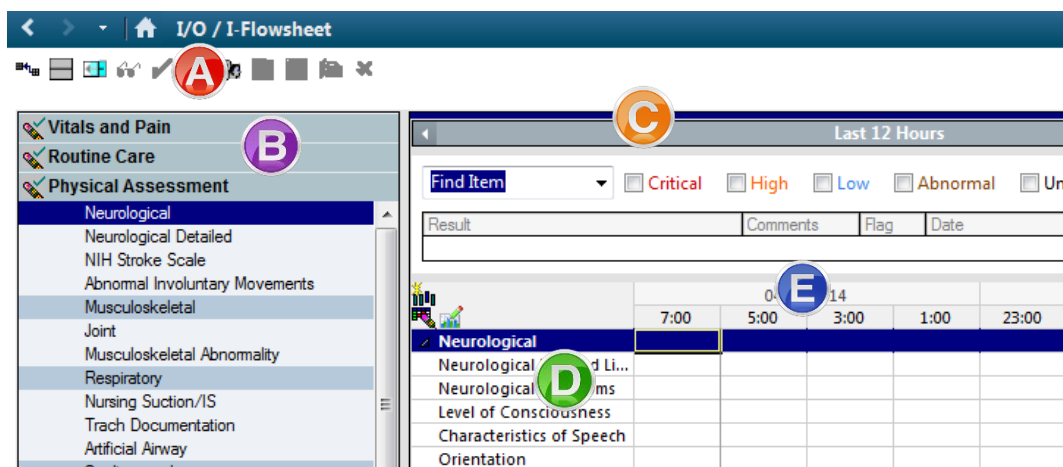
A screenshot of the 'Histories' band interface with the 'Past Medical' tab selected. The interface shows a 'Mark all as Reviewed' button at the top. Below it is a section titled 'Past Medical' containing a '+ Add' button, a 'Modify' button with a pencil icon, and a 'Display: All' dropdown menu. At the bottom is a table with the following headers: 'Name of Problem', 'Onset Date' (with a dropdown arrow), 'Age at Onset', and 'Last Reviewed'.






Note: Information entered in the **Histories** section of the chart can be auto-populated in a **PowerNote** when selected. See the **PowerNote** section of this guide for specific instructions.

I/O / I-Flowsheet

Overview

The I/O / I-Flowsheet (I-Flowsheet) facilitates clinical documentation. Clinicians use the I-Flowsheet to document patient related clinical data such as head to toe assessments, vital signs, safety measures, intake/output, etc. The window is divided into several sections.



Section	Definition / Function
	I/O / I-Flowsheet Tool Bar Contains icons used in working with the I/O / I-Flowsheet. For example: the green checkmark is used to sign documentation and the cancel icon is used to cancel unsigned documentation.
	Documentation Bands/Navigator Keep I/O / I-Flowsheet organized into documentation categories such as Vitals, intake and output, patient education, etc.
	Information Bar Indicates current time view. The timeframe can be changed by right-clicking on the information and changing the time parameters.
	Documentation Sections Within each Documentation Band, there are multiple sections to further organize documentation on the I/O / I-Flowsheet. Charting patient information is done a section at a time; i.e. vital signs.
	Time Frame Columns The default view on the I/O / I-Flowsheet is hourly. The most recent time is on the left going in reverse chronological order.

Continued on next page

The MAR (electronic Medication Administration Record)

Introduction

MAR stands for Medication Administration Record and is considered the “source of truth” for all medications. Sometimes the MAR is referred to as the “eMAR,” the electronic Medication Administration Record.

Step	Action
1.	Notice that the MAR defaults to the Time View . <i>The eMAR is a 24-hour medication view. It defaults to the Time View in the navigation pane on the left. This provides time-based columns to view medications for a patient.</i>
2.	Click the Route View button, at the bottom of the navigation pane. <i>View changes to reflect Route View.</i>
3.	Click the Therapeutic Class View button. <i>View changes to reflect Therapeutic Class View. Can view Beta Blockers from this view.</i>
4.	Click the Plan View button. <i>This will display meds within each plan.</i>
5.	Click back on the Time View button.

eMAR Page Details

The first column lists the Medication Orders. Under each medication are the details of the order for that administration. If you see an ellipsis (3 dots) at the end of the details that means there are more details to be seen. You can hover over the details section to see all details.

