Version 4.0

User's Guide

Physician Portal™

PatientKeeper Patient Care Suite™

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Introduction

The PatientKeeper Patient Care Suite™ is an integrated clinical data application. It consists of two components.

- PatientKeeper Physician Portal™: A web application that you access via a desktop, laptop, or tablet computer, in which you can enter or view patient data stored on a backend server.
- PatientKeeper Mobile Clinical Results™: A network of handheld devices that can communicate with each other, as well as the backend server.

Patient information can be entered or viewed on either type of platform, whether desktop computer or handheld device. Individual users may have access to both platforms, or only one, depending on their user profile, which is established by the institution's system administrator. This *User's Guide* describes the use of the PatientKeeper Physician Portal software application only. A separate *Mobile Clinical Results User's Guide* describes the application which allows physicians to view clinical data on their handheld devices.

This *User's Guide* contains detailed information about the Physician Portal application, as it is used by the typical health care provider or administrator. It is designed primarily as a reference tool for providers who need to create and navigate through meaningful patient clinical information. It also contains information for administrators, who manage and oversee the entire system. It does *not* review the additional system configuration tasks that are available to system administrators. Those functions are described in the *Administration Tools User's Guide*.

The Physician Portal application allows health care providers to perform the following tasks:

- Add or remove patients from their personal patient list
- Send a patient from their own patient list to another provider's patient list
- Get patients from another provider's list and add them to his own list (also referred to as *patient handoff*)
- Temporarily register patients who are not in the institution's master patient list (referred to as *manual registration*)
- View demographic, visit, or clinical data for a specific patient on their personal patient list
- View demographic, visit, or clinical data for a specific patient who is *not* on their personal patient list
- Enter personal annotations relating to a patient's clinical data, or mark clinical items with importance flags
- View a summary of all new clinical data for an individual patient, or all patients on their list
- Customize the system to meet their needs, by creating their own view filters

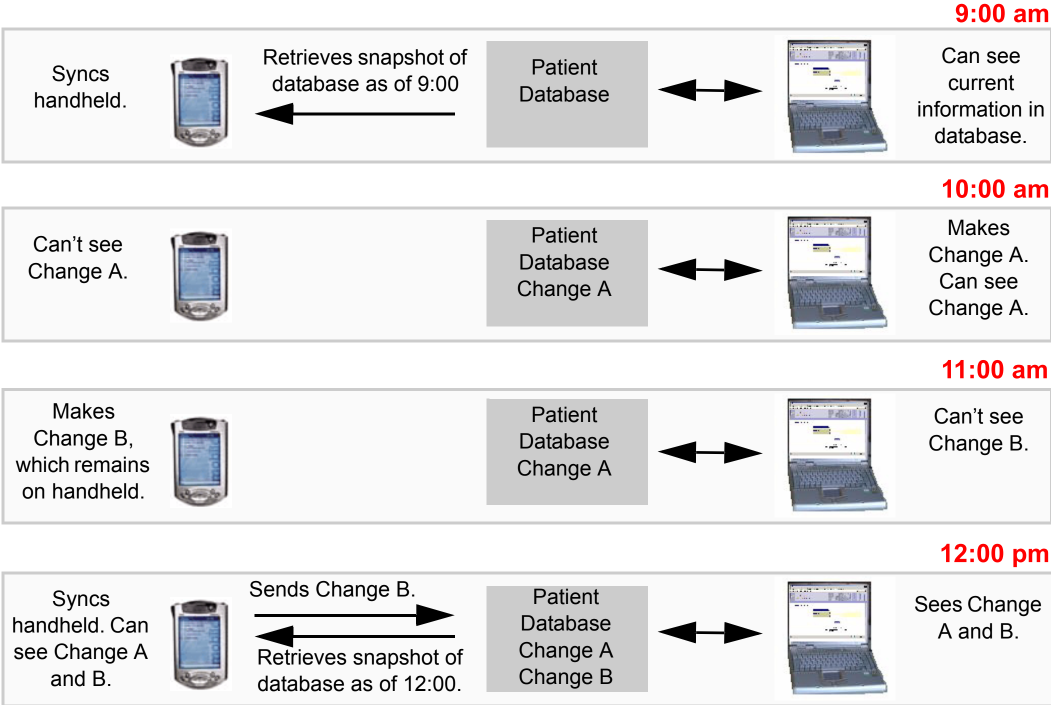
The PatientKeeper Physician Portal application allows administrators to perform the tasks listed below. Some personnel in your institution may have dual roles as both administrators and health care providers, and would therefore *also* use the functions previously listed for providers.

- View demographic or clinical data for a specific patient

- Temporarily register patients who are not in the institution's master patient list (referred to as *manual registration*)
- Reassign patient visits from one provider or service to another
- Manage the entire system's configuration (as described in the *Administration Tools User Guide*)

Relationship Between the Physician Portal and Handheld Devices

Both the Physician Portal application and the handheld devices are used to access the same database of patient information. When changes are made on a laptop or PC, using the web application, those changes are immediately posted to the database, and can be seen in the Physician Portal system. Handheld devices, however, are not constantly accessing the patient database, in the same way that a PC does. Each day, or possibly several times a day, health care providers synchronize their handheld devices and download a snapshot of the database onto their PDAs. Each change that a provider makes using his handheld device, is stored on that handheld device, and is not posted to the database until he synchronizes it again. So if for example, a provider adds a patient to his patient list using his handheld device, that change would not be reflected on his patient list on the Physician Portal application, until he synchronizes. Conversely, if a provider adds a patient to his patient list using the Physician Portal application on his PC, he would not see that new patient on his handheld device until he syncs again, and retrieves the most recent snapshot of the patient database. An example of this scenario is illustrated below.



Providers may synchronize their handheld devices as often as they wish, in order to maintain up-to-date information on it. For detailed instructions on how to synchronize a handheld device, please refer to your *Mobile Clinical Results User's Guide*.

Configuring the PatientKeeper System

The PatientKeeper system is designed to be very flexible, so that each institution can adapt the application to fit their specific needs. In addition, each *user* can also adapt the application to fit their own *personal* needs. As a result, there are a variety of preference settings which control the way a provider's patient list is displayed, the amount of lab data that is downloaded to their handheld device, etc. The majority of these preference settings are configured using the Physician Portal application, on the **Preferences** tab. (For detailed information, please refer to *Establishing your Preferences* on page 23).

Changes that you make on the **Preferences** tab affect the behavior of *both* the Physician Portal application and your handheld device (if you use both of these applications). Users may also make some slight modifications directly on their handheld device. These changes affect the behavior of the handheld, and once you synchronize, some of them may also change the behavior of the Physician Portal application.

In addition to the changes you may make yourself to your personal preference settings, there are a variety of settings that only a system administrator may change. These settings usually affect your ability to access certain functions throughout the application. If you find that you do not have access to a particular feature that is described in this manual, but you would like to use it, contact your system administrator.

Using this Manual

This *User's Guide* is organized into the following sections and chapters:

- Chapter 1, *Introduction*, provides an overview of the PatientKeeper system, describes the relationship between handheld devices and the Physician Portal application, and gives you information about documentation and getting help.
- Chapter 2, *Getting Started on the Web*, provides you with information about security levels, access restrictions, how to log into the system from a laptop or PC, and describes features common to all aspects of the Physician Portal application.
- Chapter 3, *Establishing your Preferences*, describes how to configure personal preferences for the Physician Portal system and handheld devices.
- Chapter 4, *Managing Your Short Patient List*, describes how providers can manage the contents of their short patient list by adding or removing patients, sending patients to other providers, and getting patients from other providers' lists.
- Chapter 5, *Displaying Patient Information*, describes how providers can display individual patient demographic, visit, and clinical data for patients on their short patient list.
- Chapter 6, *Searching for Patients or Visits*, describes how providers can search for patients or visits that are not on their personal short patient list, or how administrators who do not have personal short lists can search for specific patient or visit records.
- Chapter 7, *Registering Patients and their Visits*, describes how to manually register new patients, add or cancel patient visits, reassign patient visits to different

providers, and merge or unmerge manually registered patients with authenticated patients.

This *User's Guide* also contains a comprehensive Index for quick access to information on specific topics.

Documentation in this Set

In addition to this manual, the following documentation is available for users of the PatientKeeper system. Contact your PatientKeeper Implementation Manager to obtain copies of these documents:

- *PatientKeeper 4.0 Release Notes*
- *PatientKeeper 4.0 Administration Tools User's Guide*
- *PatientKeeper Patient Care Suite 4.0 Mobile Clinical Results User's Guide*
- *PatientKeeper Patient Care Suite 4.0 ePrescription User's Guide*
- *PatientKeeper Charge Capture Suite 4.0 Desktop Charge Capture User's Guide*
- *PatientKeeper Charge Capture Suite 4.0 Mobile Charge Capture User's Guide*
- *PatientKeeper Communication Suite 4.0 Sign-Out User's Guide*
- *PatientKeeper Documentation Suite 4.0 Forms User's Guide*

Getting Help

If you need help using the PatientKeeper Physician Portal system, look first in this manual for answers to your questions. You can also click on the **Help** hypertext link that appears at the top of the screen. This opens the online help.

If you experience a problem running the Physician Portal application, first report the issue to your hospital's PatientKeeper administrator.

If your system administrator is unable to solve your issue, send an e-mail to support@patientkeeper.com. Please include as many details about your issue as possible. Always include the software version, whether you are a web or handheld user; as well as your name, telephone number, e-mail address, pager number, and best time to call. Response to an e-mail should typically occur by the next business day.

If this is not sufficient, telephone support is available 8:00 am to 5:00 pm ET, Monday through Friday (excluding normal business holidays), at 888-994-2443.

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Getting Started on the Web

The PatientKeeper Physician Portal is the web-based component of the PatientKeeper Patient Care Suite. It consists of several functions: **Patient List**, **Patient Summary**, **Patient Search**, **Administration**, and **Preferences**. This manual is primarily describes those functions that are used on a daily basis to review patient clinical information. These include: **Patient List**, **Patient Summary, Patient Search**, and **Preferences**. Health care providers and administrators access these options to manage their patient lists, view patient information, and set their personal preferences.

Access Levels

When you log into the PatientKeeper Physician Portal application, the tools available to you are determined by your access level to the system. Your access level can be one of the following:

- **Level 1**: These administrators have institution-wide privileges, that is, full access across all departments and users. Typically, these are system administrators who are responsible for the information technology systems within your health care organization. The are responsible for configuring the system to meet your organization's needs. They have complete rights over themselves, as well as all other users in the system, including the ability to add new users.
- **Level 2**: These administrators can have a variety of different privileges, depending on how your organization has chosen to implement the system. They may be able to configure profiles and patient list filters for users within the departments for which they are responsible. They may also able to add new users.
- **Level 3**: These users are typically health care providers. They use the Physician Portal system to manage their patient lists, view patient information, and create personal filters to control the number of patients on their patient lists.

Access Restrictions to Patients and Their Data

In addition to the basic access levels described in the previous section, there are a variety of other settings that determine your access to specific functions within the application. Each of those is discussed in the sections that describe those functions. However, there are some additional settings that affect your ability to access patients and clinical data throughout the entire application as a whole. These settings include the following:

- **Restrict Patient Lookup To** (see *Restrictions to Selecting Patients* on page 10)
- **Clinical Results View Access (web only)** (see *Restrictions to Viewing Clinical Data* on page 11**)**

Restrictions to Selecting Patients

The **Restrict Patient Lookup To** setting determines which patient visits are available for selection throughout the system. Some organizations are comprised of multiple facilities and therefore have a very large patient census. In this case, the system administrator may use the **Restrict Patient Lookup To** setting to reduce the number of patient visits from which a user can select, in order to make it easier for them to find the patient visits they want. Depending on how a user's account is set up, they may be able to select patient visits in the following categories:

- **Patients with a relationships to the user**: any patient visit that has a relationship with the user (i.e., the user is the scheduled provider, attending provider, admitting provider, or has some other relationship to the patient's visit).
- **Patients with relationships to providers in user's departments**: any patient visit that has a relationship to any provider who works in the same department(s) as the user.
- **Patients in facilities associated with user's departments**: any patient visit that takes place in a facility that is associated with the user's department(s).
- **All patients**: any patient visit in the entire organization.

Once a user has *selected* a patient visit, the amount and type of information that they can *view* for that patient may also be restricted, based on the remaining settings described below.

Restrictions to Viewing Clinical Data

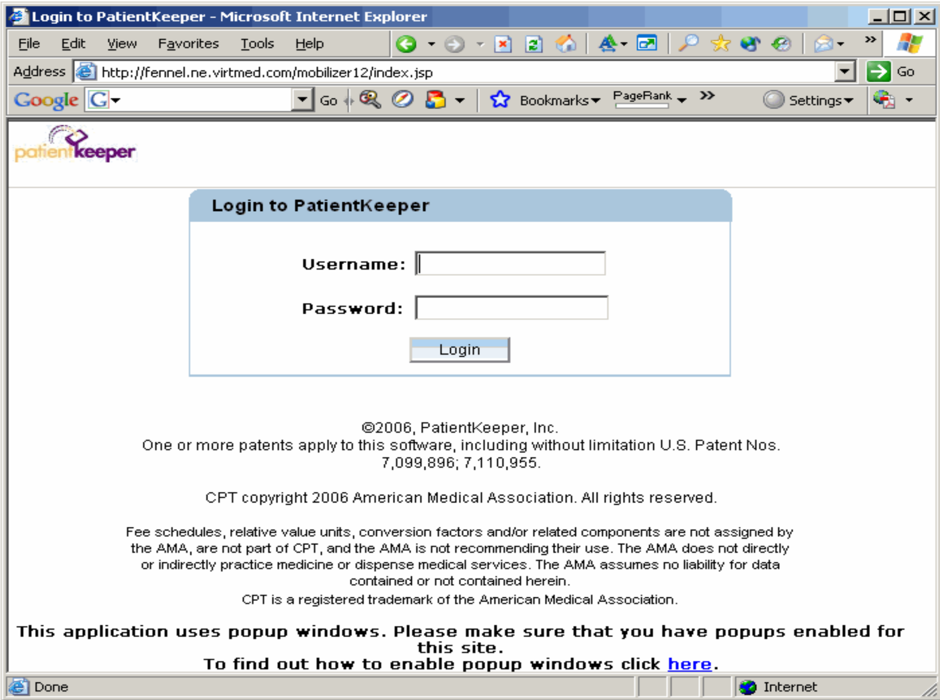
The **Clinical Results View Access (web only)** setting is used to restrict access to clinical data such as reason for visit, medications, lab results, test results, clinical notes, etc. Typically, these restrictions are put in place for non-clinical personnel, such as billing or administrative staff, thereby allowing them to view only the information that is needed for billing and scheduling functions. Depending on how a user's account is set up, they may be able to see clinical data for the following sets of patients:

- **No Access**: the user cannot view clinical data for any patients.
- **Patients with relationships to providers in user's departments**: the user can view clinical data for only those patients who have a relationship to a provider who works in the same department(s) as them.
- **Patients in facilities associated with user's departments**: the user can view clinical data for only those patients who are being seen in a facility that is associated with their department(s).
- **All patients**: the user can view clinical data for any patient in their entire organization.

Logging Into PatientKeeper Physician Portal

To log into the application, do as follows:

1. Enter the web site URL, as provided by your health care organization, for the PatientKeeper Physician Portal application.
2. From the **PatientKeeper** screen that appears, enter your **Username** and **Password.** Usernames and passwords are case-sensitive.



NOTE: If you enter your password incorrectly, you will see an error message stating, “Login failed -- incorrect password.” If this happens, type your password again. After three attempts, the system disables your username and you can no longer log into the system. You must contact your system administrator to correct the problem.

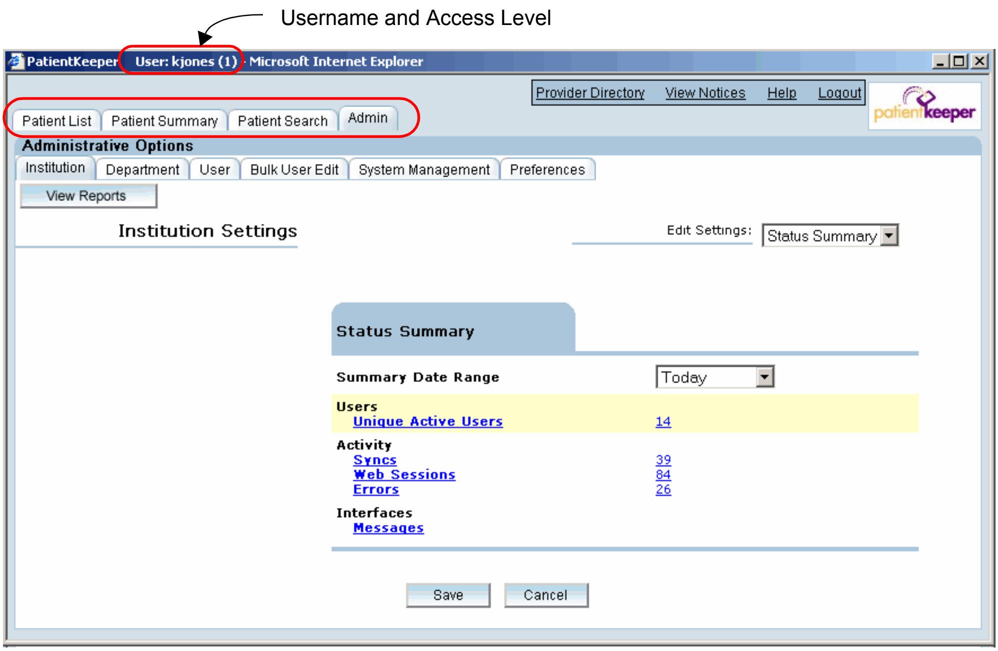
3. Click the **Login** button. The **PatientKeeper** window appears, displaying tabs for each option to which you have access depending upon the access settings granted

in your user profile. The Login window remains open. You can minimize it so you can access it later from the tool bar if desired.

NOTE: You must *not* close the login window. Doing so logs you out of the system.

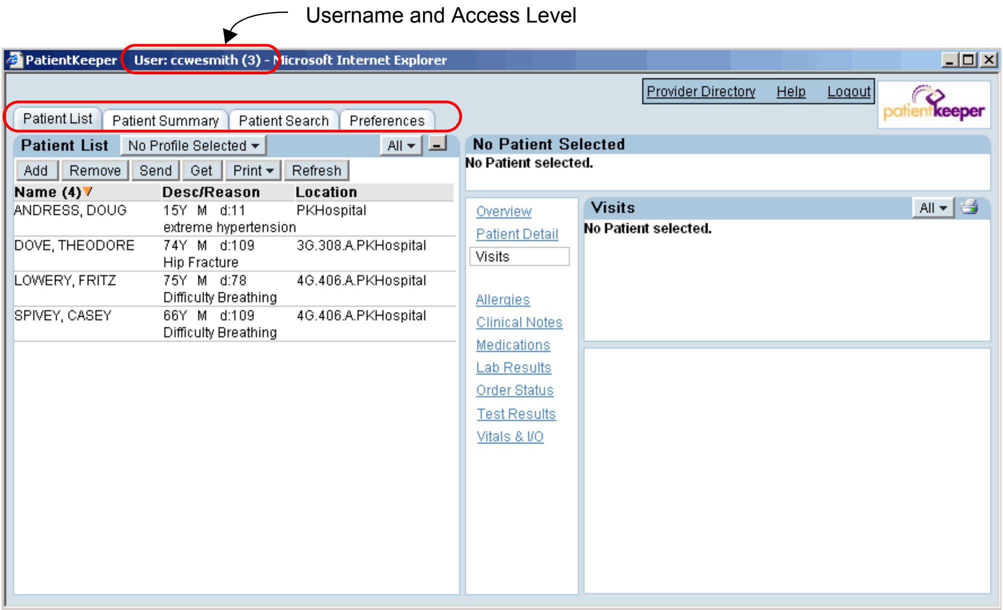
Level 1 and 2 Administrators

When you log into the system, the main browser window is opened, with a series of navigational tabs along the top. From here, you can access all of the options in the system by clicking on the tabs along the top of the screen. These include the **Patient List**, **Patient Summary, Patient Search**, and **Administration** tabs. **Level 1** administrators have full access to all of the available functions on all of these tabs. **Level 2** administrators have access to the same main tabs. However, on the **Administration** tab, they have access to only a subset of the settings found there. If an administrator is not a provider who treats patients, they can disable the **Patient List** and **Patient Summary** tabs, as these options will have no functional value for them.



Level 3 Users

When you log into the system, you see the **Patient List** option, from where you can access other options by using the tabs along the top of the screen. These include the **Patient Summary, Patient Search**, and **Preferences** options. You do not have access to the **Administration** tab.



Logging Out of PatientKeeper Physician Portal

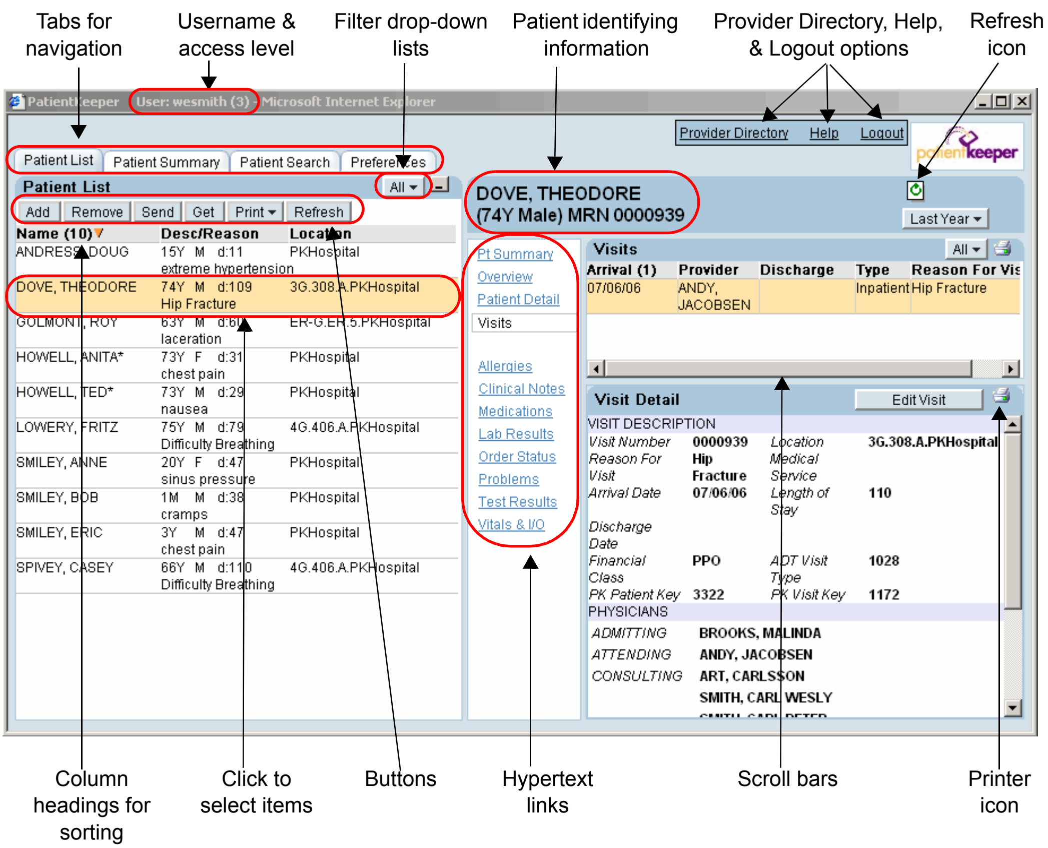
To log out of the system, click on the **Logout** option that appears in the top right corner of every screen.

You can also log out of the system by clicking on the **Logout** button that appears in the Login window, which is most likely minimized on your toolbar.

Common Features of the Physician Portal

When you have finished logging in for the first time, the system immediately displays the **Patient List** tab of the PatientKeeper Physician Portal application. Each subsequent time that you log into the system, the system recalls the tab you were last viewing, and displays that tab as your starting point.

The **Patient List** tab is the main access point for patient information. Many of the elements found on the **Patient List** screen can also be found on the main screens of the other PatientKeeper tabs. These features behave in a similar manner across the entire application, and are described below.



Username and Access Level

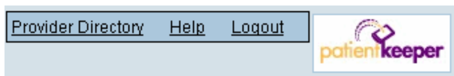
The title bar of the window displays the name of the user who is currently logged into the system, as well as their access level. If another user leaves the application open on a desktop, you should log them out and log in as yourself prior to using the system.

Tabs for Navigation

Each major category of information is located on a tab in the PatientKeeper system. Simply click on a tab to view the information contained on it. The number of tabs that are displayed depend upon the options your institution has chosen to implement, as well as your security access level. Most health care physicians and ancillary staff see some combination of the following tabs: **Patient List**, **Patient Summary**, **Patient Search**, and **Preferences**.

Provider Directory, Help, and Logout Options

The **Provider Directory**, **Help**, and **Logout** options are located in the upper right corner of every screen. Click on **Help** to open the online help for the PatientKeeper application. The **Logout** option is discussed in *Logging Out of PatientKeeper Physician Portal* on page 14, and the **Provider Directory** is discussed in *Looking up Provider Contact Information* on page 20.

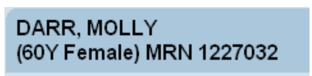


Filter Drop-Down Lists

Filters are used to decrease the number of items that are currently displayed on the screen (patients, medications, lab results, visits, etc.), allowing you to momentarily focus on a particular subset. Most screens have a pre-defined list of commonly used filters, similar to the filter list found on the **Patient List** tab. Simply click on the drop-down list to select a filter. Select **All** from any filter list to revert back to the full list of items.

Patient Identifying Information

Many screens throughout the system are used to display detailed information for a specific patient. For example, the right half of the **Patient List** screen (illustrated on the

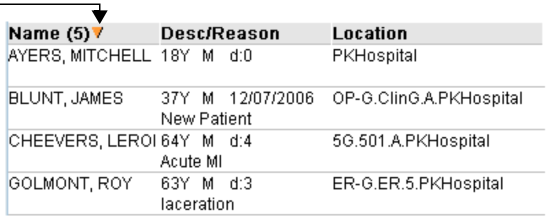


previous page) is used for patient displays. Whenever a specific patient's information is displayed, the title bar of the display window contains the name of the currently selected patient, their age, gender, and the first available identifying number from this prioritized list of three potential numbers: medical record number, account financial number, or account visit number.

Column Headings for Sorting

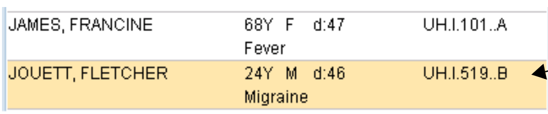
Most columns throughout PatientKeeper can be used to sort the displayed data. Simply click on the column heading once to sort the list in ascending order, and click on it again to sort in descending order.

The orange arrow indicates that this list is sorted in alphabetical order by last name



Selecting Items from Displays of Information

Many screens display information in a table format, consisting of columns and rows. The rows might contain patients, visits, lab tests, etc. In many instances, you must select a row in order to perform some type of action on it. For example, you must select a patient from your patient list, in order to view a list of their visits. To select a row, simply click on it. To deselect a row, click on it again. In options where it is appropriate to select more than one row, you can do so by continuing to click on row after row. You do *not* need to hold down the control key to select more than one row. When a row is selected, the background color changes from white to light orange. To deselect a row, click on the row again.



Patient is selected

Scroll Bars

When the current display is longer or wider than one page, use the vertical or horizontal scroll bars to view the entries at the bottom or right side of the page.

Buttons

Many screens contain buttons that allow you to perform some type of action. For example, on the **Patient List** tab, there are buttons that allow you to add or remove patients from your list. Often, you must select an item prior to clicking a button. For example, you must select a visit from the visits display prior to clicking the **Edit Visit** button.

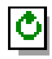
Hypertext Links

Hypertext links appear as regular underlined blue or red text. When you click on a hypertext link, the system opens a window that displays information related to the option you are currently viewing. You may or may not be able to change the information displayed in the window. Similar to buttons, you must often select an item prior to clicking on a hypertext link. For example, on the **Patient List** tab you must select a patient prior to clicking on any of the links in this illustration.

Icons

There are a variety of icons that are used throughout the system. Each of these has a specific function that is consistent wherever it is used.

Refresh Icons



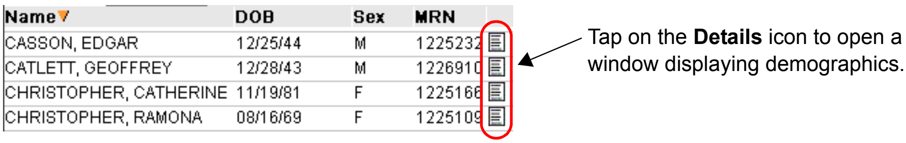
Throughout the day, data is changed in the system. For example, charges may be posted, or visits may be added or cancelled. If you leave a particular option displayed on your desktop for an extended period of time, you would not see the latest information unless you clicked the **Refresh** icon. This button retrieves the most current information from the database and re-displays it on your screen.

Printer Icons

Any time you see a **Printer** icon, you can click it to send the data displayed within that window to a printer. If you would like to see a preview of the printed report, prior to sending it to a printer, hold down the **Control** key and then click on the **Printer** icon. The report is then displayed on your screen.

Details Icons

Although not available on the main **Patient List** screen, many other options contain a **Details** icon (a printed page) whenever a list of patient names or visits is displayed. You can click this icon to help you confirm whether or not you have selected the correct patient or visit, prior to entering or editing information. When you do so, the system displays the standard patient data display screen, which includes demographic, financial, visit, and clinical information. Please refer to *Displaying Patient Information* on page 77 for more information. In the example below, the **Details** icon is visible when selecting a patient to add to your patient list.



Mark as Viewed Icons

The system tracks whether or not you have viewed certain clinical data items. These include lab results, test results, order status, clinical notes, and problems. You can use the **Mark as Viewed** icon to indicate that you have viewed one or more of these data items. See *Marking Clinical Data as Viewed* on page 139 for instructions.

Annotate Icons

You can use the **Annotate** icon to add annotations to specific lab result at any time. These are your personal remarks, or reminders to yourself, about the patient's lab results. See *Annotating a Component* on page 120 for instructions.

Date and Address Formats

At the time of installation, your PatientKeeper representative can configure the system to display date and address information in either US format (the default) or non-US format.

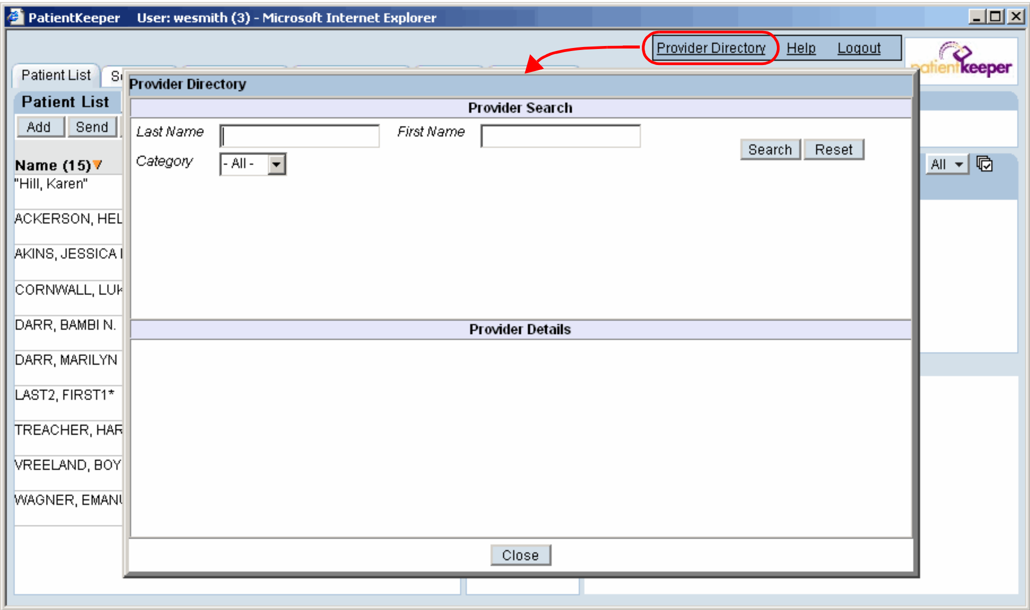
Item	US Format	Non-US Format
Date formats	mm/dd/yyyy or mm/dd/yy	dd/mm/yyyy or dd/mm/yy
Label for State/Province fields	State	Province
Label for Zip/Postal Code fields	Zip or Zip Code	Postal Code

Looking up Provider Contact Information

The Provider Directory is an optional feature that your organization may or may not have chosen to implement. If implemented, the **Provider Directory** option appears at the top right corner of the screen, and is available to all users, regardless of their access level.

The Provider Directory displays basic contact information for any providers that your institution wishes to maintain in the system. For example, you may be able to look up phone numbers (home, office, service, pager, or mobile), specialties, departments, addresses, or e-mail addresses. This information may be available for providers associated with your organization, referring providers, and/or providers in your geographic area.

To open the Provider Directory, click on the **Provider Directory** option located at the top right corner of your screen. The system opens the Provider Directory window. From this screen you can search for a particular provider in order to view their phone or address information.



To look up information for a particular provider, follow the steps below:

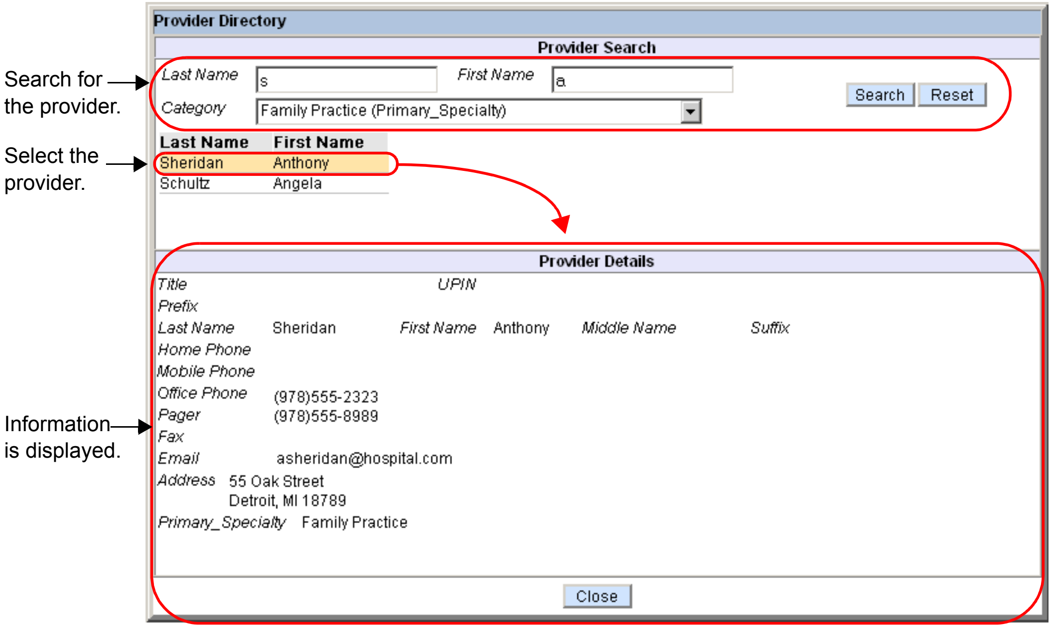
1. Enter all or part of the provider's name in the **Last Name** and/or **First Name** fields. To further refine your search, you may also select a category from the

Category drop-down list. The types of categories available in this list depend on the information your organization has chosen to load into the system. For example, you might see a list of specialties and/or departments.

2. Click the **Search** button.

   The system lists all providers who are a match, based on the last name, first name, and category that you entered. If you do not see the provider you want, click the **Reset** button to clear the current search criteria and start again.

3. Click on the name of the provider whose information you wish to view, and the system displays that provider's information in the Provider Details section at the bottom of the window. To see the details for a different provider on the list, simply click on their name and the system refreshes the Provider Details to show the new provider's information.



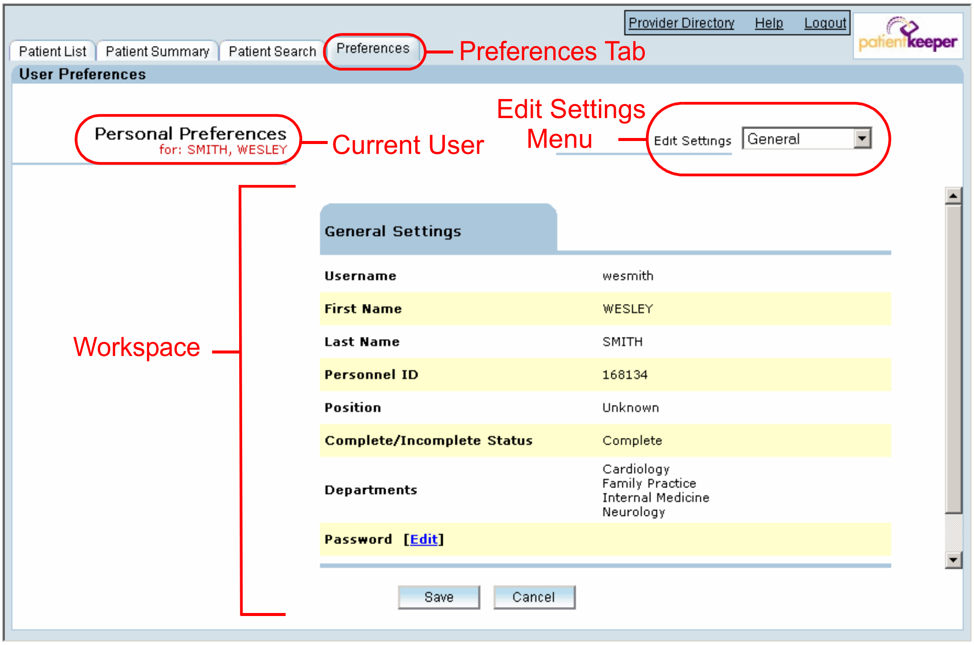
4. Click the **Close** button to exit the Provider Directory option, or click **Reset** to clear your search criteria and search for a different provider.

3

Establishing your Preferences

The **Preferences** tab allows you to configure the settings for general and module-specific behavior. These settings affect the behavior of the various modules on both your handheld device and the PatientKeeper Physician Portal application. These are your personal settings and apply only to the user who is currently logged into the system. Both system administrators and health care providers can set personal preferences, although administrators with an **Access Level** of either **Level 1** or **Level 2** are able to configure a much broader range of settings. This chapter reviews the preference settings that a typical health care provider with an **Access Level** of **Level 3** would see. For a full description of the preference settings available to an administrator, please refer to the *Administration Tools User's Guide*.

To access the Preferences option, log into the system and click on the **Preferences** tab at the top of the screen. The **Preferences** tab consists of the Edit Settings menu and a workspace.



From the Edit Settings menu, you are able to access **General** settings, as well as the settings for the modules to which you have been given access. These may include **Patient List**, **Provider Info**, and **Lab Results** settings.

Quick Guide to Preference Settings

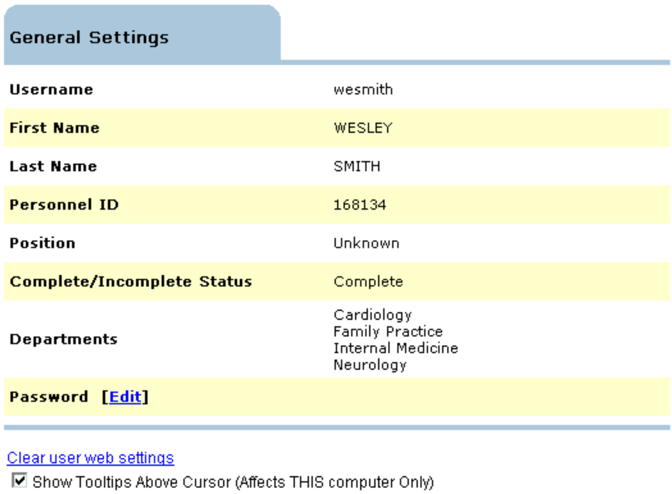
The table below provides a quick guide to the various activities available on the Preferences tab.

