Using PowerChart: Patient Chart View with Workflow MPages	Slide number
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Choosing a Relationship, Navigation Essentials, Patient Search Tools	3
We will look at an example of a Workflow View, the Overdue Medication Alert, and the Menu.	4
Choosing a Relationship	5
All access to patient records is monitored and recorded.	6
Prior to opening any record, you will be asked to choose a relationship to the patient.	6
Clicking No Relationship Exists, allows us to select our relationship.	6
Choose the relationship that best matches your reason for accessing the patient's chart.	7
In this case, we are going to choose Registered Nurse.	8
Nursing Support and Therapies will use Patient Care.	8
Click Establish.	9
Click the patient's name to open the chart.	10
Navigation Essentials	
When the patient chart is open, the name will appear on a tab on the left at the top of the screen.	12
The "X" on the tab can be used to close the patient chart view without closing PowerChart.	12
Under this tab is the Demographics Banner Bar. This will usually appear in blue and the patient's name appears again.	12
You may access additional patient demographic data by clicking the name.	12
In this window we see a little more general information. I'll click Ok to close this window.	13
To the right of the patient's name is their status of my EMHS Health which is the EMHS Patient Portal. This patient has not signed up yet.	14
Next is the patient's Age, Date of Birth, the Medical Record Number (which is patient specific) and FIN (which is	14

visit or encounter specific).	
The remaining two on this row is the patient's Dose Weight (the weight the pharmacy uses to calculate medication dosages) and their PCP.	14
If we hover with the mouse over the Dose Weight we see the date and time the weight was recorded into the system	15
On the bottom left, the patient's Allergies will display.	16
As with other areas on the banner bar, there is limited space for allergies. Therefore, the list may be truncated.	17
Additional allergy information may be seen by hovering over the allergies.	17
You may also click the allergies to view all available allergy data.	17
The patient's allergies and associated severity and reaction data display in this window.	18
The default display filter is "All." This means you are seeing Active and Inactive allergy documentation.	18
Use the Display filter drop down to change your view as needed.	19
Click OK to close the window.	20
Moving along the bottom of the Demographics Banner Bar, the patient's Gender, and Patient Status display.	21
Next we see the patient's registered Location within the hospital.	21
As with the patient's name, you may click the Location in the banner bar to access additional information.	21
This window will display additional patient visits (or encounters).	22
It's always important to make sure you are using the correct patient encounter.	22
Should you find that you are on the incorrect encounter, you may use this window to switch.	22
This patient has only one encounter, so I will open a different patient and demo searching for a patient.	22
The Search tools are in the upper right corner above the patient's banner.	24
There is a Quick Search option that allows you to enter a patient's MRN, Name or FIN.	25
I'll use the other search option, which is the magnifying glass icon.	26
This tool also allows us to search on the same fields as the quick search tools.	27

To open the correct visit, use a single click on the patient's name and the visits display in the bottom pane.	28
If we double click on the name, the visit in the first row below will open and it may be the wrong one.	28
All the visits display the FIN, Facility, Registration Date and Discharge Date.	28
Always select the correct visit from the lower pane and click OK.	30
Select the appropriate relationship.	31
And click ok.	32
As you can see, when you have two charts open at the same time, the Demographics Banner Bar of the second chart will appear in yellow.	33
This is meant to help you to differentiate between the two records. Having more than one chart open increases the potential for error.	33
Please use caution to ensure that you are reviewing and entering information on the correct patient's chart at all times.	33
This patient is on Airborne/Contact Isolation precautions.	34
Notice that the "Disease" is showing as MDRO (Multiple Drug Resistant Organism).	34
This tells us that the patient has tested positive for a resistant organism, but not which one.	34
We may click "MDRO" in the banner bar to see additional details.	34
To see the organism, click the Comments tab.	35
To close the chart without closing PowerChart, click the "X" beside the patient's name on the tab at the top of the screen.	39
Let's practice selecting the right visit. Click continue when ready.	40
A patient gets a unique FIN for each visit. Click the FIN Number that opens the Inpatient visit.	41
The FIN appears in the lower part of the screen and we would select the one on the row where the Encounter Type is Inpatient.	42
Next, where can we click to open a window that lets us view all this patient's visits without searching again?	43
When we hover over LOC: it becomes a hyperlink. So when we click it…..	44