Since the MAR is a 24-hour medication sheet, **task boxes are seen for whenever a dose is due.** For example, the Cefazolin is ordered Q8H, so there is a task box for 0600, 1400, etc.

If a task box is red it means the medication is overdue. A medication is considered late if it is 61 minutes past due. Blue task boxes are current or future doses.

Scheduled medications have a blue background and tasks remain in the time column for when they are due, until they are actually charted against. After being charted, they move to a column for the time they were actually administered.

Continued on next page

The MAR (electronic Medication Administration Record), Continued

eMAR Page Details (continued)

Unscheduled, PRN, and Continuous Infusions are not timed, so those task boxes float along the current time column – which is the yellow column. When a Scheduled Medication is charted, the task box disappears and an administration result appears. For Unscheduled, PRN, and Continuous Infusions the task box does not disappear, but the words “Last given” and the date and time it was given appears.

Continuous Infusions are displayed on a blue background, just like Scheduled Medications.

PRN medications are displayed on a green background. Users can either scroll to the PRN meds in the Medication List or click the green PRN button in the navigation pane.

Note: The Task Box for a PRN remains, allowing for more doses, as appropriate.

Discontinued medications display with a gray background. This is where information on previously ordered medications that have been discontinued is listed. And don’t forget that one-time orders are discontinued as soon as they are given so they appear in the gray area, as well.

Unscheduled medications display with an orange background.

STAT Medication Orders

If the provider orders a medication order with a priority of **STAT**, the medication task box is red with “**STAT**” displayed in the task box. **STAT** orders are always **ONCE** orders. If there is a continued need for the medication, a separate order must be entered.

Medications	04/13/2010 9:00	04/13/2010 12:54	04/13/2010 04:00
furosemide			
haloperidol (Haldol) 5 mg, IV Push, Injection, ONCE, STAT, 04/13/10 12:54:00, 04/13/10 12:54:00		STAT	
haloperidol			
pharmacy taper (predniSONE taper) 04/13/10 13:00:00, Communication order only; pharmacy to take appropriate action. 20 mg Orally Q6hrs x 8 doses 10 mg Orally Q6hr ...			
pharmacy taper			
vancomycin 1,000 mg, IVPB, Q12H, 04/06/10 13:00:00 Target Dose: vancomycin 15 mg/kg, 04/06/201 ...			

Pregnancy Summary

Overview

The Pregnancy Summary band provides a quick overview of information relevant to pregnancy. It captures and displays data from the diagnosis of pregnancy through the postpartum period for the patient's current and previous pregnancies.

IMPORTANT: Users will only be able to see the start and end date of the pregnancy. The onset date is the beginning of their pregnancy starting at their last menstrual period (LMP) and ending two weeks post-delivery. Anything that happens with the patient during the 9 months they are pregnant will show up on the Pregnancy Summary. Anything before the onset date does not show up on the Pregnancy Summary.

The screenshot shows a web-based medical interface titled "Pregnancy Summary". At the top, it displays patient information: "O'neal, Nikki", Female, 19 Years, DOB: 07/11/1993, MRN: 41001608, FIN: 000262066202, and Visit Reason: abdominal pain. Below this is a section titled "Pregnancy Overview and Contact Info" with a tabbed interface. The "Current Pregnancy" tab is active, showing details for EDD (4/12/13), EGA (11weeks 3days), Gravida/Parity (G1,P0(0,0,0,0)), Multiple Fetuses (--), and Feeding Plan (--). The "Contact Info" tab is also visible, showing details for Age (19 Years), DOB (7/11/93), Race (CAUCASIAN), Ethnicity (--), Language (English), Education (--), Occupation (--), Marital Status (Single), Domestic Partner (--), FOB (--), and Insurance (Self Pay). An "Update Pregnancy" dropdown menu is located to the right of the tabs.