Task	Settings Used to Accomplish Task
Change your password, clear web settings, and set tooltip preference	*General Settings*
Create personal profiles containing short list, long list, and rounding list filters of patients	*Patient List Settings*
Create snapshots for viewing specific groupings of lab results	*Lab Results Settings*

Task	Settings Used to Accomplish Task
Create stock phrases for use as annotations on lab results	*Lab Results Settings*

General Settings

The **General Settings** screen shows you some general information on file for your user account, and allows you to change your password. It also enables you to set your preference for the location of tooltips, and to clear all previously used web settings. When you select **General** from the **Edit Settings** menu, the **General Settings** screen appears.



The **General Settings** screen allows you to view or edit the following information:

- **Username**: This setting displays the your username within the PatientKeeper system. This is the name you use when logging into the system on both the web and your handheld device.
- **First Name**: This setting displays the first name of the user.
- **Last Name**: This setting displays the last name of the user.
- **Personnel ID**: This setting displays the unique identification number assigned to the user. This field is read-only
- **Position**: This setting specifies the user's position in the hospital. This field is read-only.

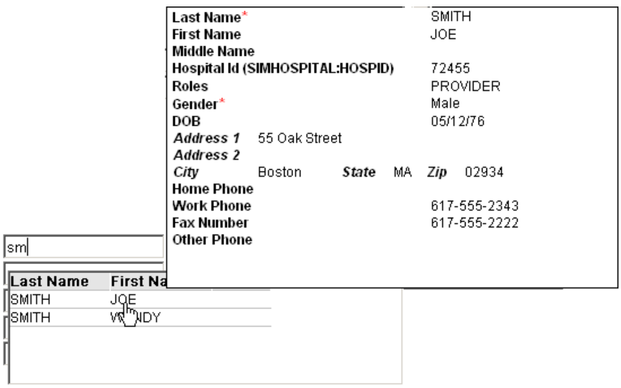
- **Complete/Incomplete**: This setting specifies whether or not this user is completely set up in PatientKeeper. The status must be complete for the user to be able to login to PatientKeeper or initiate a sync.
- **Departments**: This setting lists the departments to which the user has been assigned. This field is read-only.
- **Password**: There are different types of authentication protocols that can be used to secure access to the data in the PatientKeeper system. These include basic authentication and multi-authentication (MEDITECH Downtime, LDAP, Active-Directory, or other). In all cases, each user's password is stored on both their handheld device and on a server. The passwords must match on both server and handheld in order for a user to sync their device.
  - Users can change the password for their handheld directly on the device itself.
  - A user may be able to change their server password using this option in the PatientKeeper application. Whether or not it can be changed here depends on the authentication protocol that your organization has implemented. If the password is not editable in PatientKeeper, you must instead change the password directly in your backend system, or by using your multi-authentication service (MEDITECH Downtime, LDAP, AD or other). In this case, consult your system administrator to confirm the method that should be used to change your server password.

  If a user's password is changed in one place only, whether on the handheld or on the server, the data resident locally on their handheld will remain current as of the last time they synced, but will not be updated. The password must be changed to the same value in both places before a user can sync. It is a good idea to always change the password on the server before changing it on the handheld. The server password cannot be changed from a handheld device.

  To change the server password from the PatientKeeper application, click the **Edit** link. In the **Change Password** form, fill in the current password, the new password, and the new password a second time for confirmation. Pay attention to whether you are typing in uppercase or lowercase, as passwords are case-sensitive. Also, it is important to note that passwords cannot be longer than 16 characters. Click the **Save** button to change the password.
- **Clear user web settings**: The system recalls the settings you last used in the Physician Portal application. For example, it recalls the last tab you selected, the sort order of the search results on the **Patient Search** tab, the last filter you used on the

Patient List tab, and whether the patient list was minimized or maximized. The next time you log in, all of these settings are maintained. If you want to clear those settings, click on this hypertext link.

- **Show Tooltips Above Cursor (Affects THIS Computer Only)**: Tooltips are small informational boxes that pop up when you hover your cursor over an item on the Physician Portal application. For example, when you hold your cursor over a specific provider in a list of provider names, the system displays a box with detailed information about that provider. Normally, that box appears *below* the cursor. When accessing the system via a tablet, instead of a desktop or laptop computer, the user's hand and stylus can obstruct their view of the tooltip. Tablet users can check this box, which then forces the tooltip to appear *above* the cursor, so that they can see it more clearly. This setting does not affect the small one-line tooltips that are seen when hovering over tab names, buttons, or icons. It affects only the larger, more substantial tooltips seen when hovering over provider names or lab result details/comments.



The tooltip appears above the cursor, instead of below it.

Patient List Settings

The **Patient List Settings** screen allows you to specify the default behavior of your short and long patient lists on your handheld device, as well as in the PatientKeeper Physician Portal application. For a thorough explanation of how these settings, as well as others, interact to compile your short and long patient lists, please refer to the *Administration Tools User's Guide*.

When you select **Patient List** from the **Edit Settings** menu, the **Patient List Settings** screen appears.

Patient List Settings

View Filters [Edit]	B-- medical services ER visits FinancialClassTestFilter Inpatient visits Location PKHospital - all Location PKHospital/I, PKHospital/IG Location PKHospital/ICUG MedicalServiceTestFilter
Long List Data Filters [Edit]	Inpatients and ER at PKHospital Outpatients at PKHospital PKHospital PKHospital, C medical services PKHospital/NICU-G ICU-G ER-G PKHospital/OP-G
Short List Data Filters [Edit]	B-- medical services ER visits Inpatients PKHospital visits PKHospital/1, 1R PKHospital/ICU-G
Short List Data Populators [View]	ER at PKHospital Inpatients at PKHospital/ICU-G NICU-G PKHospital 1 & 3G PKHospital GHD patients PKHospital/OP-G, medical services CC-
Rounding Order Lists [Edit]	No Rounding Order Lists Defined
Profiles [Edit]	Inpatients at PKHospital/ICU-G Outpatients and med service CC* PKHospital PKHospital 1 & 3G
Current Profile (Handheld Only) [Edit]	No Current Profile

The **Patient List Settings** screen allows you to view and/or configure the following parameters:

- **View Filters** (see *Defining View Filters* on page 29)
- **Long List Data Filters** (see *Defining Long List Data Filters* on page 32)
- **Short List Data Filters** (see *Defining Short List Data Filters* on page 34)
- **Short List Data Populators** (see *Short List Data Populators* on page 36)
- **Rounding Order Lists** (see *Defining Rounding Order Lists* on page 38)
- **Profiles** (see *Defining Profiles* on page 39)
- **Current Profile (handheld only)**: This setting specifies the profile currently being used for the selected user on their handheld device (it does *not* affect their current profile on the **Patient List** tab of the Physician Portal application). Click the **Edit** link to choose a different profile or to preview the effects of available profiles. When you click the **Edit** link, the **Change Current Profile** dialog box appears. Select a profile from the drop-down list. Click the **Preview** button to

view the effects of the selected profile, including the number of patients on the long list, those on the short list, and those to be added via short list data populators. Be careful when specifying a **Current Profile** as it directly affects the number of patients that appear on your short and long patient lists and may dramatically affect the time required for syncing your handheld device.

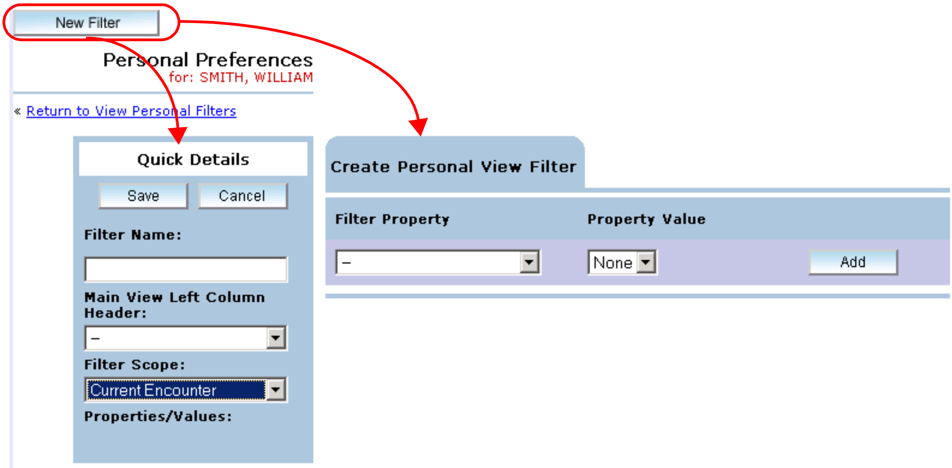
Defining View Filters

The **View Filters** setting displays the list of **Stock View Filters** created at a departmental level, as well as any personal filters that you may have created yourself. Personal filters are easily identifiable by the underscore '_' that precedes their name. **View Filters** are used to decrease the number of patient visits that are currently displayed on your patient list. It does *not* permanently remove any patient visits from your list--it temporarily takes them out of your view so that you can focus on a particular subset. You can always revert back to your full list by selecting **All** from the filter drop-down list.

Click the **Edit** link to modify the hide/unhide settings for the stock filters, or to add a new personal filter.

- To set the hide/unhide properties for a stock filter, select the filter by clicking on it in the **View Filters** form and then click the **Hide** or **UnHide** button in the **Quick Details** box. Note that the button toggles between **Hide** and **Unhide** depending upon whether or not the **Hidden** column has been checked or unchecked, respectively, for the filter. Hide a view filter if you do not want it to appear as a choice on the filter drop-down list on the handheld or Physician Portal application. You might hide a stock filter if you did not find it to be useful for your personal needs.
- To create a personal filter, click the **New Filter** button on the toolbar and the Create Personal View Filter screen appears. The remainder of this section reviews the

basic steps involved in creating a view filter.



In the **Quick Details** box, enter the following:

– **Filter Name**: enter a name for the filter as you would like it to appear in the drop-down list on the handheld device.

– **Main View Left Column Header:** use this field to specify what information appears in the first column of the Patient List main view (only on the handheld) when this filter is applied by selecting it from the drop-down list.

– **Filter Scope**: This field is used to determine to which subset of patient encounters the filter will be applied. Select one of the following filter scopes:

- **Current Encounter**: The filter selects from only the current encounters for the patients on the user's short list. Each patient has one encounter that is designated as the *current* encounter. For an explanation of how the system determines which encounter is the *current* one, please refer to *Basic Functionality of the Patient List Area* on page 51.

- **All Related Encounters**: The filter selects from all encounters with which the user has a relationship, for the patients on their short list.

- **All Encounters**: This scope only applies when the view filter is used *on a handheld device*. The filter selects from all of the encounters associated with all of the patients on the user's short list. This includes encounters from the long list, even if this user does not have a relationship with them. If the filter finds an encounter with which this provider does *not* have a relationship, the system asks him to declare one, in order for the patient to be added to his short list, and viewed on the filter. After the filter has been applied, if more than one encounter was found which matches the filter's properties, the current encounter is recalculated.

– In the **Create Personal View Filter** form, select a **Filter Property** and **Property Value** from the drop-down lists and click on the **Add** button at the end of the row to save the combination. Repeat this for each **Filter Property**/ **Property Value** combination you wish to add to the filter criteria. Note that if you have more than one **Filter Property** and **Property Value** combination, the filter will return only those patients that meet *all* the criteria.

  Each filter has multiple criteria, such as **Location**, **Visit Type**, and **Medical Service**. *All* of the specified criteria must be met (a logical AND operation is performed) for a visit to be included in the filter results. In other words, the logic applied to a View Filter is as follows:

  *(visit is of **Visit Type**)* **AND** *(visit is in **Locations**)* **AND** *(visit is a member of **Medical Services**)*

  Within a given criterion (such as **Location**, **Visit Type**, or **Medical Service**), only one of the selected options needs to be true for the entire criterion to be satisfied. For example, if several individual locations (Ambulatory Surgery and Dialysis Center) are selected under **Location**, only one of them needs to be true (a logical OR operation is performed) for the entire **Location** criterion to be satisfied. The same is true for **Visit Type** and **Medical Service**.

Click the **Save** button in the **Quick Details** box to save the personal filter. Once the personal filter is created, you can use the **Edit** button to change the properties of the filter and the **Delete** button to remove it.

Listed below are some sample View Filters.

Simple View Filter	
Location(s)	1N,2N
Filter Scope	Current Encounters
Result:	This simple View Filter shows all patient visits in locations 1N and 2N. The system reviews *only the current encounters* on your short patient list when selecting which visits to show. So if patient's *current* visit *is not* in 1N or 2N, no visit would be displayed in the filter results for that patient (even if the patient *also* had an older visit that *was* located in 1N).

Complex View Filter	
Location(s)	1N,2N
Medical Service(s)	Cardiology
Personnel Relationship	Attending
Financial Class	Medicare
Filter Scope	All Related Encounters
Result:	This View Filter shows only the patient visits in locations 1N or 2N that were admitted to the Cardiology service, who have you listed as their attending physician, and are also covered by Medicare. The system reviews *all encounters on your short patient list* (current, past, and future) when selecting which encounters to show.

Defining Long List Data Filters

The **Long List Data Filter** parameter allows you to define personal **Long List Data Filters** that are available only to the selected user. Personal filters are easily identifiable by the underscore '_' that precedes their name. This setting also displays any **Stock Long List Data Filters** that were created at the departmental level, and which are available for your use.

Long List Data Filters select those patients that you wish to keep on your long list, and remove all others off your long list. This processing is only applied to the long list that is sent to your handheld device--Long List Data Filters do not affect the long list on the Physician Portal application.

A Long List Data Filter is only applied against your handheld long list if it is included in a **Profile**. A profile can have zero or one Long List Data Filter. The resulting long list will contain all patients meeting the Long List Data Filter criteria as well as any patients filtered off of the user's short list by a Short List Data Filter.

Each filter has multiple criteria, such as **Location**, **Visit Type**, and **Medical Service**. Either both the **Location** and **Visit Type** criteria must be met (a logical AND operation is performed between **Location** and **Visit Type**), or the **Medical Service** criterion must be met (a logical OR operation is performed between **Medical Service** and the result of ANDing the other two criteria) for the Long List Data Filter to apply. In other words, the logic applied to a Long List Data Filter is as follows:

> *[(visit is of* **Visit Type***)* **AND** *(visit is in* **Locations***)]* **OR** *(visit is a member of* **Medical Services***)*

For example, if **Location** is set to Hospital A, **Visit Type** to Outpatient, and **Medical Service** to Audiology, then all outpatients at Hospital A will be on the long list, as well as all Audiology patients (regardless of their **Location** or **Visit Type**).

Within a given criterion (such as **Location**, **Visit Type**, or **Medical Service**), only one of the selected options needs to be true for the entire criterion to be satisfied. For example, if several individual locations (Ambulatory Surgery and Dialysis Center) are selected within Location, only one of them would need to be true (a logical OR operation is performed) for the entire **Location** criterion to be satisfied. The same is true for **Visit Type** and **Medical Service**.

You can include Service A and Service B on the user's long list by selecting both under **Medical Services** for a single **Long List Data Filter**. This is because **Medical Services** are ORed in Long List Data Filters. Note that this is different for Short List Data Filters, where you would need to create two separate filters to accommodate two different services. This is because **Medical Services** are ANDed in Short List Data Filters.

Listed below are some sample Long List Data Filters.

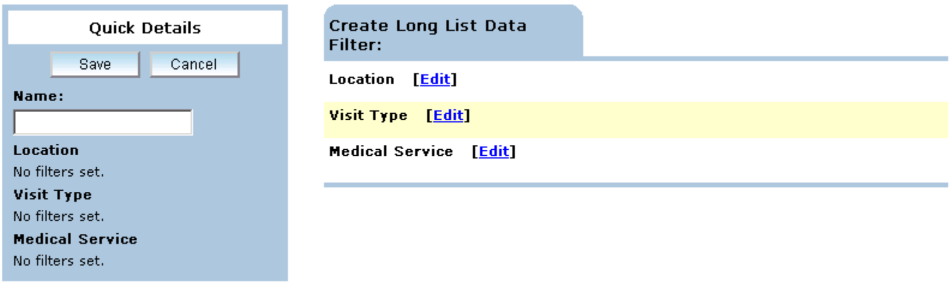
Simple Long List Data Filter	
Visit Type	Inpatient
Result:	Of the patient visits with which the user does not have a relationship, this Long List Data Filter causes only the Inpatient visit types to be sent to the handheld's long list. All other visit types (e.g., outpatient, ER) are not sent to the handheld device.

Complex Long List Data Filter	
Location(s)	3N, 3S, ER1
Visit Type(s)	Inpatient, Emergency Room
Medical Service(s)	Neurology

Complex Long List Data Filter	
Result:	Of the patient visits with which the user does not have a relationship, this Long List Data Filter causes only inpatient or emergency room patients in nursing units 3N, 3S, or ER1, as well as all visits with the Neurology Service, to be sent to your handheld's long list. All other visits are not sent to the handheld device (e.g., Inpatient visits in other locations, Emergency room visits in other locations, visits with other services).

Click the **Edit** link to view the details of the stock filters, and to create personal filters.

- To create a personal filter that is available only to a profile for the selected user, click the **New Filter** button on the toolbar and the **Create Long List Data Filter** form appears.



Click the **Edit** link for each field to bring up a screen where you can select the criteria by checking its box. Once you have selected the criteria, click the **OK** button and the **Quick Details** box will be updated to show what you selected. Note that the **Create Long List Data Filter** form always appears empty as shown; the details are only displayed in the **Quick Details** box. Click the **Save** button in the **Quick Details** box to create the personal filter.

Defining Short List Data Filters

The **Short List Data Filter** parameter allows you to define personal **Short List Data Filters** that are available only to the selected user. Personal filters are easily identifiable by the underscore '_' that precedes their name. This setting also displays any **Stock Short List Data Filters** that were created at the departmental level, and which are available for your use.

Patient visits that meet the criteria in the **Short List Data Filter** are placed on the user's final short patient list (on both handheld devices and the Physician Portal application). Patients that do not meet the filter criteria are moved to the user's long list. Essentially, these filters narrow the scope of the short list by taking some of the patients with whom the user *has* a relationship *off* of their short list. This lets you control how much data is sent to the user's handheld during a sync, and can significantly reduce the amount of time it takes for a sync to complete.

Each filter has multiple criteria, such as **Personnel Relationships**, **Location**, **Visit Type**, and **Medical Service**. *All* of the specified criteria must be met (a logical AND operation is performed) for the Short List Data Filter to apply. In other words, the logic applied to a Short List Data Filter is as follows:

> *(relationship is of type **Personnel Relationships**) **AND** (visit is of **Visit Type**)* **AND** *(visit is in **Locations**)* **AND** *(visit is a member of **Medical Services**)*

In other words, the patient must have a visit that meets *all* of the criteria of a given filter for that visit to be left on the user's short list.

Within a given criterion (such as **Personnel Relationships**, **Location**, **Visit Type**, or **Medical Service**), only one of the selected options needs to be true for the entire criterion to be satisfied. For example, if several individual locations (Ambulatory Surgery and Dialysis Center) are selected under **Location**, only one of them needs to be true (a logical OR operation is performed) for the entire **Location** criterion to be satisfied. The same is true for **Personnel Relationships**, **Visit Type** and **Medical Service**.

A single profile can have multiple Short List Data Filters. Only one of the filters needs to be satisfied (a logical OR operation is performed on filters) for a patient visit to remain on the short list. If you wish to include both Service A and Service B on the user's short list, create two Short List Data Filters, one with each **Medical Service**. Note that this is different for Long List Data Filters. A profile may only have one Long List Data Filter. To accommodate multiple **Medical Services**, Long List Data Filters OR rather than AND the services.

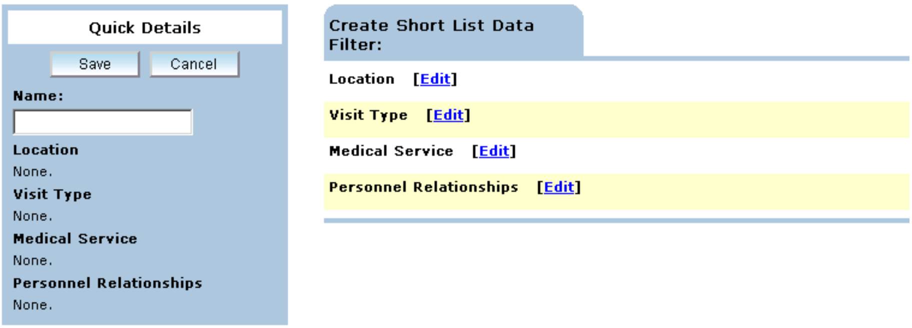
Listed below are some sample Short List Data Filters.

Simple Short List Data Filter	
Location(s)	1N,2N
Result:	Of the patient visits with which the user has a relationship, this simple Short List Data Filter selects all patient visits in nursing units 1N and 2N, to keep on the user's short list. All other patient visits with which the user has a relationship are placed on the long list (e.g., visits in other locations).

Complex Short List Data Filter	
Location(s)	Rehab A, Rehab B
Visit Type	Outpatient
Medical Service(s)	Physical Therapy
Result:	Of the patients with which the user has a relationship, this filter selects only the outpatients in the Rehab A or B location who are being treated by the Physical Therapy service, to keep on the user's short list. All other patient visits with which the user has a relationship are placed on the long list (e.g., inpatient physical therapy, physical therapy in other locations, or other services).

Click the **[Edit]** link to view the details of all **Stock Short List Data Filter**s for the department to which the user belongs. From here you can also create personal filters.

- To create a personal filter that is available only to a profile for the selected user, click on the **New Filter** button on the toolbar and the **Create Short List Data Filter** form appears.



Click on **Edit** link for each field to bring up a screen where you can select the criteria by checking its box. Once you have selected the criteria, click the **OK** button and the **Quick Details** box will be updated to show what you selected. Note that the **Create Short List Data Filter** form always appears empty as shown; the details are only displayed in the **Quick Details** box. Click **Save** in the **Quick Details** box to create the new personal **Short List Data Filter**.

Short List Data Populators

The **Short List Data Populator** setting displays the **Stock Short List Data Populators** that were created at a departmental level and are available for selection by the user. For security reasons, individual users are not allowed to create their own **Short List Data**

Populators, although they can specify which **Stock Short List Data Populators** to use in their **Profiles**. Click **[View]** to see details about the **Stock Short List Data Populators** available to this user.

Short List Data Populators select certain patient visits with whom the user does *not* have a declared relationship, and *adds* them onto their short list (on both handheld devices and the Physician Portal application). At the time the patient visit is added to the short list, a new relationship is declared for that visit, of the type specified in the **Populator Relationship** parameter of the user's current **Profile**. Essentially, short list data populators *create relationships* with the visits that meet the criteria defined in the populator.

A **Short List Data Populator** is only applied if it is included in a **Profile**. A profile can have multiple **Short List Data Populators**. The resulting short list will include all patients remaining on the user's short list after the **Short List Data Filters** have been applied plus any patients added by the **Short List Data Populators**.

Each populator has multiple criteria, including **Location**, **Visit Type**, and **Medical Service**. Either both the **Location** and **Visit Type** criteria must be met (a logical AND operation is performed between **Location** and **Visit Type**), or the **Medical Service** criterion must be met (a logical OR operation is performed between **Medical Service** and the result of ANDing the other two criteria) for the Short List Data Populator to apply. In other words, the logic applied to a Short List Data Populator is as follows:

> *[(visit is of* **Visit Type***)* **AND** *(visit is in* **Locations***)]* **OR** *(visit is a member of* **Medical Services***)*

For example, if **Location** were set to Hospital A, **Visit Type** to Outpatient, and **Medical Service** to Audiology, then all outpatients at Hospital A are added to the user's short list, as well as all Audiology patients (regardless of their **Location** or **Visit Type**).

Within a given criterion (such as **Location**, **Visit Type**, or **Medical Service**), only one of the selected options needs to be true for the entire criterion to be satisfied. For example, if several individual locations (Ambulatory Surgery and Dialysis Center) are selected within **Location**, only one of them needs to be true (a logical OR operation is performed) for the entire **Location** criterion to be satisfied. The same is true for **Visit Type** and **Medical Service**.

Simple Short List Data Populator	
Service(s)	Cardiology

Simple Short List Data Populator	
Result:	Of the patient visits with which the user does not have a relationship, this simple Short List Data Populator selects all patient visits booked with the Cardiology service, and adds them to the user's short list by declaring a relationship to them.

Complex Short List Data Populator	
Medical Service(s)	Cardiology, Cardio-Pulmonary
Visit Type	ER
Result:	Of the patient visits with which the user does not have a relationship, this filter selects all emergency room visits, as well as all visits with the Cardiology and Cardio/Pulmonary Services, and adds them to the user's short list by declaring a relationship to them.

Defining Rounding Order Lists

The **Rounding Order Lists** parameter allows you to define personal **Rounding Order Lists** that are available only to the selected user. Personal rounding order lists are easily identifiable by the underscore '_' that precedes their name. This setting also displays any **Stock Rounding Order Lists** that were created at the departmental level, and which are available for your use.

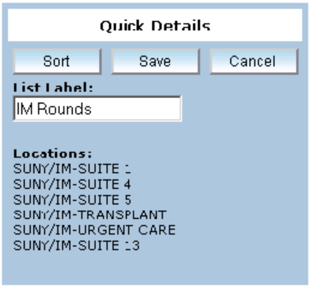
A **Rounding Order List** is a list of nursing stations, according to which the short patient list will be reordered on a handheld device or the Physician Portal application. This lets you sort your short patient list in the order that you round locations.

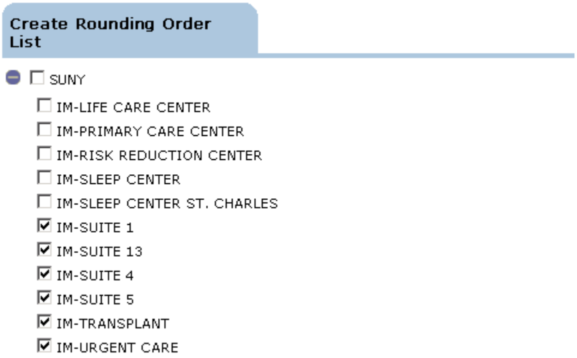
A **Rounding Order List** is only applied if it is included in a **Profile**. A profile can contain only one **Rounding Order List**.

Click the **Edit** link to view the details of **Stock Rounding Order Lists**, or to add a new personal **Rounding Order List**.

- To view the properties for a stock list, select the Rounding Order List by clicking on it in the **View Rounding Order Lists** form and the details will appear in the **Quick Details** box.
- To create a personal rounding order list, click on the **New List** button on the tool-bar. Enter a **List Label** in the **Quick Details** box. Then, select the nursing stations

to include in the list by checking them in the hierarchical list displayed on **Create Rounding List Order** form.





The nursing stations are added in a group to the list, so it is likely you will want to specify the exact order of the individual nursing stations. To do so, click the **Sort** button in the **Quick Details** box. Once the rounding list is in the desired order, click the **Save** button in the **Quick Details box** to create it.

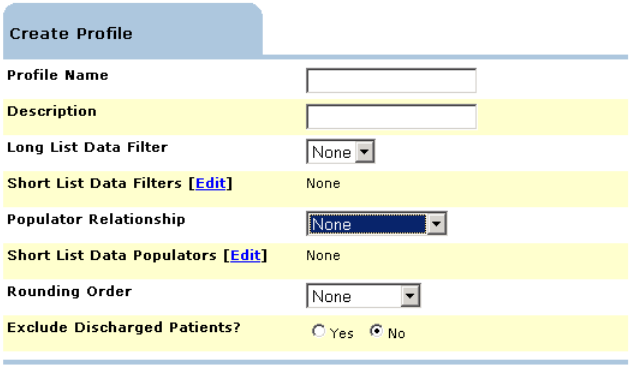
Once a personal list is created, you can subsequently use the **Edit** button to change its properties and the **Delete** button to remove it.

Defining Profiles

The **Profiles** setting displays the profiles, both stock profiles and personal profiles, available to the selected user. A profile is a single parameter that groups settings for **Short List Data Filters**, **Short List Data Populators**, **Long List Data Filters**, and **Rounding Order Lists**. This gives the user a quick means to switch between different sets of patients. This is particularly useful if the user splits their time between different facilities within an organization. On those days where they are in a particular facility, they only want to see data for patients within that facility. They can define a profile for each facility, and can simply select the appropriate profile. When they log onto the Physician Portal application or sync their handheld device, only those patients within that facility appear on their short and long patient lists.

Click the **Edit** link to view the details of stock profiles or to create one or more personal profiles (personal profiles are easily identifiable by the underscore '_' that precedes their name).

- To create a profile, click the **New Profile** button on the toolbar to bring up the **Edit Profile** form. This form contains a series of parameters for filters, populators, and rounding orders. Keep in mind that some fields may be left blank. For example, if you don't want to include a short list data populator in the profile, you can leave that field blank.



Specify the settings for the fields as follows:

– **Profile Name**: Enter a name for the profile. This name will appear on the list of available profiles when selecting the **Current Profile**.

– **Description**: Enter a description for the profile that clearly indicates what patient visits it includes.

– **Long List Data Filter**: Choose a **Long List Data Filter** to be used by the profile. You may only select one, whether it be a **Stock Long List Data Filter** filter or a personal one.

– **Short List Data Filters**: Click the **Edit** link to choose one or more **Short List Data Filters** to be used by the profile. You may select any combination of **Stock Short List Data Filters** and personal **Short List Data Filters**.

– **Populator Relationship**: Choose the default relationship that will be assigned to patients that do not have a relationship with the user, but are added to the user's list as a result of the populator (defined in the next field). If an active relationship already exists between the user and the patient, then no new relationship will be assigned.

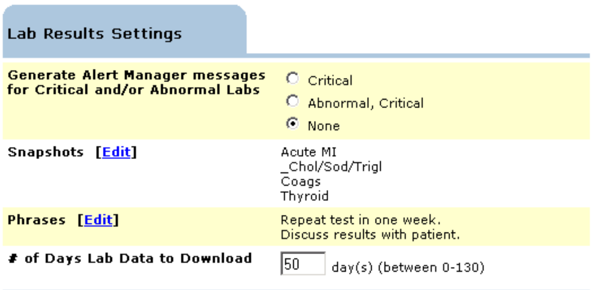
– **Short List Data Populators**: Click the **Edit** link to choose one or more **Stock Short List Data Populators** to be used by the profile.

– **Rounding Order**: Choose the **Rounding Order** that will be used by the profile to order the patients on your short patient list.

– **Exclude Discharged Patients?**: This setting determines whether or not discharged patients meeting the criteria outlined in the profile will be added to the user's short and long patient lists. Set to **Yes** to exclude discharged patients; set to **No** to include discharged patients.

Lab Results Settings

The **Lab Results Settings** screen lets a user create personal snapshots and phrases and set how many days worth of lab data to download to their handheld device. Snapshots are used to customize sets of lab components that are viewed on the Physician Portal and on handheld devices. Phrases are shortcuts for adding commonly used comments as annotations to lab component results. The department administrator may have created some stock snapshots and stock phrases that users can access automatically. If these snapshots and phrases aren't useful, the user can hide them so that they don't appear as choices on the Physician Portal or the handheld device. When you select **Lab Results** from the **Edit Settings** menu, the **Lab Results Settings** screen appears.



The **Lab Results Settings** screen allows you to view and configure the following parameters:

- **Generate Alert Manager messages for Critical and/or Abnormal Labs**: Depending on how your system administrator has configured the system, this setting may or may not be available to you on this screen. If it is available, you can use it to determine whether or not you wish to receive alerts on your handheld device for lab results. Select **Critical** to receive alerts only if the lab result is critically abnormal. Select **Abnormal, Critical** to receive alerts when lab result are either abnormal or critically abnormal. Select **None** if you do not wish to receive any alerts for lab results at all.
- **Snapshots**: This setting displays those snapshots that are available to the user as filters on the main Lab Results screen of either the handheld device or Physician

Portal. A snapshot is a customized grouping of lab components from arbitrary panels in your lab system. For example, you may prefer to see Cholesterol, Sodium, and Triglyceride results grouped together. These could be added as components of a snapshot, so that the information could be viewed collectively as a single result. If there are stock snapshots that are not useful, you can hide them so that they aren't available on the Physician Portal or your handheld device. Only those stock snapshots that are not hidden will be available.
Click the **Edit** link to modify the hide/unhide settings for stock snapshots or to add new personal snapshots.

– To set the hide/unhide properties for a stock snapshot, select the snapshot by clicking on it in the **View Snapshots** form and then click the **Hide** or **UnHide** button in the **Quick Details** box. Note that the button toggles between **Hide** and **Unhide** depending upon whether or not the snapshot is currently hidden.

– To create a personal snapshot that is available only to the selected user, click the **New Snapshot** button on the toolbar. Enter a **Snapshot Title** in the **Quick Details** box and then check those lab components you wish to include in the snapshot. Click the **Search** button and enter search text to more easily locate components. After you have selected all of the components for the snapshot, click the **Save** button to create the snapshot. Once saved, personal snapshots are easily identifiable by the underscore '_' that precedes their name. After the personal snapshot is created, you can also use the **Edit** button to add or remove components from the snapshot, and the **Delete** button to remove the snapshot.

- **Phrases**: This setting displays those phrases that are available to the selected user as a shortcut when annotating lab results on the Physician Portal or a handheld device. If there are stock phrases that are not useful, you can hide them so that they aren't available. Click the **Edit** link to create a personal phrase and to modify the hide/unhide status of stock phrases, if any are defined.

  – To create a personal phrase that is available only to you, click the **New Phrase** button on the toolbar. Enter text, up to 128 characters, to complete the phrase and then click the **Save** button to create it. Once saved, personal phrases are easily identifiable by the underscore '_' that precedes their name. After the personal phrase is created, you can also use the **Edit** button to change its text, and the **Delete** button to remove it.

  – To sort all phrases so that they will appear in a specific order on the Physician Portal and your handheld device, click the **Sort Phrases** button on the toolbar.

Use the buttons to move the phrases up, down, to the top, into alphabetical order, and click **Save** to store the changes.

– To modify the hide/unhide status for a stock phrase, select that phrase from the **View Phrase** form and then click the **Hide** or **Unhide** button. Hidden stock phrases will not be available to you when annotating lab results.

- **# of Days Lab Data to Download**: This setting determines how many days of lab data per patient to download to your handheld device during a sync. Keep in mind that the amount of data downloading affects the length of time required for a sync. The PatientKeeper system allows up to 180 days of data, although your system administrator may have set a lower maximum which you cannot exceed. If so, that maximum is displayed on the lab settings screen.

4

Managing Your Short Patient List

The PatientKeeper system organizes patients into two main groups: the long list (sometimes referred to as the census list), and personal short lists for each health care provider. The long list contains all patients who have had an outpatient appointment or inpatient visit in your institution. Any given user may have access to the entire long list, or just a subset of it. The short list is different for each provider: it contains those recent patient visits from the long list with whom the provider has some type of active relationship. For example, the provider might be the attending or admitting physician for a patient's inpatient visit, or the scheduled provider on a patient's outpatient appointment.

There are two tabs on the PatientKeeper application that allow a user to manage the patients who are on their short patient list. These are the **Patient List** tab and the **Patient Search** tab. The primary difference between the two tabs is that the **Patient List** tab gives health care providers access to patients who *are* on their short patient list, while the **Patient Search** tab gives them access patients who are *not* on their short patient list (i.e., from here they can access a patient on the long list). Administrators who do not actually treat patients do not have a personal short patient list. In this case, the **Patient Search** tab is their primary access to patient data.

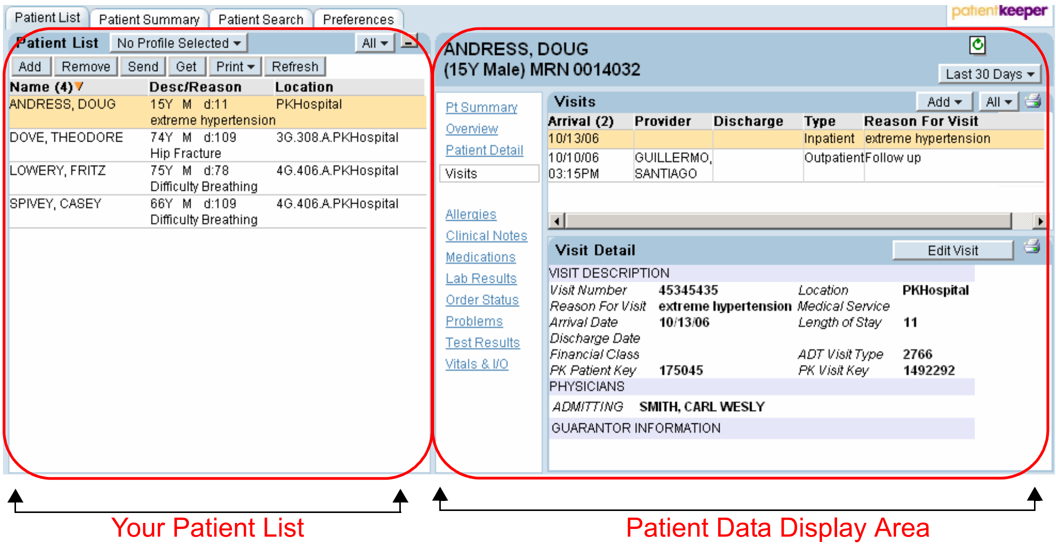
The **Patient List** tab is the provider's main access point to patient list management tasks. It *automatically* supplies the provider with a list all the patients with whom they have some type of active relationship, by pre-selecting them and displaying them on the screen. The user can sort or filter their list, as well as add or remove patients from their list. If the ability to send patients to other health care providers is enabled for them, then they can also send patients to other providers (i.e., add patients to other providers' short lists). Similarly, if the **Get Patients** capability is enabled for them, they can view other providers' short patient lists and choose patients to move onto their own patient list. Finally, a provider can easily work their way through their list, displaying clinical data without having to search for each patient by name. The display functions are described in *Displaying Patient Information* on page 77.

The **Patient Search** tab, by contrast, gives the user access to patients with whom they do not have an active relationship. For a provider, this is an easy way to look up information about a patient who is not under their direct care; they can view the patient's demographic, visit, and clinical information without having to add the patient to their short list. For the administrator, this is the only way they can view patient data, since they do not have relationships with patients at all. Since the user does *not* have a formal relationship with the patient, on the **Patient Search** tab they must first search for each individual patient name from the long list, prior to viewing their information. The **Patient Search** tab also provides access to two patient list management functions: a provider can add a patient to their short list, or a provider or administrator can select patients to send to other users.

This chapter primarily reviews the patient list management functions that are found on the **Patient List** tab, since this is the main access point for these types of activities. The add patient and send patient functions found on the **Patient Search** tab are also discussed in the following sections of this chapter: *Adding a Patient to Your List* on page 58 and *Sending a Patient to Another User* on page 62.

Overview of the Patient List Tab

To access the Patient List option, click the **Patient List** tab at the top of the screen. The Patient List option displays your personal short patient list. The screen consists of two major elements: your patient list, and a patient data display area.



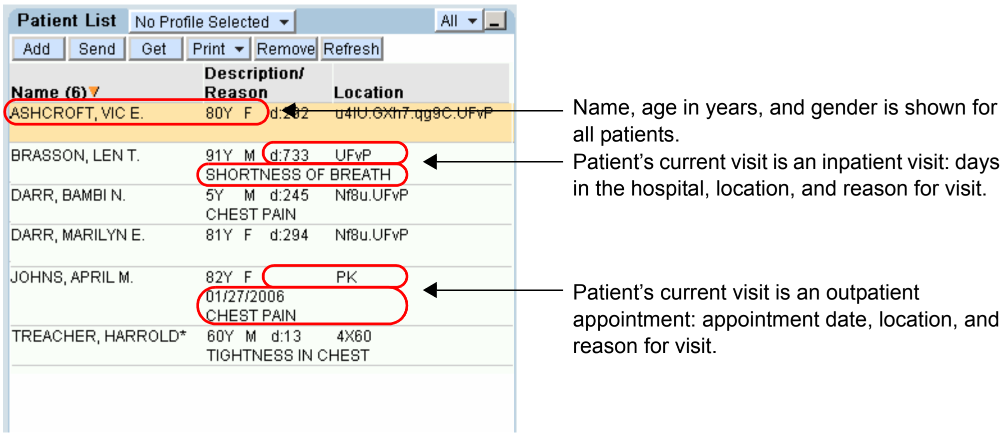
The Patient List area is located on the left side of the screen. This section displays your short patient list. It contains all of the inpatients for whom you are responsible, as well as the outpatients with whom you have appointments. (**Note**: if your source scheduling system uses recurring outpatient appointments, depending on the flexibility of that system's interface, patients with recurring visits may *not* show up on your patient list. In this case you must manually add them from the long list to your short patient list. The section entitled *Adding a Patient to Your List* on page 58 describes how to do this.)

