



Provider Quick Guide



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Support Contact Name: LAUREN McGOWAN










Phone: (573) 331-6634 Cell: (573) 200-6274


IT Help Desk: ext. 5517

Accessing Patients in Power Chart

Creating Patient Lists: Location, Relationship, etc.

Inpatient charts can be accessed via your Patient List.

























1. Click  Patient List on the toolbar
2. From the Patient List screen, click the  **List Maintenance** icon.
3. Click **New** (located at bottom of window).
4. Select appropriate **type** of patient list that you wish to create (i.e. **Location, Custom, etc.**).
5. Click **Next**.
6. To create a location list, click the  to the left of **Locations**. Scroll down to Southeast Hospital.
7. Click on the  to the left of Southeast Hospital, repeat, and select the patient care unit  you wish to view.
8. Check the box to the left of your  selection.
9. Select your Patient List preferences and enter a name for the list at the bottom of the Pane
10. Click **Finish**.
11. Move the list from Available to the Active Lists box by selecting the list from the left pane and clicking the right arrow button .
12. You can modify the order of the lists using the up arrow button  and down arrow button .
13. Click **OK**.

To create a **Relationship list**, follow steps a-e as described previously, but click the  to the left of **Visit Relationships**, and instead of Locations, and check the box to the left of your relationship. The recommendation is Admitting Physician, Attending Physician, and Consulting Physician. Click **Finish**.

Custom Lists must be manually updated by adding or deleting patients from the list. Patients will not populate the list based on Admission, Discharge or relationship criteria.


Custom Lists are created by following steps a through d as described previously, but you **MUST** enter a **name** for the list prior to clicking **Finish**.

Add patients to a custom list by Right clicking on a patient name from a location or relationship list, and select **Add to a Patient List**.

Remove patient from a custom list by right clicking on the name and selecting *Remove Patient from List* -OR- click                        


Patient Search

Access to patient charts that are not on the provider's patient list will require a patient search.

1. Enter the patient's name or FIN in the patient search field  (located at the upper right of screen).
2. Click magnifying glass to search. Patient(s) will display.
3. Lower portion of window displays patient encounters.
4. Select **correct patient** and **correct encounter**. Double-click appropriate encounter.



Provider will be prompted to declare a relationship to patient when entering patient.'s chart the first time.

Revisiting Recently Accessed Charts

To return to one of the last five accessed patient charts, click on the drop down arrow to the right of  (upper right corner) and click on the patient's name to open chart.

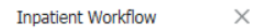
Workflow View/mPage

(Workflow mPage is the default view when opening a patient chart.)



1. Select Customize  on the upper right corner of the Summary page to configure the Page to your preferences. You can: Drag and drop headers, Expand/Collapse and change colors of widget categories as you wish..
2. Hover over any content/result item to display details.
3. Click on the word(s) in the header to open link to detailed patient data (e.g. Labs, Allergies, etc.).
4. Select  to enter orders, allergies, diagnoses, etc.



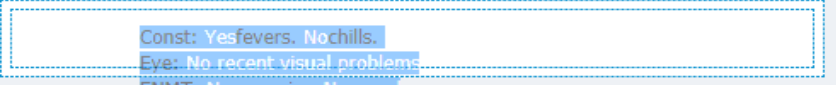
REMINDER: The Workflow Page is Designed to increase your efficiency by guiding you through both **Review of existing -and- Inclusion of new** results and observations as you work through the categories of data.

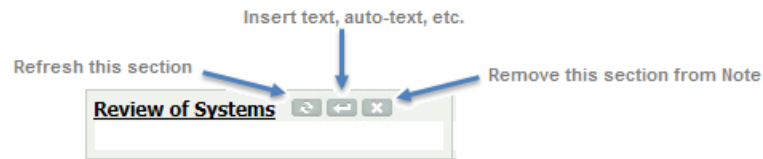
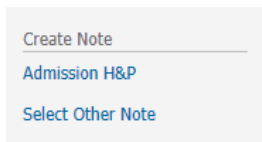
Navigate to the Workflow mpage to review the chart and begin documentation

 Inpatient Workflow X




This view will allow you to review the nursing documentation, labs, results, and begin your note.

1. To tag items from a clinical note highlight desired text and select 'Tag' 
2. To tag labs select the lab and click 'Tag'. 

- To split your workflow mpage screen and move the freetext sections to the right of the screen click the split screen icon 
- To drag your text over to the freetext sections Once the screen is split, highlight the desired text and click the drag text icon. 
- You will then be able to drop the text into the desired field of your note by dropping it within the dotted lines: 
- When you have completed your documentation on the workflow mpage, you can navigate to the bottom of the workflow menu and select your note type.