Pregnancy Overview and Contact Info	
Current Pregnancy	Contact Info
EDD: 4/12/13 (Initial)	Age: 19 Years
EGA: 11weeks 3days	DOB: 7/11/93
Gravida/Parity: G1,P0(0,0,0,0)	Race: CAUCASIAN
Multiple Fetuses: --	Ethnicity: --
Feeding Plan: --	Language: English
	Education: --
	Occupation: --
	Marital Status: Single
	Domestic Partner: --
	FOB: --
	Insurance: Self Pay

Continued on next page

Pregnancy Summary, Continued

Navigate the Pregnancy Summary Section

All sections on the Pregnancy Summary screen link to other tabs. Hover the mouse over the section titles to view the tabs they link to when clicked.

Section	Description
Pregnancy Overview and Contact Info	Current Pregnancy tab: Displays current pregnancy information, such as EDD, EGA, Gravida/Para, as well as age, race, and body measurements. Allows the user to cancel, close and modify the pregnancy from the Update Pregnancy drop- down box. Contact Info tab: Displays the patient's address, emergency contact, and primary physician information.
Ambulatory Flowsheet	The Ambulatory Flowsheet section displays data (i.e. – Weeks Gestation, Fundal Height) that is specific to the Ambulatory clinic's workflow.
Inpatient Flowsheet	The physician customizes date points the physician wants to see. The Inpatient Flowsheet link launches to the Task View section on the I/O / I-Flowsheet band.
Results Timeline	An interactive timeline that displays data by trimester. Color bars display when there is activity related to patient Visits, Labs, and Ultrasounds . Results Timeline is hyperlinked to Results Review .
EDD Maintenance	Displays the initial and final EDD/EGA. Also allows the user to add an EDD/EGA by LMP from here.
Fetal Monitoring	Launches to historical strips.
Genetic Screening	Displays the patient's genetic history. This information is collected from the mother's family history. The link launches history controls.
Home Medications	Displays home medications that have been documented on the patient. The Home Medications link launches to the Medication List band to document new or update current home medications.
Medications	Displays scheduled, continuous and PRN medications that have been ordered for the patient. It also displays administered, suspended, and discontinued medications. The Medications link launches to the MAR band.

