New Chart Module Release Notes

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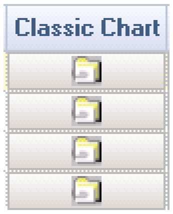
Introduction

The **Chart** and **Chart Overview** modules have been significantly updated with the 7.40 software release.

- The **Chart Overview** module has been removed. A new **Chart** module, which includes a Facesheet screen, has been added within Clinical Console to replace the existing Chart Overview screen. The new **Chart** module contains some new functionality and several updates of existing functionality to improve clinical workflows.

Note - This change will be automatic upon upgrade to v7.40.

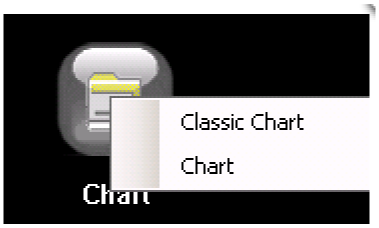
- The existing (legacy) Chart module has been renamed **Classic Chart**. All tabs and functions in the Classic Chart module have been migrated to New Chart.
  - All references to the legacy Chart module (icons, column headers, pop-ups, etc.) will now read as **Classic Chart**. Users may click the appropriate **Classic Chart** icon to navigate to the legacy Chart module.



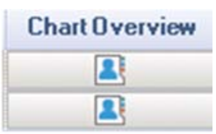
Note - The 7.40 software release represents the last release in which Classic Chart will be available.
Classic Chart will NOT be supported as of release version 7.50 and forward.
In preparation for this, the following tabs have been removed from Classic Chart in 7.40: Problems, Vitals, Overview, Checklists, Correspondence, and Previous Visits.
In addition, accessing the Clinical Event Manager via the CEM icon on the Navigation menu ribbon will take the user to the new Chart module.

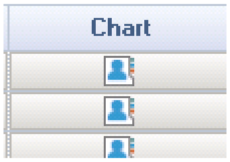
Accessing the New Chart Module

To access the new Chart module from the POC Launcher, click the **Chart** button and select **Chart** in the pop-up list. To access the Classic Chart module, select **Classic Chart**.

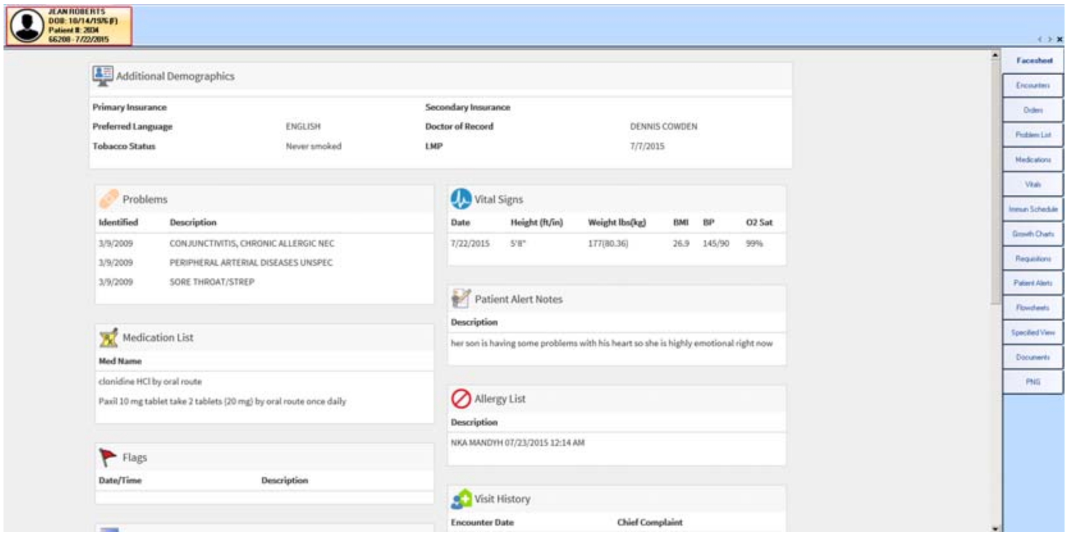


From any of the standard screens in Clinical Console, users may click the "new" **Chart** icon to access the new **Chart** module.



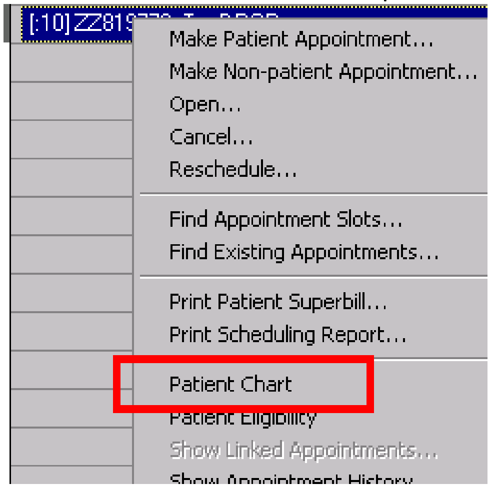


The new **Chart** window displays.



Users may also access the new **Chart** module in the **Patient Administration, Scheduling, Charge Entry, Receivables, Inquiry** and **Check In** modules for a specific patient by clicking the **Go To…** icon and then clicking the new **Chart** icon in the main module toolbar.

In the **Scheduling** module, selecting the **Patient Chart** option in the pop-up menu after clicking the **Go To…** button will access Chart for the patient.



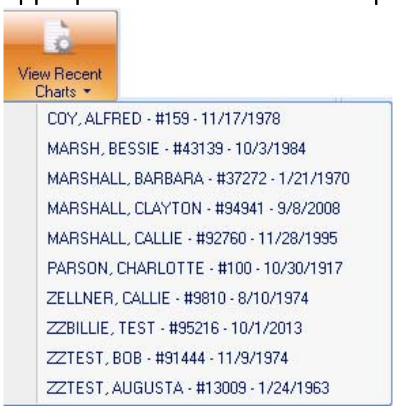
Note - The only two locations a user can access Classic Chart will be on the POC Launcher and within Clinical Console. All other chart icons will launch the new Chart module.

Chart Menu Ribbon

The **Chart Overview** menu ribbon has been renamed **Chart**.

The (new) **Chart Actions** section on the ribbon replaces the **Chart Overview Quick Links** task list.

- **Find Patient** – Launches the standard **Find Patient** window.
- **Next Patient** – Navigates the user to the **Next Patient** screen.
- **View Recent Charts** – Replaces the **Last 10 Charts Accessed** link. Users may click the icon and select the appropriate chart from the drop-down menu. (Up to 10 charts will display in the menu.)

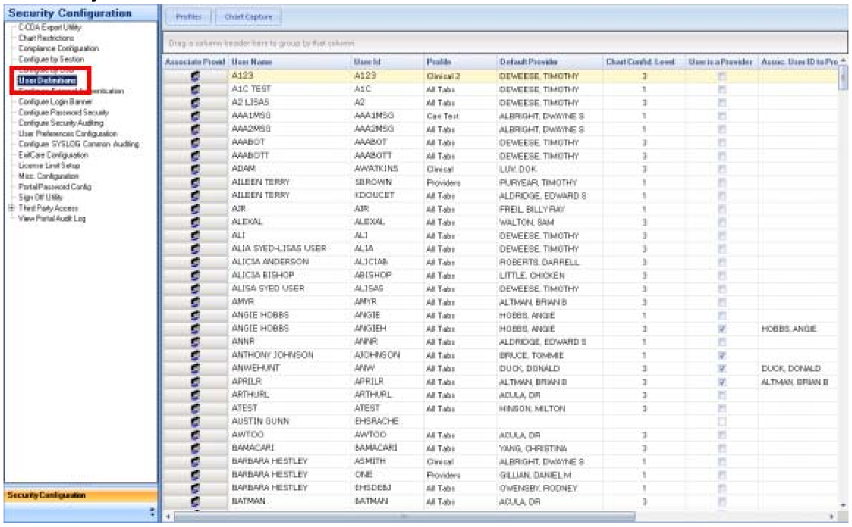


- **Chart Preferences** – Enables the user to customize the **Facesheet** tab (see the ***Configuring the Facesheet Tab*** section below).
- **Appointments** – Navigates the user to the **Appointments** screen in Clinical Console.

All of the Chart Actions selections may be added to the **Quick Access Toolbar**; however, the **Chart Preferences** icon will only be enabled when the user is in Chart.

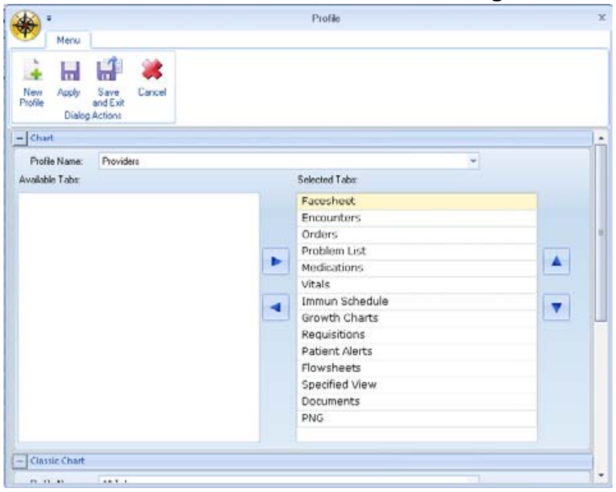
Chart Profiles

Chart profiles enable SYSADM users to configure which chart tabs will display for a user or groups of users. SYSADM users may configure profiles for both **Chart** and **Classic Chart** on the **User Definitions** screen in the **Security Console**.