The Patient List area is where you manage your patient list. From here you can view basic information about the patients on your list, add or remove patients from your list, send patients to other providers, get patients from other providers, change the way your list is currently displayed, and print your list. There are a variety of buttons you can use to perform these functions, all of which are described later in this chapter.

The Patient Data Display area is located on the right side of the screen. This portion of the screen is used to show detailed information about any patient on your patient list. All of the display functions found on this portion of the screen are described in *Displaying Patient Information* on page 77.

Information Displayed in the Patient List Area

The Patient List area is located on the left side of the **Patient List** tab. It contains only those patients with whom you have some type of active relationship. For each patient on your list you can see his or her full name, age in years, and gender.



You can also see information from the patient's *current* visit, including the number of days in the hospital (for inpatients), the appointment date (for outpatients), the reason for visit, and the location. Please note that while you must have a relationship to at least one of the patient's visits in order for the patient to appear on your list, you might *not* have a relationship to the *current* visit that is displayed on that list. Since any given patient can have multiple visits to your institution, the system applies the rules below in the following order to determine which of them is the *current* visit, to be shown on this display:

1. The system reviews the patient's active inpatient or emergency room visits, and selects the one with the most recent admission date (the user may or may not have a relationship to these inpatient or emergency room visits). An active inpatient visit is one which has not yet been discharged. An active emergency room visit is one that has an admission date of "today." If there is both an inpatient and an emergency room visit with an admission date of "today," the inpatient visit is selected.
2. If there are no active inpatient or emergency room visits, the system then reviews the patient's discharged inpatient visits, discharged emergency room visits, and the outpatient visits with which the user has a relationship. It compares the

discharge dates on the inpatient and emergency room visits with the appointment dates on the outpatient visits, and selects the visit that is closest to today's date, whether in the future or in the past. If there are two visits that are the same number of days from today's date, the system selects the current visit by applying the rules below in the following order:

a. Visits in the past are chosen over visits in the future.

b. Discharged inpatient visits are chosen over discharged emergency room visits.

c. Visits with which the user has a relationship are chosen over visits with which the user does not have a relationship.

NOTE: In addition to here on the **Patient List** tab, the patient's current visit is calculated and displayed in other options of the PatientKeeper system. In options where the user does not necessarily need to have a relationship to the patient in order to view information, such as on the **Patient Search** tab, a third and final step may be necessary when calculating the patient's current visit:

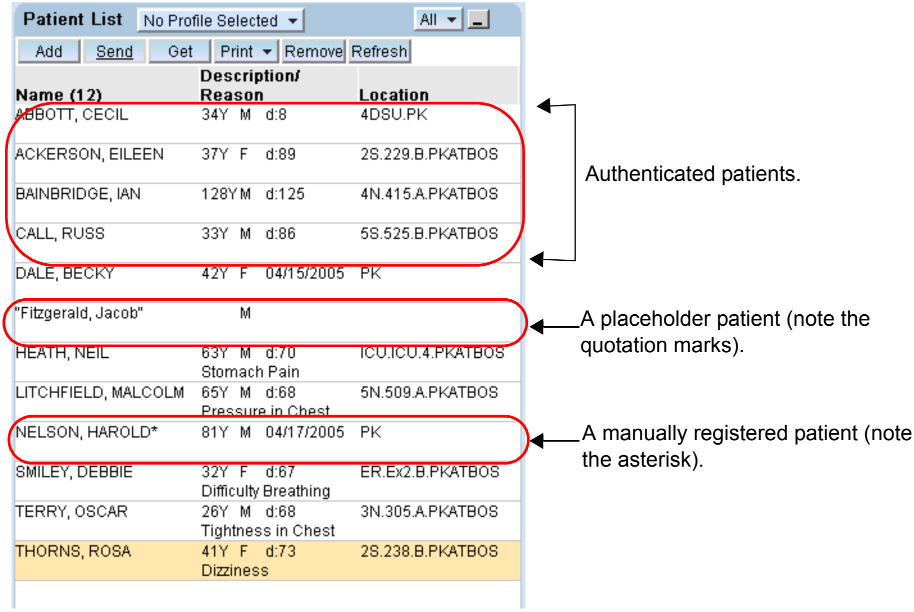
3. If the patient has only outpatient visits with which the current user does not have any relationship, the system chooses the visit closest to today, again using criteria 2a above, in instances where two visits are the same number of days from today's date.

Types of Patients found on the Patient List

It is important to understand the different types of patients that can be seen on the **Patient List** tab, or in other options of the PatientKeeperapplication. There are three potential sources for patients, and each is displayed in a slightly different manner, so that you can distinguish between them. The table below describes each type of patient.

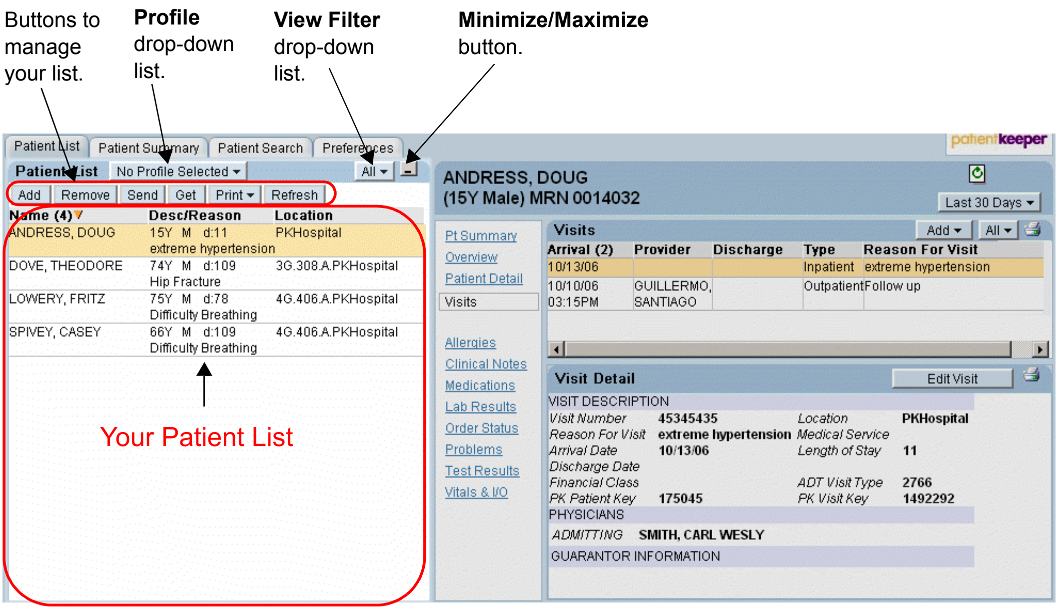
Patient Type	Source	Where visible
Authenticated (permanent patient)	Back End Registration System (for example, Cerner™ or MEDITECH®)	Handheld and Physician Portal
Placeholder (temporary patient)	Handheld Device (created via the **Manual Add** function)	Handheld and Physician Portal (enclosed in quotation marks, for example: "Jones, Mary")
Manually Registered (temporary patient)	Physician Portal (created via the **Patient Search** tab)	Handheld and Physician Portal (asterisk appended to end of name, for example, Jones, Mary*)

When you manually register a patient using the Physician Portal application, or create a placeholder patient on your handheld device, the patient is automatically added to your short patient list. The sample patient list below illustrates how each type of patient looks on the **Patient List** tab.



Basic Functionality of the Patient List Area

You can take a variety of actions to change the way your patient list is displayed, or to add or remove patients from your list. All of the controls for these actions are located at the top of the Patient List area.



There are four items that control the Patient List section of the screen:

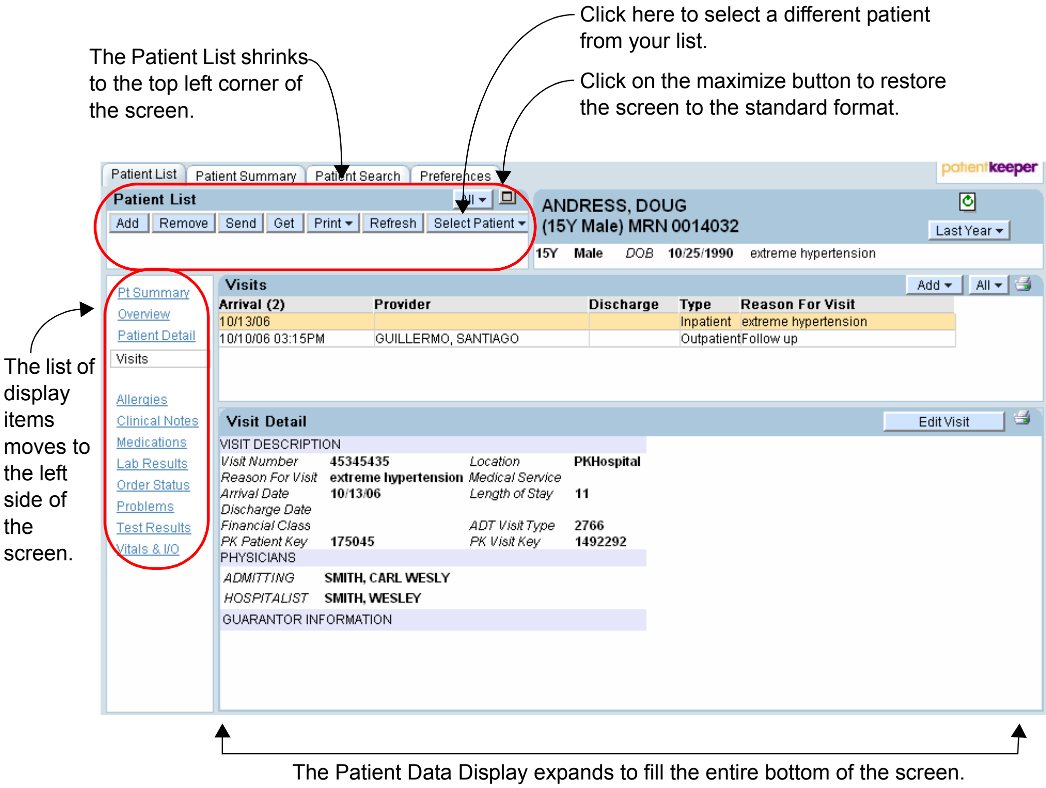
- Buttons to manage your patient list: these buttons are all actions you can take to manage the contents of your patient list. You may be able to perform the following, depending on the privileges granted in your user profile:
  - **Add**: add one or more patients to your list.
  - **Send**: send a patient on your list to another health care provider's list.
  - **Get**: get a different provider's list of patients and add them to your own list (also referred to as Patient Handoff).
  - **Print**: print a copy of your patient list, print a standard rounding report based on your own patient list, or print a clinical rounding report based on your own or another user's patient list.
  - **Remove**: remove a patient from your list.

  - **Refresh**: redisplay your patient list with the most up-to-date information.

  All of these options are described in detail later in this chapter.

- **Profile** drop-down list: this drop-down list controls the profile that is currently active for your web session. Profiles are a combination of settings that allow you to optimize both the amount and composition of patient data currently displayed on the screen and are generally used when a provider works in more than one facility or location. An administrator (or any user) can design a profile for each location, thereby allowing the user to switch the list of patients that is currently displayed. (See *Applying Profiles to Your Patient List* on page 54 for more information.)
- **View Filter** drop-down list: this drop-down list further controls the patients that are currently displayed in the Patient List Area. You can see **All** patients, just those you have added to the list yourself (**Added by User**), patients you have marked as **Hidden** on your handheld device, or **Placeholder** patients you have created on your handheld device. You can also use department or personal view filters to narrow the scope of the list. (See *Filtering Your Patient List* on page 56 for more information.)
- **Minimize/maximize** button: You can minimize the size of the Patient List, and thereby increase the size of the Patient Data Display area, by clicking on the minimize/maximize button. The Patient Data Display area then takes advantage of the

full screen when displaying detailed patient information, as shown in the following example.



Sorting Your Patient List

By default, the patient list is sorted alphabetically by last name. You can change the sort order of your patient list by clicking on any column heading in the patient list area. Clicking on the column heading toggles between sorting the list in ascending and descending order according to the selected heading. If you have applied a profile (see *Applying Profiles to Your Patient List* on page 54), and you click on the **Location** heading, the list then sorts by the rounding order defined in that profile. Sorting does not change which patients on your list--it simply changes the *order* in which they are displayed.

Applying Profiles to Your Patient List

Profiles are an optional feature that may or may not be utilized at your organization. In cases where a provider works in more than one facility within the organization, profiles can be extremely useful, as they can be designed to ensure that only the patient visits that the provider needs to see on any given day are included in their short and long patient lists.

A specific profile can be used on *both* a handheld device and on the **Patient List** tab of the Physician Portal application. In fact, a user can apply one profile on their handheld device, and apply a different profile on the Physician Portal system; they are not required use the same profile on both platforms. Profiles contain a combination of filters, populators, and rounding orders that can modify a user's short and long patient lists in several ways, depending on whether it is applied on a handheld device or in the Physician Portal application:

- When a profile is applied on a handheld device at the time of syncing, it can add visits to the short list by creating relationships to them, remove unnecessary visits off the short list, sort the visits according to the order in which hospital rounds are performed, or remove unnecessary visits from the long list.
- When a profile is applied on the **Patient List** tab of the Physician Portal application, it can add visits to the short list by creating relationships to them, remove unnecessary visits off the short list, or sort the visits according to the order in which hospital rounds are performed.

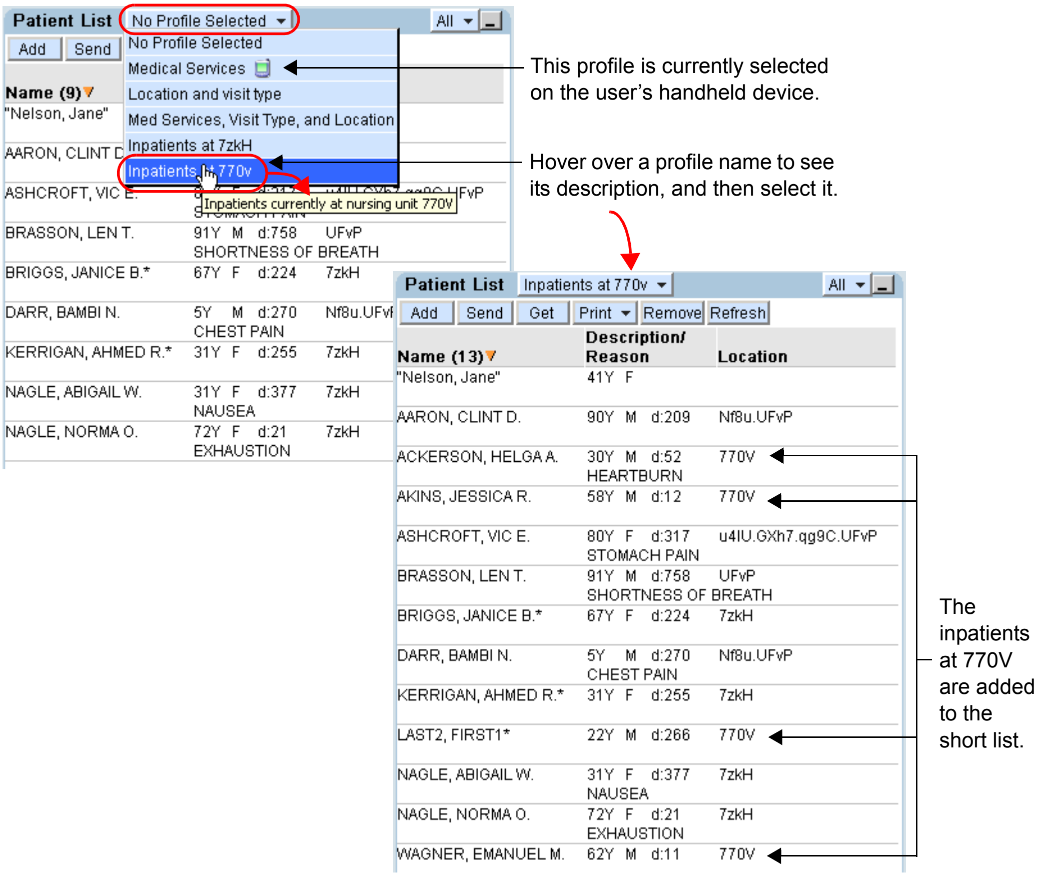
Any given user might have just one, or several profiles defined in their Patient List Settings (please refer to *Patient List Settings* on page 27 for instructions on creating a profile). If a user generally works in the same location and sees the same group of patients from day to day, they need only one profile, or none. If a user works in more than one department or location, they can use multiple profiles to help facilitate their work flow. For example, during the week a user might be on the Cardiac Consult Service, while on weekends they might be covering for a particular provider on the Inpatient Cardiac Medical Service. On Monday morning, the user could select their Cardiac Consult profile and use it all week to see their cardiac consult patients. On the weekend, they could switch to the Inpatient Cardiac profile so that they could cover the patients in the Inpatient Cardiac Medical Service over the weekend.

Administrators can create **Stock Profiles** at a departmental level. These are available to all users within the department. In addition, any user may create personal **Profiles**. These personal profiles are available only to the user who created them. Personal profiles are easily identifiable by the underscore '_' that precedes their name.

The **Profile** drop-down list is located at the top of the Patient List area. Note that the system displays **No Profile Selected** if you have not selected a profile. In this case, the system displays your entire short patient list, which consists of all patient visits with which you have a relationship, as well as any visits that you have manually added to your list.

To apply a profile to your patient list, simply click on the **Profile** drop-down list, and select a profile name. If you are unsure of what a particular profile will do, hold your mouse pointer over the name of the profile in question, and the system displays a description of it. For informational purposes, the **Profile** drop-down list also displays a handheld device icon  next to the profile that is currently selected on your handheld device (if you use one).

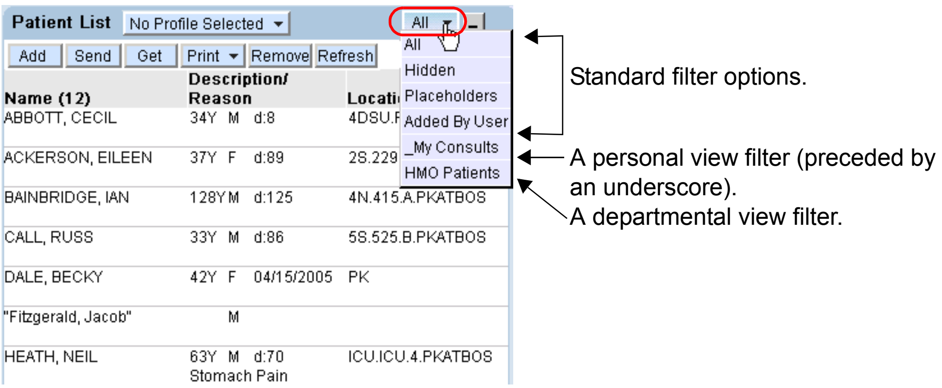
As soon as you select a profile, the system refreshes your short patient list, immediately adding or removing patients from your list, as defined in the profile settings. This profile remains selected until you change it (even if you log out and log back in again).



Filtering Your Patient List

You can use the **View Filter** drop-down list to decrease the number of patients that are displayed in the Patient List area of your screen. View filters are applied *after* profiles. A view filter does *not* remove any patients from your list--it temporarily takes them out of your view so that you can focus on a particular subset. You can always revert back to your full patient list (as defined by your currently selected profile, if you are using one) by selecting **All** from the **View Filter** drop-down list. The **View Filter** drop-down list contains the following choices:

- **All**: to see your entire short list (i.e., outpatients who have an appointment with you, inpatients for whom you are responsible, and patient visits you have manually added to your short list).
- **Added by User**: to see just those patients that you have manually added to your patient list yourself (i.e., you don't necessarily have an appointment with them, but you have decided to add them to your list to monitor them.)
- **Hidden**: to see those patients that you have marked as hidden on your handheld device.
- **Placeholder**: to see the temporary placeholder patients that you have created on your handheld device. For more information, please refer to the *Mobile Clinical Results User's Guide*.
- **Departmental and Personal View Filters**: your department administrator may have designed special view filters that are useful in to your department. In addition, you may design your own personal view filters on the **Preferences** tab, under Patient List settings. These departmental and personal view filters appear at the bottom of the **View Filter** drop-down list, so that you may use them to view specific subsets of your patient list. They are also available for use when viewing your short patient list on your handheld device. For directions on designing a personal view filter, please refer to *Patient List Settings* on page 27.



Refreshing Your Patient List

Throughout the day, new patients may be added or removed from your short patient list. For example, other providers might send some of their patients to you, or appointments could be added or cancelled. If you had left the **Patient List** tab displayed on your desktop for an extended period of time, you would not see that new information unless you clicked the **Refresh** button. This button retrieves the most current patient list information from the database, and re-displays it on your screen.

Adding a Patient to Your List

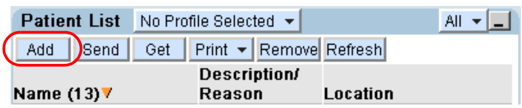
As noted in the introduction to this chapter, you add a patient to your short patient list from both the **Patient List** and the **Patient Search** tabs. All of the recent outpatients with whom you have appointments, as well as the recent inpatients for whom you are responsible are *automatically* added to your short patient list by the PatientKeeper system, and are visible on the **Patient List** tab. However, there may be occasions when you need to manually add a patient to your list. For example, another physician might ask for your assistance in caring for one of his patients. In this case you would search the long list (i.e., the entire patient census) for the patient in question and manually add that patient to your short list. Or, a provider might happen to be looking up patient information on the **Patient Search** tab, and decide that they want to add the patient to their own short list so that they could monitor them or get involved in their care.

Some organizations are comprised of multiple facilities and therefore have a very large patient census. In this case, your system administrator may have used the **Restrict Patient Lookup To** setting to reduce the number of patients that are available on your long list. If, as a result of this restriction, you are not able to find the patients you need to add to your short list, speak to your system administrator about adjusting your patient list settings. For more information on the **Restrict Patient Lookup To** setting, please refer to *Access Restrictions to Patients and Their Data* on page 10.

Adding a Patient to Your List from Patient List Tab

To add one or more patients from the long list to your short patient list, from the **Patient List** tab, follow these steps:

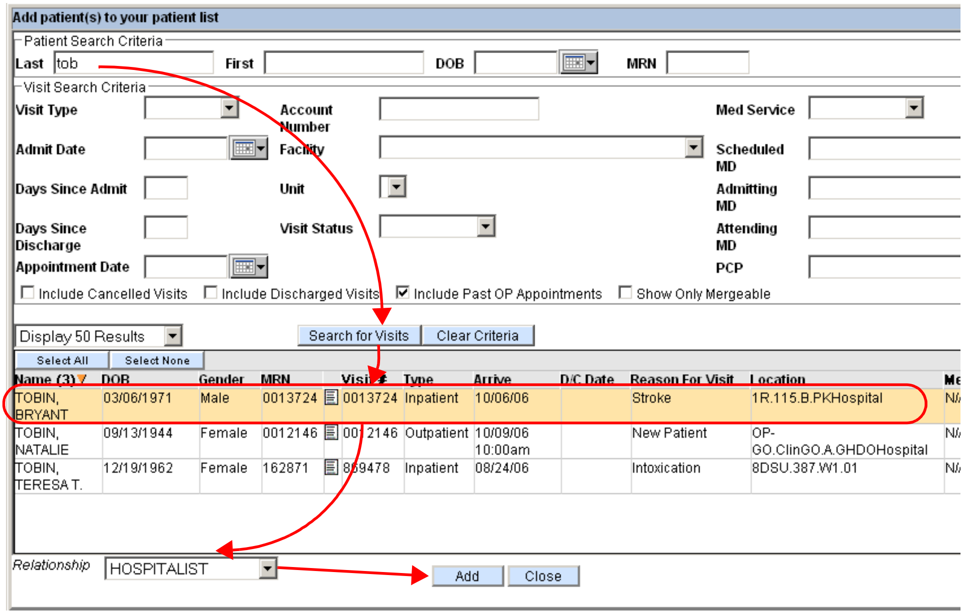
1. Click on the **Patient List** tab.
2. Click on the **Add** button in the Patient List window.



NOTE: The **Add** button is active only if the **Allow User-level Patient List Manipulation** option is set to **Yes** in your user profile. This setting can only be changed by a system administrator. See your system administrator if the **Add** button not available in your Patient List area.

The **Add patient(s) to your patient list** box appears.

3. Enter partial information in any of the criteria fields, such as **Last Name** or **MRN**, to narrow your search, and then click the **Search for Visits** button. (Please refer to *Common Search Criteria Fields* on page 148 for a full description of the most commonly used search criteria fields).



The bottom portion of the screen displays the patients that match your search criteria. If a patient has more than one appointment or inpatient visit on the long list, they are listed several times in the search results, once for each visit.

If the patient(s) you wish to add are not displayed in the list, enter new information in the criteria fields, and then click **Search for Visits** again.

NOTE: By default, the search results show you the first 100 patients who match your criteria (you can change this setting by selecting from the dropdown list). If there are more patients in the database that match your criteria, but who are not shown on the results, you will see the warning message that *Some results were not* *shown due to maximum specified*. You should make your search criteria *more specific* to narrow the field and decrease the number of matches.

4. From the list that appears, click on one or more patients to select them. If a patient has more than one visit, select all of the visit(s) in which you are interested. Or, click on the **Select All** button at the top of the list to select all of the patient visits in the results window. When a patient visit is selected, the background color changes to light orange. To deselect a patient, simply click on it again.
5. Specify your relationship to the patient visit(s) using the **Relationship** drop-down list.
6. Click the **Add** button and the selected patient visit(s) are added to your list. The **Add patient(s) to your patient list** box remains open so that you can continue searching for and adding patient visits to your list. When you are done, click on the **Close** button.

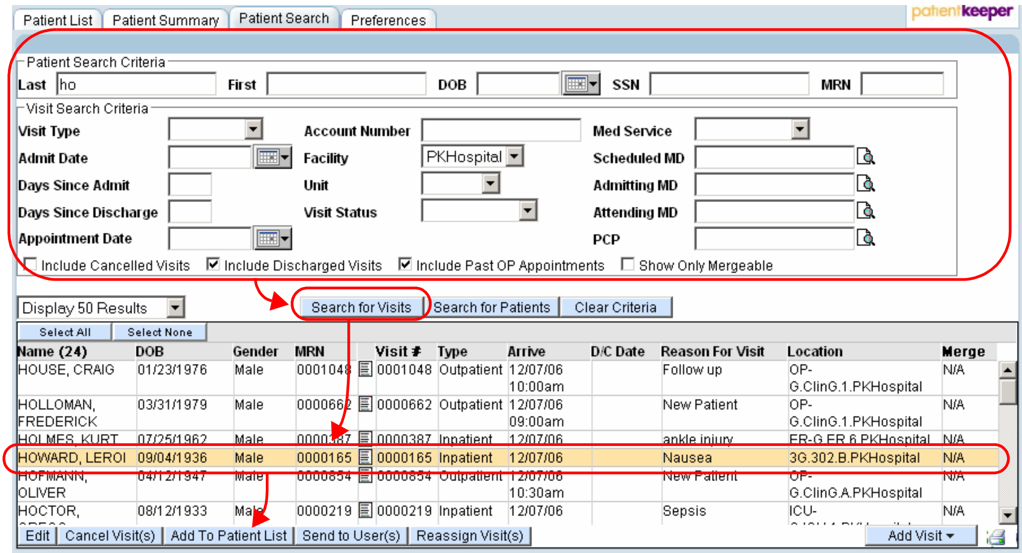
Adding a Patient to Your List from Patient Search Tab

To add one or more patients from the long list to your short patient list, from the **Patient Search** tab, follow these steps:

1. Click on the **Patient Search** tab.
2. Enter some patient or visit search criteria that describes the patient visit you want to add to your list. (See *Searching for Patients or Visits* on page 143 for instructions on using the search criteria fields.)
3. Click the **Search for Visits** button.

   The system displays all patient visits that match your criteria.

4. Locate the patient visit on the results display, and click on it to select it.



5. Click on the **Add to Patient List** button.

   The system displays a small pop-up for your relationship to the patient.

6. Select the relationship that best describes your relation to this patient visit from the **Relationship** drop-down list.

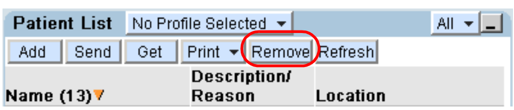
7. Click the **Add** button.

Removing a Patient from Your List

You can remove a patient from your short list at any time. You might do this if an appointment had been cancelled, or if another provider saw the patient instead of you. To remove one or more patients from your list:

1. Click on the **Patient List** tab.

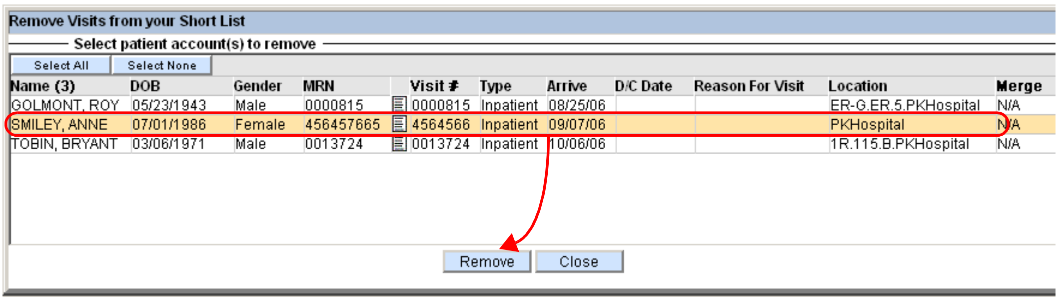
2. Click on the **Remove** button in the Patient List window.



   The **Remove Visits from your Short List** window appears.

All of the patients from your patient list are displayed, based on the profile and view filter you are currently using. If you have a relationship with more than one visit for a particular patient, each of those visits is listed. Please note that placeholder patients are not included on this list, as you cannot remove temporary patients from your short list here in the Physician Portal application. This can only be done on your handheld device.

3. Select all of the visits that you want to remove by clicking on each one. Or, click on the **Select All** button at the top of the list to select all of the patient visits in the window. When a visit is selected, the background color changes to light orange. To deselect a visit, simply click on it again.



4. Click on the **Remove** button at the bottom of the window.
5. The system asks you to confirm that you are sure you want to remove the selected accounts. Click **Yes** to remove them.

   The **Remove Visits from your Short List** box remains open so that you can continue removing patients from your list. When you are done, click on the **Close** button.

Sending a Patient to Another User

A user can send patients to another user's short patient list from both the **Patient List** and **Patient Search** tabs. The main difference between performing the send action from these two options is the types of patient visits that can be sent. From the **Patient List** tab, the user can only select patient visits from their own short patient list to send to another user. From the **Patient Search** tab, the user can select any patient visit from the entire long list of patient visits. Also, since administrators do not have their own personal short patient lists, the **Patient Search** tab is their only access to the send function.

A provider might send a patient from their own short list to another provider's short list if they wished to consult with another provider regarding a particular patient's care. An administrator might send one or more patients to a provider's short list if they wanted that provider to monitor or otherwise be involved in their care. In order to use this feature, the **Can Send Patients To** option must be enabled for your account. This is one of the user preference settings that only a system administrator (level 1 user) can change. The **Can Send Patients To** setting also determines *to whom* you can send patients (just users with a common department, just users with a common facility, or all users).

Sending a Patient to Another User from Patient List Tab

To send one or more patients to another user from the **Patient List** tab:

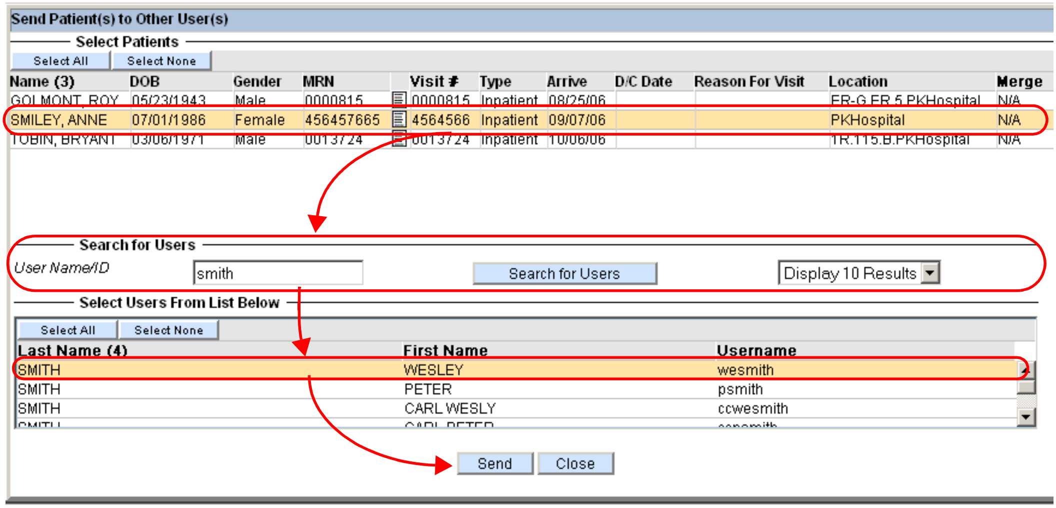
1. Click on the **Patient List** tab.
2. Click on the **Send** button at the top of the Patient List window.

The **Send Patients to Other User(s)** window appears. The top half of the window shows your patient list, based on the current profile and view filter that you are using. If you have a relationship with more than one visit for a particular patient, each of those visits is listed. Please note that placeholder patients are not included on this list, as you are not allowed to send your placeholder patients to another user.

The bottom half of the window is where you will select the user(s) to whom you wish to send your patient(s).

3. Select all of the visits that you want to send to another user by clicking on each one. Or, click on the **Select All** button at the top of the list to select all of the

patient visits in the window. When a visit is selected, the background color changes to light orange. To deselect a visit, simply click on it again.



4. Type any portion of the provider's first or last name, his username, or his user ID in the criteria field in the bottom half of the screen, and then click on the **Search for Users** button.

   The system displays all users who match your criteria in the bottom section of the screen.

5. Select the user(s) to whom you wish to send the patient, and then click on the **Send** button. The system adds the patient to those users' patient lists.

   NOTE: if a user is not allowed to receive patients (as specified in the Patient List settings for that user account), then the system will indicate that the patients could not be sent to the specified recipient.

   The **Select Patients to Send to Another User** box remains open so that you can continue sending patients to other users. When you are done, click on the **Close** button.

Sending a Patient to Another User from Patient Search Tab

To send one or more patients to another user from the **Patient Search** tab:

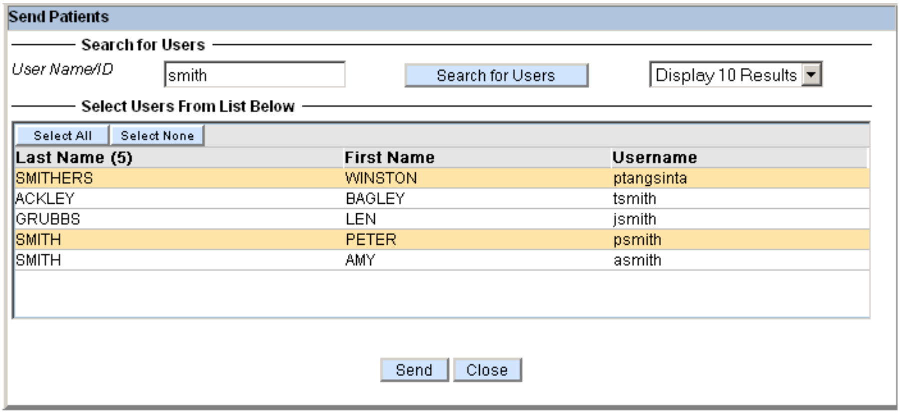
1. Click on the **Patient Search** tab.

2. Enter some patient or visit search criteria that describes the patient you want to add to your list. (See *Searching for Patients or Visits* on page 143 for instructions on using the search criteria fields.)
3. Click the **Search for Visits** button.

   The system displays all patient visits that match your criteria.

4. Locate the patient visit(s) on the results display, and click on one or more to select them.
5. Click on the **Send to User(s)** button.

   The system displays a window where you can select the user to whom you wish to send the patient.



6. Type in all or part of the user's name in the **Username/ID** field, and then click the **Search for Users** button.

   The system displays a list of all users whose name or user name contains the letters you entered.

7. Click on one or more users to select them, and then click the **Send** button.

Getting Another User's Patients

You can move patients from another provider's patient list onto your own, using the **Get** button on the **Patient List** tab. This function is often referred to as *patient handoff*, and it is useful when one provider is going off duty, and the new provider coming on duty wishes to take over the care of the departing provider's patients. Whether or not you can use this feature is determined by the **Can Get Patients From** setting for your account. This is one of the user preference settings that only a system administrator with level 1 access can set. The **Can Get Patients From** setting also determines *from whom* you can get patients (only from users with a common department, only from users with a common facility, or from all users).

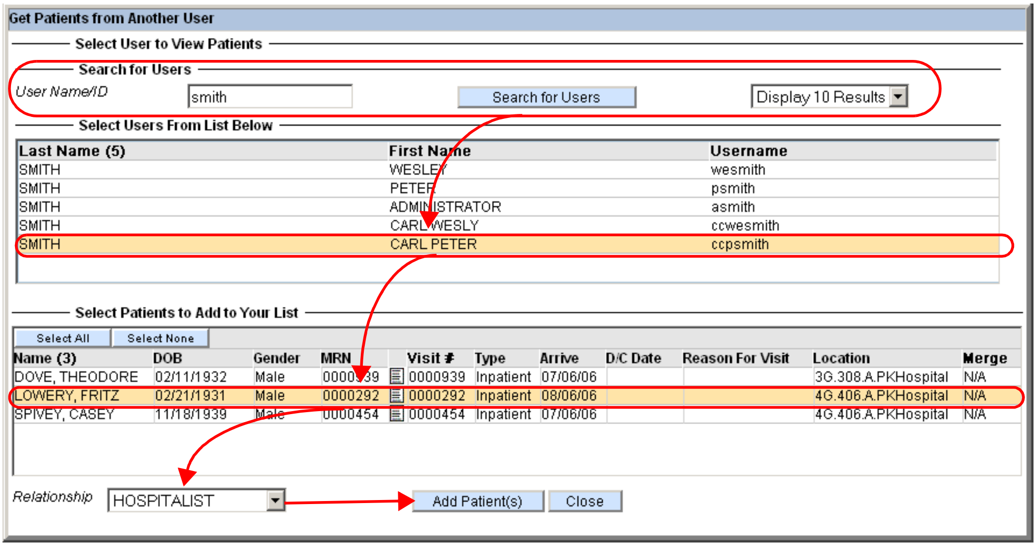
> **NOTE:** the **Get** function is not available if your source ADT/Registration system is MEDITECH®.

If patient handoff is enabled for your account, the **Get** button is active in your Patient List window. To use the patient handoff feature, the new provider coming on duty should follow these steps:

1. Click on the **Patient List** tab.
2. Click on the **Get** button in the Patient List window.

The **Get Patients from Another User** window appears. Use the top half of the window to select the provider from whom you wish to get patients. The bottom half of the window displays that provider's patient list, so that you may choose the patients you want to add to your own short list.

3. Type any portion of the provider's first or last name, his username, or his user ID in the criteria field in the top half of the screen, and then click on the **Search for Users** button.



The system displays all users who match your criteria in the middle section of the screen.

4. From the list of users, select the provider whose patients you wish to move onto your patient list, by clicking on his name.

   Once you select a provider, the system displays that person's entire short patient list in the bottom portion of the window. All of the inpatient and outpatient visits with which the provider has a relationship are listed. If the provider has a relationship with more than one visit for a particular patient, each of those visits is listed. Please note that placeholder patients are not included on this list, as you cannot add another user's temporary patients to your own short list.