Creating Personal Auto Text

- Click the Manage Auto Text icon  and the Manage Auto Text screen opens.
- Click on the New Phrase icon  and the Abbreviation and Description boxes become active.
- The icon to write a New Phrase is in the left hand corner of the Manage Auto Text Box 
- When the icon is clicked on, the Abbreviation and Description boxes become active.
- At this point a symbol is chosen so the text can be retrieved.
- You can use the "/" or a "." or
- You can also use a symbol of your choice, e.g. ^.
- It is important to put an identifying phrase after the symbol so you know what it is such as ^ **Test Phrase**. This allows the user to retrieve the text and know what information it contains.
- In the Abbreviation text box, differentiate the Personal Created Auto Text from the System-generated Auto Text by re-naming the Abbreviation field.
- For example, enter ".rosCompleteDr.Kettner"
- Type or paste in any needed information and click **Save**.


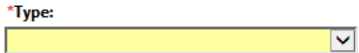

Clinical Documents

1. Navigate to the Documents header on the Workflow Page, or Documentation on the Menu.
2. Double-click on the desired document to view.


Viewing Notes

1. Open a patient's chart from Patient List.
2. Click the Documentation section from the dark menu.
3. To change the criteria click on  icon. From there, filter what documentation you want to see.
4. Click apply.
5. Double click on the notes to display Notes on the right side of the screen.
6. Click the X in the upper right hand corner of the note to close.


Creating Notes

1. To create a note, click  Add .
2. If you have a drop down arrow next to add, click that and select the type of note you want (either Power Note or Dynamic Note)
3. Choose the note type. 
4. Make sure the note is titled correctly. If not, change the title. 
5. Select the note template. Click OK.
6. Document the note.

Allergies

1. Click on **Allergies/Intolerances** from the Inpatient Summary Page or the Menu.
2. To add a new allergy, click + Add.
3. Select the appropriate Type of response by clicking on the drop down arrow (i.e. Allergy, Side Effect, Intolerance, etc...).
4. Enter the allergen in the *Substance field, and then click the binoculars.
5. Double-click on the substance from the substance search list.
6. Type the patient's Reaction, and then click the binoculars.
7. Double-click on the reaction from the reaction search list.
8. Complete additional information as appropriate, and then click OK or OK & Add New.
9. To modify or cancel an allergy, right-click on the allergy, then select Modify or Cancel.
10. Change fields as appropriate to modify or enter a *Reason to cancel, and then click OK.
11. After reviewing patient's allergies, select **Mark All as Reviewed**.
12. NKA can be indicated by selecting  (located in the allergy profile window). NKA is only available if no allergies have been documented.

Diagnosis & Problems List

1. Click Diagnosis & Problems from the Inpatient Summary Page, or the Menu.
2. In the Diagnosis pane, click **+** Add. If adding a Problem, click **+** Add in the bottom pane. The search window opens.
3. Enter the diagnosis or the code in the yellow search field. Click the  search icon.
4. Select the appropriate diagnosis from the list and click OK.
5. Update the *Type of diagnosis (Admitting, Discharge, Pre-op). (Discharge is the default type)
6. When all fields have been reviewed and updated, click or to add another diagnosis.

Converting a Problem to a Diagnosis

To convert a problem to a diagnosis, right click on the appropriate problem, and select **Convert to Diagnosis**. The problem will be added to the diagnosis list.

Home Medications

1. Within the orders section of the chart, select External Rx History from the tool bar. Verify that consent has been obtained (this is almost always obtained by Admissions staff), then select how many months of Rx history to display. The longer timeframe you chose, the longer the search will take. If the patient utilizes a pharmacy that participates in SureScripts, you will be able to review their home medications that have been filled utilizing their health insurance.
2. Right click on the medication to Convert to a Documented Medication.
3. When complete, click Close.
4. If additional home meds need to be entered, select Document Medication by Hx from the toolbar at top of screen, then select **+** Add.
5. A Search window will open. Type the name of medication in the find field. The search will start after 3-4 letters are entered, like a Google search
6. Select the medication and complete order details.
7. Once completed, click on **Document History** (located at bottom right of screen).
8. You will not be able to complete the Discharge MedRec if the External Rx History has not been completed.

Histories Reviewing / Adding

1. Open a patient's chart from from Ambulatory Organizer or your Patient List.
2. Click on the **Histories** tab on the menu list.
3. Click on **Procedures** tab to review and / or document procedures / surgeries.
4. To add Procedure, select the **Add (+ Add)** button.
5. Click on binoculars search icon.
6. Select appropriate diagnosis / procedure term from the list that appears.
7. Click on **OK**. Complete additional fields if known.