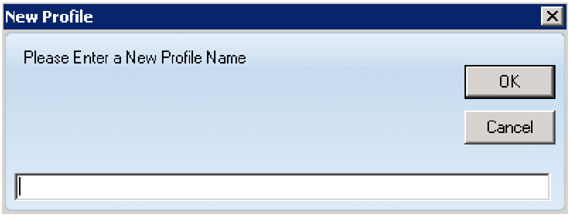


To create a new chart profile:

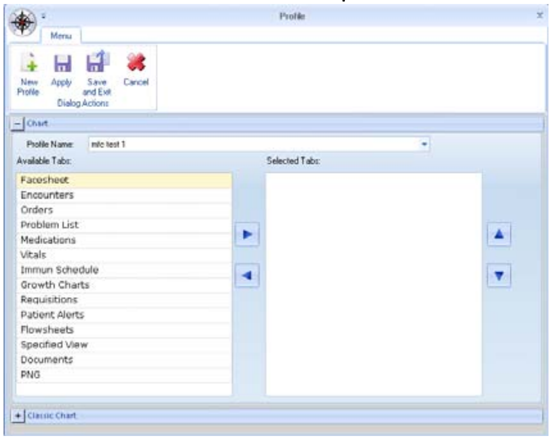
1. Click the **Profiles** button above the main grid on the **User Definitions** screen. The **Profile** window displays.



2. Click **New Profile** in the menu ribbon. A **New Profile** dialog box displays.



3. Enter the name for the new profile and click **OK**. The name displays in the **Profile Name** field.

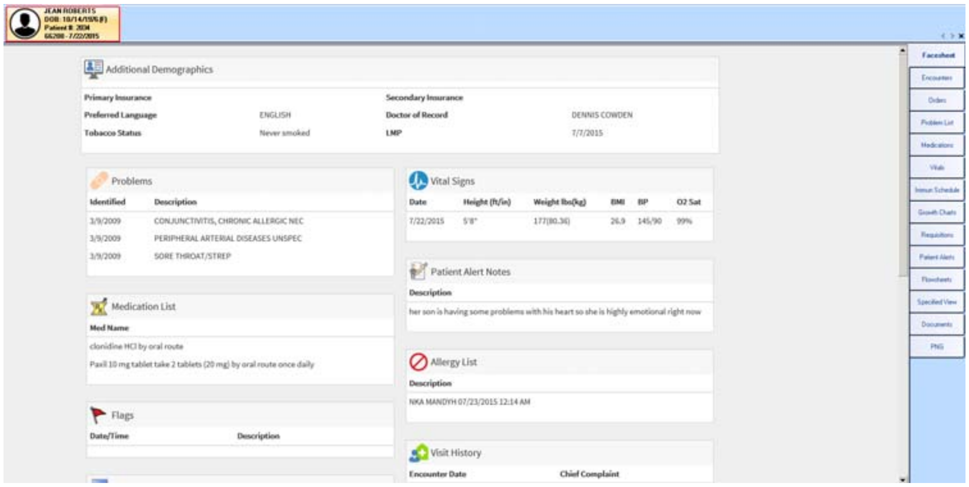


4. In the **Chart** and **Classic Chart** sections, select the appropriate chart tab name(s) in the **Available Tabs** column and click to move it to the **Selected Tabs** column.
5. To remove a chart tab, select the item in the **Selected Tabs** column and click to return it to the **Available Tabs** column.
6. Click and to re-order the items in the **Selected Tabs** column.
7. Click **Apply** to save your changes and keep the window open, or **Save and Exit** to save your changes and close the window.

   The profile will display as a selection in the **Profile** column on the main **User Definitions** window.

Tabs in the New Chart Module

Facesheet



The **Facesheet** tab displays an overview of the patient's clinical information. This information is view-only.

The following information is available for viewing:

Facesheet Section	Information Displayed
Additional Demographics	Displays additional demographic information for the patient. **Information Displayed**: Primary Insurance, Secondary Insurance, Preferred Language, Doctor of Record, Tobacco Status, LMP (female patients only).
Allergy List	Displays the patient's active allergies. **Information Displayed:** Description Note - ***NKA*** *will display as the description if* ***No Known Allergies*** *is indicated on the patient's record.*
Appointments	Displays the patient's future appointment information (not including the current [today's] encounter). **Information Displayed:** Appointment Date/Time, Type, Resources, Location
CEM Rules	Displays all CEM rules associated with the patient that pull to Patient Alerts, excluding suspended or overridden rules. **Information Displayed:** CDS Status, Rule, Action
Consult History	Displays the last five (5) consults/referrals for the patient. **Information Displayed:** Date, Description, Follow-up Date, Status
Deferred Orders	Displays all deferred orders for a given patient. **Information Displayed:** Description, Frequency, Duration, Proposed Date
Flags	Displays all active flags for the patient. **Information Displayed:** Date/Time, Description
Immunization History	Displays the last five (5) immunizations for the patient. **Information Displayed:** Ordered Date, Description
Medication List	Displays the patient's active medication list. **Information Displayed:** Medication Name, SIG

Facesheet Section	Information Displayed
Orders Tracking History	Displays the last five (5) orders for the patient and their status. **Information Displayed:** Date, Description, Status **Note -** *This section displays Labs, Radiology, Procedures, and Billable Medications order types only.*
Patient Alert Notes	Displays all notes documented within Patient Alert Notes for a given patient (notes history is not displayed). **Information Displayed:** Description
Problems	Displays the patient's active problems. **Information Displayed:** Date Identified, ICD Description
Visit History	Displays the last five (5) visits for a given patient, along with the chief complaint for each. **Information Displayed:** Encounter Date, Chief Complaint
Vital Signs	Displays a high-level review of the last five (5) vitals entries for the patient. **Information Displayed:** Date, Height, Weight, BMI, BP, O2 Sat

Configuring the Facesheet Tab

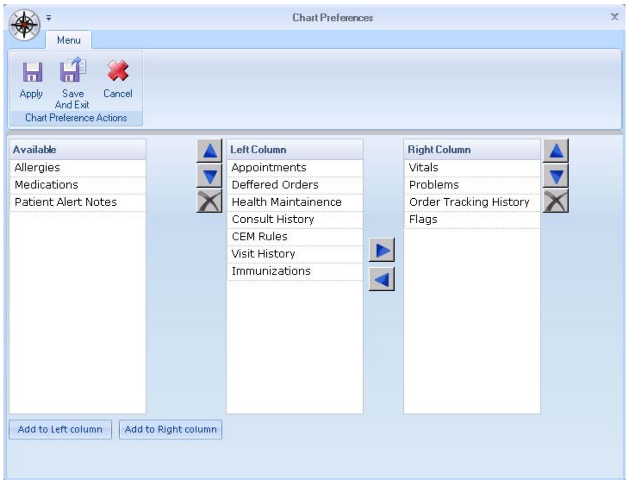
When users access the **Facesheet** tab, the following information displays by default:

Left Column	Right Column
• **Problems** • **Medications** • **Vitals**	• **Patient Alert Notes** • **Allergy List** • **Visit History**

Users may customize what information displays on the tab, and the order in which it displays, via the **Chart Preferences** icon in the **Chart** menu ribbon.

To customize the **Facesheet** tab:

1. Click **Chart Preferences**. The **Chart Preferences** window displays.



2. To add a section to the Facesheet, select the appropriate section name in the **Available** column and click **Add to Left column** or **Add to Right column** to add the section to the appropriate Facesheet column.

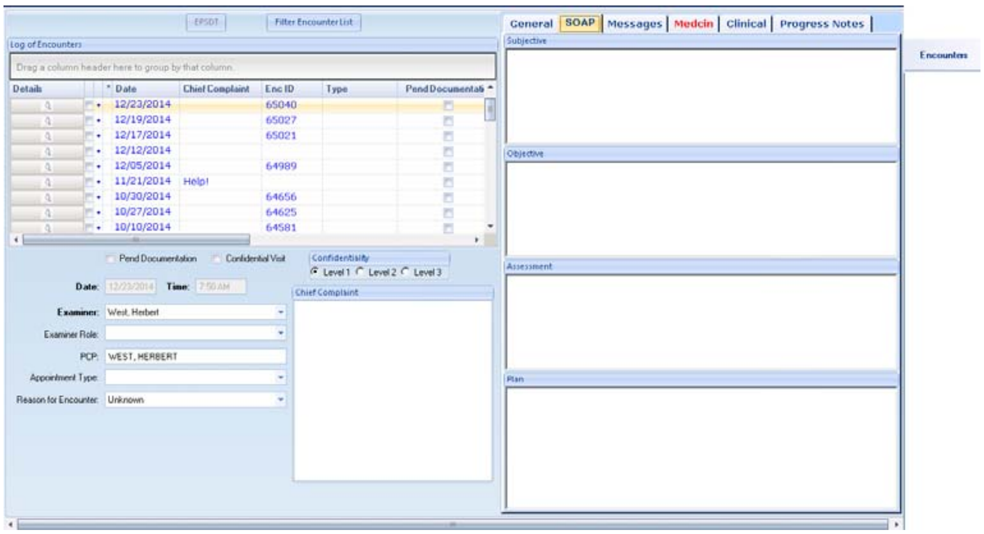
3. To move a section from one column to the other, select the appropriate section name and click to move it from the **Left Column** to the **Right Column**, or click to move it from the **Right Column** to the **Left Column**.