5. Select all of the visits that you want to send to add to your own patient list by clicking on each one. Or, click on the **Select All** button at the top of the list to select all of the patient visits in the window. When a visit is selected, the background color changes to light orange. To deselect a visit, simply click on it again.

6. Choose your **Relationship** to the patients from the drop-down list.

7. Finally, click the **Add Patients** button to move the patients onto your list. Your patient list is updated to include the new patients.

   The **Get Patients from Another User** box remains open so that you can continue searching for patients and adding them to your list. When you are done, click on the **Close** button.

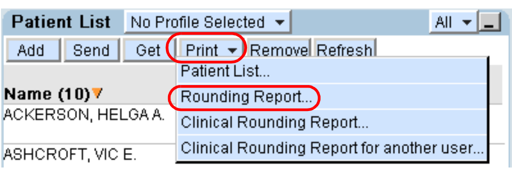
Printing the Rounding Report

The Rounding Report is an optional feature that may or may not be implemented for your organization. If it is implemented, any user with access to the **Patient List** tab may print the Rounding Report for the patients on their own short patient list. The report provides basic patient information, along with a list of commonly used charge codes for your reference. It contains the following information for each patient: name, medical record number, location, referring provider, and diagnoses.

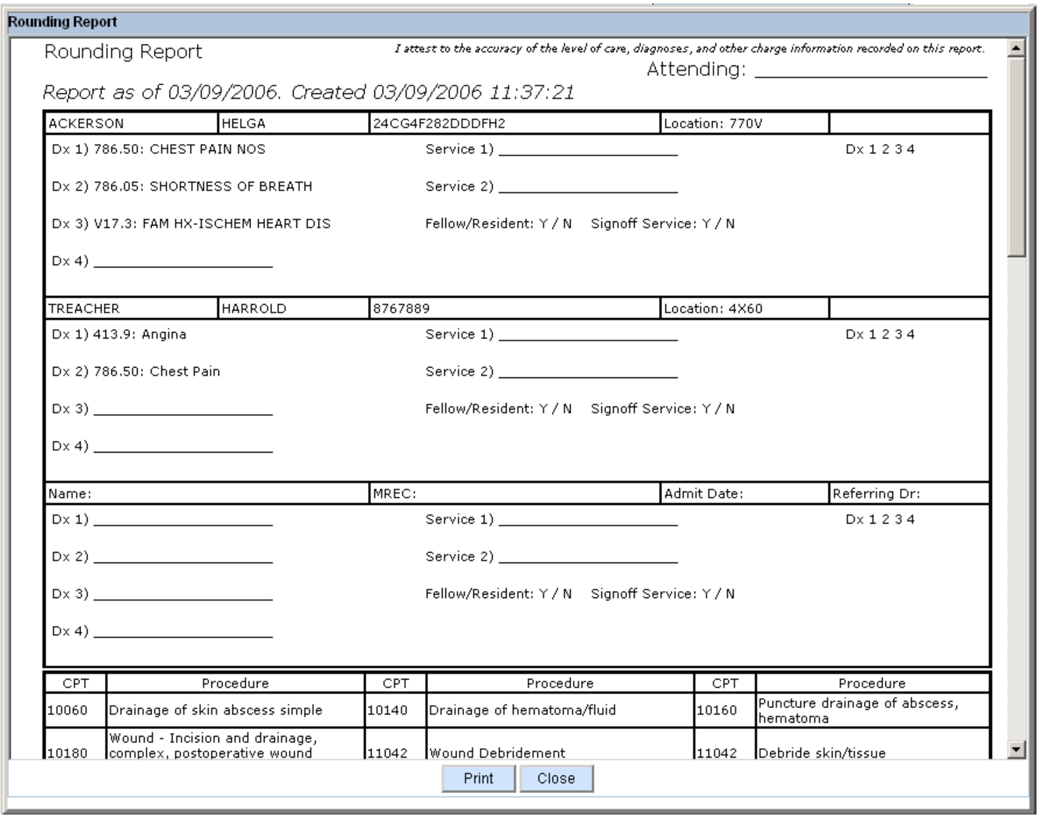
The patients included on the Rounding Report mimic the patients currently displayed on the **Patient List** tab. Therefore, if you apply a profile or view filter on the **Patient List** tab at the time you choose to print a Rounding Report, the resulting report respects those settings. It includes only those patients selected by the profile and/or view filter. For example, if you had applied a profile that selected patients from a particular facility (because that was where you were working today), and a view filter that displayed only the inpatient visits, the patients displayed on both the **Patient List** tab *and* the Rounding Report would include only inpatients at that facility.

To print the Rounding Report for your own short patient list, follow these steps:

1. Click on the **Patient List** tab.
2. If desired, apply a profile and/or view filter to narrow the scope of your patient list to a particular subset of patients.
3. Click on the **Print** button located at the top center of the Patient List, and then select **Rounding Report**.



4. The system displays a preview of the Rounding Report on your screen.



Rounding Report

Rounding Report

I attest to the accuracy of the level of care, diagnoses, and other charge information recorded on this report.

Attending: ______________________

Report as of 03/09/2006. Created 03/09/2006 11:37:21

ACKERSON	HELGA	24CG4F282DDDFH2	Location: 770V	

Dx 1) 786.50: CHEST PAIN NOS — Service 1) ______________ — Dx 1 2 3 4
Dx 2) 786.05: SHORTNESS OF BREATH — Service 2) ______________
Dx 3) V17.3: FAM HX-ISCHEM HEART DIS — Fellow/Resident: Y / N Signoff Service: Y / N
Dx 4) ______________

TREACHER	HARROLD	8767889	Location: 4X60	

Dx 1) 413.9: Angina — Service 1) ______________ — Dx 1 2 3 4
Dx 2) 786.50: Chest Pain — Service 2) ______________
Dx 3) ______________ — Fellow/Resident: Y / N Signoff Service: Y / N
Dx 4) ______________

Name:	MREC:	Admit Date:	Referring Dr:

Dx 1) ______________ — Service 1) ______________ — Dx 1 2 3 4
Dx 2) ______________ — Service 2) ______________
Dx 3) ______________ — Fellow/Resident: Y / N Signoff Service: Y / N
Dx 4) ______________

CPT	Procedure	CPT	Procedure	CPT	Procedure
10060	Drainage of skin abscess simple	10140	Drainage of hematoma/fluid	10160	Puncture drainage of abscess, hematoma
10180	Wound - Incision and drainage, complex, postoperative wound	11042	Wound Debridement	11042	Debride skin/tissue

Print Close

5. Click on the **Print** button to send the report to a printer, or click on the **Close** button to exit this screen without printing the report.

Printing the Clinical Rounding Report

The Clinical Rounding Report is an optional feature that may or may not be implemented for your organization. The report is designed to provide users with timely clinical data when performing rounds. The report is sorted in alphabetical order, and for each patient on the report, the system displays:

- Basic information such as name, medical record number, location, reason for visit, and attending and consulting providers.
- Active medications.

- Vital signs from the most current 24 hour range. The 24 hour range starts from the **Shift Start Time** on the previous day, and includes all vital sign recordings for the next 24 hours. The **Shift Start Time** is defined by your system administrator in the **Vitals & I/Os Settings,** found on the **Institution** tab. For example, if the **Shift Start Time** for your institution were 7:00 am, then a report printed anytime on 2/15/06 would include vitals in a 24 hour range from 7:00 am on 2/14/06 to 7:00 am on 2/15/06.
- Intake and output for the past 24 hours. Similar to vital signs, the 24 hour range for intake and output starts from the **Shift Start Time** on the previous day and includes all measurements for the next 24 hours.
- Microbiology information. For institution's whose back end system is MEDITECH®, the system can display the isolated organism (if any) for microbiology tests.
- Recent lab results. The report displays lab results from the last 24 hours. For example, if the report is printed at 3:00 pm on 2/15/06, it includes lab results within the time frame of 3:00 pm on 2/14/06 to 3:00 pm on 2/15/06. The system may be configured to include all types of lab results, or just a specific set of results. Your system administrator can work with their PatientKeeper representative to determine which results the institution wants to display on the report.

Whether or not a user can print the Clinical Rounding Report is determined by the **Clinical Rounding Report View Access** setting on their account. This is one of the user preference settings that only an administrator can set. The **Clinical Rounding Report View Access** setting also determines whether or not a person can print the Clinical Rounding Report for another user's short patient list. If granted permission to do this, a person may be able to print the report for other users with a common department, other users with a common facility, or for all users.

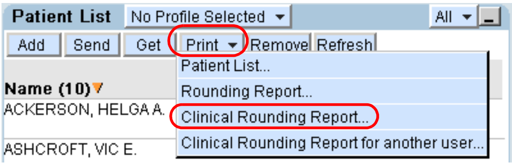
When a user prints the Clinical Rounding Report for their own short patient list, the patients included on the report mimic the patients currently displayed on the **Patient List** tab. Therefore, if the user applies a profile or view filter on the **Patient List** tab at the time they choose to print a Clinical Rounding Report, the resulting report respects those settings.

When printing the Clinical Rounding Report for another user, the system provides an opportunity to apply a profile or view filter at the time of printing, thereby narrowing the scope of the resulting report to a particular subset of patients.

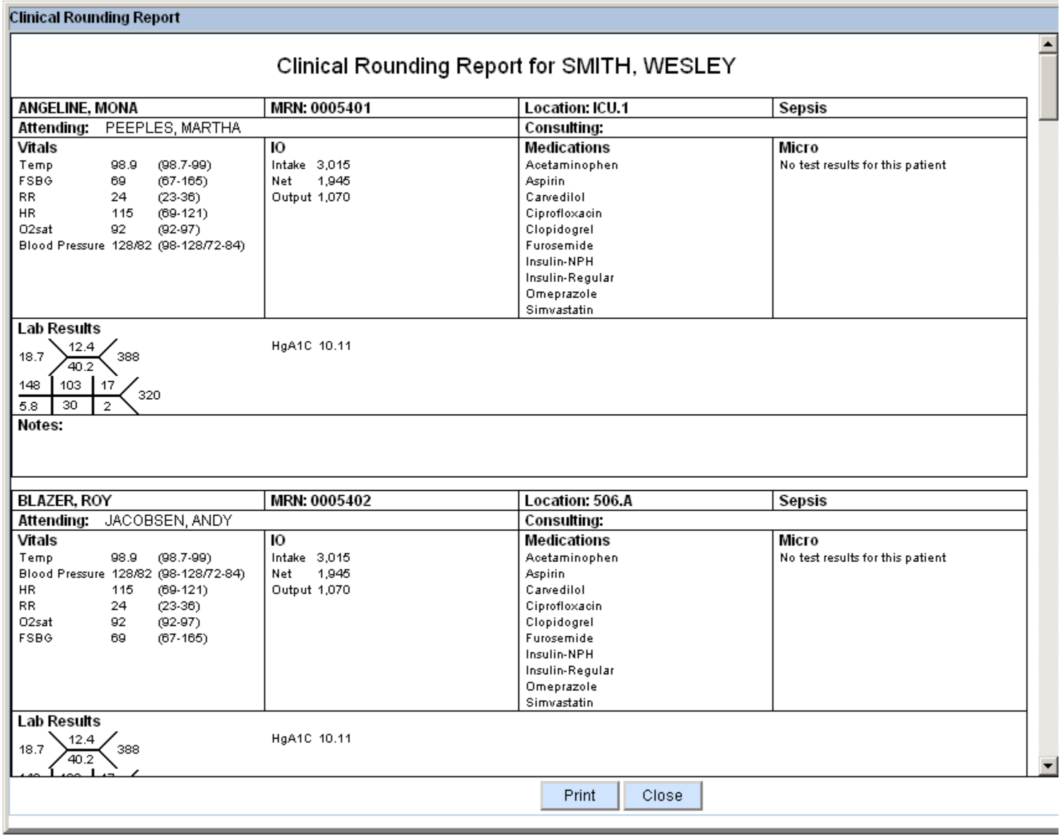
Printing the Clinical Rounding Report for Yourself

To print the Clinical Rounding Report for your own short patient list, follow these steps:

1. Click on the **Patient List** tab.
2. If desired, apply a profile and/or view filter to narrow the scope of your patient list to a particular subset of patients.
3. Click on the **Print** button located at the top center of the Patient List, and then select **Clinical Rounding Report**.



4. The system displays a preview of the Clinical Rounding Report on your screen.



Clinical Rounding Report

Clinical Rounding Report for SMITH, WESLEY

ANGELINE, MONA	MRN: 0005401	Location: ICU.1	Sepsis
Attending: PEEPLES, MARTHA		Consulting:	
Vitals Temp 98.9 (98.7-99) FSBG 69 (67-165) RR 24 (23-36) HR 115 (69-121) O2sat 92 (92-97) Blood Pressure 128/82 (98-128/72-84)	**IO** Intake 3,015 Net 1,945 Output 1,070	**Medications** Acetaminophen Aspirin Carvedilol Ciprofloxacin Clopidogrel Furosemide Insulin-NPH Insulin-Regular Omeprazole Simvastatin	**Micro** No test results for this patient
Lab Results 18.7 12.4 40.2 388 148 103 17 5.8 30 2 320	HgA1C 10.11		
Notes:			

BLAZER, ROY	MRN: 0005402	Location: 506.A	Sepsis
Attending: JACOBSEN, ANDY		Consulting:	
Vitals Temp 98.9 (98.7-99) Blood Pressure 128/82 (98-128/72-84) HR 115 (69-121) RR 24 (23-36) O2sat 92 (92-97) FSBG 69 (67-165)	**IO** Intake 3,015 Net 1,945 Output 1,070	**Medications** Acetaminophen Aspirin Carvedilol Ciprofloxacin Clopidogrel Furosemide Insulin-NPH Insulin-Regular Omeprazole Simvastatin	**Micro** No test results for this patient
Lab Results 18.7 12.4 40.2 388	HgA1C 10.11		

Print Close

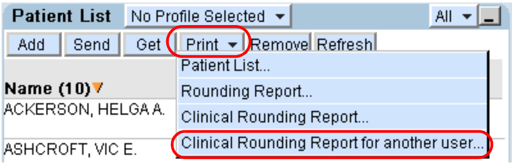
5. Click on the **Print** button to send the report to a printer, or click on the **Close** button to exit this screen without printing the report.

Printing the Clinical Rounding Report for Another User

To print the Clinical Rounding Report for another user's patient list, follow these steps:

1. Click on the **Patient List** tab.

2. Click on the **Print** button located at the top center of the Patient List, and then select **Clinical Rounding Report for another user**.



3. Enter data in one or more search criteria fields and then click the **Search** button to display all users who meet that criteria. There are a variety of search criteria fields that you can use to find the user that you want. For example, you could enter a **Department**, **Access Level**, or **Device Type** to view only those users in a particular department, with a particular access level, or who use a particular type of device (Palm OS® or Windows Mobile®). Please note that you may select from only those users and departments for which you have permission to print the Clinical Rounding Report, based on your **Clinical Rounding Report View Access** setting.

   a. **User Name/ID**: enter a full or partial user's name in this field to view only user's whose names contain those letters.

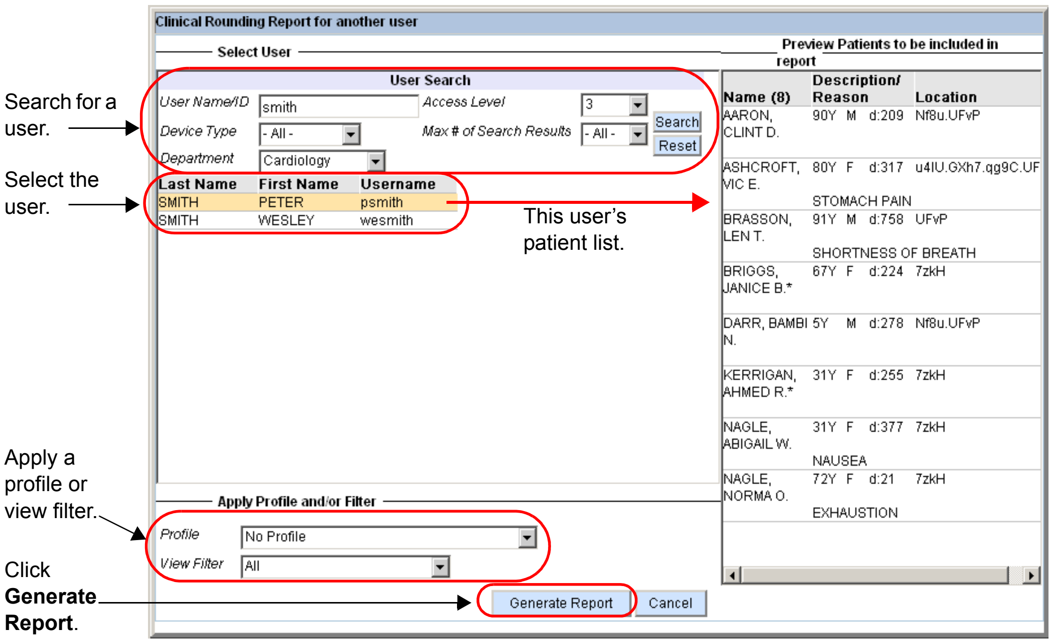
   b. **Device Type**: select a device type to view only those users who use a particular type of handheld device (Palm OS® or Windows Mobile®).

   c. **Department**: select a department to view only those users within a particular department.

   d. **Access level**: select an access level to view only those users with a particular access level.

   e. **Max # of Search Results**: for organizations with a high number of users, you can select a number here to limit the number of matching users that are displayed.

When you click the **Search** button, the system displays all users who meet the criteria you entered in the search criteria fields.



4. Click on the name of the user for whom you wish to print the report.

   The system displays that user's short patient list on the right side of the screen. The user's placeholder patients are not included on this list, nor are they included on the final Clinical Rounding Report.

5. If desired, apply a profile or view filter to the selected user's patient list, in order to reduce the list to a specific subset of patients that you want to include on the rounding report. If you select a profile or view filter, the system applies it to the short list displayed on the right side of the screen, so that you can immediately see the patients that would or would not be included on the report.

   a. **Profile**: select a profile to apply to the user's short patient list. The drop-down list contains all profiles available to the user for which you wish to print the Clinical Rounding Report, including any personal profiles they may have created.

   b. **View Filter**: select a view filter to apply to the user's short patient list. The view filter drop-down list contains all view filters available to the user for which you wish to print the Clinical Rounding Report, including any personal view filters they may have created.

6. Click the **Generate Report** button. The system displays a preview of the Clinical Rounding Report on your screen. The report heading contains the name of the provider for whom the report will be printed.
7. Click on the **Print** button to send the report to a printer, or click on the **Close** button to exit this screen without printing the report.

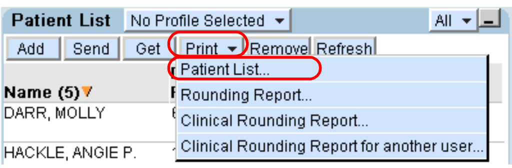
Printing your Patient List

You can print a report containing your short patient list at any time. The report contains basic demographic and visit information for each patient on your list, including: patient name, date of birth, gender, type of visit, arrival and discharge date (for inpatients) or appointment date (for outpatients), length of stay, the visit number, location, and reason for visit.

The patients included on the report mimic the patients currently displayed on the **Patient List** tab (similar to the standard Rounding Report). Therefore, if you apply a profile or view filter on the **Patient List** tab at the time you choose to print a Patient List Report, the resulting report respects those settings.

To print your patient list, follow these steps:

1. Click on the **Patient List** tab.
2. If desired, apply a profile and/or view filter to narrow the scope of your patient list to a particular subset of patients.
3. Click on the **Print** drop-down list located at the top of the Patient List, and then select **Patient List**.



The system displays a preview of the Patient List report on your screen, along with the standard printer dialogue box.

4. Select a printer from the standard printer dialogue box and then click **Print**.

The system sends the Patient List report to the printer.

patientkeeper

Printed: 6/27/06 12:48 PM
By: SMITH, WESLEY

Patient List

Name (4)	DOB	Sex	Type	Arrive	Discharge	LOS	Visit #	Location	Reason for Visit
TRAIL, ALVIN	08/19/1958	M	Outpatient	10/12/06 10:00AM			**0018643**	OP-GO.ClinGO.A.GHDOHospital	New Patient
TOBIN, BRYANT	03/06/1971	M	Inpatient	10/06/06		10	**0013724**	1R.115.B.PKHospital	Stroke
SMILEY, ANNE	07/01/1986	F	Inpatient	09/07/06		39	**4564566**	PKHospital	sinus pressure
GOLMONT, ROY	05/23/1943	M	Inpatient	08/25/06		52	**0000815**	ER-G.ER.5.PKHospital	laceration

5

Displaying Patient Information

The PatientKeeper system provides the user with two options for viewing patient data. Using the Patient Data Display, they can view *any type of data* (demographic, visit, or clinical), for *one individual patient* at a time. Or, using the **Patient Summary** tab, they can view a summarized list of the new, unviewed *clinical* data, for *all* of the patients on their short list at once. This chapter describes how to use both of these options. In addition, it reviews the types of information that are available for all of the patients in the system.

Available Information for Patients

Since there are three potential types of patients in the PatientKeeper system, it is important to note that not all of the same information is available for all types. Patients that have been manually registered in the Physician Portal application, and placeholder patients that have been created on handheld devices, are generally utilized as temporary patient records. As a result, clinical information such as lab results, clinical notes, allergies, and test results are not available for these patients. Only authenticated patients (those that have been fully registered in your source ADT/Registration system) will have these types of clinical data available.

For the temporary patients, only the basic demographic and visit information that was posted when the temporary record was created are available. Once the patient has been fully registered in your source system, and the temporary patient record has been merged or resolved with the authenticated patient record, full information becomes available.

Regardless of the amount of data that *is available* for a given patient, you may or may not have *permission* to view all of that data. The amount and type of information that you are allowed to view or edit for any patient on the **Patient List** or **Patient Search** tabs is based on the following:

- The **Clinical Results View Access (web only)** setting

The **Clinical Results View Access (web only)** setting is used to restrict access to clinical data such as reason for visit, medications, lab results, test results, clinical notes, etc. Please refer to *Access Restrictions to Patients and Their Data* on page 10 for further information on this setting.

Viewing Information for One Patient

The PatientKeeper system provides the user with a standard Patient Data Display to view any individual patient's demographic, visit, or clinical information. The Patient Data Display contains a variety of display options that group the different types of available information into useful categories. These display options include the following:

- **Visits**: detailed inpatient and outpatient visit history (see *Viewing Visit Information for a Patient* on page 86).
- **Patient Detail**: demographic, physician, and visit information (see *Viewing Patient Details* on page 88).

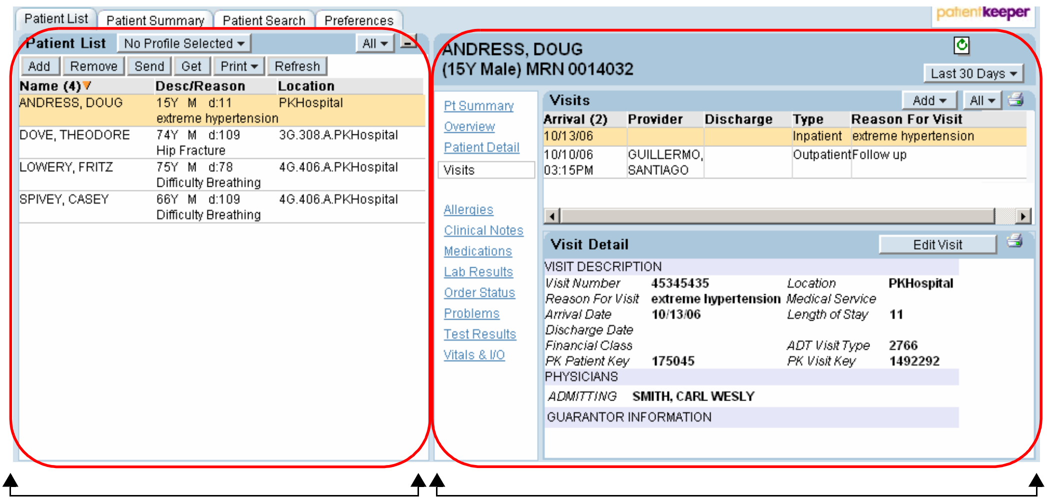
- **Vitals & I/O**: a history of vital signs and intake/output (see *Viewing Vitals and Intake/Output for a Patient* on page 90).
- **Medications**: a history of medication orders (see *Viewing Medication Orders for a Patient* on page 93).
- **Allergies**: known allergies and reactions (see *Viewing Allergies for a Patient* on page 99).
- **Lab Results**: the results of laboratory tests (see *Viewing Lab Results for a Patient* on page 101).
- **Test Results**: the text-based results of tests such as radiology, pathology, microbiology, blood bank, or other test types that involve clinical interpretation (see *Viewing Test Results for a Patient* on page 123).
- **Clinical Notes**: the text of clinical notes on file (see *Viewing Clinical Notes for a Patient* on page 126).
- **Order Status**: the status of the patient's orders for items such as tests, dietary needs, consults, or clinical notes (see *Viewing the Status of Orders for a Patient* on page 129).
- **Problems**: a history of diagnosis codes that have been posted on handheld devices using the Problem List module (see *Viewing Problems for a Patient* on page 131).
- **Overview**: a combination of the visits, charges, and clinical notes display options (see *Viewing an Overview of a Patient* on page 133).
- **Pt Summary**: a summarized list of all *unviewed* clinical data, including medication orders, allergies, lab results, test results, clinical notes, order status, and problems (see *Viewing a Patient Summary* on page 134).

Where is the Patient Data Display located? First, since a provider works primarily from the **Patient List** tab, the Patient Data Display is always available on the right side of that option's screen. The provider can click on any patient on the left side of the screen, and then click on any of the display options found in the Patient Data Display on the right side of the screen, to view any type of data that they wish to view for that patient. See *Using the Patient Data Display from the Patient List Tab* on page 80 for more information.

In addition to the **Patient List** tab, there are a variety of other options from which the Patient Data Display can be accessed. Generally, any option that contains a list of patients or visits will also contain a **Details** icon located to the right of each patient name. The user can click on the **Details** icon to open the standard Patient Data Display, enabling them to use the full list of display options to view demographic, visit, or clinical information. Please see *Using the Details Icon to Access the Patient Data Display* on page 81 for a list of the options on which the **Details** icon is available, as well as instructions on how to use this feature.

Using the Patient Data Display from the Patient List Tab

The **Patient List** screen consists of two major elements: your short patient list and the Patient Data Display.

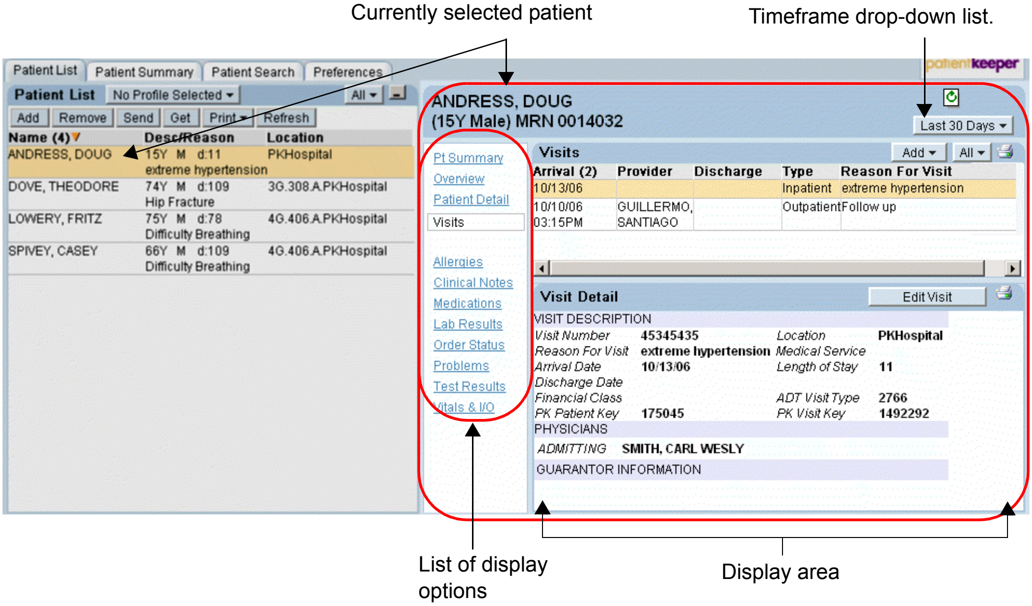


Your Patient List　　　　Patient Data Display Area

Your short patient list is located on the left side of the screen. It contains a variety of buttons and options that allow you to manage the contents of your patient list. These features are described in *Managing Your Short Patient List* on page 45.

The Patient Data Display is located on the right side of the screen. This portion of the screen is used to show detailed information about any patient on your patient list.

To view patient information, you must first select a patient from the patient list on the left, by clicking on their name. Then, using a variety of buttons and menus on the right, you can select the type and timeframe of the data that you wish to display in the Patient Data Display window.



Using the Details Icon to Access the Patient Data Display

The Patient Data Display can be accessed from either the **Patient Summary** or the **Patient Search** tab by clicking on the **Details** icon. When you first click on either of these tabs, the system may require you to enter some search criteria before displaying any patients or visits, or it may automatically generate a report based on default search criteria. Even in the second case, you might want to change the search criteria so that the report shows the desired patients or visits. Once a list of patients or visits is displayed, you can click on the **Details** icon located to the right of any patient name to open the Patient Data Display.

Please note that each of these options has a specific purpose, and as such, the ability to view the Patient Data Display from them is a minor, secondary feature. Please refer to the sections noted below, for full instructions that describe how to use each of these options:

- **Patient Search** (see *Searching for Patients or Visits* on page 143)
- **Patient Summary** (see *Viewing a Summary of All Patients* on page 135)

The steps necessary to open the Patient Data Display from either of these options are very similar. Lets walk through the steps, using the **Patient Search** tab as an example.

1. Click on the tab in question (the **Patient Search** tab in our example).

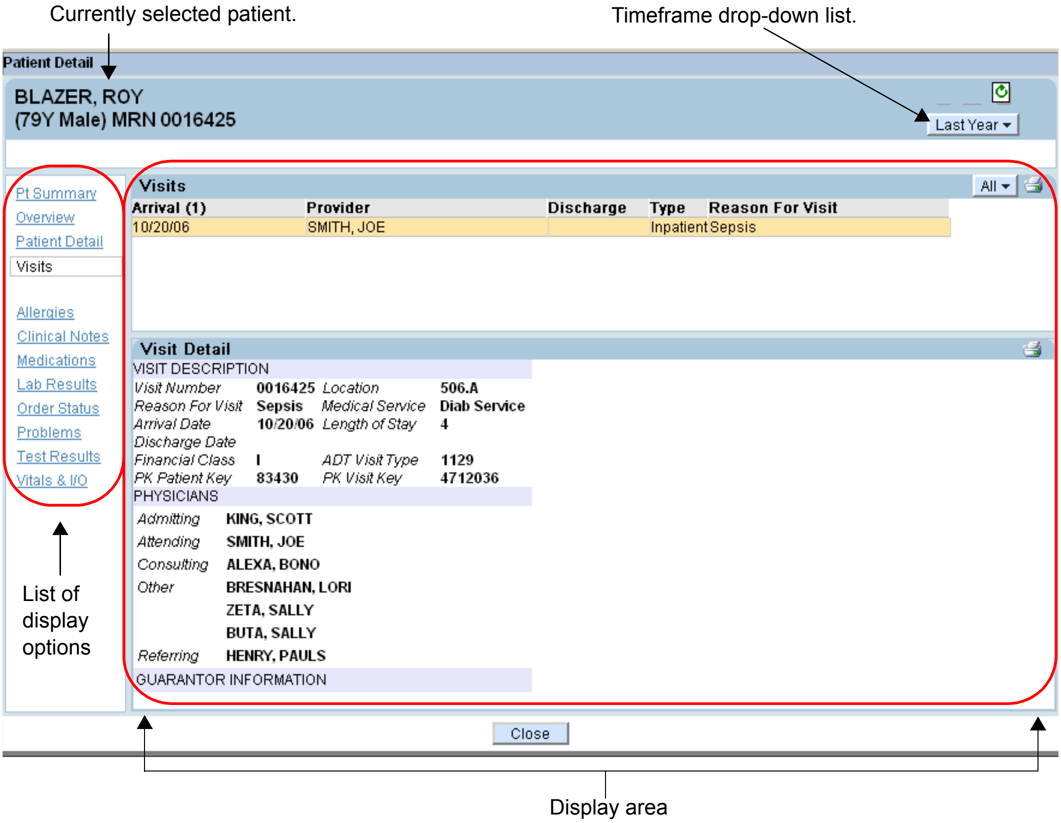
   The system immediately opens a window containing search criteria. In our **Patient Search** example, it opens the **Select Patient** window. This window contains a variety of fields where you can enter identifying information about the patients or visits you want to find.

2. Enter some search criteria, and then click a button to search for a specific set of data. In our **Patient Search** example, you would click on the **Search for Patients** or **Search for Visits** button. (For more information on using these search criteria fields, see *Searching for Patients or Visits* on page 143.)

   The system then selects all patients or visits that match your criteria and displays them in the results section at the bottom of the window.

3. Identify the patient or visit about which you would like to view information, and click on the **Details** icon .

The system opens the standard Patient Data Display. You can now click on a variety of buttons and menu lists to select the type and timeframe of the data that you wish to view.

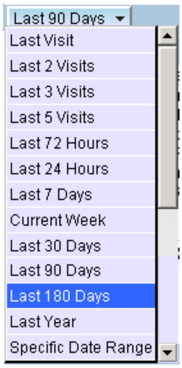


4. Click the **Close** button to close the Patient Data Display and return to the option from which you started (the **Patient Search** tab, in our example).

Understanding the Patient Data Display

The Patient Data Display that is available on the **Patient List** tab or via the **Details** icon contains three main elements:

- **Timeframe** drop-down list: use this drop-down list to increase or decrease the amount of patient data that is shown in the **Patient Data Display** area. You may choose to see data from a variety of pre-defined date ranges, or data from a specific date range that you enter yourself.



- List of display options: this is a list of the different types of information that you may display for any given patient on your list. Choose from the following items:
  - **Visits** (see *Viewing Visit Information for a Patient* on page 86)
  - **Patient Detail** (see *Viewing Patient Details* on page 88)
  - **Vitals & I/O** (see *Viewing Vitals and Intake/Output for a Patient* on page 90).
  - **Medications** (see *Viewing Medication Orders for a Patient* on page 93)
  - **Allergies** (see *Viewing Allergies for a Patient* on page 99).
  - **Lab Results** (see *Viewing Lab Results for a Patient* on page 101)
  - **Test Results** (see *Viewing Test Results for a Patient* on page 123)
  - **Clinical Notes** (see *Viewing Clinical Notes for a Patient* on page 126)
  - **Order Status** (see *Viewing the Status of Orders for a Patient* on page 129)
  - **Problems** (see *Viewing Problems for a Patient* on page 131)
  - **Overview** (see *Viewing an Overview of a Patient* on page 133)
  - **Patient Summary** (see *Viewing a Patient Summary* on page 134)

When you click on an item, the information in the display area changes to show you that particular subset of patient data. Each of the display options is described in detail later in this chapter.

- Display area: this portion of the screen is where the detailed information for a particular patient is actually shown.

Basic Steps for Using the Patient Data Display

All of the display options in the Patient Data Display window function in a very similar manner. The basic steps to view patient information are always the same:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option (see *Using the Patient Data Display from the Patient List Tab* on page 80 or *Using the Details Icon to Access the Patient Data Display* on page 81).
2. Select a display option. For example, you might select **Visits**.
3. Select a date range from the **Timeframe** drop-down list.

   The system displays the type of data that you selected (**Visits** in our example) in a summary window. The summary window is just what it sounds like: a summarized list of items (visits in this case) that fall within the **Timeframe** that you selected.
4. You can now perform any of these activities:
   – Use a filter to view a specific subset of the data in the summary window. Many of the displays have a filter option. For example, the filter on the **Visits** display allows you to select from a variety of visit types, such as inpatient, outpatient, or emergency room. Filters are always located in the title bar of the summary window.

   – Click on an item in the summary window to view additional details about it. When you do so, one or more detail windows open below the summary window. For example, when you click on a visit in the summary list, the system shows you additional information about that one specific visit in the Visits Detail window.

   – Change the **Timeframe** to increase or decrease the span of data in the summary window.

   – Click on a different display option to view different information about the same patient. For example, you might now want to view **Clinical Notes** for the same patient.

Some display options have additional features or options that allow you to view the patient information in different manners (graphs for example). Some also allow you to add annotations, to mark specific items with importance flags, or to mark items as viewed. Any notations that you make about a given patient's data (such as importance flags, annotations, or marking items as viewed), are reflected on your handheld device the next time you sync. These additional features are described under those display options whenever they are available.

As you are using the **Patient Data Display**, you will use a variety of filters, timeframes, and display options. The system recalls your preferences as you click from display option to display option. For example, when using the **Visits** display option, you might select a **Timeframe** of **Last 60 Days** and a visit type filter of **Inpatient**. As you select different display options, the **Timeframe** of **Last 60 Days** is maintained. Additionally, the next time you select **Visits**, the system recalls that you had chosen **Inpatient** as your filter setting, and uses that setting again.

The system even maintains these settings after you log out. When you log back in again, the last **Timeframe**, display option, and filter settings that you used are automatically selected for you.

> **NOTE:** You can clear the last saved settings using the **Clear user web settings** option on the **Preferences** tab. See *General Settings* on page 25.

Viewing Visit Information for a Patient

Use the **Visits** option to review a summary of all visits on file for a particular patient. The summary includes both inpatient and outpatient visit information. In addition to the summarized list of visits, you can also view detailed information for any specific visit on the list. The amount of detailed visit information available depends on your source ADT/ Registration system, as it is from there that the information is derived. For example, if MEDITECH® is your source system, guarantor information is not included in the visit detail screen.

To see visit information, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Click on **Visits** from the display list.

   The patient data display area shows the Visits window, which displays the following information:

   – **Arrival**: this is the admission date for inpatient visits, or the appointment date for outpatient visits.

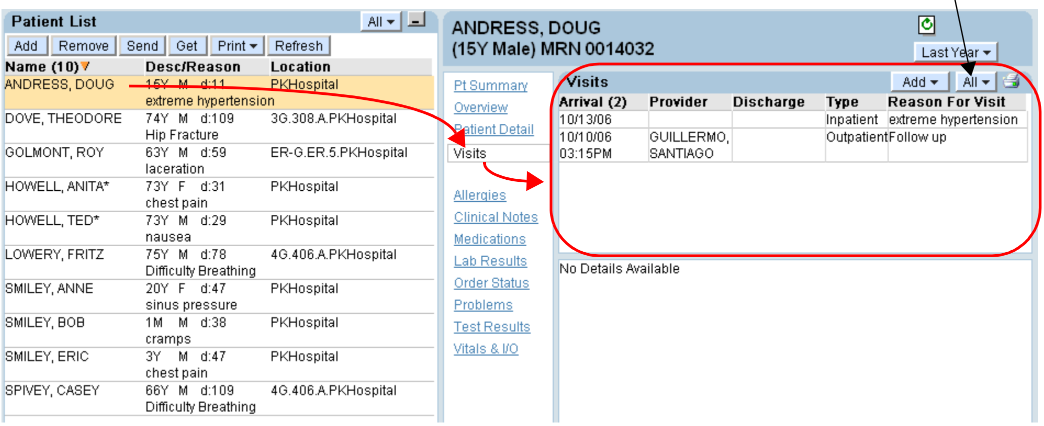
– **Provider**: this is the attending provider for inpatient visits, or the scheduled provider for outpatient visits.

– **Discharge**: the date of discharge, for inpatient visits only.

– **Type**: this is the type of visit, such as inpatient, outpatient, or emergency room.

– **Reason for Visit**: the reason the inpatient was admitted, or the reason the outpatient visit was scheduled.

Click here to filter the list by type of visit.