Continued on next page

Pregnancy Summary, Continued

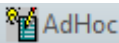
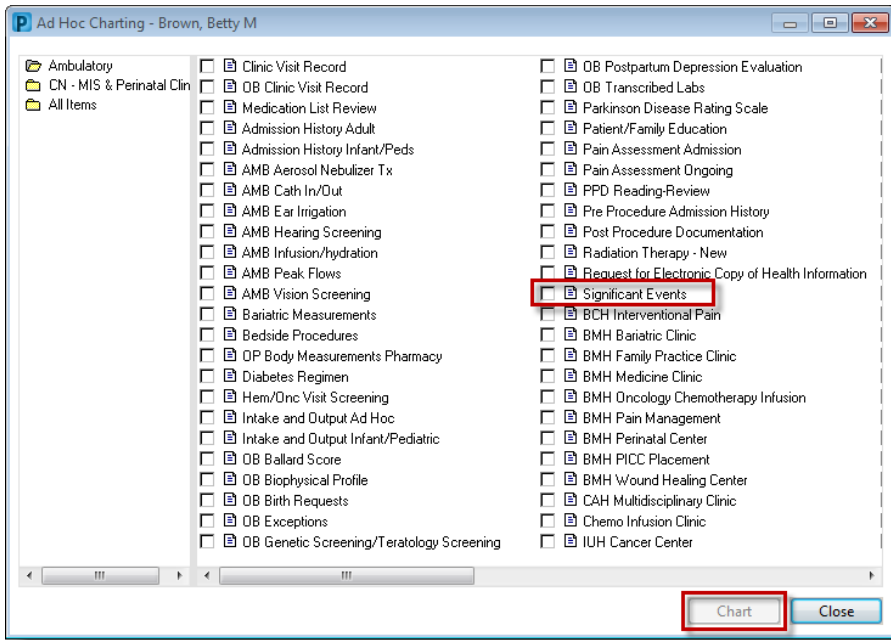
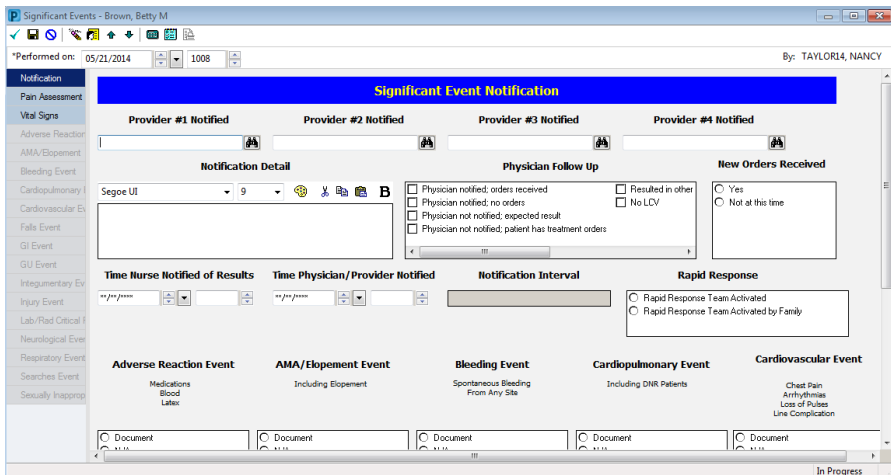
Navigate the
Pregnancy
Summary
Section
(continued)

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Documents	Displays any type of note outside of OB notes (i.e. - nursing notes, progress notes, physician notes, etc). Click on the Date/Time hyperlink next to a note to display the note. The Documents link launches to the Clinical Notes band.
Birth Plan	Displays birth plan information documented on the Birth Request PowerForm. The Add button launches the Birth Request PowerForm.
Pregnancy History	Displays previous pregnancy information. The Pregnancy History link launches to the Pregnancy tab on the Histories band.
Problems	Displays problems documented on the patient. The Problems link launches to the Problems and Diagnosis band.
Past Medical History	Displays past medical history documented on the patient. The Past Medical History link launches to the Histories band. Click the Past Medical tab to access and/or enter past medical information.
Procedure History	Displays the procedure history documented on the patient. The Procedure History link launches to the Histories band. Click the Procedure tab to access and/or enter information.
Social History	Displays the social history (i.e. – alcohol, substance, and tobacco usage) documented on the patient. The Social History link launches to the Histories band. Click the Social History tab to access and/or enter information.
Diagnostics	Displays any diagnostic test or procedures results performed on the patient. The Diagnostic link launches to the Result Review band. Click the Diagnostics tab to view additional information.
Labs	Displays lab results performed on the patient. The Lab link launches to the Result Review band to view additional information. Click the Lab Result tab, if necessary, to view additional information.
Microbiology	Displays microbiology results performed on the patient. The Microbiology link launches to the Result Review band to view additional information.
Pathology	Displays pathology results performed on the patient. The Pathology link launches to the Result Review band to view additional information. Click the Pathology tab to view additional information.