4. Click and to re-order the items in either column.

5. To delete a section from a column, select the appropriate item in the **Left Column** or **Right Column** list and click the appropriate icon. The item will be removed and returned to the **Available** list.

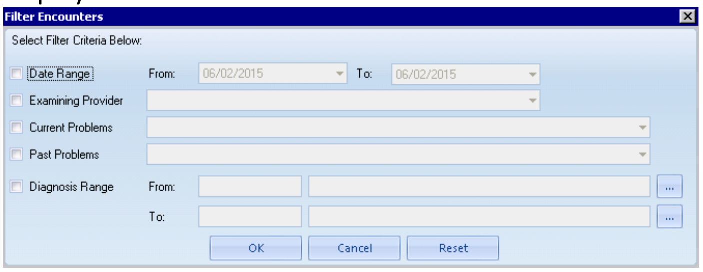
6. Click **Apply** to save your changes and keep the window open, or **Save and Exit** to save your changes and close the window. Click **Cancel** to cancel your changes and close the window.

Encounters



The **Encounters** tab contains the information from the old **Encounters** tab in Classic Chart.

- The **Log of Encounters** table contains the standard information from Classic Chart, including date, chief complaint, encounter ID, type, status, etc.
  - A **Details** column has been added to the Log table. Clicking the **Details** button will launch the standard **Encounter Detail** window for the appropriate encounter.
  - The **Filter Encounter List** button displays above the Log of Encounters table. Clicking the button displays the standard **Filter Encounters** window.



    - A lock icon and **Confidential Information Exists** indicator will display to the right of the **Filter Encounter List** button if the selected encounter has a higher confidentiality level than the user's level:

    - A dictation icon will display to the left of the **Filter Encounter List** button if dictation exists for the encounter:

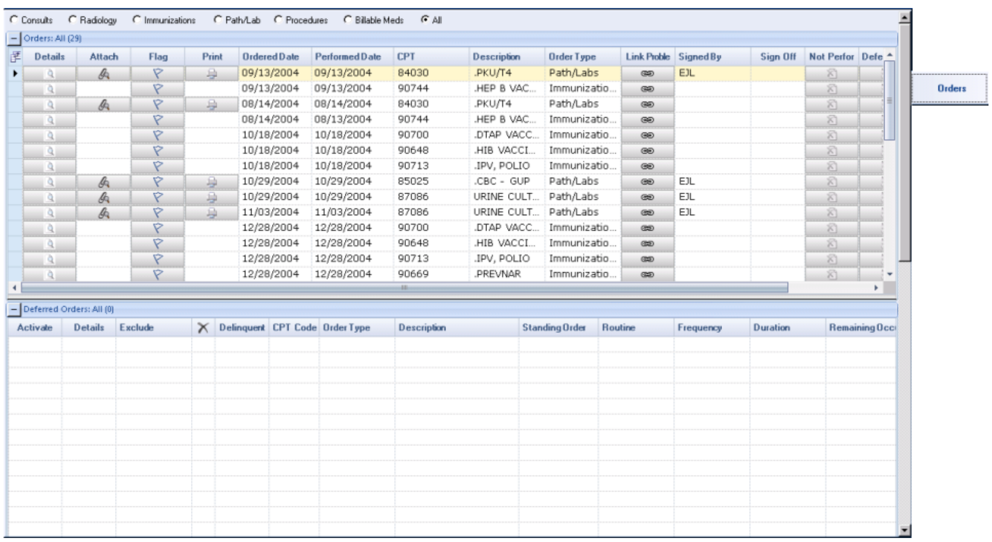
  - The **EPSDT** button (for configured users) has been moved above the **Log of Encounters** table.

- The following **additional fields** will display below the Log of Encounters table:
  - **Confidentiality Level**
  - **Pend Documentation**
  - **Confidential Visit**
  - **Date**
  - **Time**
  - **Examiner**
  - **Examiner Role**
  - **PCP**
  - **Appointment Type**
  - **Reason for Encounter**
  - **Chief Complaint**
- **Documentation** section – A **Documentation** section to the right of the Log of Encounters displays the standard documentation tabs from the **Encounter Detail** window:
  - **General**
  - **SOAP**
  - **Messages**
  - **Medcin**
  - **Antepartum**
  - **Clinical**
  - **Progress Notes**

- **Menu ribbon** – The **Chart** menu ribbon contains the following functionalities in the Encounters section:

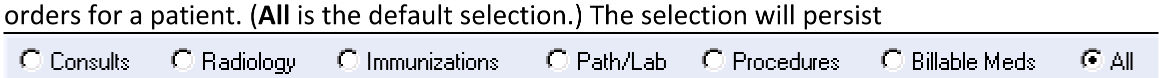
  – **Flag** – Flags the encounter.
  – **Sign Off Selected** – Signs off the selected encounter(s).
  – **Review** – Enables the appropriate examining provider to review the encounter and update the Medcin note.
  – **Attachments** – Enables the user to add an attachment to the encounter.
  – **Save** – Saves information entered by the user (e.g., Chief Complaint).
  – **Undo** – Cancels the previous action from the user.
  – **Clinical Notes** – Enables the user to view clinical notes on the encounter.

Orders



The **Orders** tab displays all order types present on all encounters in the patient's record. It contains the same information and functionality as main **Orders** grid in **Chart Overview**.

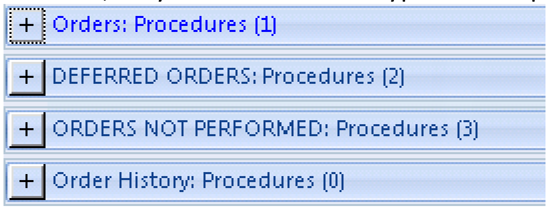
Users may select the appropriate order type radio button to view those specific orders, or select **All** to view all orders for a patient. (**All** is the default selection.) The selection will persist



The selection will persist across all patients accessed until the user selects a different radio button; for example, if the user selects **Procedures** for one patient, the procedure orders will display for all patients accessed until the order type is changed. The selection will also persist between sessions; that is, the last order type selected when a patient logs out will display when the patient logs back into Chart.

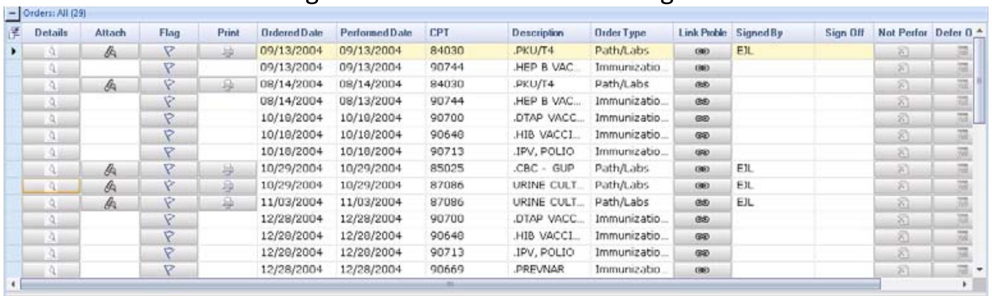
The **Orders** tab includes four sections: **Orders, Deferred Orders, Orders Not Performed, and Order History**. The specific order type will display (if the **All** radio button was selected, **all orders** will display) and the number of order records contained in each section.

The sections will display the order type selected by the user; for example, if the **Procedures** radio button is selected, only Procedure order types will display.



All four sections will display in expanded view when the Orders tab is selected; if a section contains no orders, it will display in collapsed view.

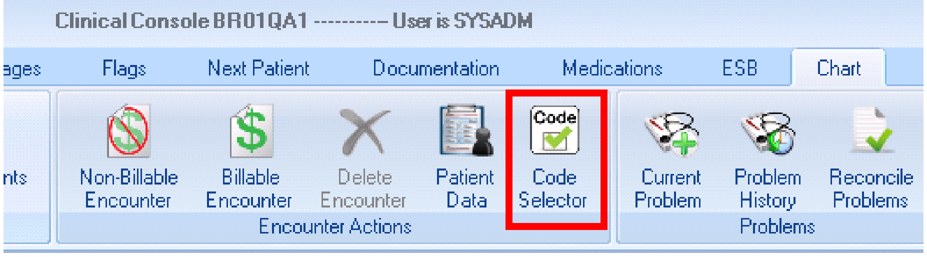
Each section on the **Orders** tab contains the same information and functionality as the existing **Orders** screen in **Chart Overview**. No changes have been made in this regard.