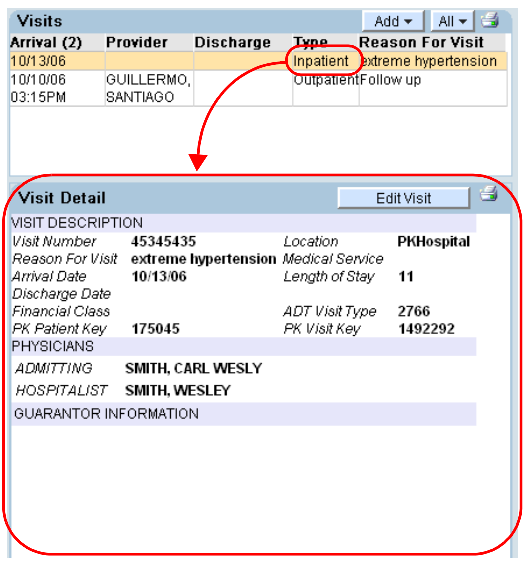


– You can change the sorting order of the Visits display by clicking on any of the column headings. For example, if you wanted to sort the visits by the responsible provider, you could click on the **Provider** field, which would sort the visits alphabetically by provider last name.

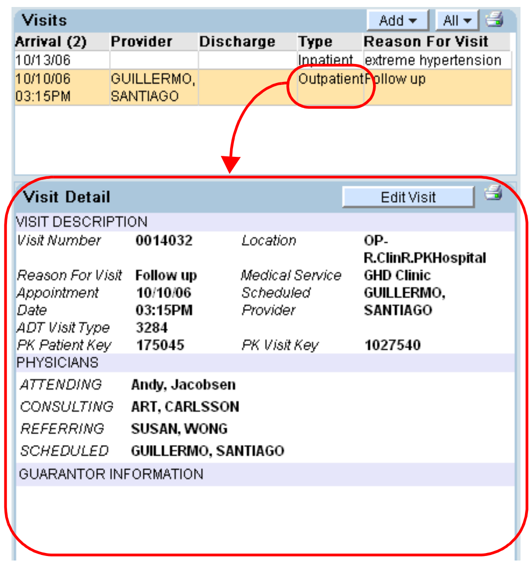
– You may filter the list of visits, by type of visit. To do so, click on the drop-down filter located in the upper right corner of the Visits window. The various types of visits used by your institution are included in the filter list, as shown in the example below. Select an item from the list to view only those types in the Visits window.

3. If you would like to see further detail about a particular visit, simply click on it. A Visit Detail screen opens below the Visits summary list, which shows you items such as care center, visit number, medical service, billing information, and the physicians who were responsible for the patient during the visit. Here are examples of the visit details for an inpatient and an outpatient visit:

Inpatient Visit



Outpatient Visit



– The Visit Detail window also contains an **Edit Visit** button, if you have privileges to edit visit information. Please refer to *Editing a Visit* on page 170 for more information.

Viewing Patient Details

The **Patient Detail** option allows you to view detailed information about the patient. The following types of information are available:

- Demographics such as name, date of birth, gender, social security number, address, and telephone.
- Visit information such as the patient's *current* visit (please refer to *Information Displayed in the Patient List Area* on page 48 for a definition of *current* visit) and their next scheduled visit.
- Names of the physicians involved in the patient's care.
- Guarantor and billing information.

Keep in mind that the amount of information available depends on your source ADT/Registration system, as it is from there that the information is derived. For example, if MEDITECH® is your source system, guarantor information is not available in the **Patient Detail** option.

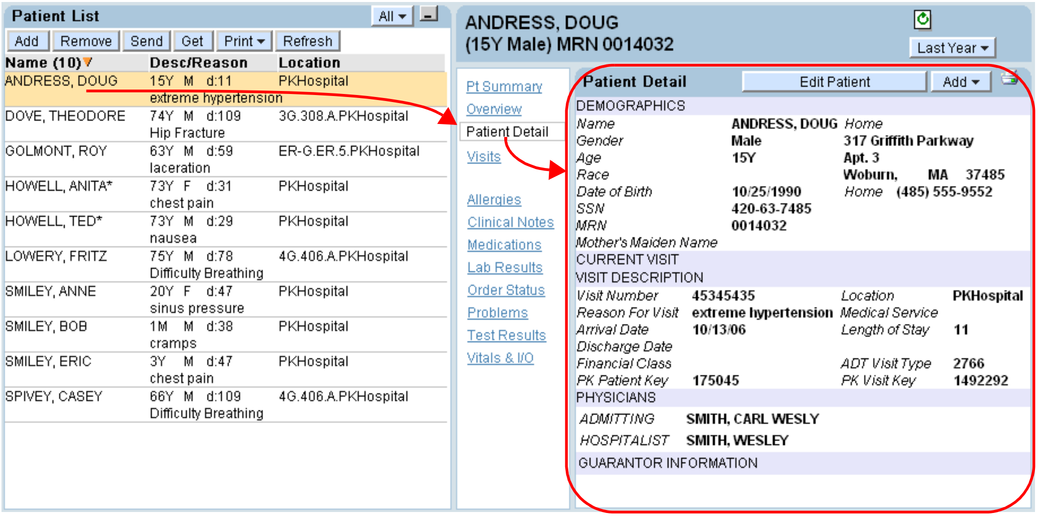
For placeholder and manually registered patients, you can see all of the information that was entered when their temporary record was initially created in the PatientKeeper system.

If a manually registered patient has since been merged with an authenticated patient, this display also provides the ability to unmerge the two patient records, in the event that the merge was a mistake. You can do this using the **Merge History** link at the bottom of the Demographics section of the display. For a full discussion of manually registering patients, merging patient records, and unmerging patient records, please refer to *Registering Patients and their Visits* on page 153.

To view detailed information for a specific patient, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Click on **Patient Detail** from the display list.

The patient display area shows the Patient Detail window.



Viewing Vitals and Intake/Output for a Patient

The **Vitals & I/O** option displays a history of vital signs and intake and output measurements for a particular patient.

Which physiological parameters are displayed as vital signs varies by institution. The following are a few of the common parameters that hospitals may choose to display:

- **Pulse Rate**: the rate at which the patient's heart is beating, usually in beats per minute.
- **Respiratory Rate**: the rate at which the patient is breathing, usually in breaths per minute.
- **Blood Pressure**: the pressure(s) at which blood flows through the peripheral vascular system. Systolic and diastolic pressures may be reported separately or as a compound measurement (for example, 120/80), usually in mmHg.
- **Blood Pressure Mean**, or Mean Arterial Pressure (MAP): a calculated blood pressure that may be available from some back-end systems. This weighted mean is calculated as *MAP = (2/3) * Systolic Pressure + (1/3) * Diastolic Pressure*
- **Temperature (Fahrenheit)**: the patient's temperature as obtained from a given anatomical location (such as, oral, axillary, ear, or rectal), reported in Fahrenheit.

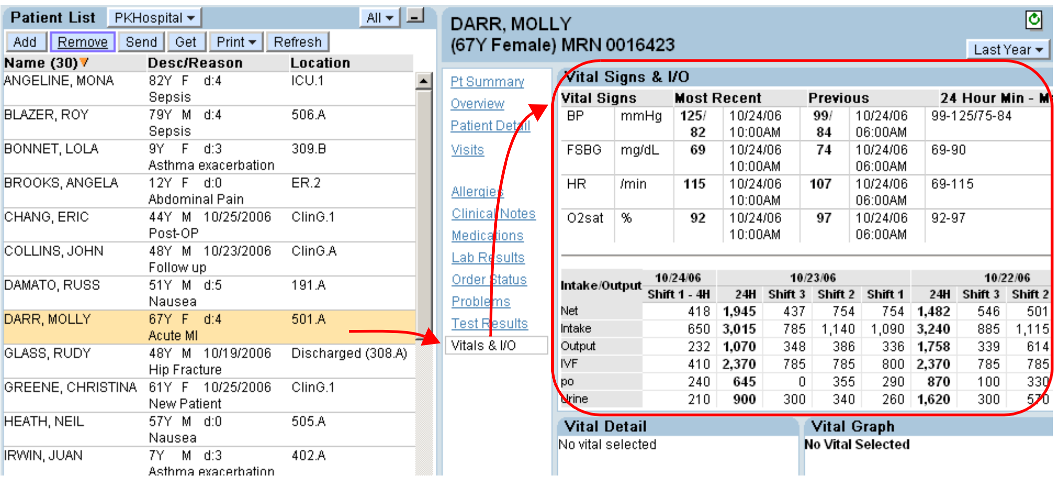
- **Temperature (Calculated Celsius)**: the patient's temperature in Celsius, calculated from the value measured in Fahrenheit.
- **O2 Sat by Pulse**: the oxygen saturation (SaO_2) level of the patient's blood as determined by a pulse oximeter, usually reported in percent (%).

For intake and output, the system provides fluid balances, which represent the totals of fluid intake and fluid output, as well as Net, or the difference between the total intake and total output. Some intake and output components, however, are not fluids and are therefore not included in these calculations. Examples are stool count and number of breast feedings.

To view a patient's vital signs and intake/output, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Vitals & I/O** from the display list.

   The patient data display area shows the Vital Signs and I/O window. It is broken into two sections: the top portion displays vital signs, and the bottom portion displays intake/output.



– The Vital Signs section contains a summary list of the patient's vitals, listed in alphabetical order. There is a row for each type of vital sign, along with the units in which it is measured. For each type of vital sign the system displays the most recent measurement along with the date and time it was taken, the previous measurement with its date and time, and the minimum and maximum measurements taken within the last 24 hours.

– The Intake/Output section displays the various types of intakes and outputs in a tabular format, with intake/output type listed on the vertical axis, and time blocks listed on the horizontal axis. Information is displayed in blocks of 8 hour shifts, with cumulative 24 hour totals as well. For the current date (today), there is no 24 hour cumulative total, since the day is still incomplete. Only the 8 hour shifts are displayed, with an indication of how many hours have elapsed in the current/latest shift.

Intake/Output	06/09/05		
	Shift 3	Shift 2 - 5H	Shift 1
Net	635.9	1750.4	2750.3
Intake	900.3	1750.4	3050.7
Output	264.4		300.4
Oral Intake	900.3	1750.4	3050.7
Urine Voided	264.4		300.4

In this example, 6/9/05 is today, and Shift 2 is not over, though 5 hours have elapsed so far.

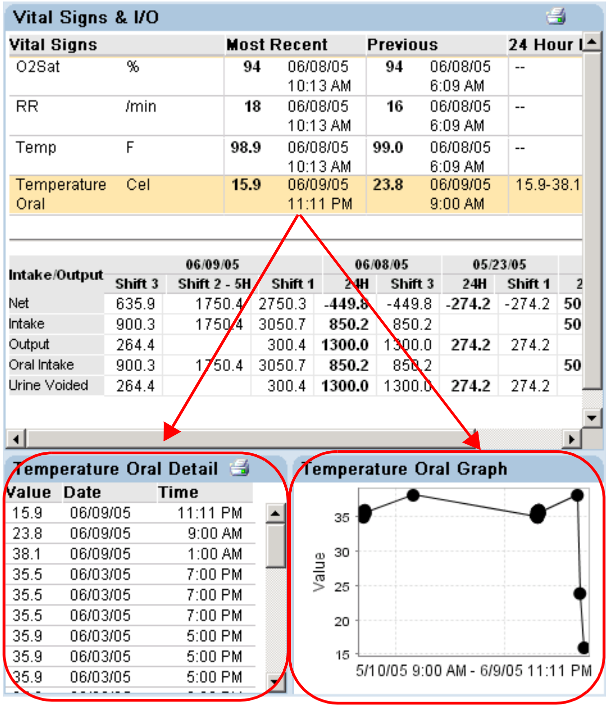
Intake/Output	06/09/05			
	24H	Shift 3	Shift 2	Shift 1
Net	**5136.6**	635.9	1750.4	2750.3
Intake	**5701.4**	900.3	1750.4	3050.7
Output	**564.8**	264.4		300.4
Oral Intake	**5701.4**	900.3	1750.4	3050.7
Urine Voided	**564.8**	264.4		300.4

In this example, it is now 6/10/05, so the system can display a 24 hour cumulative total for 6/9/05.

NOTE: At this time, clicking the **Printer** icon in the Vital Signs and I/O window will produce a print-out that includes only the Vitals summary table, and not the Intake/Output, due to issues with pagination.

4. If you would like to see a history of all the measurements for a specific vital sign, simply click on that vital sign in the summary list. Two small detail screens open below the summary list. The left detail screen displays a list of all known measurements for the vital sign with the value, and the date and time of the measurement. The right detail window automatically graphs the values of the vital

sign measurements. To change the starting and ending dates of the graph, use the **Timeframe** drop-down list at the top of the display area.



Viewing Medication Orders for a Patient

The **Medications** option displays a history of medication orders for a given patient. You can view the original order from the physician for each medicine including its name, dosage, schedule, and possible conditions of administration to the patient such as PRN, conditionals and alternating IVs. If your source medication system tracks Medication Administration Record (MAR) information, the Physician Portal can also display MAR information for each medication order.

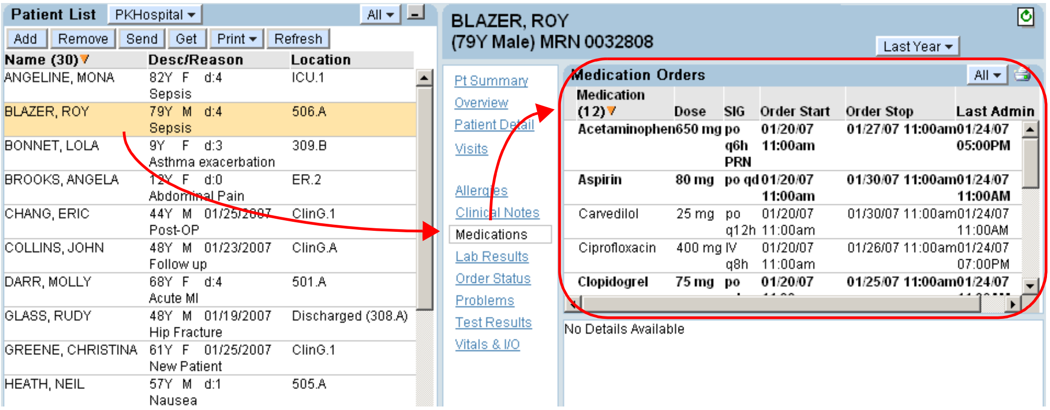
To view a patient's medication orders, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon  from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.

3. Click on **Medications** from the display list.

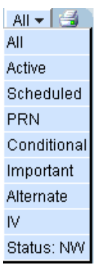
   The patient data display area shows the Medication Orders window. It includes the medication name, the dose, and the sig (route and frequency), and the dates the order should start and stop. If MAR data is available, it also displays the date the medication was last administered. Discontinued orders, or any orders with a stop date/time earlier than the current date/time, are displayed with a line struck through the text of the name.

   NOTE: A medication with zero dosage displays a blank dosage field in the Medication Orders window. To view further information, including dosage instructions, click on the medication to open the Medication Detail pane.



– You may change the order in which the medications are sorted, by clicking on a column heading. For example, clicking on the **Medication** heading would sort the medications alphabetically by name.

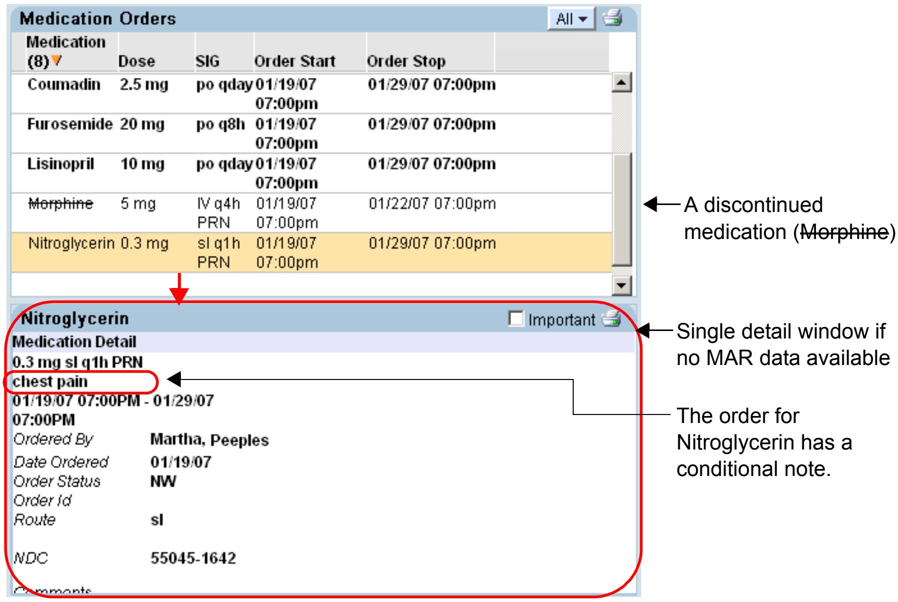
– You may filter the list of medications, by type of medication. To do so, click on the drop-down filter located in the upper right corner of the Medication Orders window.



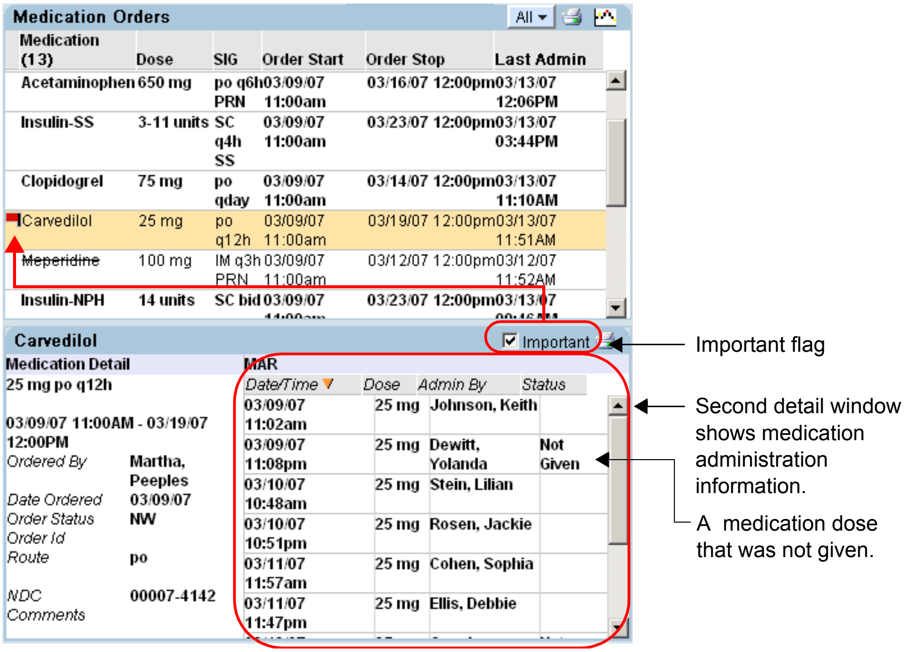
Select an item from the list to view only those types in the Medication Orders window. You can filter the list of medications to display only those in which you are interested. For example, you might filter the list to display only those medications that are actively being administered or that are indicated as important. The predefined filters display the following sets of medications:

- **All**: All medications
- **Active**: Medications that are currently being administered. This includes all medications that do not have an end date, or that have an end date later than the current date and time.
- **Scheduled**: All medications that are to be administered on a regular schedule (i.e., medications other than PRN, Conditional, or Alternate)
- **PRN**: Only medications that are to be given on an *as needed* basis.
- **Conditional**: Only medications with a dosing schedule based on some piece of clinical data or a clinical judgement (for example, blood glucose level for insulin).
- **Important**: Only medications that you have flagged as important.
- **Alternate**: Only medication orders where two medications, or differing doses of the same medication, are given sequentially.
- **IV**: Only medication orders where the route is intravenous (or contains the letters IV, such as IV or IVPB).
- **Discontinued**, or **Status: D/C**, or **Status: Discontinued**: Depending on your source medication ordering system, any of these three filter names may be used to signify medications that are no longer being actively administered.
- **Status Filters**: Only medication orders that have a specific status assigned to them. There may be a variety of filters based on the status associated with the medication order. These statuses are derived from your source medication ordering system, so the list varies from one organization to another. These filters use the format **Status**: followed by an abbreviation such as **CM** for completed, or **DC** for discontinued.
- **Unverified**: Depending on your source medication ordering system, the Unverified filter may be available. This filter displays medications that are not flagged as having been verified in the back-end system.

4. If you would like to see the details of a specific medication order, simply click on that item in the summary list. One or two detail screens open below the summary list. The first detail screen shows all known information about the medication order, including the dosage, name of the ordering physician, and the status of the order (from your source medication ordering system), as well as any linked orders, compound orders, associated forms**,** comments, or conditional notes.

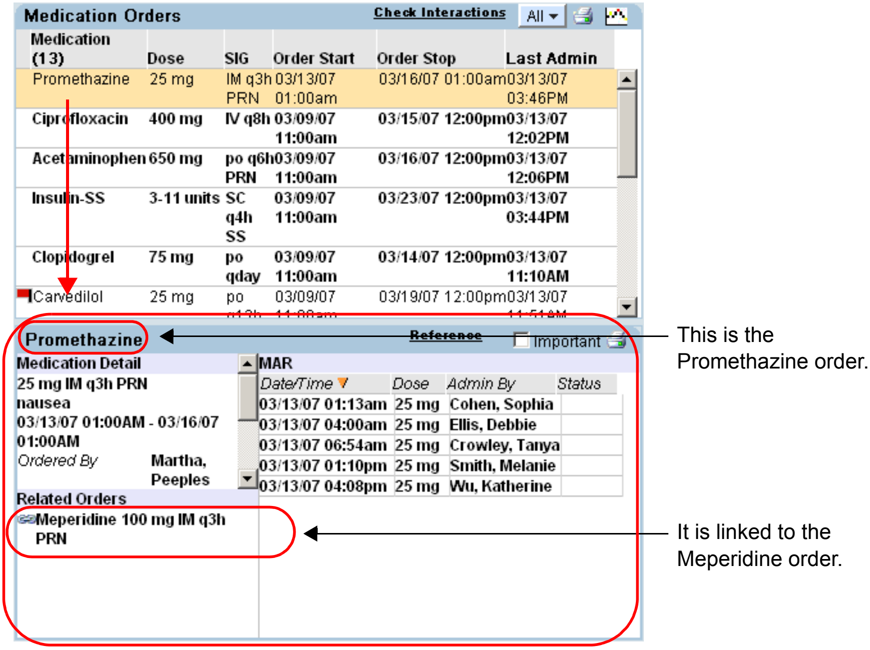


The second detail screen appears only if Medication Administration Record (MAR) information is available. It displays every date and time the medication was administered, the dose administered, and the person who administered it. If a medication was not administered as ordered and this fact was documented, the MAR contains the words “Not Given” in the Status column.



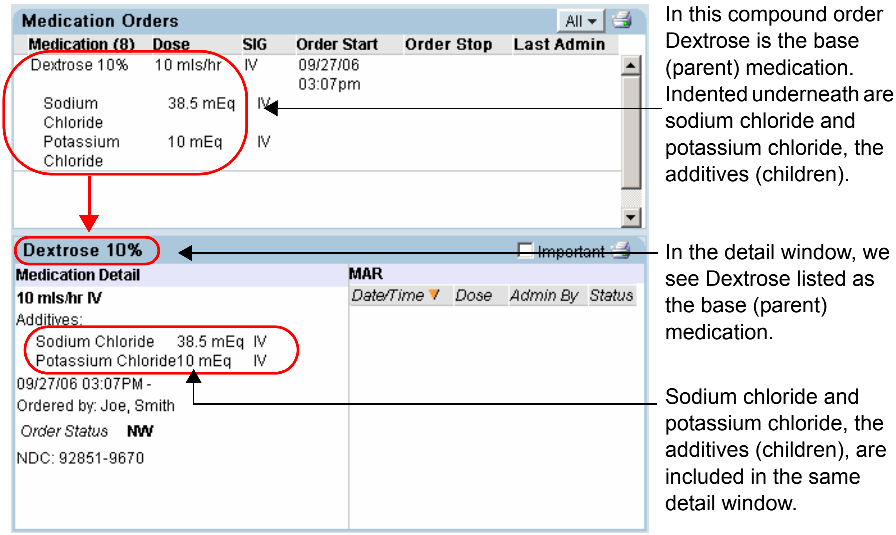
– To mark a medication order as important, place a check mark in the **Important** field (located at the top of the detail window). When you do so, a **Red Flag** icon is displayed next to that medication name in the summary list. You can also *uncheck* the flag once you deem that this medication order is no longer significant.

– Some orders may have items listed in the Related Orders section of the detail screen. These are *linked orders* (as indicated by the linked chain icon). Linked orders are orders for medications that are related, typically because they are administered together. For example, meperidine (Demerol) can be ordered for pain, along with promethazine (Phenergan) to prevent the nausea that is often caused by the meperidine. Both drugs are commonly administered together after surgery.



If you see a linked order in the Related Orders section of a detail screen, you can click on it to change the detail screen to display the information about the related medication.

– A compound order consists of a base medication with one or more additives or diluents that are subsidiary to the base medication. The most common examples of compound orders are found in IV medications. In the summary window, the base medication is listed first, with the additives indented below it. The additives are also listed in the detail window for the base medication.



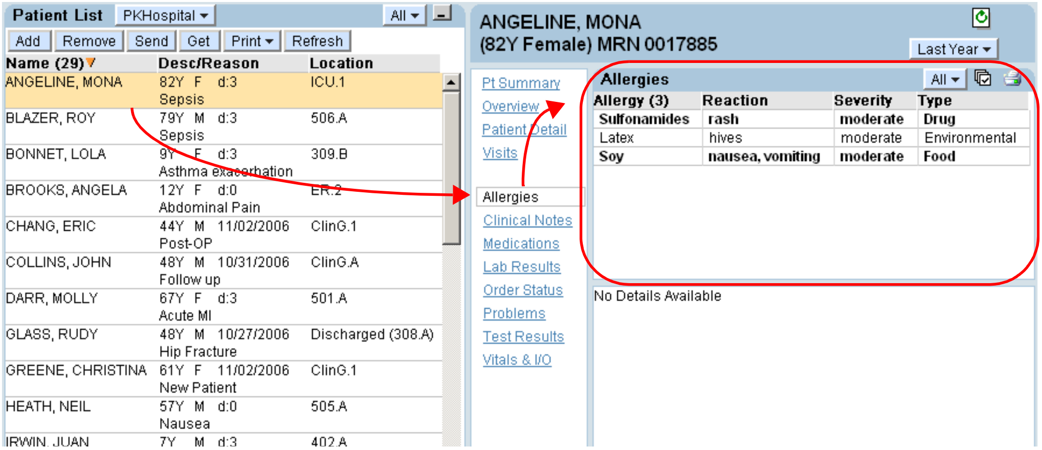
NOTE: If your back end system is MEDITECH®, the additives in a compound order do not appear in the summary view. They are visible only in the detail window.

Viewing Allergies for a Patient

The **Allergies** display option lists all known allergies and reactions for a specific patient.You can see the allergy description, the patient's reaction, the severity, and the type of allergy (food, drug, etc.). In addition to the summarized list of allergies, you can also view additional details about any allergy on the list. To view allergies, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Allergies** from the display list.

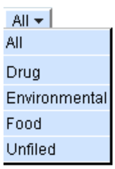
The patient data display area shows the Allergies window.



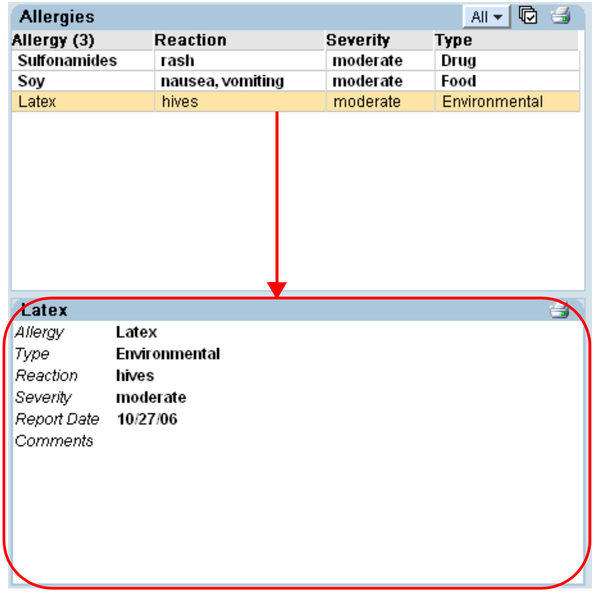
– Any allergies that you have not yet viewed on either your handheld device or the PatientKeeper Physician Portal are displayed in **bold** typeface. Once you have selected an allergy and viewed the details on either platform, the typeface changes to regular text. This feature helps you to quickly identify new allergies. You can also mark all of a patient's allergies as viewed without having to individually select and display each one on the Physician Portal or your handheld device. See *Marking Clinical Data as Viewed* on page 139 for more information and instructions on this topic.

– You may change the order in which the Allergies are sorted, by clicking on a column heading. For example, clicking on the **Reaction** heading would sort the allergies alphabetically by reaction.

– You may filter the list of allergies, by type of allergy. To do so, click on the drop-down filter located in the upper right corner of the Allergies window. The various categories of allergies defined by your institution are included in the filter list. Select an item from the list to view only those types in the Allergies window.



4. If you would like to see the details of a specific allergy, simply click on that allergy in the summary list. A detail screen opens below the summary list, showing you all known information about the allergy.



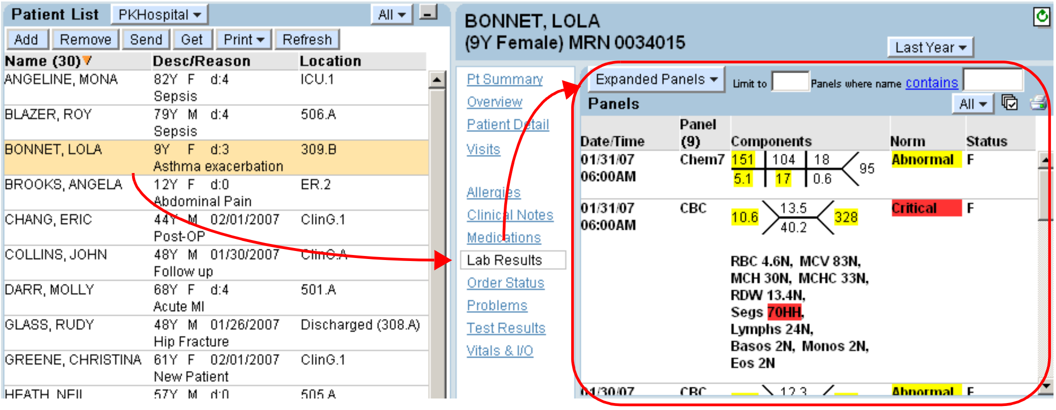
Viewing Lab Results for a Patient

Use the **Lab Results** option to view the results of lab tests that have been administered for a specific patient. The PatientKeeper system organizes lab test results into *panels* and *components*. A panel can consist of a single component lab test, or a group of component lab tests that are performed together. For example, a Prothrombin Time (PT) panel might consist of that single component test, while a Complete Blood Count (CBC) panel might consist of a variety of component tests such as a hematocrit, a hemoglobin, a white blood count, and a platelet count.

To view lab results, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon  from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Lab Results** from the display list.

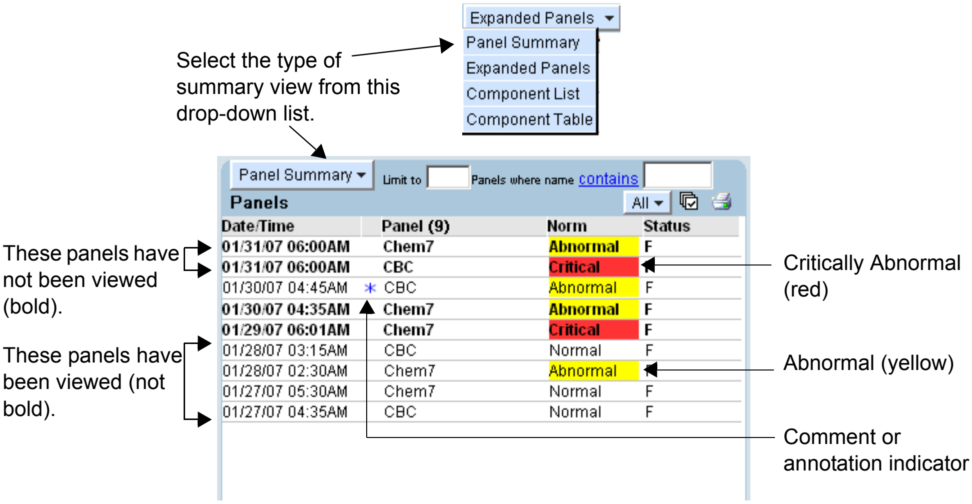
The patient data display area shows the Lab Results summary window.



This summary window lists all of the patient's lab results for the timeframe that is currently selected. You can view this list of lab results in any of four summary view formats, each of which is described in detail in later sections of this chapter:

- *Panel Summary View* on page 107
- *Expanded Panels View* on page 109
- *Component List View* on page 110
- *Component Table View* on page 112

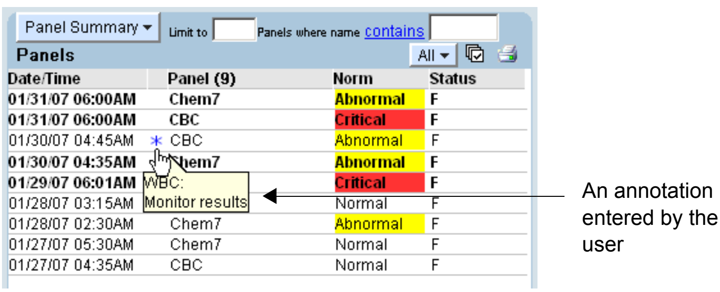
You can easily switch between the four summary views by selecting the view you want from the drop-down list at the top left of the lab results summary window.



Any lab results that you have not yet viewed on either your handheld device or the Physician Portal are displayed in **bold** typeface. Once you have selected a result and viewed the details on either platform, the typeface changes to regular text. This feature helps you to quickly identify those results which require your attention.

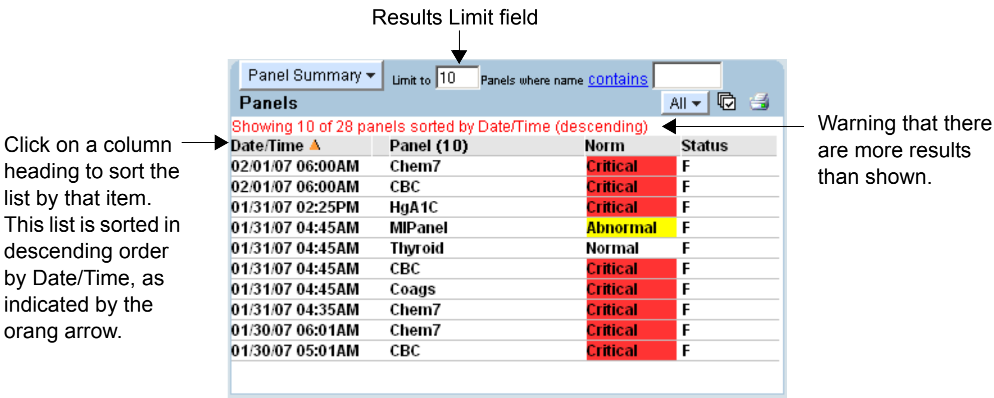
Lab results that fall outside of the normal range for the lab test are highlighted in either yellow or red. Yellow highlighting indicates that the lab test results are *abnormal*, while red highlighting indicates that lab test results are *critically abnormal*.

A blue asterisk next to a lab component indicates that the component has either a comment posted by a lab personnel, or an annotation that you have entered (see *Annotating a Component* on page 120). Holding your mouse pointer over the asterisk displays the comment or annotation.



Sorting Lab Results

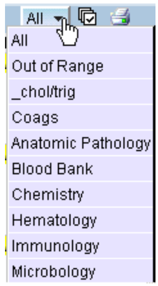
The results in all four summary views are sorted in descending order by date, as a default setting. This means that the most recent results are shown first. However, you may change the order in which the results are sorted in any of the first three summary views by clicking on a column heading. For example, if you were looking at Expanded Panels and you wanted to sort the tests by normalcy status, so that the tests with critical or abnormal results were grouped together, you could click on the **Norm** column heading. Please note that you *cannot* change the sort order of the Component Table view.



Some patients may have accumulated hundreds of lab test results over time. You can limit the number of results that the system retrieves, in order to improve computer response times, and also prevent historical data from being displayed on a day to day basis. Using the **Limit to** field, you can set different limits for panels and components. For example, you might set your panel limit to 50 and your component limit to 100. Simply enter the number you want to use as your limit and then press the **Enter** key on your keyboard. When you do so, the system retrieves the most recent 50 panels or 100 components, and excludes the older results. When you set a results limit, the system recalls that setting and uses it for all future displays. If a patient has more results than the limit you have set, the system displays a warning message to that effect (for example: Showing 10 of 28 panels, sorted by Date/Time (descending)). If you want to see the full set of results, you can always clear the limit field (delete the limit number and the press the **Enter** key), or set a higher limit.

Filtering Lab Results

You may filter the list of lab results, based on several different types of criteria. To do so, click on the drop-down filter located in the upper right corner of the summary view window.



When you select an item from the filter list, the current summary view (Panel Summary, Expanded Panels, Component List, or Component Table) shows only those lab results that meet the filter criteria. The various types of filter criteria are described here:

- **All:** shows all of the patient's lab results within the currently selected **Timeframe**.
- **Out of Range**: select this filter to view only those lab results which fall outside of the "normal" range for the lab test in question.
- **Snapshots**: select a snapshot item to view a custom grouping of lab tests and their results. For example, you might want to see all tests related to coagulation together (such as an INR, PTT, and PT), even though they might not have been administered in a group as a panel, or given on the same date.

  Your system administrator can set up departmental snapshots of the lab test results that most physician's like to view together, or you can also create your own personal snapshots of favorite groupings. Use the **Lab Results Settings** option on the **Preferences** tab to create personal snapshots. For detailed instructions describing how to create snapshots, please refer to *Lab Results Settings* on page 41.
- **Categories**: select a category to see the results of all of the lab tests that fall within that category. If your institution uses them, categories are broad groupings of lab tests that are defined by the institution. Categories are different from snapshots, as they are usually a a more generalized grouping of test types, while snapshots contain a very specific set of related tests. For example, you might see categories such as Cardiac, Chemistry, or Endocrine. Since each institution defines their own categories, the ones you see on your filter list may not be the same as those described here. Or if your institution does not use categories, none will be listed.

- **Unfiled**: select this item to see the results for those lab tests which are not included in any of the categories defined by your institution. If your institution does not use categories, Unfiled does not appear on the filter list.

Please note that items on the filter list are always listed in the same order as they are in the description above. Specifically, the filter items are listed in this order: All, Out of Range, departmental snapshots, personal snapshots (preceded by an underscore), categories, and then Unfiled.

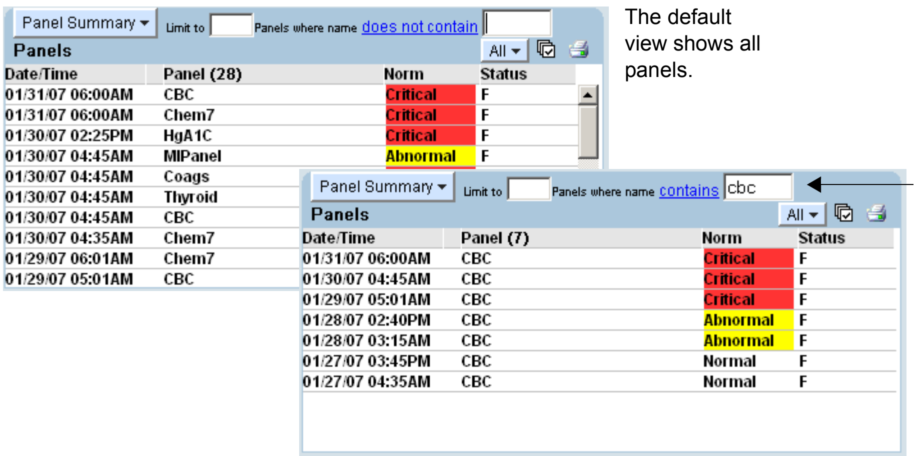
Searching for a Specific Panel or Component

The top of the summary view contains a search field and a contains/does not contain toggle that you can use to include or exclude specific panels or components from the summary view.