NOTE: The only required field (yellow) is the Past Medical or Procedure name.

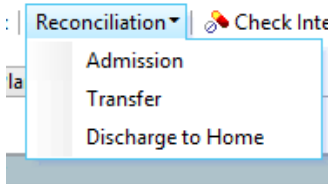
8. Click **OK** or **OK & Add New** (to continue documenting additional diagnoses or procedures).
9. Click **Family tab** and enter Family History as appropriate. Mark all as reviewed.

MAR Summary (Medication Administration Record)

Select **MAR Summary** from the Menu list (on the left). This displays medications ordered/administered, specific to patient's current encounter.

Medication Reconciliation

1. Reconciliation is found within the toolbar located on the orders section of the chart.
2. Click on Reconciliation.





3. Select and complete the appropriate med rec process.
 - *Admission Reconciliation allows you to convert documented **External Rx History** to inpatient orders.*
 - *Discharge Reconciliation will default to the **External Rx History** as the medicines to continue after discharge.*
4. When completed, click Reconcile and Sign. (bottom right corner)

iView/I & O

1. Select Iview/I&O header from the Workflow Summary.
2. Select the Intake And Output band to view fluid balances. Top portion of window displays today's and yesterday's intake, output, and balance. Scroll up/down and left/right to view more data. Twenty-four (24) hour totals are 0700–0659.
3. Right-click on the blue date bar (located at top of page) to change viewing options, such as date range or hours per column.

Orders





Individual Order Entry

1. From the Inpatient Summary page, click on the **+** located on the New Order Entry header. This takes you to the orders search box.
2. Type the order in the Find field. Select appropriate order. Click Done.
3. Complete order details, then click Sign (located in the lower right of your screen).  Indicates missing order detail(s). Yellow fields or a bolded *field name preceded by an asterisk (*) are mandatory. After finishing all required fields, remember to Refresh your screen.  1 minutes ago (upper right corner)




Cancel/Reorder (for modifying an existing order, such as changing a medication dose)

1. Right click on the order. Select Cancel and Reorder then complete the appropriate order details. Click Orders for Signature, and then click Sign.
2. Copy an Order (such as getting a repeat CBC)
3. To copy a previous order, right click on the order and select COPY.
4. Make appropriate changes within the order details window (i.e. date). Click on Orders for Signature, and then click Sign.

Using PowerPlans

1. From the Inpatient Summary page or the menu, click on the  located on the New Order Entry header. This takes you to the orders search box.
2. Type the specialty abbreviation in the Find field.
3. Click the desired PowerPlan , then click Done. The plan is now added to the order profile, but is incomplete.
4. To complete, select or deselect the components of the PowerPlan that you wish to order.
5. Modifications to order details can be made by right
6. clicking on the order sentence, then select
7. Modify Planned Order.
8. To view only selected orders, single-click the Filter button . Remember to un-click the filter button.
9. Click on the Merge View button  (located on the orders screen) to see the orders in the powerplan displayed next to orders that have been previously ordered. Merge View only works when a powerplan in the View window is selected.
10. After completing all orders/details within the PowerPlan, select Sign. Refresh your screen. This places the PowerPlan in a Planned status. Orders will not be acted upon in the planned state.
11. Orders become active when the PowerPlan is initiated. The provider needs to Initiate (lower right corner) a PowerPlan when you have seen the new patient and are satisfied that the orders are complete.

Adding a PowerPlan to Favorites

1. From the Inpatient Summary page, or the Menu, select New Order Entry .
2. Follow steps 2-5 (from page 13) to configure the PowerPlan as you prefer to have it.
3. Add new single order lines to the PowerPlan if you prefer, by clicking on the Add to PowerPlan button (upper left) and complete any required fields.
4. Prior to signing your PowerPlan, select Save as My Favorite (lower left corner).
5. Rename the PowerPlan (e.g. Dr Ballard's Tetraplegia Adm Order PP) if you choose, and then click OK.
6. To retrieve a saved PowerPlan, click  Add (as if entering an order), then select the My Favorite Plans folder from the lower panel.
7. To organize favorites, click on the drop down arrowhead next to the yellow star .
8. Click Organize Favorites. Follow instructions provided on the screen.

Discharge Process


1. Update discharge diagnosis listed if necessary.
2. Review outstanding orders; DC unneeded orders prior to discharge as appropriate
3. Complete Medication Reconciliation if not already done.