Orders: All (29)

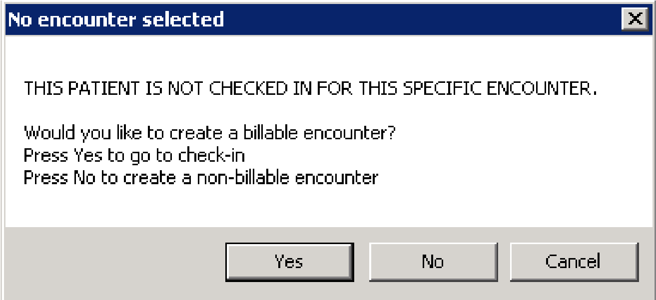
Details	Attach	Flag	Print	Ordered Date	Performed Date	CPT	Description	Order Type	Link Proble	Signed By	Sign Off	Not Perfor	Defer O
				09/13/2004	09/13/2004	84030	.PKU/T4	Path/Labs		EJL			
				09/13/2004	09/13/2004	90744	.HEP B VAC...	Immunizatio...					
				08/14/2004	08/14/2004	84030	.PKU/T4	Path/Labs					
				08/14/2004	08/13/2004	90744	.HEP B VAC...	Immunizatio...					
				10/18/2004	10/18/2004	90700	.DTAP VACC...	Immunizatio...					
				10/18/2004	10/18/2004	90648	.HIB VACCI...	Immunizatio...					
				10/18/2004	10/18/2004	90713	.IPV, POLIO	Immunizatio...					
				10/29/2004	10/29/2004	85025	.CBC - GUP	Path/Labs		EJL			
				10/29/2004	10/29/2004	87086	URINE CULT...	Path/Labs		EJL			
				11/03/2004	11/03/2004	87086	URINE CULT...	Path/Labs		EJL			
				12/28/2004	12/28/2004	90700	.DTAP VACC...	Immunizatio...					
				12/28/2004	12/28/2004	90648	.HIB VACCI...	Immunizatio...					
				12/28/2004	12/28/2004	90713	.IPV, POLIO	Immunizatio...					
				12/28/2004	12/28/2004	90669	.PREVNAR	Immunizatio...					

Code Selector



The **Code Selector** button in the **Chart** menu ribbon will be enabled whenever the Orders tab is selected. The **Code Selector** window will display the starter set that corresponds to the order type selected; for example, if the **Radiology** button is selected, the Code Selector will default to the Radiology Tests starter set. If **All** is selected, the window will default to the Path/Labs starter set.

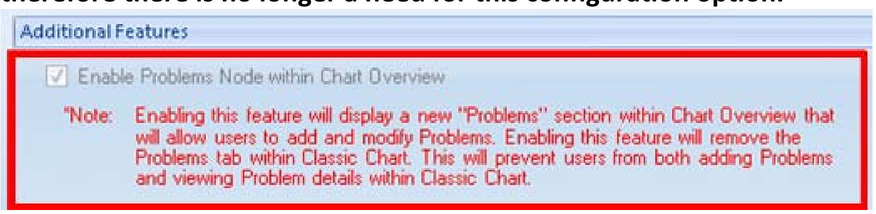
If the user clicks the **Code Selector** button without an encounter selected, they will receive the standard prompt to add a new encounter (similar to in Classic Chart). Users may select **Yes** to check the patient in and create a billable encounter, or **No** to create a non-billable encounter.



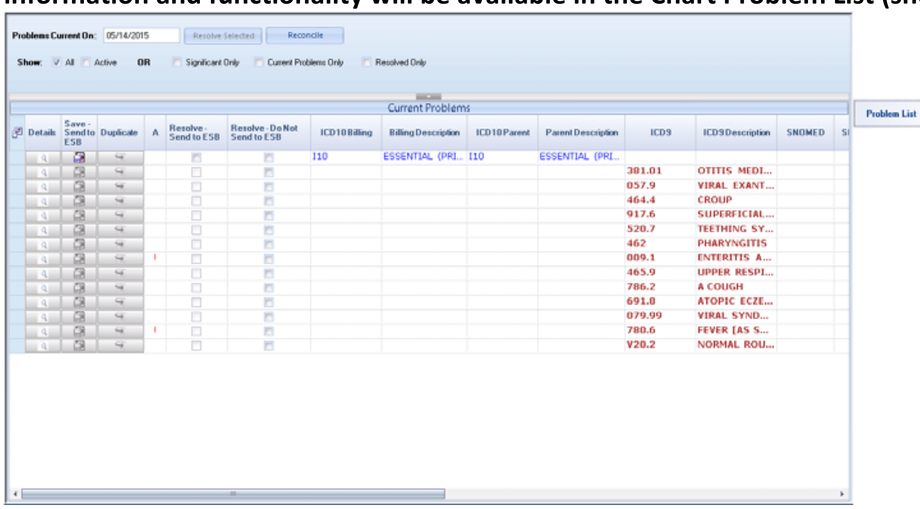
Problem List

The **Enable Problems Node** within the **Chart Overview** setting under **Misc. Configuration** in the **Security Console** <u>has been removed</u>.

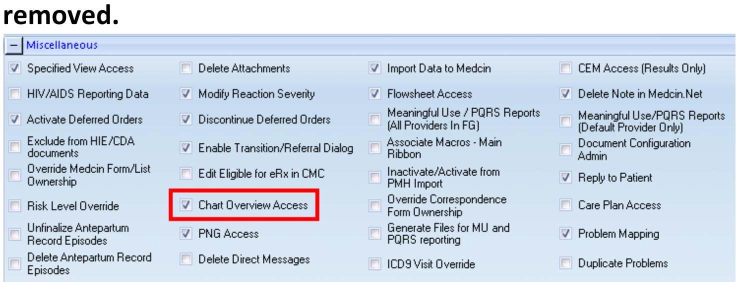
Note - Clients upgrading to SuccessEHS 7.40 will automatically be upgraded to the Problem List node in Chart; therefore there is no longer a need for this configuration option.



The Problems tab in Classic Chart will be removed and users will no longer have access to the Problem tab. All information and functionality will be available in the Chart Problem List (shown below).

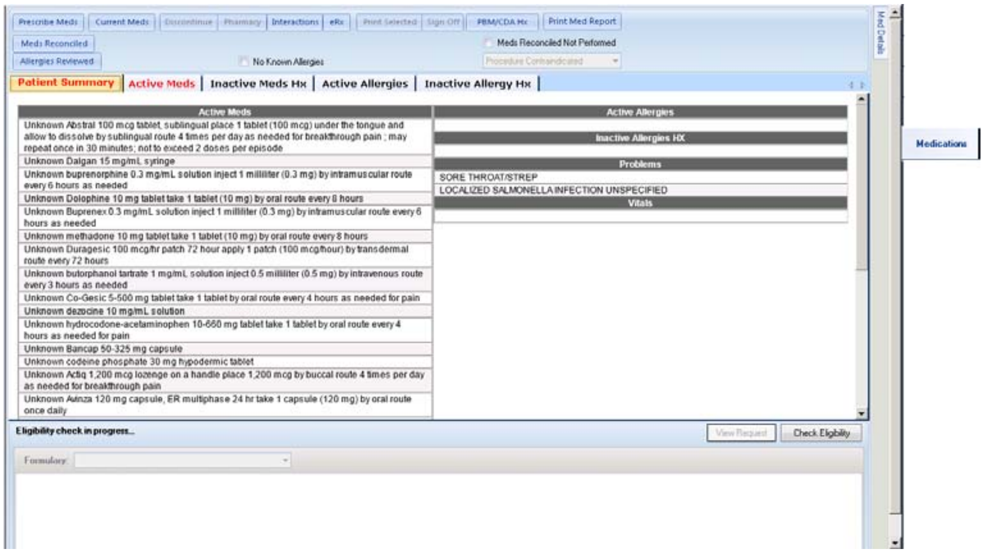


The Chart Overview Access setting on the Miscellaneous tab on the Configure by User screen will also be removed.



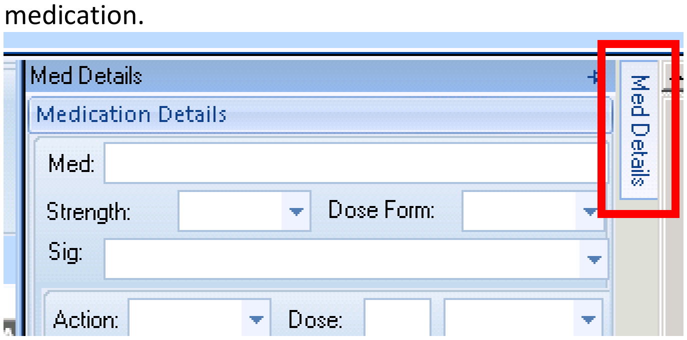
The **Problem List** tab contains the same information and functionality as the main **Problems** grid in **Chart Overview**, including resolve functions, ICD and SNOMED codes/descriptions, problem significance, mapping information, examiner information, etc. No changes have been made in this regard.