To search for one specific type of panel or component follow the steps below. For example, you might want to see just the CBC panels.

1. Select the desired summary view. Use Expanded Panels or Panel Summary to see panels, or use Component List or Component Table to see components.
2. Select contains as your parameter (click on contains or does not contain toggle between the two choices).
3. Type the name of the panel (for example, CBC) or component (for example, PT) in the search field and then press the **Enter** key on your keyboard.

   The system displays only those panels or components whose name contains the text you entered.



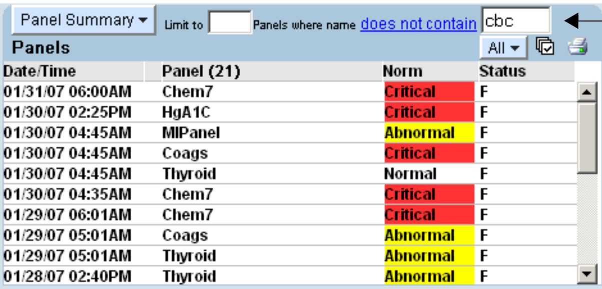
The default view shows all panels.

Here we searched for just CBC panels.

In some cases, you might want to exclude a specific type of panel or component from the summary list. For example, you might want to see all lab panels *except* the CBC panels.

1. Select the desired summary view.
2. Select does not contain as your parameter.
3. In the search field, type the name of the panel or component that you want to exclude and then press the **Enter** key on your keyboard.

   The system displays all panels or components whose name does not contain the text you entered.

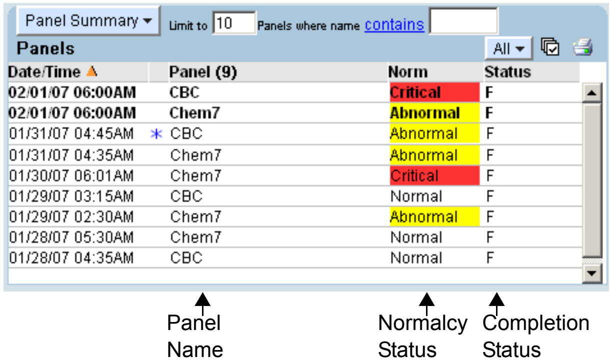


Here we see everything except CBCs.

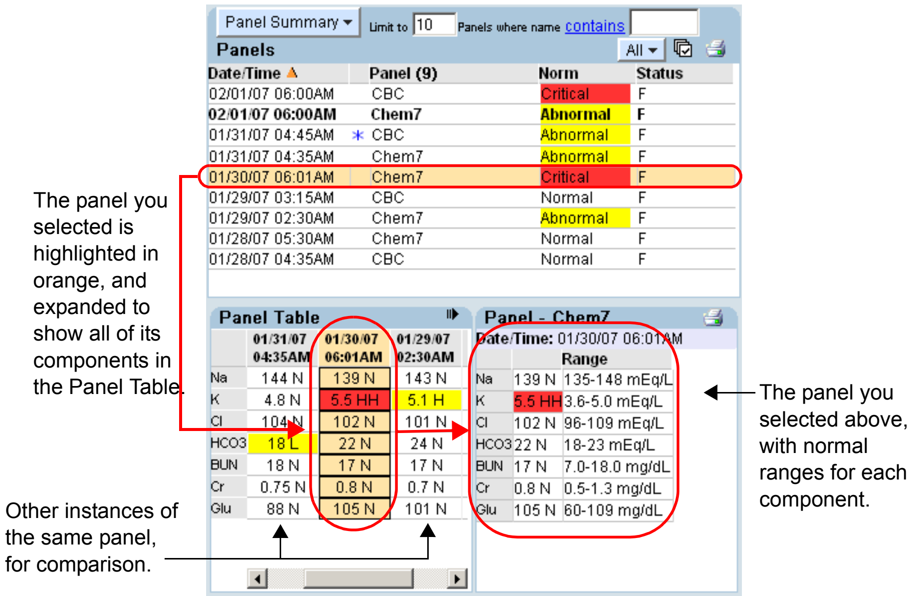
To return to viewing all panels or components again, clear the text in the search field and press the **Enter** key on your keyboard.

Panel Summary View

Select **Panel Summary** from the drop-down list to see the most highly summarized view. This view contains a row for each panel of tests that the patient has had performed. For each panel it shows the date/time of the lab panel, the panel name, the normalcy status of the panel as a whole (normal if all results were normal, abnormal if any component test in the panel was abnormal, or critical if any component test in the panel was critically abnormal), and the completion status.



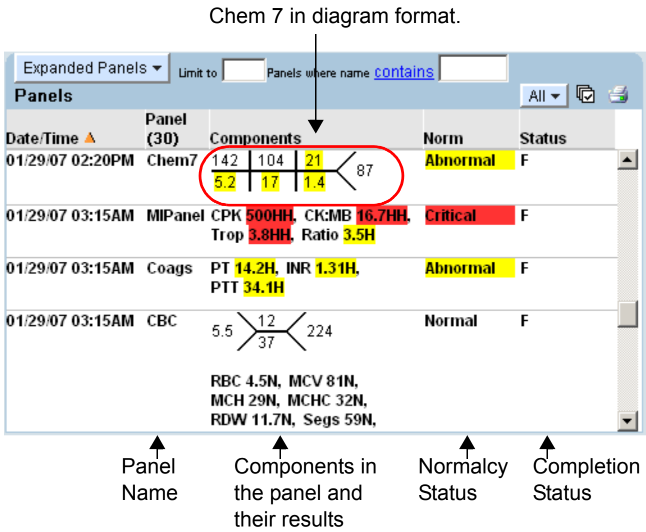
You can click on any row in the Panel Summary to display the details of that panel. The system opens two small detail windows: *Panel Table* (see page 115) and *Panel Details* (see page 117).



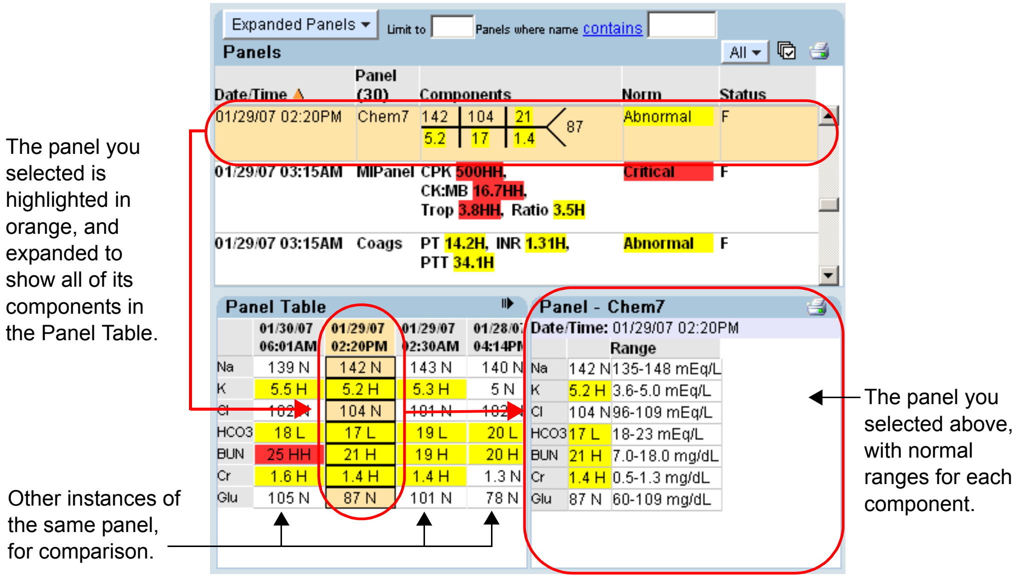
Panel Table **Panel Details**

Expanded Panels View

Select **Expanded Panels** from the drop-down list to see a slightly more detailed listing of the patient's panels. This view displays a row for each panel of tests that the patient has had performed. In each panel's row it shows the date/time of the lab panel, the panel name, the individual component tests included in the panel and their numeric results, the normalcy status of the panel as a whole (normal, abnormal, or critical), and the completion status. For Complete blood count (CBC) and Chem 7 panels, the panel detail view also contains a diagram of the results.



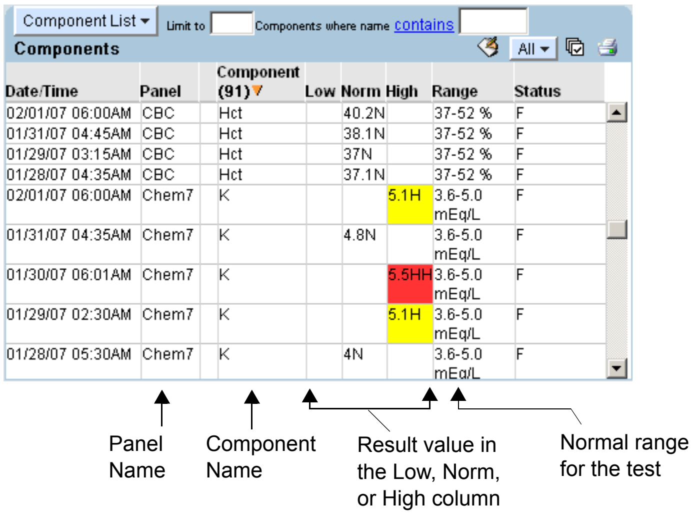
You can click on any row in the Expanded Panels view to display the details of that panel. The system opens two small detail windows: *Panel Table* (see page 115) and *Panel Details* (see page 117).



Panel Table   Panel Details

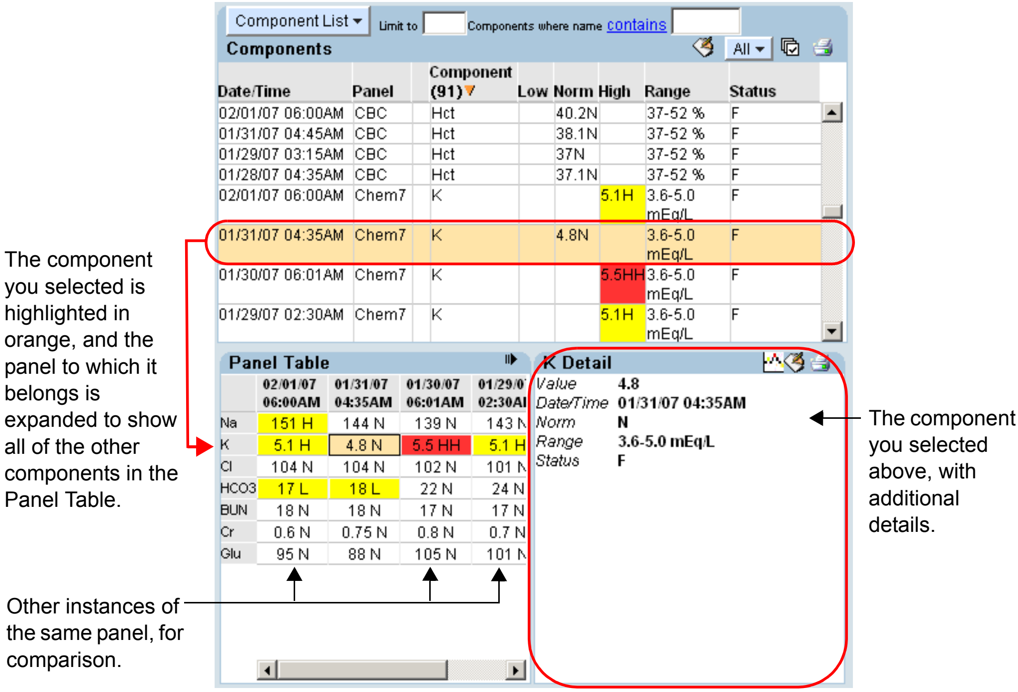
Component List View

Select **Component List** from the drop-down list to display the most granular view of lab test results. This view displays a row for each component lab test that the patient has had performed. So if, for example, the patient had a particular component test performed three times, there would be three rows--once for each occurrence. For each component row it shows the date/time of the component lab test, the panel name to which the component belongs, the individual component name, the numeric lab result value for the component test (in either the low, normal, or high column), the normal range for the component test, and the completion status.



Date/Time	Panel	Component (91)	Low	Norm	High	Range	Status
02/01/07 06:00AM	CBC	Hct		40.2N		37-52 %	F
01/31/07 04:45AM	CBC	Hct		38.1N		37-52 %	F
01/29/07 03:15AM	CBC	Hct		37N		37-52 %	F
01/28/07 04:35AM	CBC	Hct		37.1N		37-52 %	F
02/01/07 06:00AM	Chem7	K			5.1H	3.6-5.0 mEq/L	F
01/31/07 04:35AM	Chem7	K		4.8N		3.6-5.0 mEq/L	F
01/30/07 06:01AM	Chem7	K			5.5HH	3.6-5.0 mEq/L	F
01/29/07 02:30AM	Chem7	K			5.1H	3.6-5.0 mEq/L	F
01/28/07 05:30AM	Chem7	K		4N		3.6-5.0 mEq/L	F

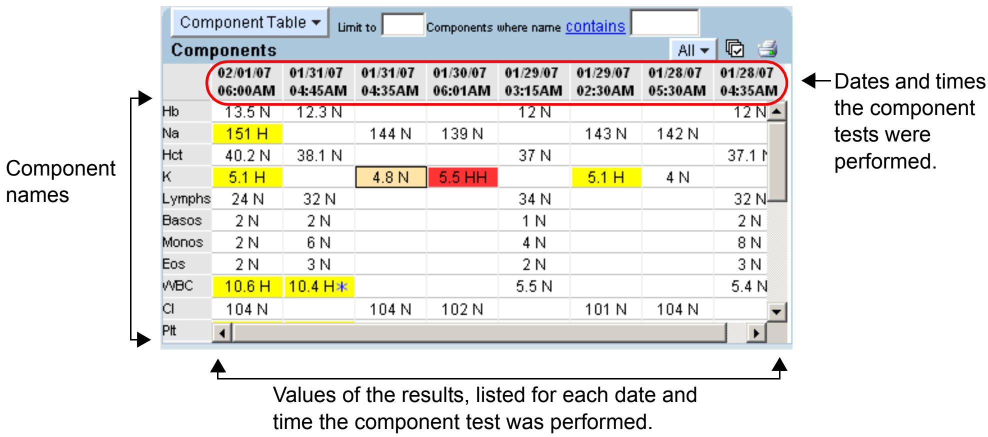
You can click on any row in the Component List to display the details of that component. The system opens two small detail windows: *Panel Table* (see page 115) and *Component Details* (see page 118).



Panel Table **Component Details**

Component Table View

Select **Component Table** from the drop-down list to see a slightly different detailed display of component lab results. The Component Table is similar to the Component List, in that it is a very granular view, which displays components rather than panels. However, the Component Table uses a table format, while the Component List uses a list format. The Component Table displays the *type* of component test on the vertical axis, with each *occurrence* of that test type listed on the horizontal axis. The cells of the table contain the numeric lab results for each occurrence of the component test on a specific date. There is only one row for each type of component test. (The Component List, on the other hand, lists each occurrence of a component test in its own row. If a particular component test is performed multiple times, there are multiple rows in the list.)



	02/01/07 06:00AM	01/31/07 04:45AM	01/31/07 04:35AM	01/30/07 06:01AM	01/29/07 03:15AM	01/29/07 02:30AM	01/28/07 05:30AM	01/28/07 04:35AM
Hb	13.5 N	12.3 N			12 N			12 N
Na	151 H		144 N	139 N		143 N	142 N	
Hct	40.2 N	38.1 N			37 N			37.1 N
K	5.1 H		4.8 N	5.5 HH		5.1 H	4 N	
Lymphs	24 N	32 N			34 N			32 N
Basos	2 N	2 N			1 N			2 N
Monos	2 N	6 N			4 N			8 N
Eos	2 N	3 N			2 N			3 N
WBC	10.6 H	10.4 H*			5.5 N			5.4 N
Cl	104 N		104 N	102 N		101 N	104 N	
Plt								

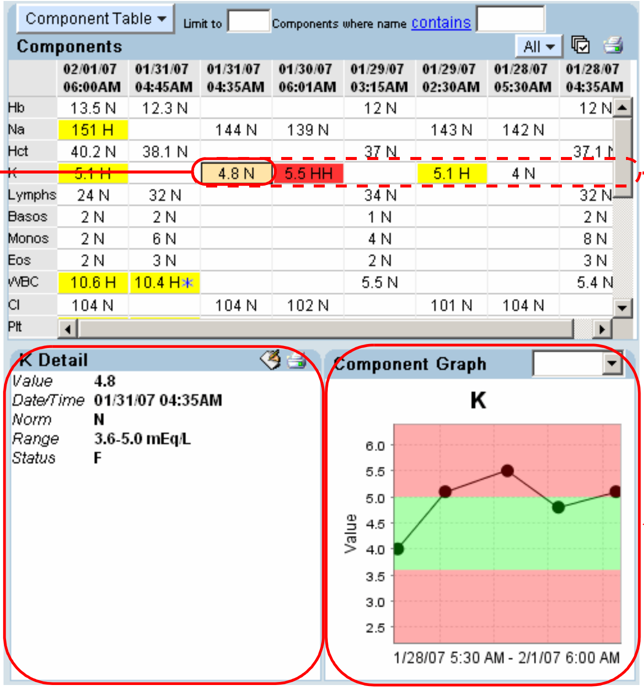
Please note that this is the only view of the four summary views that does not allow you to change the sort order by clicking on a column heading. Component tests from a given panel are listed together sequentially. Then each panel is sorted in reverse chronological order by date and time (most recent panels first). For example, if Panel A contained five components and was performed on 1/5/06, and Panel B contained eight components and was performed on 1/6/06, the system would sort the components as follows: all eight of Panel B's components first (since they are more recent), and then all five of Panel A's components.

Regardless of the value you enter in the **Limit to** field, the system always shows *all* of the components within a panel; it will not truncate a panel. For example, if you entered "6" in the scenario described above, the system would show all eight of Panel B's components (because it will not truncate a panel), but would not show any of panel A's components (because the first component of that panel would be the ninth result, which would exceed the number you entered in the **Limit to** field).

You can click on a table cell containing a numeric result to display the details of that particular lab result. The system displays two small detail windows below the Component

Table: *Component Details* (see page 118) and a Component Graph (see *Graphing Lab Results* on page 119).

Click on a component value (in a cell of the table) to view additional details about that specific lab result.

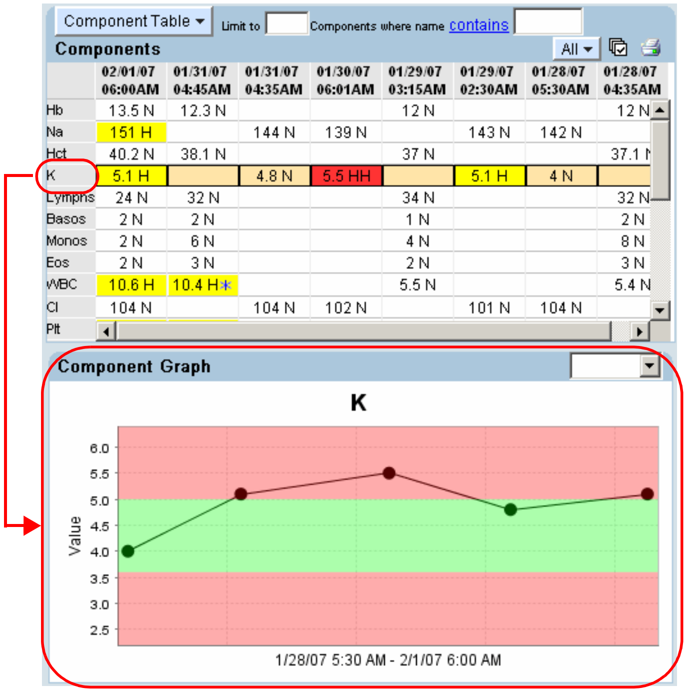


The specific result you selected above, along with the values for additional dates, are graphed.

Component Details **Component Graph**

You can also click on a component test type name on the vertical axis of the table to graph all of the results for that component test. The Component Graph is displayed below the Component Table.

Click on a component name (not a value) to graph all of the results for that component test type.

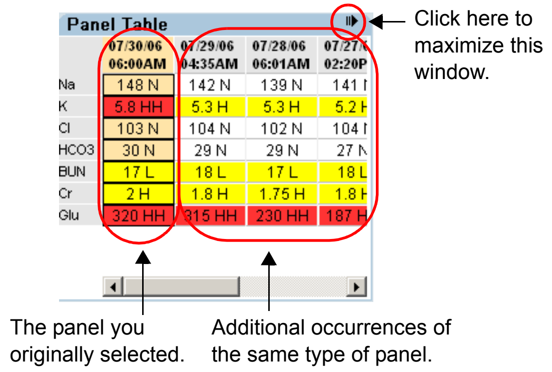


Viewing the Details of a Panel or Component

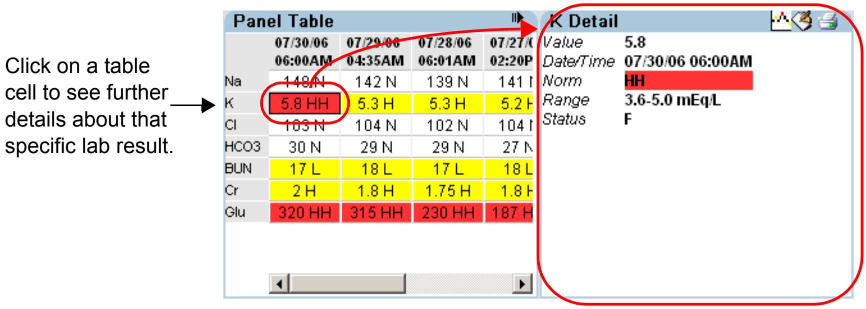
If you would like to see the details of a specific panel or component, simply click on that row or cell in any of the four summary views (Panel Summary, Expanded Panels, Component List, or Component Table). Depending on what you have selected, any combination of the following detail screens may appear below the summary view:

Panel Table

If you click on a panel in either the Panel Summary or the Expanded Panels view, the Panel Table screen appears at the bottom left of the summary view. This detail screen displays a table containing a history of all instances when that same panel was performed within the **Timeframe** that you selected. For example, if your **Timeframe** was set to the **Last 30 Days**, and you clicked on the PAN BASIC panel that was performed on 05/12/05 in the summary list, the system would also display all other PAN BASIC panels performed within the last 30 days. The panels are displayed in a table format with all of the component tests within the panel listed on the vertical axis, and the dates and times of the test occurrences along the horizontal axis. The table cells contain the numeric lab results for each component test. The date/time heading of the particular instance of the panel that you originally selected in the summary list (05/12/05 in our example) is highlighted in orange. The ability to view the other occurrences of the same panel, along with the specific occurrence in which you were originally interested, allows you to identify any trends in the clinical data.

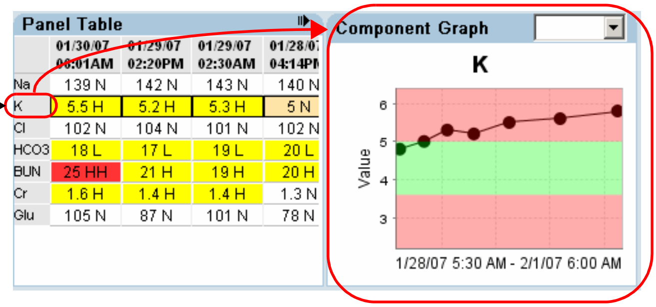


If you click on any cell containing a component's numeric result, the system displays the *Component Details* screen (see page 118), where you can see further information about that specific lab result.



If you click on a component test name that is listed on the vertical axis, the system graphs all of the lab result values for that component test type on the Component Graph screen (see *Graphing Lab Results* on page 119).

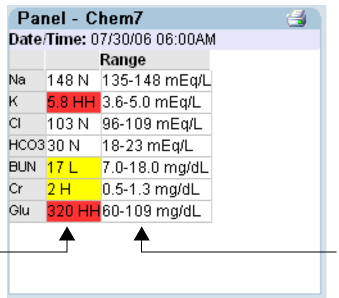
Click on a component test name to graph all of the results for that test type.



Panel Details

If you click on a panel in either the Panel Summary or the Expanded Panels view, the Panel Details screen appears at the bottom right of the summary view. This detail screen displays the details of the specific panel that you selected in the summary view. It shows you the date and time of the panel, the components in the panel, and the numeric results for each component, and the normal range for each component.

Date and time of the panel.

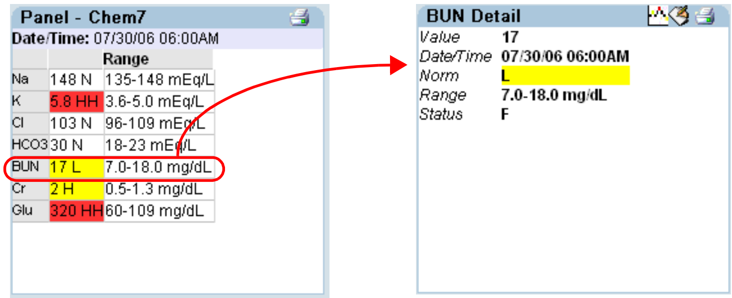


Numeric results of the component tests.

Normal ranges for each component test.

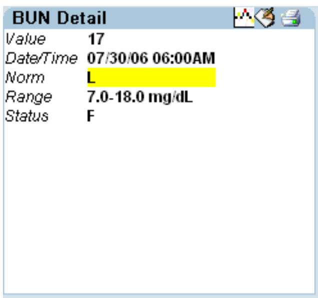
If you click on any component row in this detail screen, the display changes to the *Component Details* screen (see page 118), where you can see further information about that specific lab result.

Click on a component test row to display the details of that specific lab result.

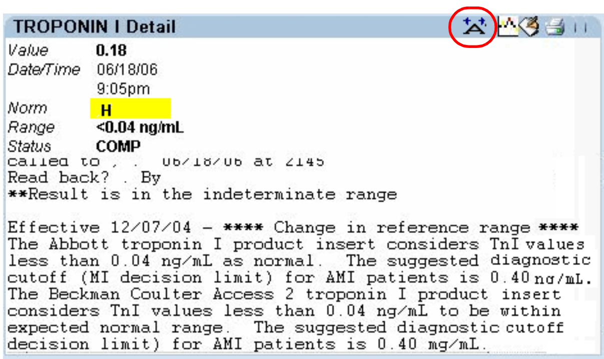


Component Details

If you click on a row in the Component List, a cell in the Component Table, or on a component's result in the Panel Table or Panel Details (either of the two detail screens described above), the system displays the Component Details screen. This detail screen shows you information about that one specific component lab result. You can see the date and time the test was performed, the numeric result, the normalcy status, the normal range for the lab test, the completion status, and any comments or annotations.



Detail for a component test result that is numeric.

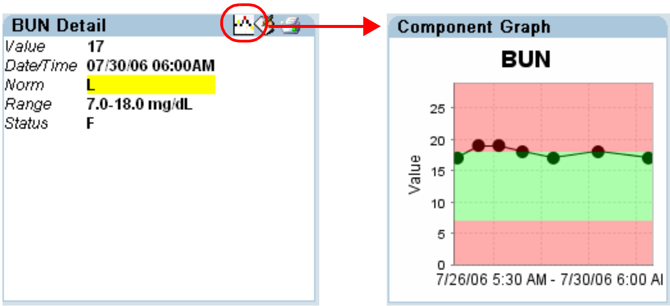


Detail for a component lab result that has formatted text that is currently wrapping. Click on the **Word Wrap** icon to toggle between wrapping or not wrapping the text.

The lab component detail field displays in a fixed-font format, because components sometimes contain formatted results such as tables. You can click the word wrap icon to toggle between a fixed-font that does not wrap (useful for formatted results) and a regular font that does wrap (useful for viewing long comments).

You can click on the **Graph** icon to graph this lab result along with other occurrences of the same lab test, over time (see *Graphing Lab Results* on page 119).

Click on the Graph icon to graph this result along with other results for the same test.

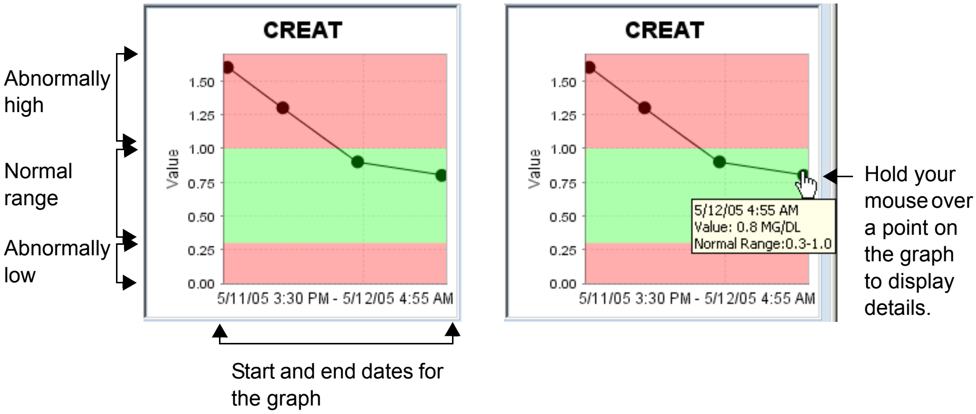


Graphing Lab Results

You can easily graph the results of any individual component lab test to see a pictorial representation of the results for that test over time. There are a variety of screens from which you can graph a component's results:

- Component Table: This is one of the summary views. It displays all component test types, with the results of each occurrence of the component lab test listed in columns from left to right. Simply click on a component test name in the leftmost column to display a graphical representation of that component's results. (For further information please refer to *Component Table View* on page 112.)
- Panel Table: This is one of the detail views. It displays all of the components of a particular panel, along with the results of other occurrences of the same panel listed in columns from left to right. Again, simply click on a component test name in the leftmost column to display a graph. (For further information, please refer to *Panel Table* on page 115.)
- Component Details: This is one of the detail views. It shows you the details of one specific occurrence of a component lab test in a textual format. A **Graph** icon is located in the upper right corner of the window. Simply click on it to graph the results of this particular occurrence of the component's results along with any other occurrences of the same type of component lab test. (For further information, please refer to *Component Details* on page 118.)

Regardless of which of the methods above you use to display the graph, the format of the graph itself is the same. The normal bounds for the component are shaded green. The high and low values appear outside the normal bounds, and are shaded red. To display the exact numeric value for a specific data point on the graph, simply hold your mouse pointer over that point (you do *not* have to click on the point).



If you would like to expand or decrease the date range of the graph, simply select a new date range using the **Timeframe** drop-down list located at the top of the Patient Data Display area.

Annotating a Component

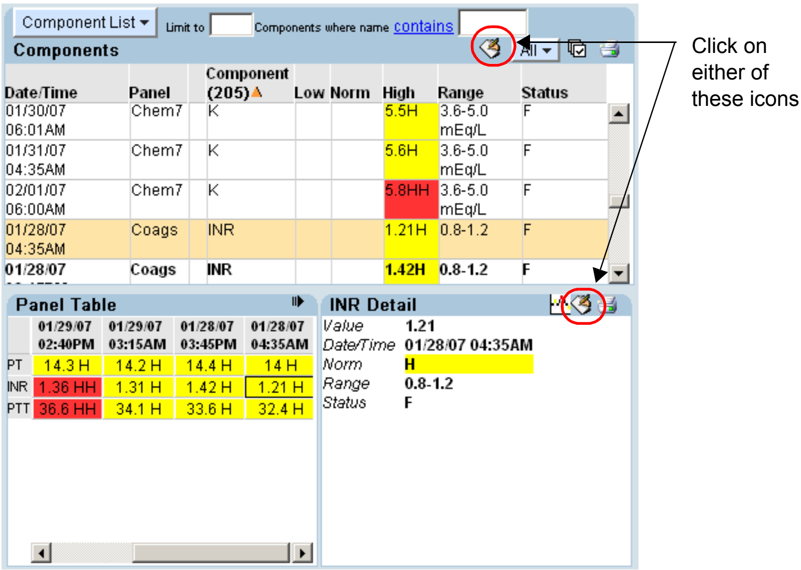
You can add annotations to a component lab result at any time. These are your personal remarks, or reminders to yourself, about the patient's lab results. Annotations are visible to only you--other physicians cannot see them on the PatientKeeper Physician Portal or on their handheld devices.

You can enter an annotation from either the Component List in the summary window, or from the Component Detail window. Note that an annotation is associated with a specific component in a panel. You cannot post an annotation to the panel as a whole.

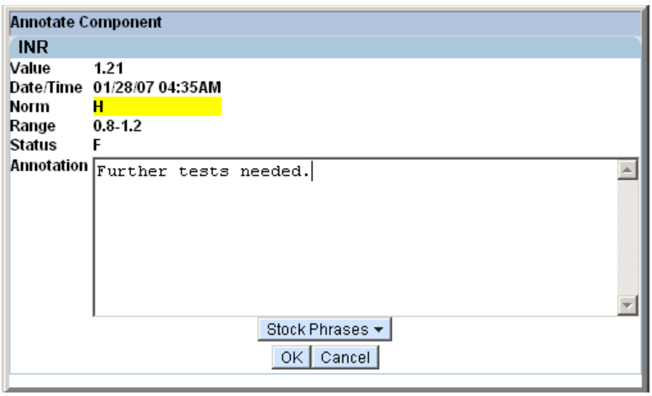
To enter an annotation, follow these steps:

1. Display the specific component lab result that you wish to annotate, using any of the methods described in the *Viewing Lab Results for a Patient* section.

2. Click on the **Annotation** icon (a hand holding a pencil over a note pad) located in the top right corner of either the Component List in the summary window, or the Component Detail window.



3. The system opens the Annotate Component window.



Enter your annotation using any combination of these methods:

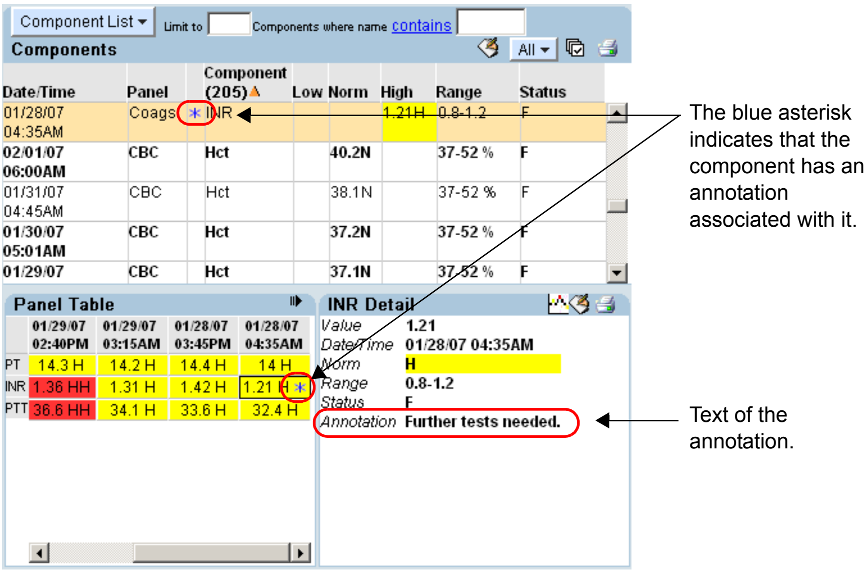
– Type a free text comment using your keyboard.

– Select a stock phrase from the **Stock Phrases** drop-down list. This is a list of standard phrases commonly used by providers to annotate lab results. You can also create your own personal stock phrases for annotations on the **Preferences** tab. Please refer to *Lab Results Settings* on page 41 for more information.

– Enter both a free text comment *and* a stock phrase.

4. Click **OK** to save your annotation, or click **Cancel** to close the window without saving the annotation.

   The annotation is now associated with the component lab result.



Once a component is annotated, the annotation itself, or a blue asterisk indicating that an annotation exists, appears in a variety of displays:

- In the Panel Summary, an asterisk appears next to the panel name, if one or more of the component tests in the panel have an annotation.
- In the Expanded Panels view, the system displays an asterisk next to the names of any components containing annotations.
- In the Component List, the system displays an asterisk next to the names of any components containing annotations.

- In the Component Table, the system displays an asterisk in the table cell for any component test results that have an annotation.
- In the Panel Table detail window, an asterisk appears in the table cell for any component test results in the panel that have an annotation.
- In the Panel Detail window, an asterisk appears next to the lab result value, if any component in the panel has an annotation.
- In the Component Detail window, the full text of the annotation appears at the bottom of the textual lab result.

Marking All Lab Results as Viewed

As mentioned previously, any lab results which you have not yet viewed on either the PatientKeeper Physician Portal or your handheld device are displayed in **bold** typeface, while those that you *have* viewed are displayed in regular typeface. You can also mark all of a patient's lab results as viewed without having to individually select and display each one on the Physician Portal or your handheld device. See *Marking Clinical Data as Viewed* on page 139 for more information and instructions on this topic.

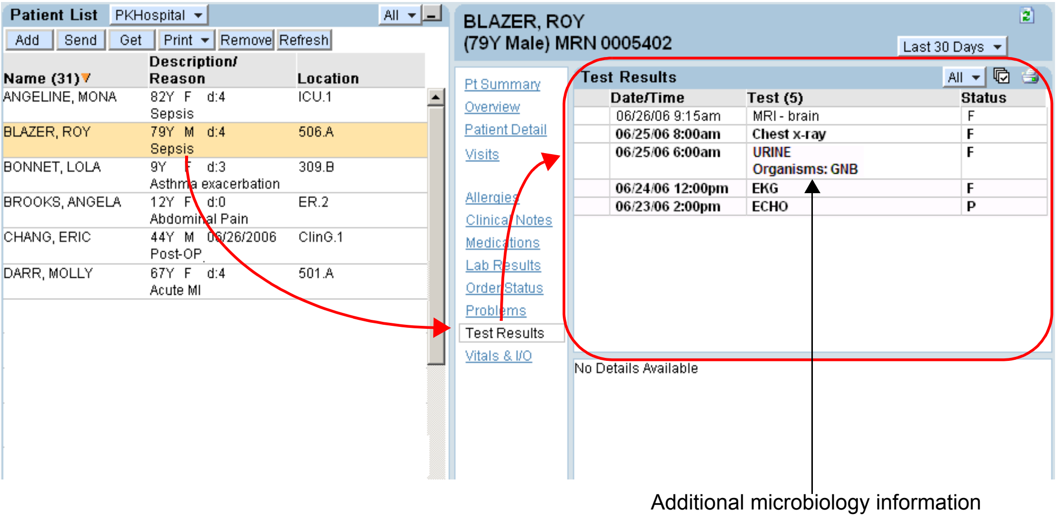
Viewing Test Results for a Patient

The **Test Results** option shows you a summarized list of the text-based clinical results of tests that have been performed on a patient. The most common types of test results that you might be able to see include radiology, pathology, microbiology, blood bank, or other test types that involve clinical interpretation.

To view test results, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon  from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Test Results** from the display list.

   The patient data display area shows the Test Results summary window. The summary window displays the date and time the test result was dictated, the test name, and the completion status. For institutions using MEDITECH® as their back end system, microbiology results may also display the isolated organism, if any, just under the name of the microbiology test.



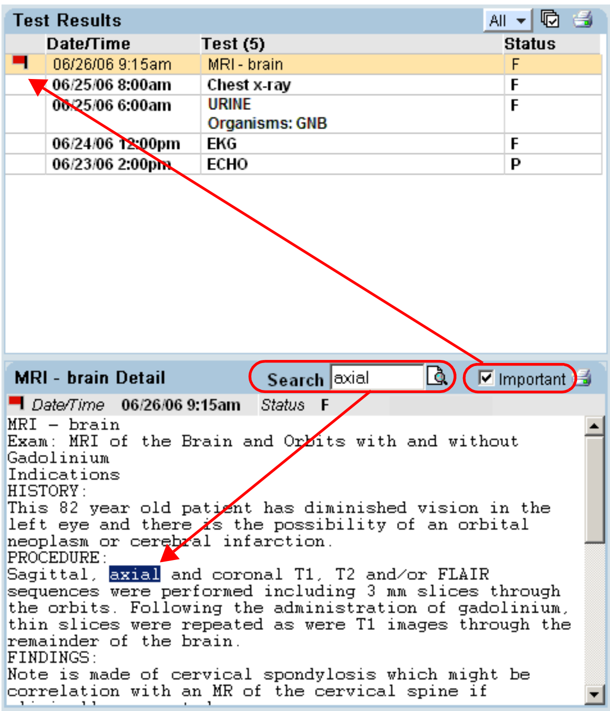
– Any test results that you have not yet viewed on either your handheld device or the PatientKeeper Physician Portal are displayed in **bold** typeface. Once you have selected a test result and viewed the details on either platform, the typeface changes to regular text. This feature helps you to quickly identify those results which require your attention. You can also mark all of a patient's test results as viewed without having to individually select and display each one on the Physician Portal or your handheld device. See *Marking Clinical Data as Viewed* on page 139 for more information and instructions on this topic.