Note: You must complete step 3 **BEFORE** step 4 in order for it to pull in to your Discharge Documentation automatically.

4. Click the Discharge tab on the Workflow Summary mPage
5. View patient's Discharge Readiness and Quality Measures status.
6. Click the Place Discharge Order header and select Discharge Patient order below then click Order button. or click on the + Add button and search for the correct discharge order.
7. From the Discharge mPage, click the + on the Follow Up header to add provider follow up instructions. Click OK.
8. Click the + on the Patient Education header to add patient education instructions, then click OK.
9. Review and update the remaining items in the discharge menu/workflow.
10. Enter the Discharge Review of Systems at this time if appropriate.
11. If all depart activities are satisfied, create the Discharge Summary note.

Message Center

Message Center displays upon logging in.


1. To access Message Center from a patient chart or from your patient list, click  Message Center in the tool bar.
2. Inbox Summary includes three categories:
 - i. Inbox Items- Results, Results FYI, Orders (orders for co-signature and proposed orders), Documents (for signature) and Messages.
 - ii. Work Items- Saved Documents, Anticipated Documents, Reminders and Paper Based Documents.
 - iii. Notifications- Notify Receipts, Trash and Sent Items.

Results FYI: Review, Sign or Refuse


1. Navigate to the Results FYI section of the Inbox Summary.
2. Double-click on the result to view result details. Use Action Pane (located at the bottom of screen) to Endorse or Refuse.
3. Refuse- Select reason for refusal. Additional Forward Action is Review. Additional comments may be entered. Refused results are sent to HIM, REFUSAL INBOX (Health Information Management).
4. Click OK or OK & Next to sign and move to the next Results item.

Anticipated Documents

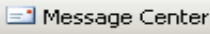
To Create

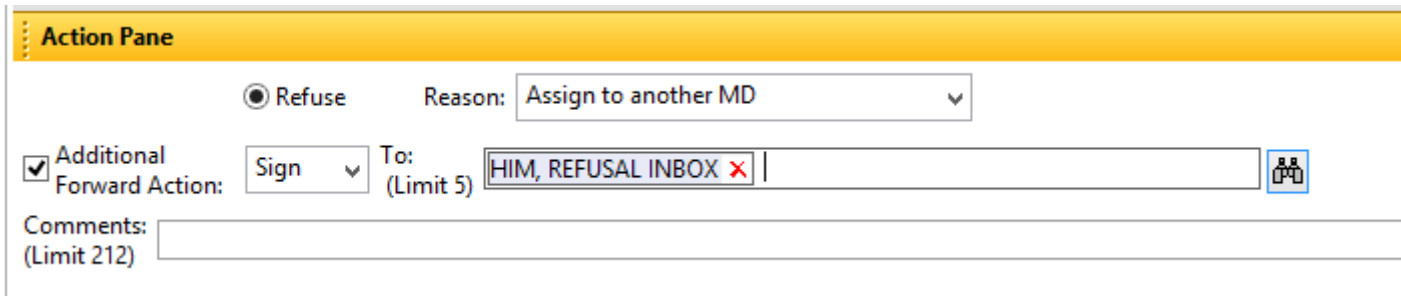
1. Go to your Message Center. 
2. Click on Anticipated Documents.
3. There will be a list of documents that need to be finished. Under the Subject heading will be the type of note that needs to be finished.
4. Right click on the patients name and you will be able to open the patient chart and access Documentation.
5. Document the note needed that is written below the Subject heading.

To Sign

1. Click on Anticipated Documents in your Message Center. 
2. Double click the note that needs to be signed.
3. Scroll until you see yellow provider signature box.
4. Click inside the Yellow provider signature box. When you do so, it will outline the box in a blue stripped box
5. Click ok & close or ok & next which ever applies to your need.

To Refuse

1. Click on Anticipated Documents in your Message Center. 
2. Open the document.
3. At the bottom of the screen there is the Action Pane.
4. Select the reason you are refusing the anticipated document.
5. Additional Forward Action is Sign.
6. Search for HIM, REFUSAL INBOX and send the anticipated document to HIM. Do not forward to other providers.
7. Click ok & close or ok & next which ever applies to your need.



The screenshot shows the 'Action Pane' at the bottom of a document view. It features a yellow header bar with the text 'Action Pane'. Below the header, there is a radio button labeled 'Refuse' which is selected. To its right is a 'Reason:' dropdown menu with 'Assign to another MD' selected. Below these, there is a checkbox for 'Additional Forward Action:' which is checked. Next to it is a 'Sign' dropdown menu. To the right of the 'Sign' dropdown is a 'To:' field with '(Limit 5)' below it, containing the text 'HIM, REFUSAL INBOX' and a red 'x' icon. To the right of the 'To:' field is a small icon of two people. At the bottom of the pane is a 'Comments:' field with '(Limit 212)' below it.