Medications



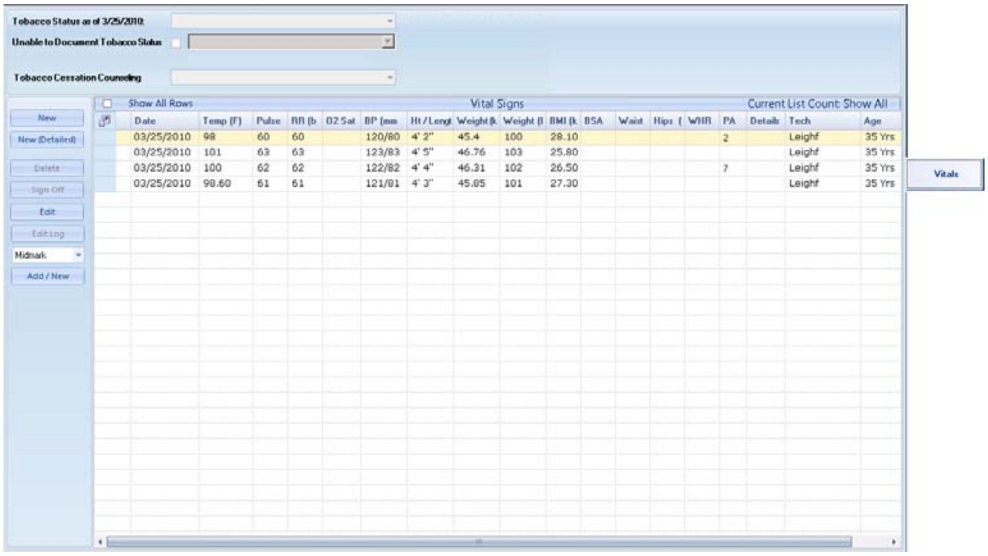
The **Medications** tab contains the same information and functionality as the main **Medication Summary** window in **Medications.NET**. Users may prescribe new medications, document current medications, reconcile medications and review allergies, send prescriptions via eRx or print medications, etc.

Users may hover their cursor over the **Med Details** tab to display the **Med Details** section for a selected medication.



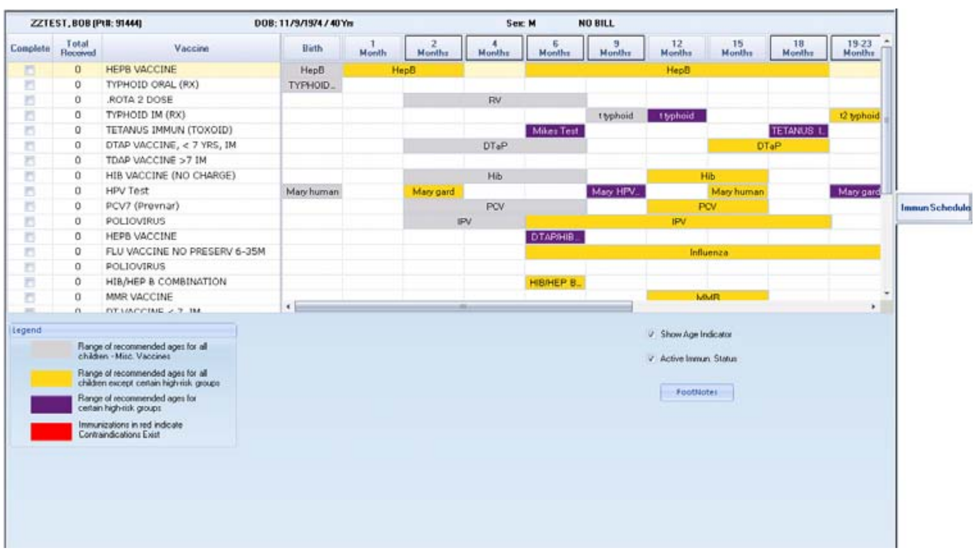
Note - The Problems and Vitals tabs on the Medication Summary window have been removed from the Medications tab in Chart, as this information resides in the Problem List and Vitals tabs respectively.
In addition, the Close Meds button on the Med Details sub-tab will be disabled.

Vitals



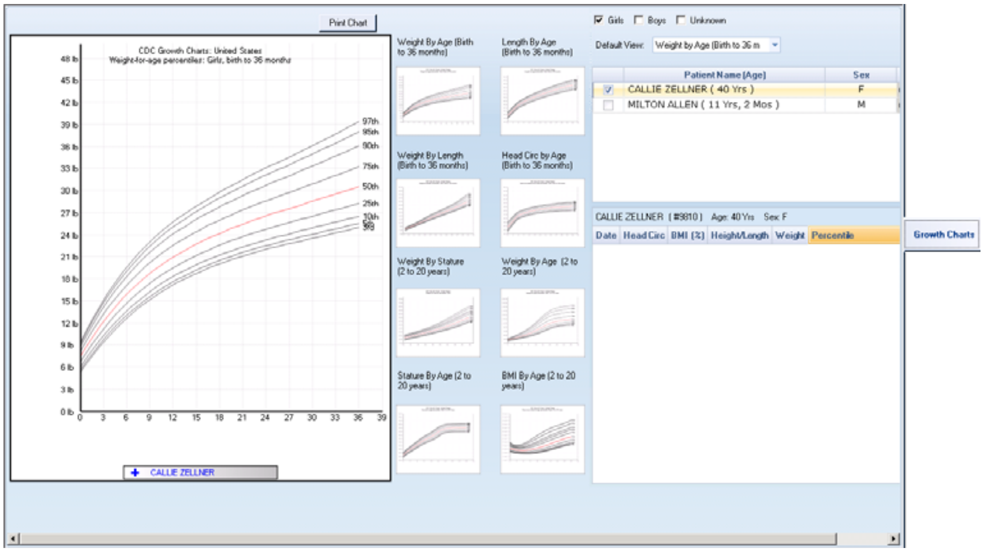
The **Vitals** tab contains the same information and functionality as the main **Vital Signs** screen in Clinical Console, excluding patient demographics (which reside on the Facesheet). Users may add, edit, delete, and sign off vitals measurements, as well as import vitals measurements from configured third-party devices.

Immunization Schedule



The **Immunization Schedule** tab contains the same information and functionality as the main **Immunization Schedule** screen in Clinical Console, excluding patient demographics (which reside on the Facesheet).

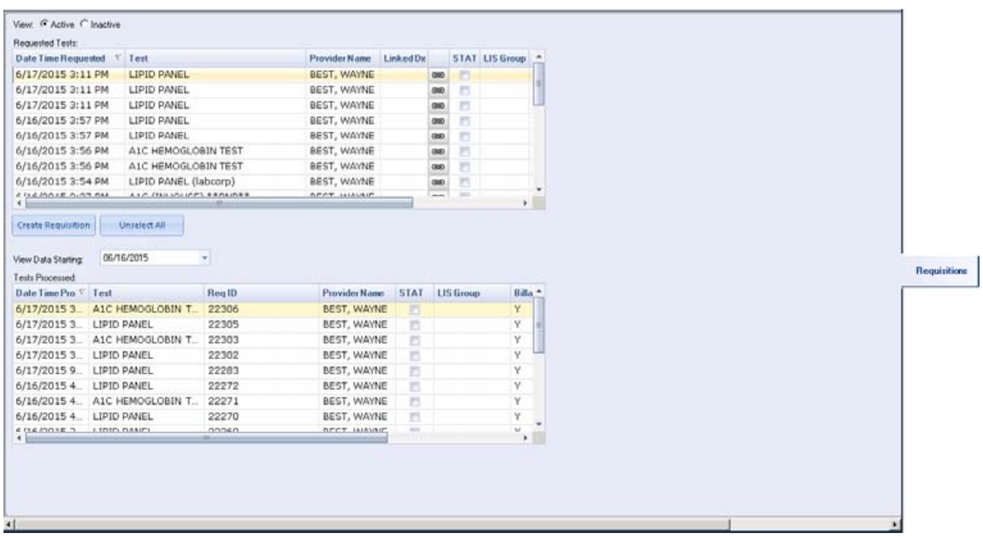
Growth Charts



The **Growth Charts** tab contains the same information and functionality as the main **Growth Charts** screen in Clinical Console, excluding patient demographics (which reside on the Facesheet).

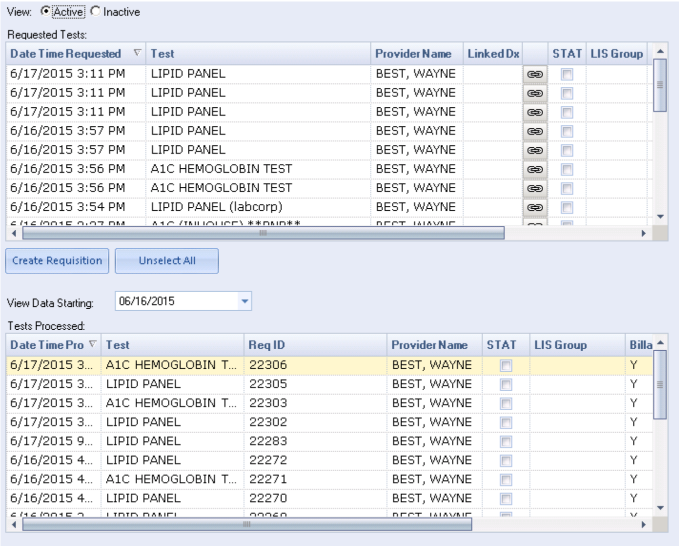
The **Default View Preferences**, **Patient Name** grid, growth chart history grid, and growth chart thumbnail icons have been repositioned and enlarged on the tab for easier viewing.