Clicking a problem will open a window to see more info or make changes.	75
There is a Modify button inside this window.	77
The Status can be changed and comments can be made if needed.	79
I'll cancel without making any changes.	81
Health Concerns is a Meaningful Use 3 (MU3) requirement.	84
Nurses can document patient health concerns outside of the clinical problems being addressed (e.g. patient concerned about Safety at home).	84
The plus sign provides a drop down of categories.	84
We can scroll down to type in a description which is a required field.	87
Anything required displays in yellow and is marked with a red asterisk.	87
Scroll down to get to the Source options.	90
I'll cancel using the X at the top corner.	92
To make changes to a concern, click the concern to open the details window.	94
In this window, we can update and make changes using modify or resolve the concern as needed.	95
In the case we may have put it on the wrong patient's chart we can remove it.	95
I'll cancel without saving.	97
Refreshing your screen	99
It's important we constantly refresh our screen, to see the most current results or documentation from other care givers.	99
Each component has it's own refresh button, which refreshes and keeps us in the same component.	99
I'll refresh to show you.	99
If we refresh using the global minutes ago button, it moves us back to the top of the navigator.	100
I'll demo to show you how using this refresh icon moves us out of the Health Concerns component.	100
We have been moved to the first component and it is time consuming to get back where we were.	101

Try to get in the habit of using the refresh on each component to save yourself time and clicks.	101
Goals and Interventions is an MU3 requirement and used more by Ambulatory practices.	105
It pulls in previously documented information (across encounters) and allows clinicians to document goals and related interventions directly in the component.	105
There is a drop down to change the status as appropriate.	105
Click the plus sign to add a new goal.	107
We add the goal using the free text box.	109
Use the drop down fields below for dates, source, category and barriers.	109
Goals do not integrate with plans of care within Cerner.	109
Scroll down to get to the Interventions section.	110
Interventions can be added as a free text, along with other details using the options provided.	111
I'll cancel without making changes.	112
Allergies crosses visits and displays previously documented allergies.	115
Allergies must be reviewed and updated for each visit.	115
Clicking an allergy opens a window with more information.	115
The Allergies header and the Plus Sign are hyperlinks which takes us to the tool to make changes or add new allergies.	118
When we use a hyperlink to move to a different part of the chart, our location title changes from Nurse View to our new location.	119
A right click on an allergy provides us options to make changes.	119
These are the options available.	120
The Add button will open the add allergy window.	122
I'll cancel and go back to Nurse View to review more of the Handoff page.	123
The House icon in the title bar is the shortcut to go back to Nurse View and Handoff.	124

Home Medications pulls in previously documented medications taken at home and this list crosses visits.	128
Home Medications must be reviewed and updated at each visit.	128
When a medication is clicked we see more details.	128
There are options to Cancel/DC if we put the medication on the wrong patient or selected the wrong medication.	129
If the patient is no longer taking a medication we can Complete it, which indicates they were taking it but not any longer.	129
The X closes the window.	130
If the Home Medications have not been documented for this visit, this area would look different.	131
We would see the Status is Incomplete and be able to use the Complete Reconciliation button to document.	131
As with other components, the title is a link out to do documentation.	131
Use this if the Reconciliation Status is complete, and the patient remembers a medication not mentioned during the admission process.	131
From here it is important to use Document Medication by History button.	133
Selecting the Add button will place an order.	133
I'll go back to Nurse View Handoff.	134
Histories has 4 tabs, Procedure, Family, and Social are (read only) and Problems, which can be updated from here.	138
Like other areas of Handoff, when we click on a row, a details window opens.	138
As we've seen prior, use the x to close the details windows.	142
Some detail windows will have scroll bars to view more information.	146
In the details window we have modify and resolve options to make updates as needed.	150
Use the side arrow to open and view Resolved problems	151
As with some of the other components, the header takes you to the area in the chart to update or add to any of the histories.	152