Continued on next page

Significant Events

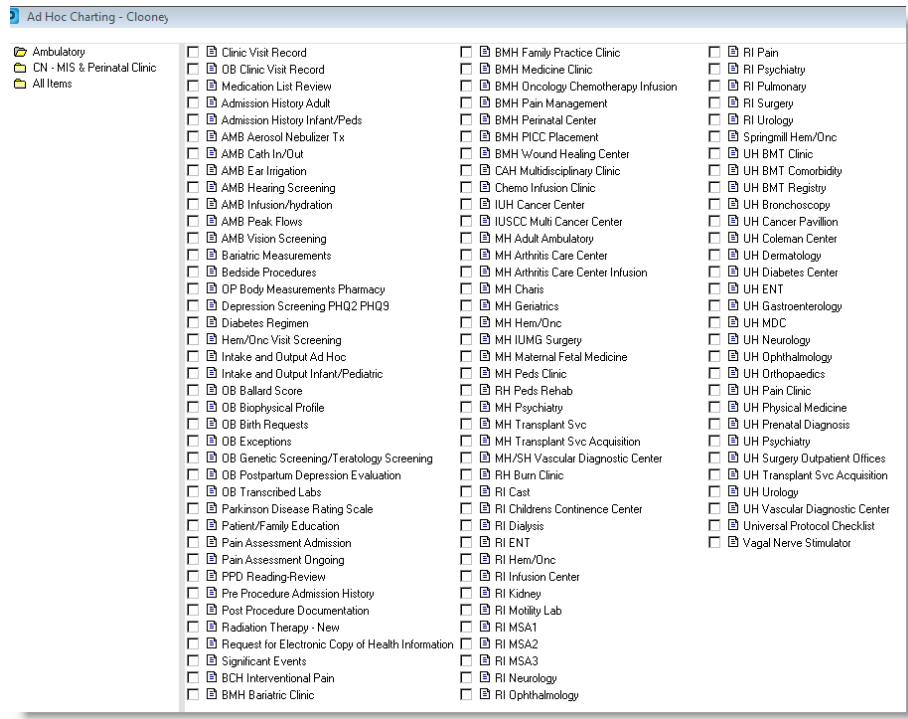
Complete a Significant Events Form

Step	Action
1.	 Click the AdHoc button in the PowerChart toolbar.
2.	Select the checkbox for Significant Events and then. 
3.	Click the Chart button.
4.	Fill out any necessary fields and. 
5.	Click the Sign (green checkmark).

Charge Forms

Access a Charge Form

These instructions are for a Hospital facility Charge Form and not all clinics will utilize Cerner to input charges.

Step	Action
1.	Click the Ad Hoc toolbar button. <i>A screen displays asking for Charge Details.</i>
2.	Click the Ambulatory folder. <i>Available Charge Forms display.</i>
3.	Click the check box for the correct charge form.  <p>Note: If a problem or diagnosis is entered for the current encounter, charted information will automatically populate.</p>
4.	Click OK . <p>Note: Rev Cycle will provide detailed training on entering charges.</p>

Use the Tracking Shell

Access the Tracking Shell

The Tracking Shell provides a high-level overview of current patients. The view on the Tracking Shell will be dependent on the location of the Cerner user, whether they are using an IU or IUH computer.

Step	Action
1.	Click the Tracking Shell button on the View toolbar. <i>The Tracking Shell displays. The view is location specific and will not include all the locations displayed here.</i>

Use the Filter to View One or Two Units

It is possible to select just one (1) unit and to add a second unit.

Step	Action
1.	Click the Filter drop-down arrow.
2.	Select the unit to view. <i>The view is changed to reflect the new location.</i> Note: The number of patients and the average LOS (Length of Stay) is displayed next to the Filter drop-down window.
3.	Click the Filter drop-down arrow at second time.
4.	Select the second unit. <i>The patients on the second unit are added to the list and display at the bottom of the window.</i>

View All Patients

Step	Action
1.	Click the Filter drop-down arrow.
2.	Select the All Patients option. <i>All patients are now displayed.</i>

Continued on next page

Use the Tracking Shell, Continued

Sort by Column The Tracking Shell can be sorted by any column header displayed.

Step	Action
1.	Click any header in the Tracking Shell window. <i>The Tracking Shell is sorted by that column.</i>
2.	Click a second header in the Tracking Shell window. <i>The Tracking Shell is now sorted by that second column.</i>

Hovering Capabilities

The information that displays will vary based on the column and icon being hovered over with the mouse pointer.