Requisitions



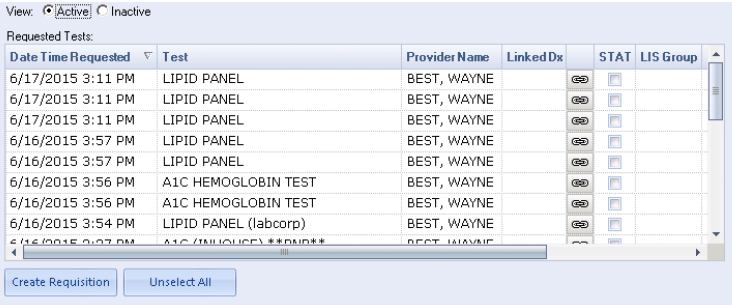
The **Requisitions** tab contains the information from the old **Requisitions** tab in Classic Chart, excluding patient demographics (which reside on the Facesheet).

Requested Tests / Tests Processed



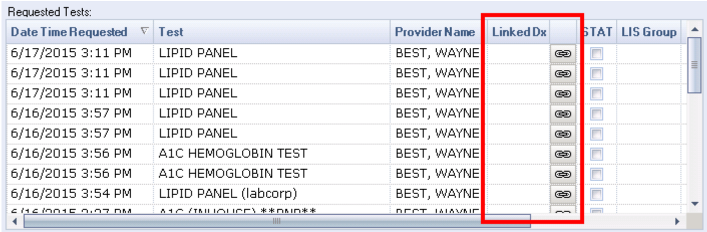
The **Requested Tests** and **Tests Processed** tables contain the same information as in Classic Chart, with the following additions:

REQUESTED TESTS

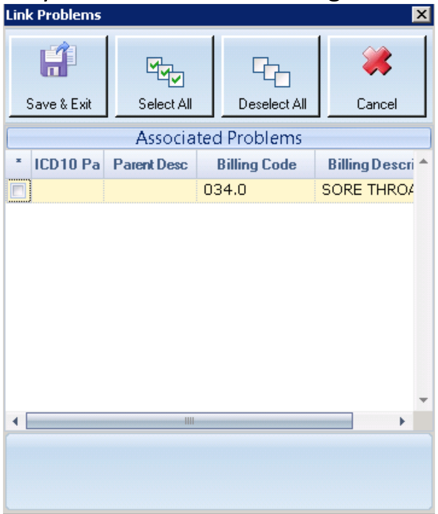


- **View Active/Inactive** – **Active** and **Inactive** radio buttons have been added to enable users to switch views between active and inactive lab test lists.

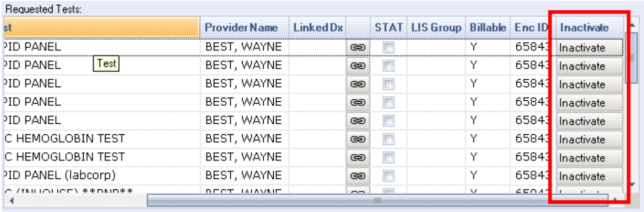
- **Linked Dx / Link** – The **Linked Dx** and **Link** columns enable users to link the requisition to a specific diagnosis.



Clicking the **Link** icon for the appropriate test displays the standard **Link Problems** window, where users may select one or more diagnoses to link to the test.

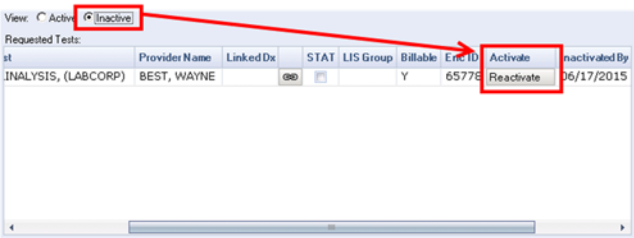


- **Inactivate** – The **Inactivate** column enables users to inactivate the appropriate lab test.

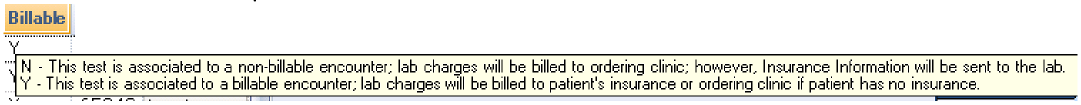


Clicking the appropriate **Inactivate** button will remove the test from the **Active** grid.

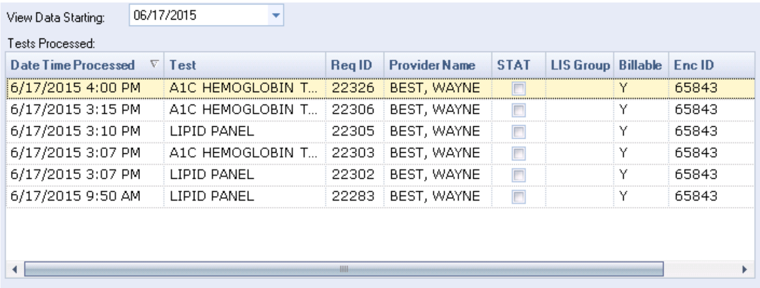
  – Users may re-activate an inactive test by selecting the **Inactive** radio button and clicking **Reactivate** in the **Activate** column for the appropriate test.



- **Billable tool tip** – The existing message regarding requisition lab charges has been moved from displaying on screen to displaying in a tool tip. Users may hover their cursor over the Billable column header to view the tip.



TESTS PROCESSED



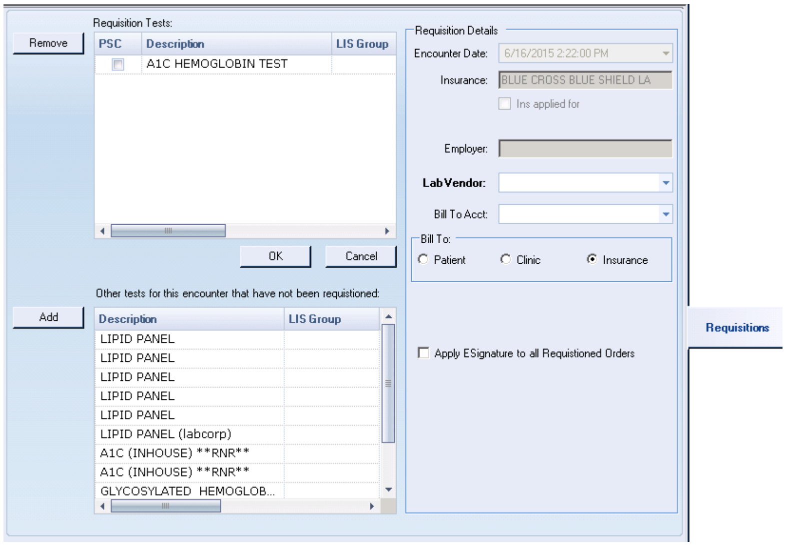
View Data Starting: 06/17/2015

Tests Processed:

Date Time Processed	Test	Req ID	Provider Name	STAT	LIS Group	Billable	Enc ID
6/17/2015 4:00 PM	A1C HEMOGLOBIN T...	22326	BEST, WAYNE			Y	65843
6/17/2015 3:15 PM	A1C HEMOGLOBIN T...	22306	BEST, WAYNE			Y	65843
6/17/2015 3:10 PM	LIPID PANEL	22305	BEST, WAYNE			Y	65843
6/17/2015 3:07 PM	A1C HEMOGLOBIN T...	22303	BEST, WAYNE			Y	65843
6/17/2015 3:07 PM	LIPID PANEL	22302	BEST, WAYNE			Y	65843
6/17/2015 9:50 AM	LIPID PANEL	22283	BEST, WAYNE			Y	65843

- **View Data Starting** – The **View Data Starting** field enables users to customize the data range for viewing processed tests by selecting or entering the appropriate data in the field. (The date defaults to the current date.)
- **Req ID** – The **Req ID** field displays the Req ID associated to the CPT/order(s).

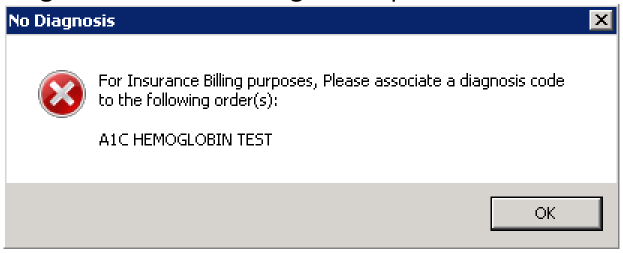
Req Details



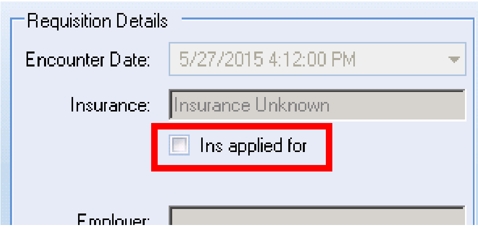
When the user clicks the **Create Requisition** button to create a new lab requisition, the **Req Details** section will now display on the right half of the **Requisitions** tab (instead of in a separate window).

The following additions have been made to the **Req Details** section:

- **No Diagnosis** – If the requisition is being billed to the patient's insurance and no diagnosis code has been linked to the lab, a **No Diagnosis** prompt will display requiring the user to link the appropriate diagnosis before creating the requisition.