Vital Signs has different tools and filters.	155
The plus sign takes us directly to Interactive View and I & O where we document.	155
You may also hear it called iView.	155
When in iView, patients on a floor with monitors need to be associated, so that window pops up first.	156
This will be part of your live clinical training.	156
Notice the title bar now displays Interactive View and I&O.	158
This is where most of the clinical documentation is done. You'll get this in a later eCourse.	158
I'll click the house icon to get back to Vitals in Handoff.	158
The filters default to Latest, and other options for Selected Visit or Last 12 hours.	159
The last 2 change your view, from flowsheet view with dates and times	160
to a view that displays the latest results in the first column, and previous in an Ambulatory condensed view.	161
Be careful with the Ambulatory view as the results will not always be the same date or time.	161
Colors are a visual queue for abnormal results.	162
Hovering over a result will display more information, with normal and critical, low and high ranges.	162
Clicking the result in the window opens up more information.	163
This gives you a place to see results with the dates and times in table format.	164
If you want to see a quick graph, click on the description label.	167
Click the description label again to close the graph.	168
Clinical Notes works the same as some of the other components we've looked at.	173
This component has two rows of filters.	174
Clicking a note will open it in view window.	178
Keep in mind there are two scroll bars.	180
The outside scroll moves you within the Handoff page.	180

To close a note we can use the tab or click the note row again.	182
Orders contain the orders that have not been completed, just keep in mind some orders will stay on the list like the diet or code status orders.	184
There are filters at the top to manage what displays in your view.	184
The Show filter allows you to change which orders you see.	185
The default is All Active Orders.	185
All orders five days back will display active and completed orders for the past 5 days.	187
This patient doesn't have orders within the last five days.	187
I'll put it on All Active Orders, which means any orders that are completed or resulted will not show in this filter.	188
Orders are grouped in their appropriate section to help find orders quickly.	190
Clicking in the checkbox opens the order in a window to make changes.	191
From the window we can Cancel/DC the order if requested by a provider.	192
I'll cancel this order to demo what happens.	193
Once we cancel an order, it must be signed by the nurse and then cosigned by the requesting provider.	194
The order appears with a strike thru it and it has been put in our shopping cart in the Nurse View toolbar.	194
I'll click the shopping cart.	194
Orders will be covered in a later eCourse so I'll cancel for now.	195
Notice the order still has the strike and it is still in the shopping cart.	196
To remove the strike on the order we click the order and select the Clear button in the window.	197
The shopping cart has been cleared out.	198
Lines/Drains/Tubes	199
This section will list lines, drains or tubes the patient has documented in iView.	200
The date is insertion date. The date will turn red when the dressing change for Peripheral and Central Lines becomes overdue.	200

Clicking the row will open the more information window.	200
As with other details windows, we can scroll to get more info.	201
From this view you would be able to see discontinued lines if needed.	203
Clicking the header will take you to iView where nurses document.	205
We are in iView in the Adult Lines - Devices band.	206
The default time is Last 12 hours. To change the time in the time bar, right click on it.	206
These are the timeframe options.	207
Our patient has an IV in the forearm.	208
Click the side arrow next to the label to open the documentation section.	208
You will get practice with iView in a later eCourse so let's go back to Handoff.	209
Actions & Situational Awareness should only contain non clinical information; it is Not part of the legal medical record.	211
Actions can be completed and will fall off when marked as done.	211
Completed tasks will be viewable when clicking the Show Completed link.	211
Completed tasks will display with a strike and display the name of the nurse that completed the task along with date and time.	212
If a task was put on a patient in error or we need to update it, we can hover over the task to see some editing icons.	213
Tasks can be modified or updated using the pencil icon.	214
The X will allow us to delete it.	214
Assessments pull in documented iView assessments.	217
The Plus sign takes you to iView.	217
From here you will scroll down in the assessments band to get to the section needed.	219
I'll go back to Nurse View.	220