Cosign Orders (Verbal/Telephone)

1. Navigate to the Cosign Orders section of the Inbox.
2. Double-click on the order to view order details. Use Action Pane (located at the bottom of screen) to Approve or Refuse.
3. Refuse- Select a reason for refusal (*mandatory). Additional Forward Action is Review. Additional comments may be entered. Refused orders are sent to HIM, REFUSAL INBOX (Health Information Management).
4. Click OK or OK & Next to sign and move to the next Order.

Proposed Orders

1. Navigate to the Proposed Orders section of the Inbox Summary.
2. Double-click on the order to view order details.
3. Select the appropriate action: Approve, Reject , or Modify.
4. If modifications are necessary, click Modify (white triangle located to the right of the order).
5. Make the necessary modifications and click **Sign**.

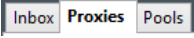
Messages: Creating a New Message

1. Click the Communicate icon  Communicate (located at the upper left of the Messages pane).
2. If you choose, enter the patient's name in the Patient field, and then click the binoculars.
3. Select the patient and the correct encounter, then click **OK**.
4. Enter the recipient(s) in the To: and CC: fields. To include yourself, check Include me.
5. Compose message.
6. If you entered a patient's name, you have the option to save the message to the patient's chart by checking **Save to Chart**.
7. Actions- Check appropriate box (es).
8. You have the option to set a Remind on or Due on date/time for the message.
9. Click **Send**.

Messages: Reply, Forward or Delete

1. Double-click on the message to open. Select Reply, Reply All, Forward, or Delete.
2. If not deleting message, compose your response.
3. Actions- Check appropriate box (es).
4. You have the option to set a Remind on or Due on date/time for the message.
5. Click Send.

Proxies: Granting

1. Click the  Proxies tab located in the Inbox Summary.
2. Click Manage.
3. Select the Given tab (located at the bottom of screen), then click **Add**.
4. Type the recipient in the User search field.
5. Specify Begin Date and End Date.
6. Select Available Items to grant, then click Grant-> or click Grant All->>.
7. Click Accept & Next, then **OK**.
8. The provider that has received proxy will be notified via inbox message. The users displayed in Proxies Given by Me pane are authorizations that have been granted by me.

Proxies: Receiving/Viewing Another User's Inbox





1. Click the Proxies tab located in the Inbox Summary.
2. Within Proxies tab, select the sending provider from the drop down in the Proxy field. This allows you to access their inbox.

*The users displayed in the **Proxies Received by Me** pane are authorizations that you have received from other providers.*



























Proxies: Removing Proxy Authority

1. Click the Proxies tab located in the Inbox Summary.
2. Click Manage.
3. Select the proxy that authority is to be removed.
4. Click Remove, and then click **OK**.

Helpful Hints

- **Refresh:** Displays the last time that the data on the current screen was updated. Click it frequently to refresh, and to avoid timing out. 
- To **Hide the Menu** (located on the left hand side of your screen), click the tack in the upper right corner on Menu line 
- To **Un-Hide the Menu**, click the  tab to view the menu. (upper left side). It will slide back if you move off it. To keep the **Menu** in view, click the tack again.
- To exit **PowerChart**, please utilize the  button in the tool bar. (“Use the **EXIT** door”).
- Hover cursor over icons to see what they are for.
- “T:N” Enter “t” in a date field to get today’s date. Enter “n” in a time field for “now.”

PowerChart Icons

 Add Orders/Allergies	 New Orders Review CareCompass
 Add Orders to a Plan	 New Stat Orders Review CareCompass
 Cancel PowerPlan/IPOC	 Orders for Review
 Customize IView	 Goal/Outcome IPOC
 Dynamic Group IView	 PowerPlan/Plan of Care
 Ellipsis Button	 Pharmacy Verify Pending
 Exit Application	 Pharmacy Rejected Order
 High Risk Alerts	 Physician Co-Sign Required
 Home/Documented Med	 Physician Co-Sign Rejected
 Initiate PowerPlan/IPOC	 Quality Measures Icon
 Inpatient Order/Med	 Reference Doc Available
 Merge PowerPlan View	 Stat Order Review
 Missing Order Details	 Sign Documentation

Notes

Support Contact Name: LAUREN McGOWAN

Phone: (573) 331-6634 Cell: (573) 200-6274

IT Help Desk: ext. 5517