For example, some event icons will display the:

- Event name
- Status
- When it was requested
- Who initiated the action

Other columns, such as Lab and Rad columns will display the:

- Orders associated with that column and the
- Departmental status of the orders

Step	Action
1.	Hover over an LOS entry. <i>A pop-up displays the Arrival date and time.</i>

Continued on next page

Use the Tracking Shell, Continued

Check-in as a Provider

Upon logging in for the first time at each shift, you will be asked to check-in as a provider.

Note: In PROD you will only need to add your display name and choose your color selection once. The system will default to your choices in future logins.

Step	Action
1.	Click the Yes button on the Available Provider Check-In confirmation box. <i>Provider Check-in dialogue box displays.</i>
2.	For Display Name, delete the initials and type your own initials .
3.	In the Provider Role drop-down, select Nurse .
4.	In the Default Relationship drop-down, select Registered Nurse .
5.	Click the checkbox for Associated Provider Color . <i>Color window displays.</i>
6.	Select any color .
7.	Click the OK button. <i>Provider check-in window re-displays.</i>
8.	Click the OK button. <i>Tracking List displays to the appropriate tab.</i>

ED Patient Summary

Overview

This is a view only page that pulls patient information from:

- Registration.
- Quick Triage Form.
- Past Medical History.
- ED Special Charting Form.

The screenshot displays the 'ED Patient Summary' interface. On the left is a vertical menu with options: Results Review, Growth Chart, Alerts, Allergies, Blood Bank, Chart Summary, Clinical Notes, **ED Patient Summary**, ED Physician Summary, Flowsheet, Forms, UO / I-Flowheet, Immunizations, MAR, MAR Summary, Medication List, Misc, Nurse Review, Orders, Overview, Patient Information, PowerNote, Safe Handoff, Surgery Meds/Fluids, Task List, ED Summary, Problems and Diagnoses, Histories, and Plan of Care Summary. The main content area is titled 'ED Patient Summary' and contains the following sections:

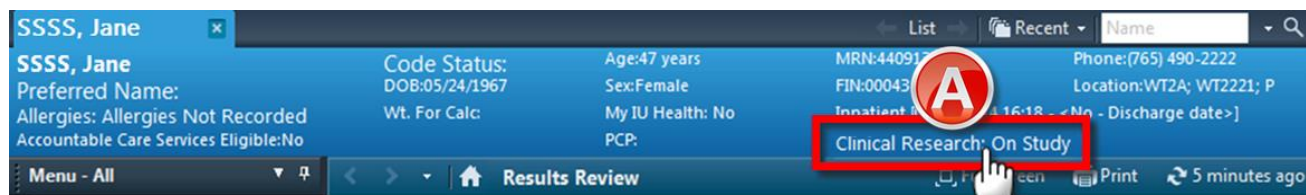
- Header:** Age: 7 Yrs, Sex: Male, Adm.Date/Time: 10/13/14 21:20:00, ED LOS: 0 days 00:02:00, Isolation: Code Status: VIP Status:
- Chief Complaint:** Acuity: Mode of Arrival: Transfer of Care:
- Tetanus/Immunizations:** Height: Weight:
- Attending MD:** Emergency Services, Medicine Admitting MD: Emergency Services, Medicine MED SVC: X OR-Emergency PCP: Unknown MD, Physician
- Medications Reviewed and Updated For This Visit:** NO
- Medications:**
 - Pentacel (Pentacel Vaccine Kit (Outpatient Only))
 - acetaminophen (Tylenol)
 - acetaminophen/dextromethorphan/PE (Tylenol Children's Plus Cold & Cough)
 - cyanocobalamin (Vitamin B12 100 mcg oral tablet)
 - ibuprofen (Ibuprofen 800 mg oral tablet)
 - influenza virus vaccine, inactivated (influenza virus vaccine, inactivated quadrivalent intramuscular suspension)
 - influenza virus vaccine, live (influenza virus vaccine, live, quadrivalent- (FluMist))
 - levothyroxine (Synthroid 0.025 mg (25 mcg) oral tablet)
 - morphine (morphine 100 mg/12 hours oral tablet, extended release)
 - prednisONE (prednisONE 2.5 mg oral tablet)
 - rifaximin (Xifaxan 550 mg oral tablet)
 - sulfasalazine (sulfasalazine 500 mg oral tablet)
 - tetanus/diphtheria/pertussis, acell (Tdap (Tdap))
- Allergies:** Banana, codeine, inhalation anesthetics
- Past Medical History:**
 - Cardiovascular Health History: Atrial Septal Defect
 - Other: Reviewed this encounter
 - Genetic Disorder Health History: Cystic Fibrosis; Down Syndrome
 - Other: Reviewed this encounter
 - Genitourinary Health History: Buried Penis; Continuous Ambulatory Peritoneal Dialysis
 - Other: Reviewed and patient is not currently undergoing dialysis to date.
- Past Surgeries:** Hysterectomy; Appendectomy; Cesarean Section; Cholecystectomy; T & A; Hysterectomy
- Past Social History:**
- Social History:**
- Alcohol Assessment:** alcohol concerns: No. Drink and drive?: Yes.
- Home/Environment Assessment:** situation: Parents Divorced. Lives with Alone.