The Ambulatory view puts the latest results in the first column even if they have different dates and times.	255
Click a result to open the details window.	258
This window provides details for normal, high and critical ranges.	259
Clicking the name of the lab ...	261
...opens a graph and the reference points will display details when hovering over one.	262
I'll close this patient using the x in the tab.	265
I&O provides a summary view to eliminate need to navigate to IView separately.	268
The timeframe displays at the top.	268
There is a scroll at the bottom.	269
We can open each section to see the details for Intake and Output.	273
The title is a hyperlink to iView where we document.	277
We may need to open the I&O band to document.	278
This band has a scroll as well, scrolling to the right displays previous documentation.	280
Let's go back to Nurse View.	283
Outstanding Orders display orders not completed.	287
Some orders will stay on the list for the entire visit like code status and diet. We can view more details by clicking on an order.	287
Quality Measures this is future functionality.	294
Discharge planning	295
I'll use by Recent dropdown again.	296
Anticipated Discharge Date and Home Lay Caregiver will populate based on Care Management and Nursing documentation.	299
Patient Provided Health Information URLs is a place for nurses to enter a patient-provided health information external hyperlink.	301

It may be used for items such as an electronic Advanced Directive.	301
We can type the URL here and save it using the green checkmark.	302
This will create an active hyperlink.	302
Overdue Medication Alert	304
Let's take a peek at what an Overdue Medication alert looks like.	305
When a nurse opens a patient's chart and the patient has medications overdue....	306
....nurses see an alert listing all the medications overdue.	307
This is helpful when starting your shift, to know which patient may need their medications now.	307
I'll close the chart now and move to the last part of our learning.	308
Menu Overview	309
By default, our patient's chart menu is collapsed and displays as a button.	310
When we hover over the button with our mouse, the menu appears and we see the other links that we may use infrequently.	311
We click the Thumbtack icon to pin the menu.	312
Notice the Nurse View Handoff navigator hides when the menu is pinned.	313
We can hover over the tab to get the navigator to pop out so we can use it.	313
When we slide off the navigator hides again.	315
Let's take a look at a few of these links.	317
Code Status/Advance Directives link contains several helpful components.	318
The Code Status pulls into its own component. (NOTE: The Orders link should always be used as the "source of truth".)	318
Clinical Documentation related to the patient's advance directives will show within the Advance Directives component.	318
The Documents component here will contain any scanned copies of the patient's advance directive documents.	318

MAR is the Medication Administration Record.	319
The MAR is organized as follows; Scheduled, Unscheduled, PRN, and Continuous Infusions.	319
Below those sections are the sections containing inactive medications. You will get hands on training in a live instructor led class.	319
Interactive View and I&O Link contains multiple bands that each contain many sections.	320
This is sometimes referred to as "iView".	320
The band at the top of the navigator will default open when you access the link for the first time.	320
There is a scroll in each of the bands.	321
The black checkmarks next to a section means there is documentation in that section.	325
Click the section to pull it to the top of your view window.	327
Activities and Interventions is used by clinical staff to keep track of patient care and communication tasks.	331
The link provides reminders and shortcuts to documentation tools.	331
The "Task Status" column provides information on whether the task is not yet documented or in progress.	331
If we had communication tasks to mark as done they would be on this tab.	332
Orders has a navigator with the order categories.	333
If the order is bold font with a checkmark there are active orders in it.	333
Medication List link displays the patient’s home medication list.	336
"Prescribed" medications have been ordered electronically by an EMHS provider.	336
"Documented" medications were ordered by an outside provider and recorded into the system by a nurse or MA.	336
The Documentation link allows you to access many reports, assessments, and notes.	337
The view defaults to the preview pane. We can remove preview by clicking on the preview icon.	337
To open in preview we click on a title.	340
Results Review link has a Navigator window on the left.	342