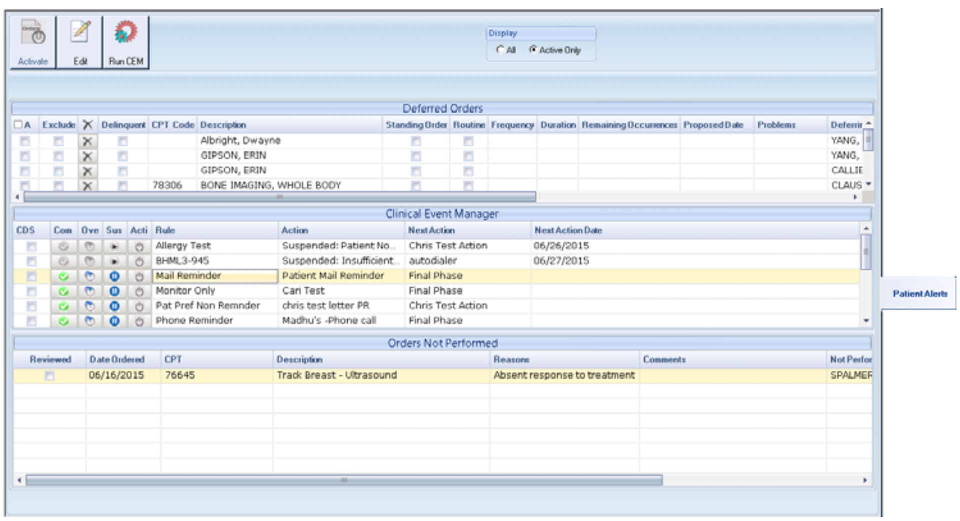
- **Ins applied for** – The **Ins applied for** checkbox enables the user to indicate to the lab vendor that the patient has pending insurance, if no present insurance exists.



- **Lab Vendor** – The **Lab Vendor** field will populate the lab vendor if a single vendor is configured for the database. If multiple lab vendors are configured, the user must select the appropriate vendor from the drop-down list in the **Lab Vendor** field.
- **Non-billable encounters** – Requisitions may be created for non-billable encounters. If **Insurance** is selected in the **Bill to** section for a non-billable encounter, the message sent to the lab vendor will include the insurance information for the **most recent billable encounter**. If the insurance information is not correct, users should select either **Clinic** or **Patient** in the **Bill to** section.
- **Vendor information** – **Vendor CPT, Vendor Code,** and **Vendor Description** columns have been added to both tables in the Req Details section that display the appropriate mapped information for the lab requisition once a vendor is selected in the **Lab Vendor** drop-down list.

Vendor CPT	Vendor Code	Vendor Description
82947	2329	GLUCOSE, RANDOM

Patient Alerts

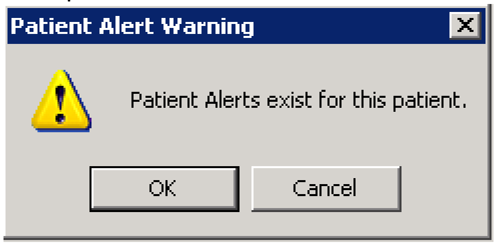


The **Patient Alerts** tab contains the same information and functionality as the main **Patient Alerts** window in Clinical Console, excluding patient demographics (which reside on the Facesheet). Users may activate and manage deferred orders; run, complete, override, and suspend CEM rules; and review orders not performed.

The **Deferred Orders** section has been enlarged on the tab for easier viewing.

Patient Alert Warning

If alerts exist for a patient, the standard **Patient Alert Warning** dialog box will display when the user opens Chart for a patient.



Clicking **OK** will open the **Patient Alerts** tab. Clicking **Cancel** on the **Patient Alert Warning** dialog box will navigate the user to their default tab in Chart.

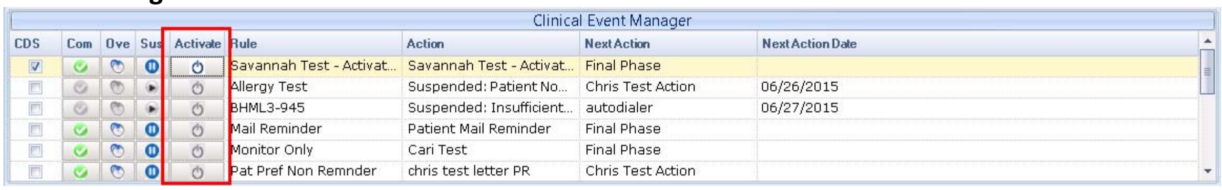
Viewing Account/Standard Notes in Chart

Users may customize standard or account notes to display in the new Chart module if a patient has a standard or account note, a **Notes** dialog box will display the notes for the patient.

Users may click **Close** to close the **Notes** dialog box and continue to the Chart module.

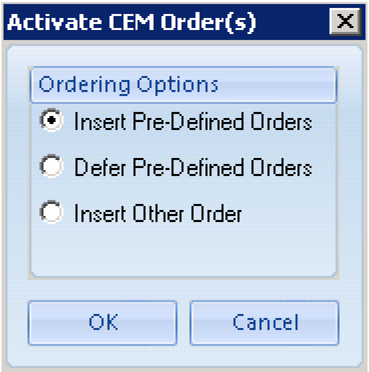
Activating CEM Orders

Users may activate CEM rules by clicking the appropriate **Activate** button in the **Activate** column in the **Clinical Event Manager** section.



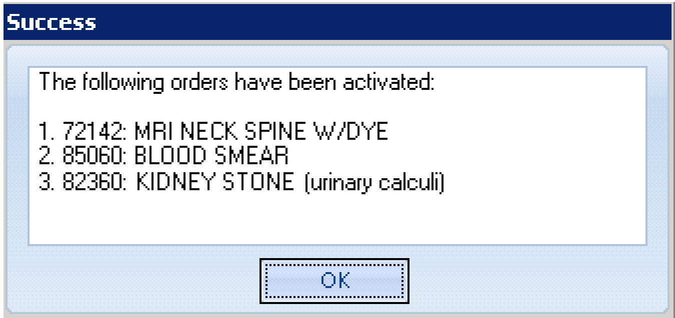
To activate deferred CEM orders:

1. Click the **Activate** button for the appropriate CEM rule. An **Activate CEM Orders** dialog box displays.



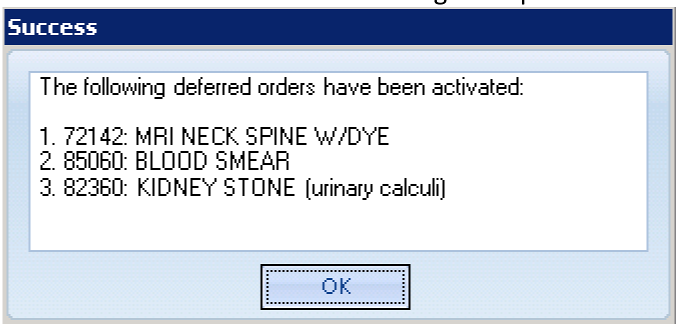
2. Select the appropriate option and click **OK**:

- **Insert Pre-Defined Orders** – Selecting this option activates all pre-defined orders for the CEM rule.



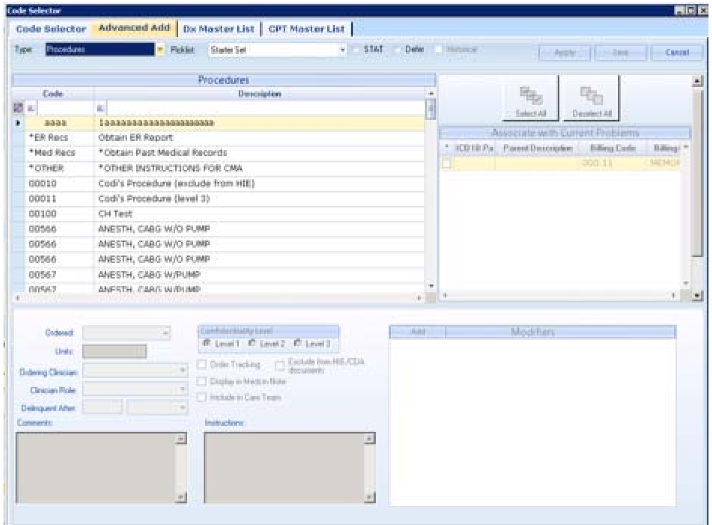
  Select **OK** to confirm the activation.

- **Defer Pre-Defined Orders** – Selecting this option defers all orders for the CEM rule.



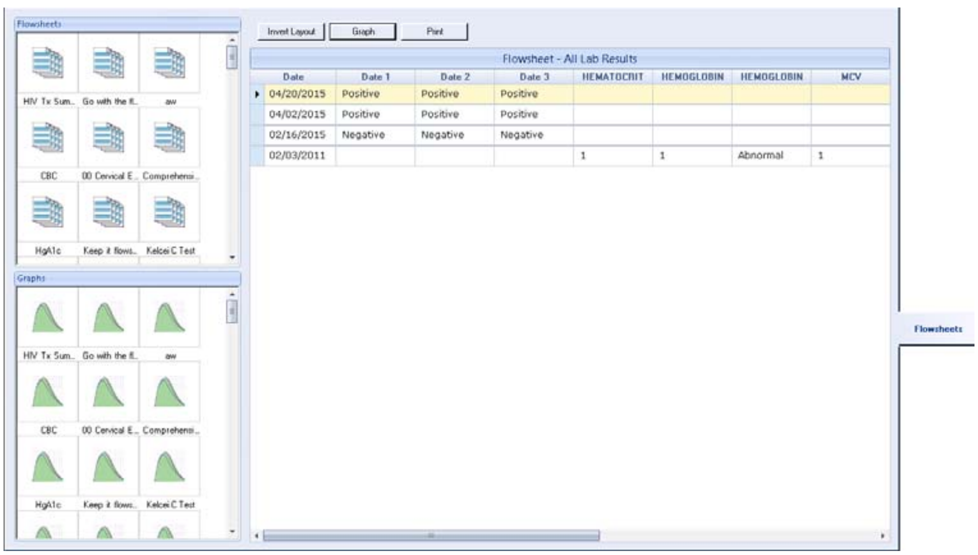
  Select **OK** to confirm the activation.