– You may change the order in which the Test Results are sorted, by clicking on a column heading. For example, clicking on the **Test** heading would sort the tests alphabetically by type of test. You could then look at all of the results for a specific type of test together.

– You may filter the list of test results, by type of test. To do so, click on the drop-down filter located in the upper right corner of the Test Results window. The various types of tests used by your institution are included in the filter list, as shown in the example below. Select an item from the list to view only those types in the Test Results window. Selecting Important from the list displays those results which you have marked with an Importance flag.

4. If you would like to see the details of a test result itself, simply click on that test result in the summary list. A detail screen opens below the summary list, showing you the full contents of the test result. The test results are shown in a fixed-width font, to preserve any formatting required for tables within the results, such as might be needed for microbiology test results.

   NOTE: If your source system is MEDITECH®, the text of the report may include the report date/time from the MEDITECH system, which can be different from the dictated date/time in the summary window.



– Use the **Search** field at the top of the detail window to find all instances of a particular word or phrase in the result. First type in the desired phrase, and then click on the magnifying glass icon (or press the **Enter** key on your keyboard). Click repeatedly on the icon to move to each subsequent occurrence of that word or phrase in the result.

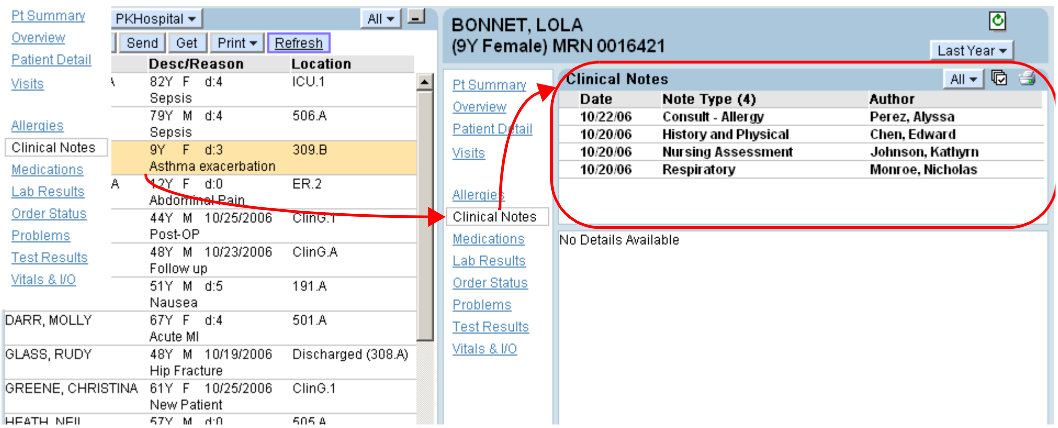
– To mark a test result as important, place a check mark in the **Important** field (located at the top of the detail window). When you do so, a **Red Flag** icon is displayed next to that test result in the test results summary list. You can also *uncheck* the flag once you deem that this result is no longer significant.

Viewing Clinical Notes for a Patient

The **Clinical Notes** option allows you to review a summary list of the notes on file for a particular patient. You can see the date the note was written, the type of note (admission, discharge, etc.), and the author. In addition to the summarized list of notes, you can also view the contents of any specific note on the list. To view clinical notes, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Clinical Notes** from the display list.

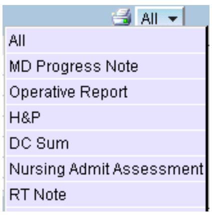
   The patient data display area shows the Clinical Notes window.



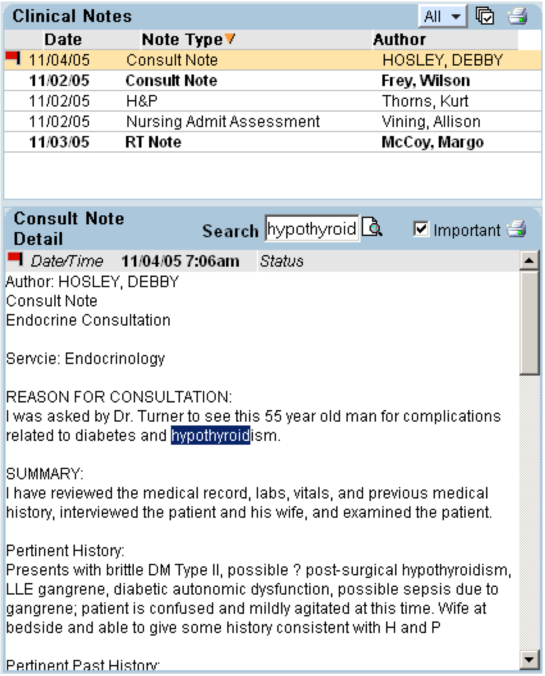
– Any clinical notes that you have not yet viewed on either your handheld device or the Physician Portal application are displayed in **bold** typeface. Once you have selected a clinical note and viewed the details on either platform, the typeface changes to regular text. This feature helps you to quickly identify those notes which require your attention. You can also mark all of a patient's clinical notes as viewed without having to individually select and display each one on the Physician Portal application or your handheld device. See *Marking Clinical Data as Viewed* on page 139 for more information and instructions on this topic.

– You may change the order in which the Clinical Notes are sorted, by clicking on a heading. For example, clicking on the **Author** field would sort the notes alphabetically by author.

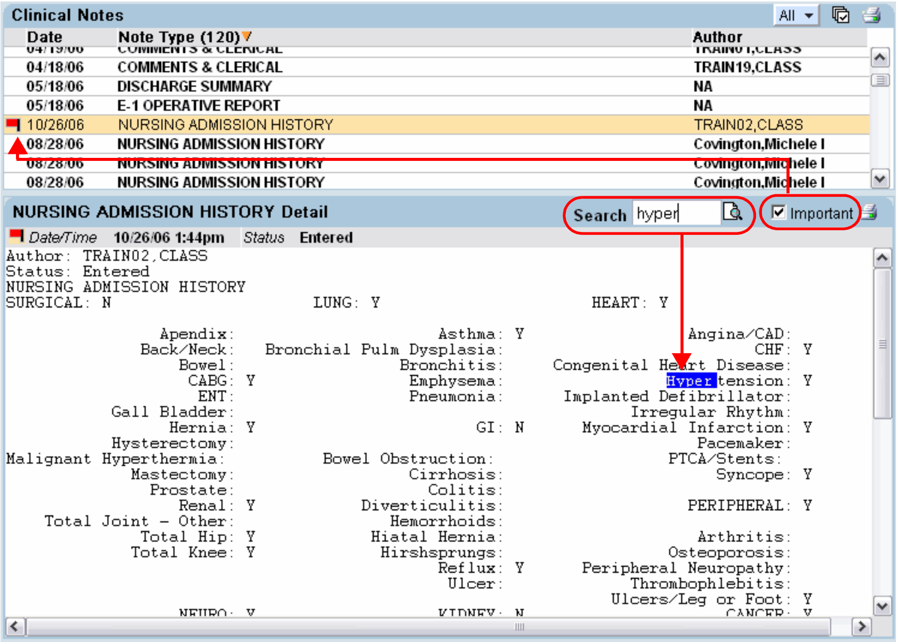
– You may filter the list of clinical notes, by type of note. To do so, click on the drop-down filter located in the upper right corner of the Clinical Notes window. The various types of notes used by your institution are included in the filter list, as shown in the example below. Select an item from the list to view only those types in the Clinical Notes window. Selecting **Important** from the list displays those notes which you have marked with an Importance flag.



4. If you would like to see the details of a clinical note itself, simply click on that note in the summary list. The Clinical Note Detail screen opens below the summary list, showing you the full contents of the note.



If MEDITECH® is your source system, the PatientKeeper system derives clinical notes from three sources: patient notes, departmental reports (medical records), and nursing interventions. Some of these reports use a wide table or columnar format. In these instances, the PatientKeeper system preserves the formatting of the note by displaying it in fixed-width format.



– Use the **Search** field at the top of the window to find all instances of a particular word or phrase in the note. First type in the desired phrase, and then click on the magnifying glass icon (or press the **Enter** key on your keyboard). Click repeatedly on the icon to move to each subsequent occurrence of that word or phrase in the note.

– To mark a note as important, place a check mark in the **Important** field (located at the top of the detail window). When you do so, a **Red Flag** icon  is displayed next to that note in the clinical notes summary list. You can also *uncheck* the flag once you deem that this note is no longer significant.

Viewing the Status of Orders for a Patient

Use the Order Status display option to check the status of any orders for a given patient. This option lets you see the status of the ordering process within your source order entry system, as well as the status from the department that processes the order. Depending on how your source order entry system is configured, you might be able to view the status of orders for the following types of items: tests, dietary needs, consults, notes, etc.

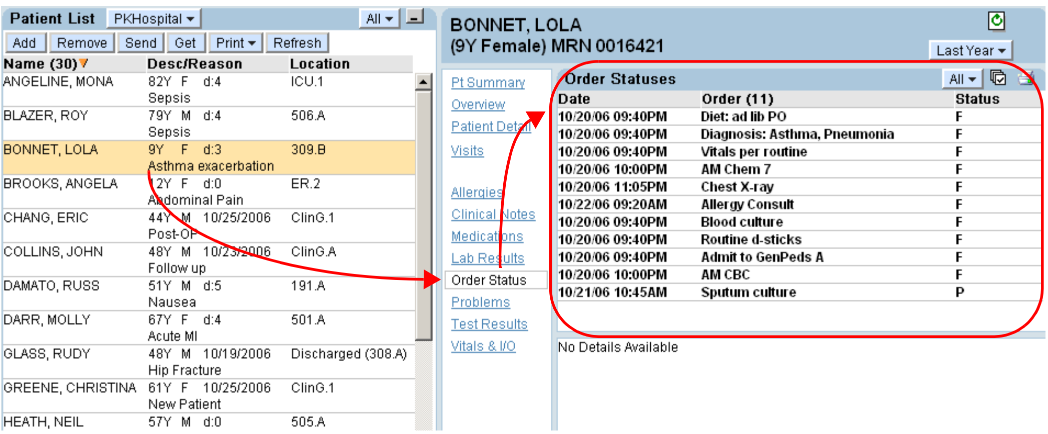
This option is unique in that it not only shows you the orders for tests that have available results, but also shows you those in progress. This allows you to avoid redundant ordering for tests that have been taken, but for which the results are not yet available.

To view orders, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Order Status** from the display list.

   The patient data display area shows the Order Statuses window. This summary list displays the date and time of the order, the name of the order, and the completion status.

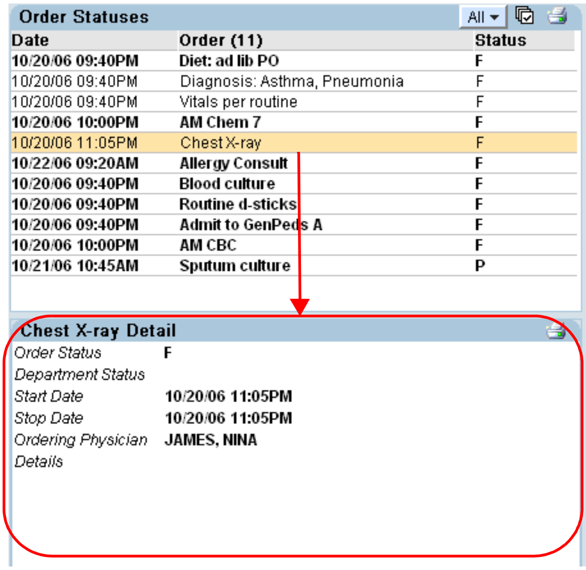
   NOTE: For systems with MEDITECH® back ends, the summary list contains a fourth column for the Service date and time (the date and time the order was resulted). Furthermore, for those orders that are associated with meal times such as breakfast, lunch, or dinner, an abbreviation for the type of meal replaces the numeric time.



– Any order statuses that you have not yet viewed on either your handheld device or the PatientKeeper Physician Portal are displayed in **bold** typeface. Once you have selected an order and viewed the details on either platform, the typeface changes to regular text. This feature helps you to quickly identify those orders which require your attention. You can also mark all of a patient's orders as viewed without having to individually select and display each one on the Physician Portal or your handheld device. See *Marking Clinical Data as Viewed* on page 139 for more information and instructions on this topic.

– If you would like to change the sorting order of the Order Statuses summary list, simply click on a column heading. For example, if you click on the **Date** heading, the sort order of the list toggles between ascending and descending chronological order by order date.

4. To view further information about a particular order, click on the row containing that order.The system opens a detail window below the summary list. The detail window shows you the full name of the order, the status of the order in your order entry system, the status of the order in the department that is processing it, the start and stop dates of the order, the ordering physician, and any additional details.

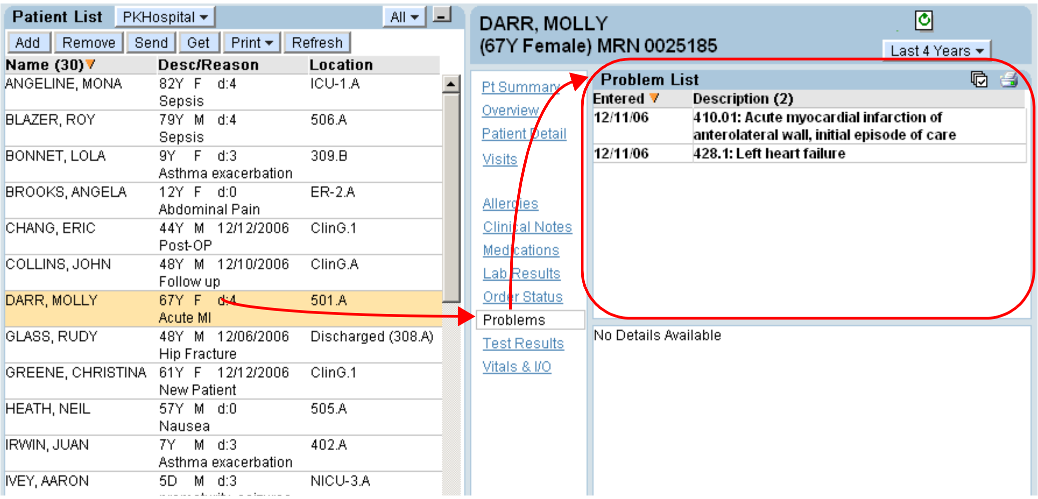


Viewing Problems for a Patient

Use the **Problems** option to view a summary list of diagnosis codes on file for a particular patient. Providers can enter diagnoses for their patients using the Problem List module on their handheld devices. The summary list shows you the date of onset, the course, the ICD-9 code, and the description for each problem. In addition to the summary of problems, you can also view detailed information for any specific problem on the list. To view problems, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Problems** from the display list.

   The patient data display area shows the Problem List window.

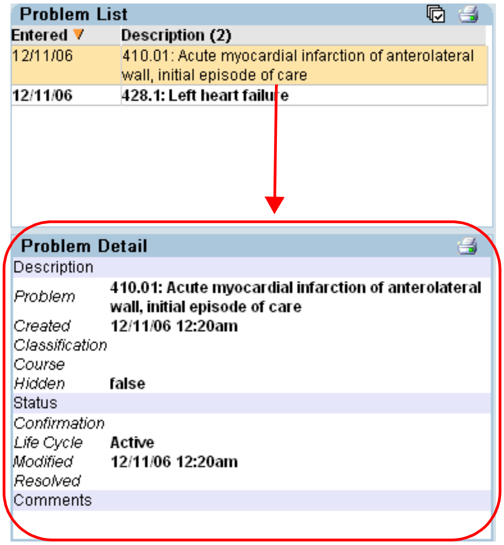


   – Any problems that you have not yet viewed on either your handheld device or the Desktop Charge Capture application are displayed in **bold** typeface. Once you have selected a problem and viewed the details on either platform, the typeface changes to regular text. This feature helps you to quickly identify those problems which require your attention. You can also mark all of a patient’s problems as viewed without having to individually select and display each one on the Desktop Charge Capture application or your handheld device. See *Marking Clinical Data as Viewed* on page 139 for more information and instructions on this topic.

   – If you would like to change the sorting order of the problems summary list, simply click on a column heading. For example, if you click on the **Description** heading, the sort order of the list toggles between ascending and descending numerical order by ICD-9 code.

4. To view further information about a particular problem, click on the row containing that problem.The system opens the Problem Detail window below the

summary list. The Problem Detail window shows you the full description, course, classification, date created, status information, and comments about the problem.

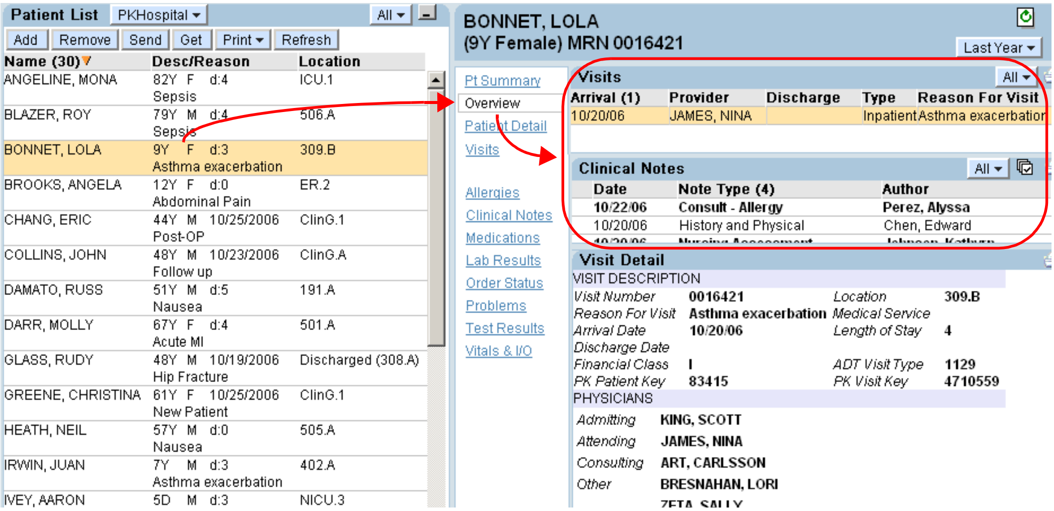


Viewing an Overview of a Patient

This option shows you a high-level overview of the patient. This display is a composite of two other displays: **Visits** and **Clinical Notes**. The overview simply stacks these displays one above the other, to facilitate viewing different types of information all in one glance. At the bottom of the screen is a detail window, which displays the details of the currently selected item, whether it be a visit or clinical note. To display an overview, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Overview** from the display list.

The patient data display area shows the Overview window.



Each of the windows in the Overview functions in the same manner as it would when viewed individually. For information about how these display options function, please refer to the descriptions of these items in the preceding sections:

– *Viewing Visit Information for a Patient* on page 86.

– *Viewing Clinical Notes for a Patient* on page 126.

Viewing a Patient Summary

The **Pt Summary** display option shows a summarized list of all unviewed clinical data for the currently selected patient. It simply takes all of the unviewed items that would normally appear as bold text in the **Allergies**, **Clinical Notes**, **Medications**, **Lab Results**, **Order Status**, **Problems**, and **Test Results** displays, and lists them all in one window. This is quick way for you to see “what’s new?” for the patient. You can then click on any clinical data item in the list to see further details about it.

To display a patient summary for a particular patient, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on **Pt Summary** from the display list.

The patient data display area shows the Pt Summary window. It contains columns for the **Type** of clinical data item, the **Date** of the item, a brief **Description** of the item, and important **Details**. The actual information shown in these columns varies by the type of clinical data involved. Please refer to *Viewing a Summary of All Patients* on page 135 to view a description of the column contents for each type of clinical item.

4. There are additional buttons and controls on the **Pt Summary** display option that enable you to perform a variety of activities. All of the buttons and controls listed below function in exactly the same manner as the do on the **Patient Summary** tab. Please refer to *Viewing a Summary of All Patients* on page 135 for detailed instructions on these topics.
   - Click on a column heading to change the sort order of the display
   - Use the **Limit to** field limit the number of clinical items that are currently displayed
   - Click on the **Options** button to select only those categories of clinical data that you wish to view
   - Click on the **Mark as Viewed** button to mark as viewed some or all of the currently displayed clinical items
   - Click on any clinical item's row to view additional details about it

Viewing a Summary of All Patients

Each patient's clinical data is constantly changing: new lab tests are performed, new clinical notes are written, new medications are being prescribed, etc. The **Patient Summary** tab is designed to present the provider with all new clinical data for all of the patients on their short patient list. This is a running summary of the clinical data they have not yet viewed on either their handheld device or the Physician Portal. For a provider, this is a quick way to see "what's new?" for their entire patient list. Once they view a particular item (for example, a particular lab result), whether via this option or any other option in the PatientKeeper system, that item is marked as viewed and is removed from the **Patient Summary** tab.

Please note that there is also a display option called **Pt Summary** on the standard Patient Data Display. This is an almost identical option, as it provides the same type of information (all new unviewed clinical data), and has many of the same controls for viewing, sorting, and marking as viewed. However, in the case of the **Pt Summary** display option, you are looking at the unviewed clinical data for *one* individual patient, while on the **Patient Summary** tab, you are looking at the unviewed clinical data for *all* of the patients on your short patient list. Please refer to *Viewing a Patient Summary* on page 134 for more information on the **Pt Summary** display option.

To view the Patient Summary report, follow these steps:

1. Click on the **Patient Summary** tab.
2. If desired, use any of the following options to control the amount of information you wish to display, as well as the patients for which you wish to display it:
   - **Timeframe** drop-down list: select the date range of the information you wish to display.
   - **Profile** drop-down list: select the profile that you wish to make active for this web session. Profiles are a combination of settings that allow a provider to optimize both the amount and composition of patient data currently displayed on the screen and are generally used when a provider works in more than one facility or location. A provider might have a profile defined for each location, thereby allowing them to switch the list of patients that is currently displayed. (See *Applying Profiles to Your Patient List* on page 54 for more information.)
   - **View Filter** drop-down list: select a view filter to control the patients from your short list that are currently displayed in the report. You can see **All** patients, just those you have added to the list yourself (**Added by User**), patients you have marked as **Hidden** on your handheld device, or **Placeholder** patients you have created on your handheld device. You can also use department or personal view filters to narrow the scope of the list. (See *Filtering Your Patient List* on page 56 for more information.

   The Patient Summary report now shows all unviewed clinical data for all of the patients on your short patient list (or for the patients in the current profile and view filter). It contains columns for the **Patient** name, the **Details** icon  , the **Type** of clinical data item, the **Date** of the item, a brief **Description** of the item, and important **Details**. The actual information shown in the **Date**, **Description**, and **Details** columns varies by the **Type** of clinical data involved. The table below describes the contents of the columns for each type of clinical item.

Type	Date	Description	Details
Allergy	always blank	allergen (penicillin, bee sting, etc.)	type of allergy (food, drug, etc.) and reaction (nausea, rash, etc.)

Type	Date	Description	Details
Clinical Note	date/time the note was written	type of note (consult, nursing assessment, etc.)	author of the note
Medication	medication order start date/time	medication name and SIG information	date last administered to the patient (if administered)
Order Status	order start date/time	order name	status of the order (final, pending, etc.)
Problem	date of onset	ICD-9 code and description	problem status (active, inactive, etc.)
Test Result	test result date/time	test result name	test result status (final, pending, etc.)
Lab Result Panel	lab result date/time	panel name	normalcy status (critical, abnormal, or normal) and status (final, pending, etc.)

3. You can now perform any of the following actions to change the amount, type, or format of the displayed information.

   – **Change the sort order**: You can change the sort order of the report by clicking on any column heading. By default, the items are sorted by **Type** of item, so that all of the allergies are grouped together, then all of the clinical notes, etc.

   – **Limit the amount of information to view**: You can limit the number of clinical data items that appear in the Patient Summary window using a combination of the **Limit to** field and the current sort order. Simply type a number in the **Limit to** field and then press the **Enter** key on your keyboard. For example, if the report were sorted in reverse chronological order by date, and you entered 50 in the **Limit to** field, it would show only the 50 most recent items.

   – **Select the type(s) of clinical data to view**: Click the **Options** button to select which of the clinical data items you wish to view at any given time. For example, if you are considering prescribing a medication, you might be interested in viewing only the allergies, medications, lab results, and problems. Simply click the checkboxes for those items that you wish to display. You may note that the Lab Panels item allows you to select the criticality of the lab results that you want to see, if any at all:

     - **Critical**: include only critical unviewed lab results

- **Abnormal**: include only abnormal and critical unviewed lab results
- **All**: include all unviewed lab results (critical, abnormal, and normal)
- **None**: do not show any lab results

– **Mark the clinical data as viewed**: Click the **Mark as Viewed** button to mark the clinical data as viewed. When you do so, you are presented with two options:

- **Mark All Viewed**: click this option to mark as viewed all of the items in the summary display.
- **Mark All Viewed Before Today**: click this option to mark as viewed all of the items in the summary view that have a date earlier than today. This includes all allergies in the current display (even though they do not have a date associated with them).

Please note that only those items that are currently displayed on the summary are marked as viewed when you select either of these options. For example, if your **Timeframe** were set to **Last 7 Days**, any items that were older than seven days ago would not be included in the summary display, and therefore would not be marked as viewed.

Similarly, if you had set your **Options** to view only Allergies and Medications, only the allergies and medications would be marked as viewed. Since the nature of this option is to show only *unviewed* items, once you mark those items as viewed, they are removed from the display. Of course, you can always look at these items again by clicking on its respective display option in the Patient Data Display (available on the **Patient List** tab, or by clicking the **Details** icon). In our example above, you could see the allergies and medications you had marked as viewed by clicking on the **Allergies** or **Medications** display options. (See also *Marking Clinical Data as Viewed* on page 139.)

– **View additional details for any clinical item**: Click on any clinical item in the summarized list to see further details about it. When you do so, the system displays the same detail window(s) that it would normally appear if you had clicked on the same type of data item in it's own display option in the Patient Data Display. Please refer to the following sections for more information about the various detail displays:

- *Viewing Medication Orders for a Patient* on page 93

- *Viewing Allergies for a Patient* on page 99
- Lab Results Panels: there are several detail windows for lab results. The ones that appear in **Pt Summary** are the Panel Table and Panel Details windows (see *Panel Table* on page 115 and *Panel Details* on page 117).
- *Viewing Test Results for a Patient* on page 123
- *Viewing Clinical Notes for a Patient* on page 126
- *Viewing the Status of Orders for a Patient* on page 129
- *Viewing Problems for a Patient* on page 131

Marking Clinical Data as Viewed

The system tracks whether or not you have viewed certain clinical data items. These include allergies, lab results, test results, clinical notes, medications, order status, and problems. Any of these clinical items that you have not yet viewed on either your handheld device or the Physician Portal application are displayed as follows in the various options:

- Unviewed clinical items are displayed in **bold** typeface in each of the various *individual* display options found on the Patient Data Display (for example, unviewed test results are displayed in **bold** typeface on the **Test Results** display option in the Patient Data Display).
- The **Pt Summary** display option in the Patient Data Display lists *all* unviewed clinical data for the *currently selected patient*, including clinical data from all of the categories listed above.
- The **Patient Summary** tab lists *all* unviewed clinical data for *all of the patients* on your short patient list, including clinical data from all of the categories listed above.

Once you have selected a particular clinical item, such as a test result, and viewed the details on either your handheld or the Physician Portal, the typeface changes from **bold** to regular text in its respective individual display option in the Patient Data Display. For example, that one test result would change from **bold** to regular typeface in the **Test Results** display option. The clinical item is also removed from the **Pt Summary** display option and the **Patient Summary** tab.

You can also mark clinical data as viewed in groups, without having to individually select and display each specific item on your handheld device or the Physician Portal.

- You can mark as viewed an entire category of clinical data for a particular patient, from an individual display option on the Patient Data Display. For example, if you had just received a paper print-out of the patient's most recent test results, you could mark all of that patient's test results as viewed from the **Test Results** display option. The steps for this are described below.
- You can mark as viewed *all* of a particular patient's clinical data, or several categories of their clinical data, all in one step, using the **Pt Summary** display option. You might do this, for example, if you had just reviewed a patient's entire paper medical record. Instructions for this are in the section entitled *Viewing a Patient Summary* on page 134.
- You can mark as viewed *all* of the new clinical data for *all of the patients* on your short list, in one step, using the **Patient Summary** tab. You might do this, for example, if you had just reviewed all of the new clinical data via that same tab. Instructions for this are in the section entitled *Viewing a Summary of All Patients* on page 135.

To mark as viewed an entire category of clinical data for a particular patient, from an individual display option on the Patient Data Display, follow the steps below. The steps are the same for all display options.

1. Select a patient on the **Patient List** tab, or click on the **Details** icon from another option.
2. Select the **Timeframe** that you wish to display.
3. Click on the display option for the category of data that you want to mark as viewed, such as **Lab Results**, **Test Results**, **Allergies**, **Order Status, Problems,** or **Clinical Notes**.

   The system displays the patient's unviewed clinical data, based on the **Timeframe** that you selected.

4. Click on the **Mark as Viewed** button (several pages with a check mark).

   Please note that only those items that are currently displayed on the summary list are marked as viewed when you click this icon. For example, if your **Timeframe** were set to **Last 7 Days**, any items that were older than seven days ago would not be included in the summary display, and therefore would not be marked as viewed. After clicking the **Mark as Viewed** icon, the summary display refreshes and the typeface of the unviewed data items is changed from **bold** to regular text.

6

Searching for Patients or Visits

Depending on their role in the institution, there might be several reasons why a user might need to search for a patient or visit record, prior to taking some type of action:

- A health care provider might want to search for a patient visit so that they can add it to their short list, because they are getting involved in the patient's care in some manner. The provider can search for and add the visit by using the **Patient Search** tab, or by clicking the **Add** button on the **Patient List** tab.
- A health care provider might want to look up information for a patient that is not on their own list, perhaps because a colleague asked for their opinion. The provider can find the patient using the **Patient Search** tab.

- A health care provider who is in a supervisory role might want to look up information for a patient who is assigned to one of their staff, in order to review clinical activity. The provider can find the patient using the **Patient Search** tab.
- An administrator, who does not have a patient list of their own, might need to review information for a specific patient. The administrator can find the patient using the **Patient Search** tab.
- An administrator or provider might want to verify that a patient or visit has not already been registered in their source ADT/Registration system, prior to manually registering a new patient, or manually adding a new visit to an existing patient. These actions can be performed on the **Patient Search** tab.

In any of the scenarios listed above, the system presents a search screen where the user can enter identifying information about the patient or visit in question. The same search screen appears after clicking the **Add** button on the **Patient List** tab, or when a user first accesses the **Patient Search** tab. However, depending on the privileges the user has been granted in their user profile, some of the buttons on this screen may be disabled.

Access Restrictions to Patient and Visit Search

There are several settings that affect your ability to search for patients on both the **Patient List** and **Patient Search** tabs, and then once found, your ability to view or edit information about them. Only a system administrator may change these settings.

- The **Allow Patient/Visit Search** setting determines whether or not you have access to the **Patient Search** tab.
- The **Restrict Patient Lookup To** setting determines which patient visits are available for selection throughout the system.
- The **Clinical Results View Access (web only)** setting determines whether or not you have access to clinical data items, such as reason for visit, medications, lab results, test results, clinical notes, etc.

Please refer to *Access Restrictions to Patients and Their Data* on page 10 for further information on any of these settings.

Overview of Patient and Visit Search

When you first click on the **Patient Search** tab, or on the **Add** button from the **Patient List** tab, the system immediately opens the **Select Patient** window. This window contains a variety of fields where you can enter identifying information about the patient or visit. Each organization works with their PatientKeeper representative to define the fields that they want to use as search criteria on this screen. As a result, the fields vary from institution to institution. In the section entitled *Common Search Criteria Fields* on page 148, we list some of the more commonly used criteria fields.

You may use any combination of the search criteria fields to help you identify the patient or visit that you want. If you are very specific, and fill out several criteria fields, the system returns fewer potential matches in the results section. If you enter minimal data, the system returns many possible matches, all of which may not fit in the results display. In this instance, a warning message indicating that fact is displayed. If you see such a warning, and the patient or visit for whom you are searching is not listed in the results section, you should enter more specific information in the criteria fields and search again.

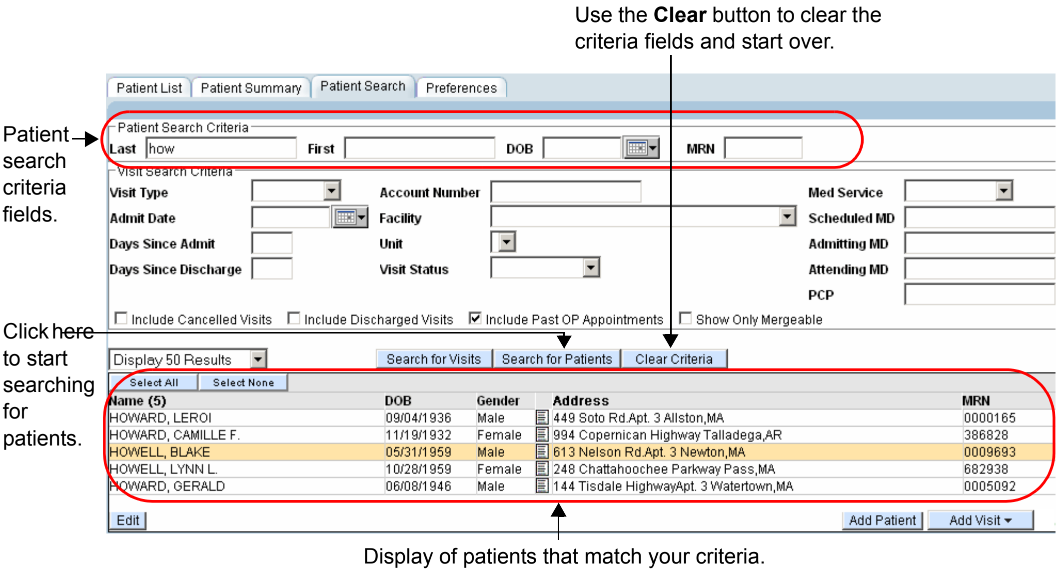
After you enter your search criteria, you must click either the **Search for Patients** or **Search for Visits** button, depending on whether you want to find a patient or a visit. Each button is useful in different situations and produces different results. Please refer to the following sections for more information:

- *Searching for Patients* on page 145
- *Searching for Visits* on page 146

Searching for Patients

The **Search for Patients** button lets you search the complete patient list, including all authenticated and manually registered patients, regardless of whether or not they have had any visits. The **Search for Patients** button returns only *one entry per patient record*.

For example, you might enter data in the patient search criteria fields, and click the **Search for Patients** button. The system returns patient records in the results display.



Once the results are displayed, you can take a variety of actions, as indicated by the buttons and icons within the results display:

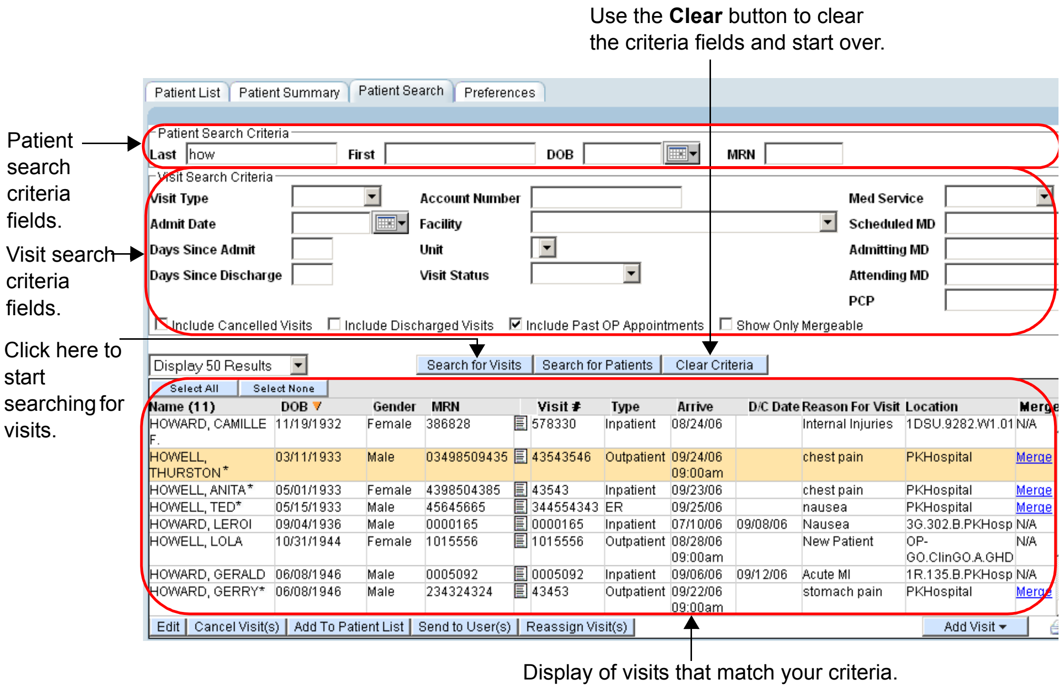
- Click on the **Details** icon to review demographic, visit, or clinical information (see *Displaying Patient Information* on page 77 for more information).
- Click on the **Add Patient** button to manually register a new patient (see *Registering Patients and their Visits* on page 153 for more information).
- Click on a patient to select it and then click the **Add Visit** or **Edit** buttons to manually add a visit to the patient, or edit the patient's demographic information (see *Registering Patients and their Visits* on page 153 for more information on these registration functions).

Searching for Visits

The **Search for Visits** button lets you search through the complete patient visit list to find patient visits. The **Search for Visits** button returns *one entry per visit* for the patient. If a patient has had multiple visits that match your search criteria, each of those visits is listed.

Keep in mind that the **Search for Visits** button only returns visits; therefore, if a patient does not have any visits, then they do *not* appear in the search results.

For example, you could enter data in both the patient and visit search criteria fields, or in just the visit search criteria fields, and then click the **Search for Visits** button. The system returns patient visits in the results display.



Once the results are displayed, you can again take a variety of actions, as indicated by the buttons and icons within the results display:

- Click on the **Details** icon to review demographic, visit, or clinical information (see *Displaying Patient Information* on page 77 for more information).
- Click on one or more patient visits to select them, and then click on the **Add to Patient List** button to add it to your short patient list (see *Adding a Patient to Your List* on page 58 for more information).
- Click on one or more patient visits to select them, and the click on the **Send to User(s)** button to add them to another user's short patient list (see *Sending a Patient to Another User* on page 62 for more information).

- Click on a patient visit to select it, and then click the **Edit**, **Cancel Visits, Reassign Visits**, or **Add Visit** buttons to edit demographic or visit data, cancel a visit, reassign a visit to another provider or service, or manually add a visit to a patient (see *Registering Patients and their Visits* on page 153 for more information on these registration functions).

Common Search Criteria Fields

Listed below are some of the more commonly used search criteria fields that you might encounter on the search screen.

- **Patient Search Criteria Fields**
  - **Last:** enter all or the first few letters of the patient's last name.
  - **First**: enter all or the first few letters of the patient's first name.
  - **DOB**: enter the patient's date of birth in your country's standard format of either mm/dd/yyyy or dd/mm/yyyy, or use the calendar icon to select from a pop-up calendar.
  - **Gender**: select a gender of (**M**)ale, (**F**)emale, or (**U**)nknown.
  - **SSN**: enter a nine digit social security number *with or without* dashes. For example, 123-45-6789 and 123456789 are both acceptable formats.
  - **MRN**: enter a medical record number with up to four leading zeros, or do not use leading zeros at all. For example, whether you enter 1234 or 00001234, the system finds those patients with the following MRNs: 1234, 01234, 001234, 0001234, and 00001234. If you enter more than four leading zeros, the system finds an exact match (0000001234 finds 0000001234), or any number of leading zeros up to four (0000001234 also finds 1234, 01234, 001234, 0001234, and 00001234).
- **Visit Search Criteria Fields**
  - **Visit Type**: select a type of visit from the drop-down list. For example, you might choose inpatient, outpatient, or emergency room.
  - **Visit Status**: select the visit status from the drop-down list. For example, your choices might include Active, Inactive, or Cancelled.