The date range which is in the date bar is the last 4 days. This patient has no recent results.	342
Notice the date bar for Result Extended is a greater timeframe for about 7 months.	343
This section pulls in the data documented in iView by a nurse or nursing support.	347
Assessments has a navigator with an inside scroll, and any item with a checkmark has documentation.	347
We have a scroll at the bottom to move left or right to see prior documentation.	347
Let's practice a quick tip. Click continue when ready.	348
This patient does not have much for documentation so let's open a recent patient.	349
Do you remember where we click to open a Recent patient?	349
Click the area to open the list of our last 5 Recent patients.	349
I'll show you.	350
Recent is listed above the patient banner and has a dropdown arrow next to it.	350
When we click the Recent dropdown, our recent patient list appears.	351
I'll go back to Results Review on the menu.	352
And go to the Assessments tab.	353
We have a scroll bar on the right side and the date and time columns at the top.	354
The columns can be opened to view more by dragging the column to the right.	356
Use the inside scroll to see more documentation.	358
Let's take a peek a the next tab.	360
There are 2 sections, Existing Orders are at the top and Personnel Antibiogram at the bottom.	361
Take note there is also a scroll on the right.	361
The date fields can be used by typing in them, or we can use the dropdown.	362
The Display defaults to All Orders, and it also has a dropdown to change what we see.	364
The last tab is Pathology.	366

This works the same as the other tabs and if we had reports, they can be opened by clicking on the link.	367
The date range can be changed using the date and time bar.	370
Right click on the bar and select Change Search Criteria.	370
In this window are the options to change how far we want to look back.	370
Allergies is the next link and as we saw earlier we can also see allergies in the patient banner.	373
Allergies cross visits.	373
Diagnosis and Problems are listed here and the problems will cross visits.	374
Nurses use the Problems which is in the bottom section.	374
We never use the upper section as that is a provider tool and it will result in a nurse adding a diagnosis.	374
Form Browser link is another place where we find documentation on forms completed by clinical staff.	375
A Red box indicates the form is incomplete and usually the form is missing required documentation marked in yellow.	375
By default, documents on this link will be sorted by Date. However, several other sort orders are available in the dropdown at the top of the link.	375
Another popular sort order is "Form." This sorts the forms by title in alphabetical order instead of date.	375
Right-click any form to see available options.	375
Growth Chart	376
This link displays growth charts for pediatric patients.	376
CDC, Fenton, and CDC WHO charts are available - each with multiple possible parameters.	376
Histories has 4 tabs, to capture Family, Social, Procedure and Implant history.	377
As with other parts of the patient's chart, this information crosses visits.	377
MAR Summary is a good way to review the medications administered during a specific timeframe.	381
The thing you will need to remember, if you would like to use this link, is that the default look back timeframe is 3	381

days.	
If you are reviewing a chart older than three days, you'll need to adjust the timeframe using the arrows in the date bar.	381
Clinical Media gallery is not widely used at EMHS at this time.	382
Presently, its use is generally limited to Acadia Hospital and some procedural/surgical departments.	382
This link stores photographs and other media from the patient's visit.	382
Patient Information contains three tabs: Patient Demographics, Visit List, and PPR Summary.	383
The Patient Demographics tab contains information about the patient, where he or she lives, emergency and family contacts, and insurance.	383
The Visit List displays all of the patient's visits.	384
If the patient has multiple visits, we could change the visit we are on by double clicking the row as we saw earlier using LOC in the patient's banner.	384
The Patient Provider Relationship or PPR Summary displays all who have accessed the patient record.	385
Do you remember how we had to select a relationship to the patient when we first accessed the record?	385
This information is stored in the system and can be found here.	385
It is critically important that you access patient data on an "as needed for work" basis.	385
Become familiar with the EMHS and member organization policies related to the Electronic Medical Record, in order to stay in compliance.	385
Insurance link has information related to insurance, PCP and the Admission diagnosis.	388
The Preferred language and Interpreter Required display in red.	388
Patient Schedule can be helpful if the patient is having inpatient therapies and we need to see when they will be off the floor.	389
Nurses can document barcode scanner issues on this page or generate a medication request.	390
Once a request has been generated, this link will be helpful tracking the request.	390
Let's practice. Click continue when ready.	391

Click the thumbtack that collapses the menu to a button which gives us more viewing space.	392
The thumbtack collapses the menu.	393
Next, click the icon that quickly takes us back to Nurse View which is our default workflow page.	394
The house icon brings us back to Nurse View.	395
"Great job" completing the Patient Chart View course.	396