- **Insert Other Order** – Selecting this option launches the **Code Selector** window, from where users may add a specific order from the **Advanced Add** tab.



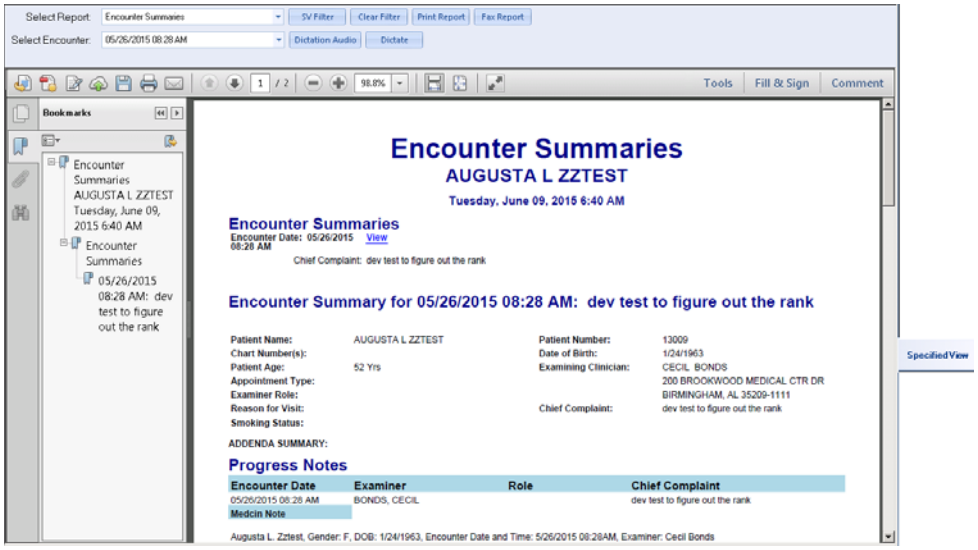
Select the appropriate order(s). Click **Apply** to save your changes and keep the window open, or **Save** to save your changes and close the window.

Flowsheets



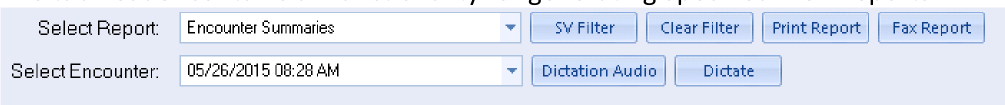
The **Flowsheets** tab contains the same information and functionality as the main **Flowsheets** window in Clinical Console, excluding patient demographics (which reside on the Facesheet). Users may view, graph, and print flowsheets as per normal.

Specified View



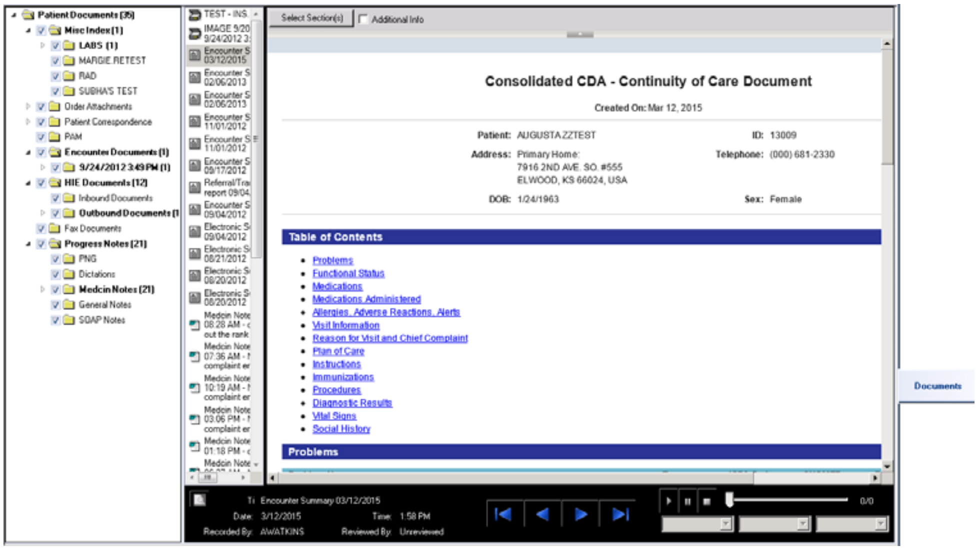
The **Specified View** tab contains the same information and functionality as in the main **Specified View** module.

The tab header contains all functionality for generating Specified View reports.



Users may select the appropriate report type and patient encounter from the **Select Report** and **Select Encounter** drop-down lists respectively. All filter, print, fax, and dictation functionality operates as per normal.

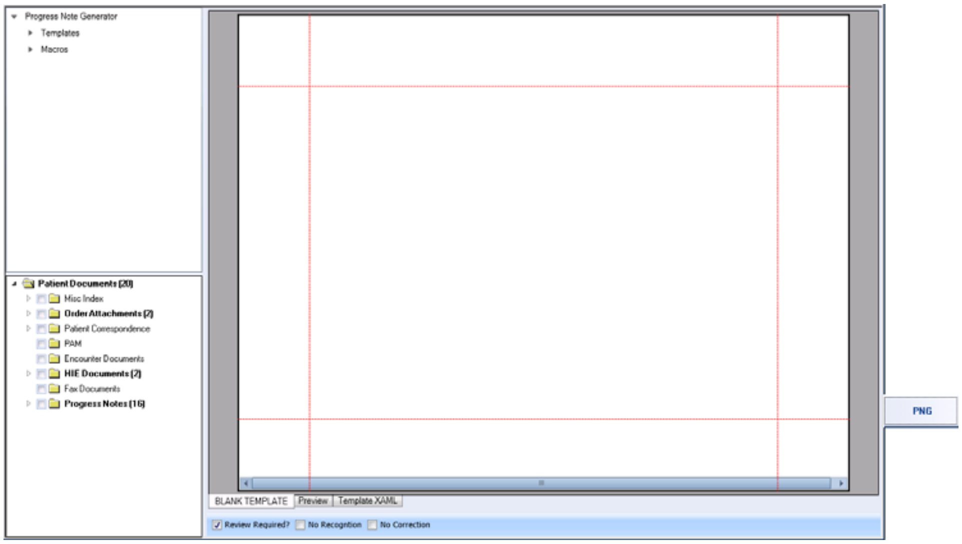
Documents



The **Documents** tab contains the same information and functionality as the main **Patient Documents** section in **Chart Overview**, excluding patient demographics (which reside on the Facesheet).

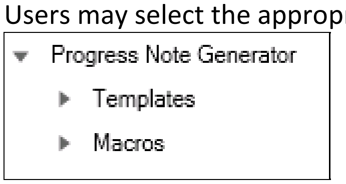
Users may select the appropriate patient document type from the folder tree and click the appropriate title to view the document within the **Documents** tab. All functionality pertaining to the specific document types operates as per normal.

PNG

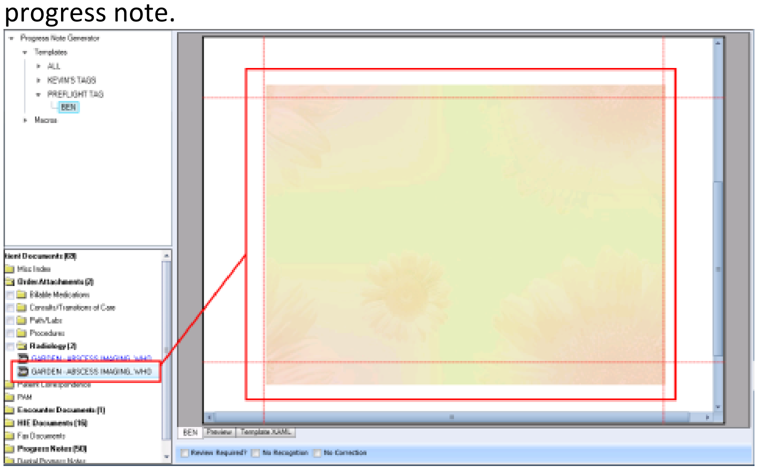


The **PNG** tab contains the same information and functionality from the **Progress Note Generator,** excluding patient demographics (which reside on the Facesheet). The **PNG** tab provides more room in the **Templates** and **Macros** sections for users to view the respective template/macro lists.

Users may select the appropriate templates and macros from the **Progress Note Generator** node.



Users may also select encounter document(s) from the appropriate folder in the **Patient Documents** section and drag the name of the document to the appropriate place in the PNG template to add the information to the progress note.



Note - Information added to a PNG template is final and cannot be edited or formatted.