On the right side, there is a section for 'ED Clinical Notes (Current Encounter)' with the text '***NO ED NOTES FOUND***'. Below this is a 'Flowsheet' section with a dropdown menu set to 'Lab/POC Results Flowsheet' and a 'Level' dropdown. A date range '16 August 2015 10:46 - 18 August 2015 10:46 (Clinical Range)' is displayed. A 'Navigator' section is also present, showing 'No Results Found'.

Clinical Research Identification and Information

Clinical Research Section

If a patient is enrolled in a Clinical Research study, a notification will appear on the Patient Demographics Bar, on the bottom, right side, as shown below.



Step	Action
1	<p>Access the Clinical Research page, using one of the following two methods:</p> <p>Option A: Click the Clinical Research On Study link on the Patient Demographics Bar (<i>above</i>).</p> <p>Option B: Click the Clinical Research band on PowerChart's navigator menu (<i>below</i>).</p> <p><i>The Clinical Research page and the "Clinical Trial/Study Enrollment History for Patient" pane displays.</i></p>
2	<p>Right-click on the protocol name.</p> <p><i>A context menu displays.</i></p>
3	Click the View Document command.
4	Close the document when finished.

Document Change Control

This page provides information regarding each update made to this guide. Contact the most recent author with any questions, comments, or corrections.

Update	Date	Author(s)	Design Team	Comments
1.0.0	11-24-2015	Christie Prosser	Ronica Pate	Created for Research. Material originated from Ambulatory Clinical Support Guide
1.0.1	05-25-16	Jon Barber	Beverly Hagler	Inserted How to Proxy and Use Patient Lists, pages 53-55.
1.1.0	08-17-16	Jon Barber	Beverly Hagler	Changes submitted by Susan Straka and Deb Broach
1.1.1	08-26-16	Beverly Hagler, Rita Kenney, Christie Prosser, Cheryl Yacone, Jon Barber	Jon Barber	Changes agreed upon by Rita Kenney, Cheryl Yacone and Jon Barber in an effort to address the needs of researchers and maintain the guide as a generic PowerChart guide.
1.1.2	08-31-16	Cheryl Yacone, Jon Barber	Jon Barber	Provided additional changes based on Rita Kenney's input.
1.1.3	10-07-16	Deb Broach, Susan Straka, Jon Barber	Jon Barber	Final edits from MFA, IU Health network connection meeting and other updates.
1.1.4	12-06-16	Panel for network connections	Jon Barber	Modified Connect to the IU Health Network section.
2	01-31-17	Deb Broach, Susan Straka Rita Kenney	Jon Barber	Final approval for distribution