– **Appointment Date**: for outpatients, enter a specific appointment date in your country's standard format (either mm/dd/yyyy or dd/mm/yyyy), or select one from the pop-up calendar.

– **Admit Date, Discharge Date**: for inpatients, enter a specific date of admission or discharge in your country's standard format (either mm/dd/yyyy or dd/mm/yyyy), or select one from the pop-up calendar.

– **Admit/Appt Date**: enter a date in your country's standard format (either mm/dd/yyyy or dd/mm/yyyy) to search for either an inpatient visit with that admission date, or an outpatient visit with that appointment date.

– **Admitted on or after, Admitted on or before, Discharged on or after, Discharged on or before**: one or more of these fields may be available for use when searching for inpatients. Enter a date, or select on from the pop-up calendar, that describes when the inpatient was admitted or discharged.

– **Days Since Admit**: limit the search results to recent inpatient admissions or outpatient appointments by specifying the number of days since they were admitted. For outpatient appointments, the appointment date is considered to be the admit date. Some of the common settings are:

  - Set to **0** to see inpatients admitted today (since midnight), or with an outpatient appointment today or in the future.
  - Set to **1** to see inpatients admitted yesterday and today, or outpatient appointments from yesterday, today, or in the future.
  - Set to **30** to see inpatients admitted within the last 30 days, or outpatient appointments within the last 30 days or in the future.

– **Days Since Discharged**: limit the search results to include current inpatients and recently discharged inpatients by specifying the number of days since they were discharged. For outpatient appointments, the appointment date is considered to be the discharge date. Some of the common settings are:

  - Set to **0** to see the inpatients discharged today (since midnight), along with current inpatients. For outpatients, this would include appointments today or in the future.
  - Set to **1** to see the inpatients discharged yesterday and today, along with current inpatients. For outpatients, this would include appointments from yesterday, today, or in the future.

- Set to **30** to see inpatients discharged within the last 30 days, along with current inpatients. For outpatients, this would include appointments within the last thirty days, as well as in the future.

– **Insurance Type**: select the patient's insurance coverage from the drop-down list.

– **Facility**: select the facility in which the outpatient appointment is booked, or in which the inpatient is located, from the drop-down list.

– **Unit**: for inpatient visits, select the patient's current nursing unit. Please note that you must first select a **Facility**, in order to view choices for the **Unit** field.

– **Med Service**: select the medical service with which the inpatient visit or outpatient appointment is booked.

– **Provider Types**: there may be several fields for various types of providers on your screen. For example, your institution might want to use Admitting, Scheduled, and Attending providers as selection criteria. Simply enter all or part of a provider's last name in any of these fields. The system selects only those visits which have a matching provider name of that type.

– **Include Cancelled Visits**: leave this box unchecked so that cancelled visits are not included in the search results. If you would like to see cancelled visits, check the box.

– **Include Discharged Visits**: leave this box unchecked so that discharged inpatient or emergency room visits are not included in the search results (past emergency room visits are assumed to be discharged on the date of admission, even if there is no discharge date on the visit). If you would like to see discharged visits, check the box.

– **Include Past OP Appointments**: leave this box unchecked so that outpatient appointments with an appointment date earlier than today's date are not included in the search results. If you would like to see past outpatient appointments, check the box.

– **Show Only Mergeable**: leave this box unchecked so that all visits (both authenticated and manually added) are included in the search results. To see only those visits that have been manually added directly in the PatientKeeper system, check this box. These visits can potentially be merged with (moved onto) an authenticated patient’s record (see *Merging Patients* on page 177).

NOTE: If your source system is MEDITECH®, as a minimum you must include one of the following five fields in your search criteria: **Last**, **First**, **MRN**, **Facility**, or **Date of Birth**. Attempting a search without completing one of these fields results in the following message: “A First Name, Last Name, MRN, Date of Birth, or Facility is required.” Additionally, the **Unit**, **Med Service**, and **Provider Type** fields are not available on these systems.

7

Registering Patients and their Visits

The PatientKeeper system gives central administrators and health care providers the ability to perform a variety of manual registration functions, such as registering new patients, adding new visits, or otherwise changing or manipulating patient or visit data. At the outset, it is important to understand the difference between an *authenticated* patient or visit and a *manually registered* patient or visit. An *authenticated* patient or visit is one that has been interfaced to the PatientKeeper system from your existing hospital systems, or for health care companies such as HMOs, authenticated patients are their members. A *manually registered* patient or visit is one which has been registered or posted directly in the PatientKeeper system.

Generally, patients are manually registered in the PatientKeeper system as a *temporary* solution, to accommodate situations where visit, task, or forms data needs to be posted before the patient has been formally registered in your existing hospital systems. It is also expected that the manually registered patient and their visits will eventually be merged, or resolved, with an authenticated patient record, once that record has been created in your source ADT/Registration system and interfaced to the PatientKeeper system.

> **NOTE:** In some situations, the manually registered patient record is never merged with an authenticated patient record. For example, some organizations may not have interface feeds from their associated Long Term Care or Skilled Nursing Facilities. The patients seen in those facilities are manually registered in the PatientKeeper system as permanent patient records, with all of the appropriate information for scheduling and billing.

In displays of patient data, the system places an asterisk at the end of manually registered patient names, so that you can more easily distinguish them from authenticated patients (for example, DARR, MOLLY*).

On handheld devices there is a similar function available for manually registering temporary patients. Temporary patients registered on a handheld device are commonly referred to as *placeholder* patients. The system places quotation marks around placeholder patient names so that you can distinguish them from authenticated or manually registered patients (for example, "DARR, MOLLY"). For more information, please refer to the *Mobile Clinical Results User's Guide*.

Tasks related to manual registration may involve any of the following:

- Manually registering new patients by entering basic demographic information.
- Manually adding visits (whether inpatient, outpatient, or emergency room) to existing authenticated patients, or to manually registered patients.
- Editing or cancelling manually added visits.
- Editing or cancelling visits that have been interfaced from your source hospital system for authenticated patients (this function may not be available at all sites).
- Re-assigning patient visits, either individually or in batches, to health care providers or groups, such as scheduled providers, hospitalists, or medical services. This function can be performed for both manually added visits and visits that have been interfaced from your source hospital system.
- Merging patient records (both authenticated and manually registered).

- Viewing the merge history of a specific patient record and unmerging records that were merged in error.
- Moving visits from one patient to another (both authenticated and manually registered).

NOTE: Registration functions are not available if your source ADT/Registration system is MEDITECH®, Cerner™, Siemens™, or other non-PatientKeeper systems.

Where are the Registration Functions?

Registration functions are available from a variety of options within the PatientKeeper system. They include:

1. **Patient Search** tab: the majority of the registration functions noted in the prior section are available from the **Patient Search** tab.
2. **Patient List** tab, **Visits** display option: when viewing a particular patient's visit information, you may edit the patient's demographic or visit information, or manually add a visit.
3. **Patient List** tab, **Patient Detail** display option: when viewing a particular patient's detailed information, you may edit the patient's demographic information, manually add a visit, or unmerge patient records that were merged in error.

Please note that both of the tabs listed above (**Patient Search** and **Patient List**) also have additional functions that are not necessarily related to manually registering patients or adding visits. For example, the **Patient Search** tab is used by providers and administrators to view clinical, demographic, or visit data for patients who are not on their short list (see *Displaying Patient Information* on page 77). The **Patient List** tab is used by providers to view similar types of data for patients on their short list, as well as to manage the contents of their short list (see *Managing Your Short Patient List* on page 45).

Access Restrictions to Registration Functions

The registration functions are available to users with any **Access Level**. Your access to these options is controlled by your user preference settings, which a system administrator can set using the following Patient List settings on the **User** tab:

- **Can Access Patient List on the Web**: This setting enables or disables the **Patient List** tab for a user.
- **Allow Patient/Visit Search**: This setting enables or disables the **Patient Search** tab for a user.
- **Can Edit Interfaced Patients**: This setting enables or disables a user's ability to edit basic patient demographic information for patients interfaced from your source ADT/Registration system.
- **Can Add/Edit PK Patients**: This setting enables or disables a user's ability to manually register patients directly in the PatientKeeper system, as well as to edit the basic demographic information for those patients.
- **Can Edit Interfaced Visits**: This setting enables or disables a user's ability to edit visits that are interfaced from your source ADT/Registration system.
- **Can Add/Edit PK Visits**: This setting enables or disables a user's ability to manually add visits directly in the PatientKeeper system, as well as to edit those visits.
- **Allow Patient Assignment**: This setting enables or disables a user's ability to re-assign patient visits to different providers or services, in all options from which this function is available.
- **Can Cancel Appointments**: This setting enables or disables a user's ability to cancel appointments, in all options from which this function is available.

As a general rule, health care providers are not usually given access to registration functions. Typically, only ancillary staff or administrative personnel register new patients, add new visits, or otherwise change patient demographic or visit data. Since there are several settings that affect registration functions, a user may have access to one feature without the other. For example, a user might have access to the **Patient Search** tab, in order to look up information for patients who are not on their short list, but not be able to register new patients or add new visits on that tab (typical scenario for a provider). Or, a user might be able to register new patients and add new visits, but not be able to cancel visits (typical scenario for a junior administrator).

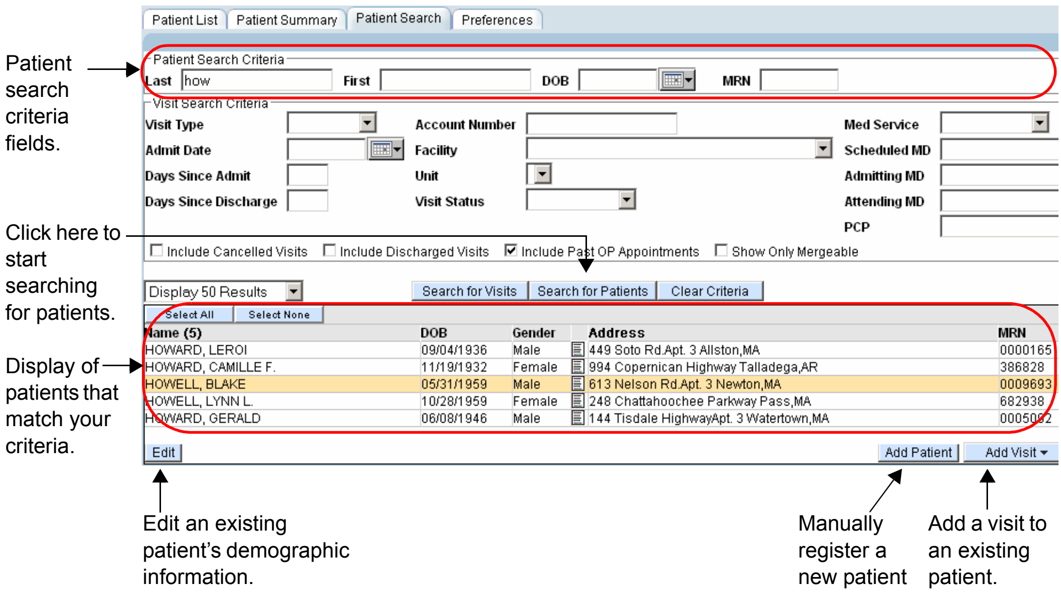
Overview of Registration Functions

Most of time, registration of new patients or visits takes place on the **Patient Search** tab. This is because administrators use the **Patient Search** tab as their primary access to patient data. As a result, when the patient or visit in question cannot be found on the institution's master list after performing a search on the **Patient Search** tab, the next natural step would be to register a new patient and their first visit, or to manually add a new visit to an existing patient.

By comparison, a health care provider normally works from their short patient list on the **Patient List** tab. If the patient visit in which the provider is interested is not on their short list, their next inclination would be to use the **Add** button on the **Patient List** tab to search the master patient list for the visit and add it to their short list. If they could not find the visit in this manner, and they have been given access to registration functions, they could then go to the **Patient Search** tab to register a new patient and their first visit, or to manually add a visit to an existing patient.

When you first click on the **Patient Search** tab, the system immediately opens the **Select Patient** window. This window contains a variety of fields where you can enter identifying information about the patient or visit (please refer to *Searching for Patients or Visits* on page 143 for information on using the search criteria fields). After you enter your search criteria, you must click the **Search for Patients** or **Search for Visits** button. The system then selects all patients or visits that match your criteria and displays them in the results section at the bottom of this window. The user can then take a variety of registration actions, as outlined below:

- The **Search for Patients** button lets you search the complete patient list, including all authenticated and manually registered patients, regardless of whether or not they have had any visits. The **Search for Patients** button returns only *one entry per patient record*. You can use it to quickly check the patient list to determine whether or not a particular person is an authenticated patient from your health care facility or organization, and then perform any of the activities listed below.



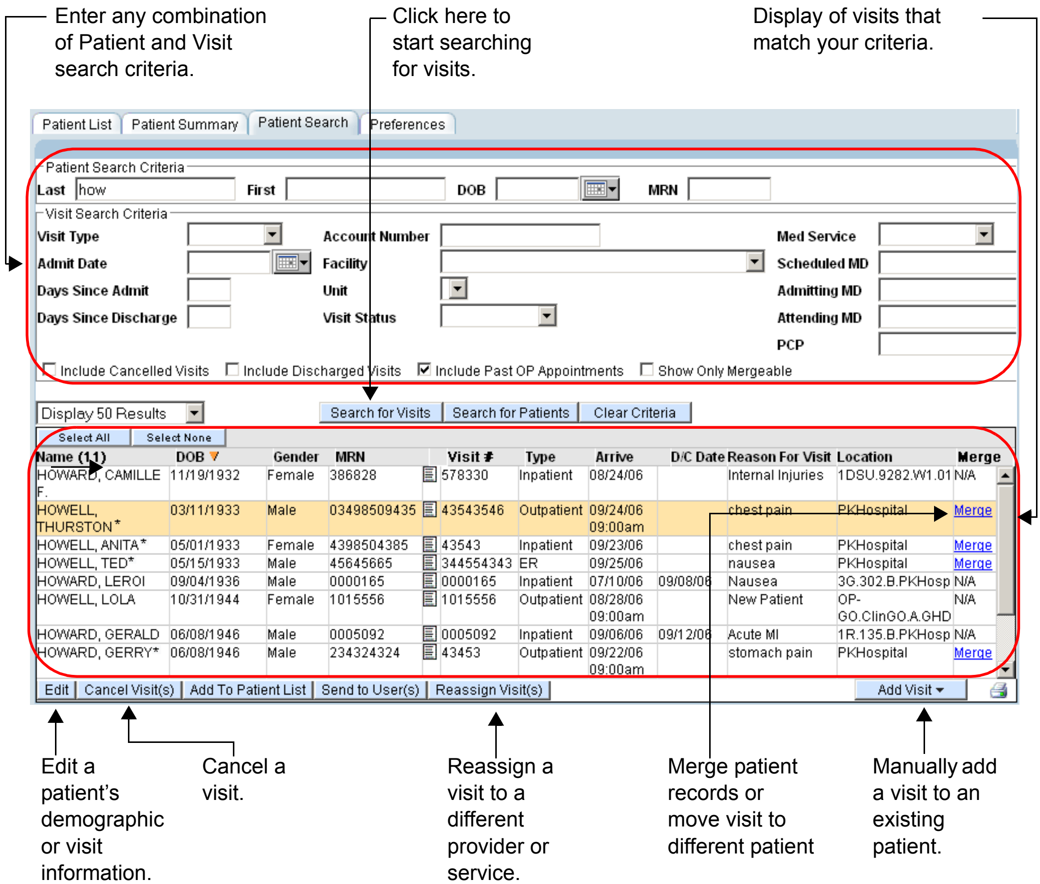
– Manually register a new patient.

– Manually register a new patient and add their first visit all in one step.

– Edit an existing patient's demographic data.

– Add a visit to an existing patient.

- The **Search for Visits** button lets you search through the complete patient visit list to find patient visits. The **Search for Visits** button returns *one entry per visit* for the patient. If a patient has had multiple visits that match your search criteria, each of those visits is listed. (Keep in mind that the **Search for Visits** button only returns visits; therefore, if a patient does not have any visits, then they do *not* appear in the search results.) After using the **Search for Visits** button, you can take any of the actions listed below.



– Manually register a new patient and add their first visit all in one step.

– Manually add a visit to an existing patient.

– Edit a visit (to enter a discharge date for an inpatient visit, update insurance information, or change the date or time of the visit).

– Cancel a visit.

– Reassign a visit to a different provider or medical service group.

– Move a visit from one patient to another.

- Merge two patient records.
- Edit a patient's demographic data.

Common Data Elements in Manual Registration

Each organization can define the patient, visit, insurance, and guarantor fields that they wish to capture when manually registering new patients or manually adding new visits. As a result, the data elements that you might seen when performing these tasks varies from institution to institution. The following sections list some of the more commonly used data elements.

Patient Data Elements

Some of the more common patient demographic fields that you might see include:

- **Last Name**, **First Name**, **Middle Name**: Enter the patient's last, first, and middle names.
- **Date of Birth**: Enter the patient's date of birth in your country's standard format (either mm/dd/yyyy or dd/mm/yyyy), or click on the calendar icon.
- **Gender**: Select the patient's gender from the drop-down list.
- **Social Security Number**, or **SSN**: Enter the patient's social security number, with or without dashes (e.g., 123-45-6789 or 123456789 are both acceptable).
- **MRN**: Enter the patient's medical record number, if known.
- **Addresses**: You can enter multiple addresses for the patient, such as work, home, or vacation. Click on the **Add** link to create a series of fields for the first address, such as **Type** (e.g., home, work, vacation), **Address 1**, **Address 2**, **City**, **State**, and **Zip**. Click on the **Add** link again to enter another type of address and its related data.
- **Phone Numbers**: You can enter multiple phone numbers for the patient, such as home, work, mobile, etc. Click on the **Add** link to enter each type of phone number.

Visit Data Elements

Some of the more common visit data elements that you might encounter include:

- **Account Number**, **Visit Number**: If your organization associated account numbers or visit numbers with each visit, enter it here.
- **Facility** (or **Care Center**): Enter the facility or care center at which the patient is being treated by selecting the appropriate facility from the drop-down list.
- **Visit Type** (or **Patient Class**): Enter the type of visit or patient class. Common choices you might see include ER (Emergency Room), Inpatient, or Outpatient.
- **Visit Status**: Enter the status of the visit. Common choices you might see include Active, Inactive, or Cancelled.
- **Financial Class**: Select a financial class from the drop-down list.
- **Referral ID**, or **Authorization Number**: if there is a referral ID or authorization number associated with the visit, such as in the case of HMO visits to non-primary care physicians, enter it here.
- **Unit, Room, Bed:** If this is an inpatient visit, enter the nursing unit, room number, and bed.
- **Scheduled Provider, Admitting Provider, Attending Provider, Referring Provider, or other provider**: Enter the appropriate provider for any of the provider fields, by selecting one from the drop-down list.
- **Medical Service**: Enter the Medical Service group that is responsible for this patient from the drop-down list.
- **Admitting Diagnosis** or **Reason for Visit**: Enter the reason the patient was admitted, or the reason for this visit.
- **Appointment Date/Time**: If this is an outpatient visit, enter a valid date and time for the appointment in your country's standard format of either mm/dd/yyyy hh:mm or dd/mm/yyyy hh:mm (for example, 08/31/2004 09:15 or 31/08/2004 09:15).
- **Admit Date/Time**: If this is an inpatient visit, enter a valid date and time for the admission in your country's standard format of either mm/dd/yyyy hh:mm or dd/mm/yyyy hh:mm.

- **Discharge Date/Time**: If this is an inpatient visit, and the patient is already discharged, enter the date and time in your country's standard format of either mm/dd/yyyy hh:mm or dd/mm/yyyy hh:mm.
- **Discharge Disposition**: If this is an inpatient visit that has been discharged, enter the discharge disposition, or the place to which the patient was discharged, such as home, nursing home, rehabilitation center, etc.
- **Insurance Information**: A particular visit might have one or more insurance providers associated with it. You should list any insurance carriers that provide coverage for the patient on the date of the visit. To enter an insurance coverage, click the **Add Insurance Provider** link. Some of the more common fields that you might see include:
  - **Provider** or **Insurance Name**: Select an insurance carrier from the drop-down list.
  - **Policy Number** or **Member ID Number**: Enter the insurance policy number, or member ID number.
  - **Group Number**: Enter the insurance group number, if any.
  - **Subscriber Name**: Enter the name of the subscriber, or the person who holds the insurance coverage.
  - **Subscriber DOB**: Enter the subscriber's date of birth in your country's standard format of either mm/dd/yyyy or dd/mm/yyyy, or click on the calendar icon.
  - **Insurance Address and Telephone**: The screen may contain a series of fields for the insurance address and telephone information.
  - **Subscriber Address and Telephone**: The screen may contain a series of fields for the subscriber's address and telephone information.
- **Guarantor Information**: A particular visit might have one or more guarantors associated with it. A guarantor is a person who is financially responsible for any bills resulting from the care of the patient. Typically, this is the head of the household, or for children, it is a parent or guardian. To enter a guarantor, click the **Add Guarantor** link. Some of the more common fields that you might see include:
  - **Guarantor Name**: Enter the name of the guarantor.
  - **Relationship**: Enter the guarantor's relationship to the patient.

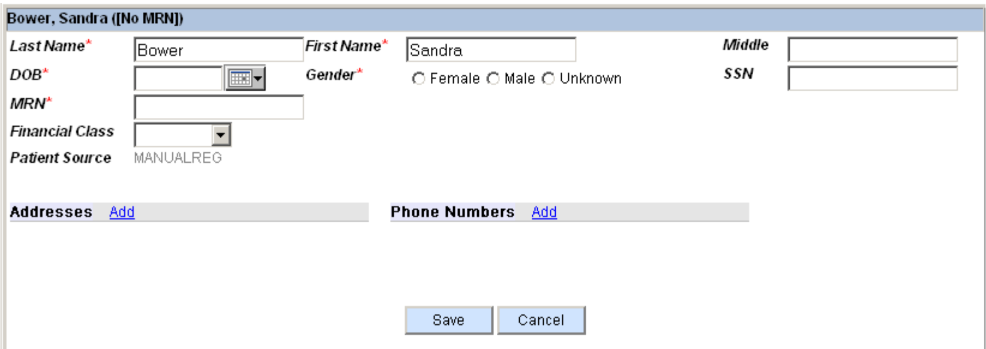
– **Guarantor Address and Telephone**: The screen may contain a series of fields for the guarantor's address and telephone information.

Manually Registering a New Patient

If you have reason to believe that the patient has never been registered in your source system, you can manually register them directly in the PatientKeeper system. Some organizations allow users to register patient information without also adding a visit, while some do not. If your organization allows it, you can manually register just the patient, entering basic patient demographics, by following the steps below.

1. Click on the **Patient Search** tab.
2. Enter some search criteria that describes the patient that you want to register, and click on the **Search for Patients** button.
3. The system searches for the patient, and displays the results.
   – If you see the patient you were about to register in the results, then there is no need to go further. Adding another would create a duplicate patient.
   – If you do not see the patient in the results, click on the **Add Patient** button.
   – If there are no patients that match your criteria, the system displays a message stating that fact and provides the following link: Create a new Patient from the search criteria. Click on this link.

   The system opens the manual registration screen, displaying a series of fields for patient demographic information.



4. Enter data in the patient demographic fields (see *Patient Data Elements* on page 160 for more information on these fields). Required fields are denoted by a red asterisk.
5. Click the **Save** button at the bottom of the screen to save the information that you just entered.

Manually Registering a Patient and Adding a Visit in One Step

If you have reason to believe that the patient has never been registered in your source ADT/Registration system, and has neither patient nor visit information on file, you can manually register the patient and add the information for their first visit all in one step. The best approach to doing this is to first search the system to make sure that the patient and/or visit does not already exist. If neither exists, then you can register the patient and add the visit (whether inpatient, outpatient, or emergency room), secure in the knowledge that neither is a duplicate.

1. Click on the **Patient Search** tab.
2. Enter some search criteria that describes the patient and visit that you want to register, and click on the **Search for Visits** button.
3. The system searches for the visit, and displays the results.
   - If you see the exact patient visit that you were about to add, then there is no need to go further, since both the patient and the visit already exist in the system.
   - If you see some visits for the patient, but not the specific visit you wanted to add, click on one of the visits to select it. Then click on the **Add Visit** drop-down button, and select a visit type (move to Step 4 on page 165). This enables you to add a visit to the already existing patient.
   - If you see visits for other patients in the results, but not for your specific patient, click on the **Add Visit** drop-down button, and select a visit type (move to Step 4 on page 165). This enables you to add both the patient and their first visit.

– If there are no visits at all that match your criteria, the system displays the following message:

  Create a new visit from the search criteria by clicking on one of the visit types below:

  ER

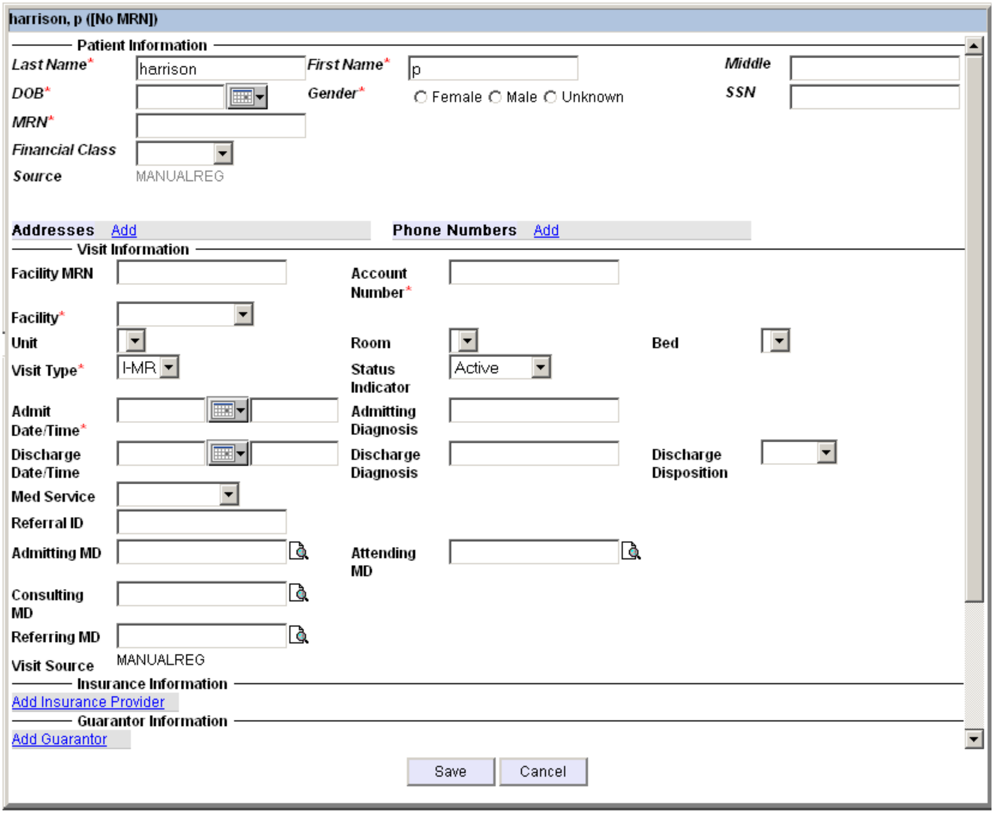
  Inpatient

  Outpatient

  Click on the appropriate visit type link so that you can add both the patient and their first visit (move to Step 4 on page 165). Please note that the list of visit types varies by institution.

4. The system opens the manual registration screen, displaying a series of fields for patient and visit information. If the patient existed previously, their information is already defaulted onto this screen for you. Enter data in the Patient Information and Visit Information fields (see *Patient Data Elements* on page 160 and *Visit*

Data Elements on page 161 for more information). Required fields are denoted by a red asterisk.



5. Click the **Save** button at the bottom of the screen to save all of the data that you just entered.

   The system re-displays the **Patient Search** tab.

Manually Adding a Visit to a Patient

If you have reason to believe that the patient has previously been registered in either the source ADT/Registration system, or directly in the PatientKeeper system, but that the current visit information is not on file, you can manually add a visit to the patient You can add any type of visit (inpatient, outpatient, or emergency room) to both authenticated patients and manually registered patients. The best approach is to first search the system to find the correct patient, and make sure that the visit does not already exist. If the patient exists, but not the visit, then you can add the visit to the patient, secure in the knowledge that it is not a duplicate.

1. Click on the **Patient Search** tab.
2. Enter some search criteria that describes the patient visit you want to add, and click on the **Search for Visits** button.

   The system searches for the visit and displays the results.

   – If you see the exact patient visit you were about to add, then there is no need to go further. Adding another would create a duplicate visit.

   – If you see some visits for the patient, but not the specific visit you wanted to add, click on any of those visits to select the patient, click the **Add Visit** drop-down list, and select the type of visit you want to add (move to Step 3 on page 167).

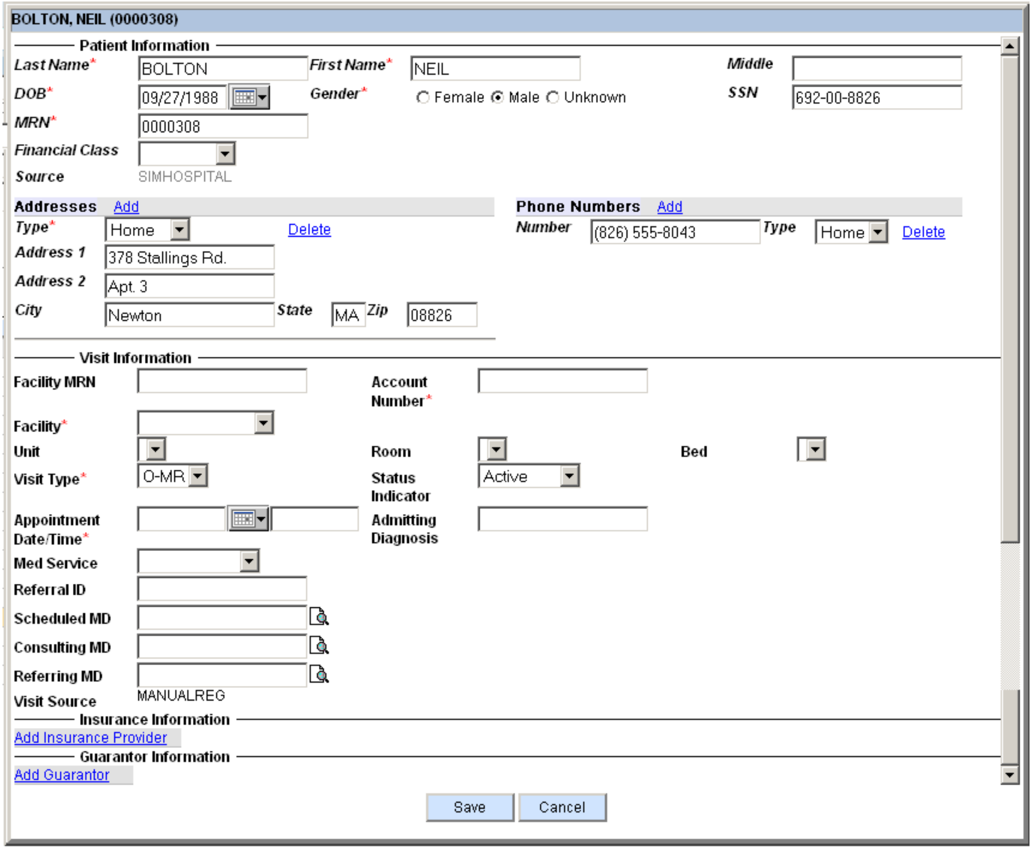
   – If you do not see any visits for the patient, try searching the system to see if at least the patient information has been previously registered, by clicking the **Search for Patients** button. The system searches for the patient and displays the results.

     - If you see the patient in question, click on it to select it, and then click the **Add Visit** drop-down list and select the type of visit you want to add to that patient (move to Step 3 on page 167).

     - If you do not see the patient, then you must register the new patient, and add their first visit, all in one step. (See the section entitled *Manually Registering a Patient and Adding a Visit in One Step* on page 164).

3. The manual registration screen opens, displaying a series of fields for patient and visit information. You may note that the Patient Information fields are already completed, based on the patient or visit that you selected in Step 2. However, the

Visit Information fields are blank, since you have not yet entered the details of this new visit.



4. Enter data in the Visit Information fields (see *Visit Data Elements* on page 161 for information on these fields).
5. Click the **Save** button at the bottom of the screen to save all of the information that you just entered.

   The system re-displays the **Patient Search** tab.

Editing a Patient

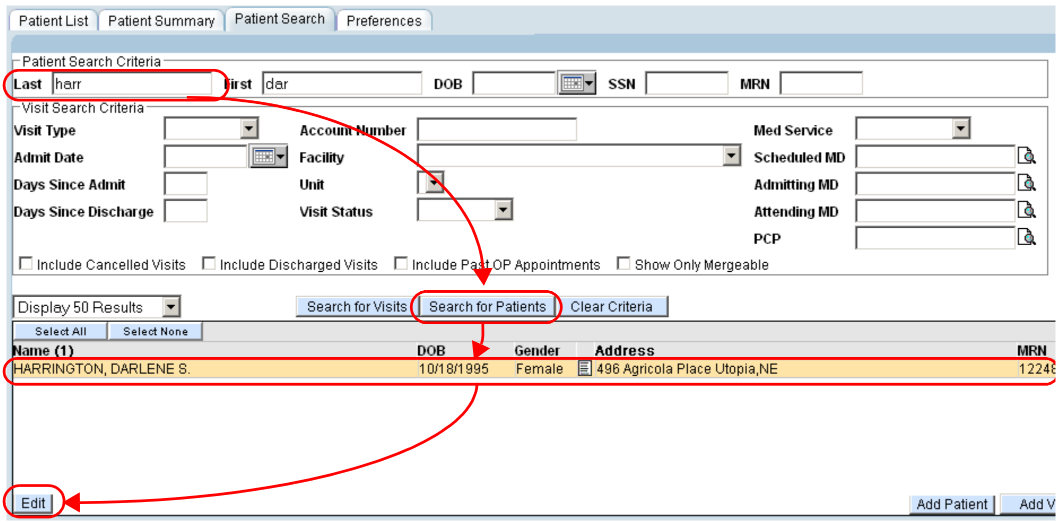
You can edit patient demographic information from either of the following tabs: **Patient Search** or **Patient List**. It does not matter which option you use to edit the patient's information. It's simply a matter of selecting an option to which you have access, or selecting the one with which you are most familiar.

If you try to edit a patient that has been interfaced from your source ADT/Registration system, you may not be able to modify some of the fields. Even if you are able to modify them, keep in mind that changes you make here affect only the data in the PatientKeeper system. Those changes will not be reflected in your source system. In fact, the next time information for that patient is interfaced to the PatientKeeper system, the data from the ADT/Registration system will overwrite the data you manually entered in the PatientKeeper system. As a result, you should correct the information in your source system as well.

Editing a Patient from the Patient Search Tab

To edit basic patient demographic information from the **Patient Search** tab, follow these steps:

1. Click on the **Patient Search** tab.
2. Locate the patient by entering search criteria and then clicking the **Search for Patients** button.
3. Select the patient from the results display by clicking on it.



4. Click on the **Edit** button.

The system displays the patient's demographic information. Click on the appropriate field(s) and make the desired changes.

5. Click on the **Save** button at the bottom of the window.

Editing a Patient from the Patient List Tab

To edit basic patient demographic information from the **Patient List** tab, follow these steps:

1. Click on the **Patient List** tab and then click on a patient from your short list to select it.
2. Click on **Patient Details** from the display list.

   The Patient Data Display area shows the Patient Detail window.
3. Click on the **Edit Patient** button at the top of the display pane.

   The system opens the Edit Patient window.
4. Click on the appropriate field(s) and make the desired changes.
5. Click on the **Save** button.

Editing a Visit

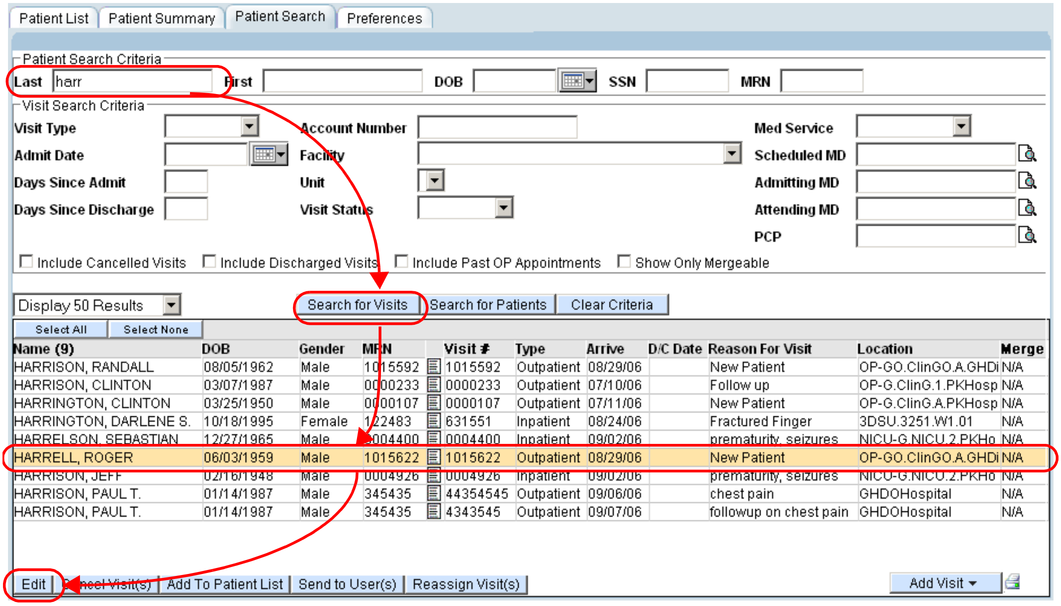
You can change the details of a visit for patient, such as adding a discharge date, changing a provider, or changing insurance or guarantor information. These actions can be performed from either of the following tabs: **Patient Search** or **Patient List**. It does not matter which option you use to edit visit information. It's simply a matter of selecting an option to which you have access, or selecting the one with which you are most familiar.

Keep in mind that whether or not a visit data item is editable is based on the origin of the visit data. If you are editing a visit that has been interfaced from your source ADT/Registration system, you may not be able to modify some of the fields. Even if you are able to modify them, keep in mind that changes you make here only affect the data in the PatientKeeper system. Those changes will not be reflected in your source system. In fact, the next time information for that visit is interfaced to the PatientKeeper system, the data from the ADT/Registration system will overwrite the data you manually entered in the PatientKeeper system.

Editing a Visit from the Patient Search Tab

To edit a visit, follow these steps:

1. Click on the **Patient Search** tab.
2. Locate the patient visit by entering search criteria and then clicking the **Search for Visits** button.
3. Select the visit from the results display by clicking on it.



4. Click on the **Edit** button.

   The system displays the information associated with this visit. Click on the appropriate field(s) and make the desired changes (see *Patient Data Elements* on page 160 or *Visit Data Elements* on page 161 for information on these fields).

5. Click on the **Save** button at the bottom the window.

Editing a Visit from the Patient List Tab

To edit a visit, follow these steps:

1. Click on the **Patient List** tab and then click on a patient from your short list to select it.

2. Click on the **Visits** display option, and the system displays a list of the patient's visits.
3. Click on the visit that you wish to edit, and the system displays the details of that visit in the detail pane.
4. Click on the **Edit Visit** button at the top of the display pane.

   The system opens the Patient/Account Edit window.
5. Click on the appropriate field(s) and make the desired changes (see *Patient Data Elements* on page 160 or *Visit Data Elements* on page 161 for information on these fields).
6. Click on the **Save** button.

Cancelling a Visit

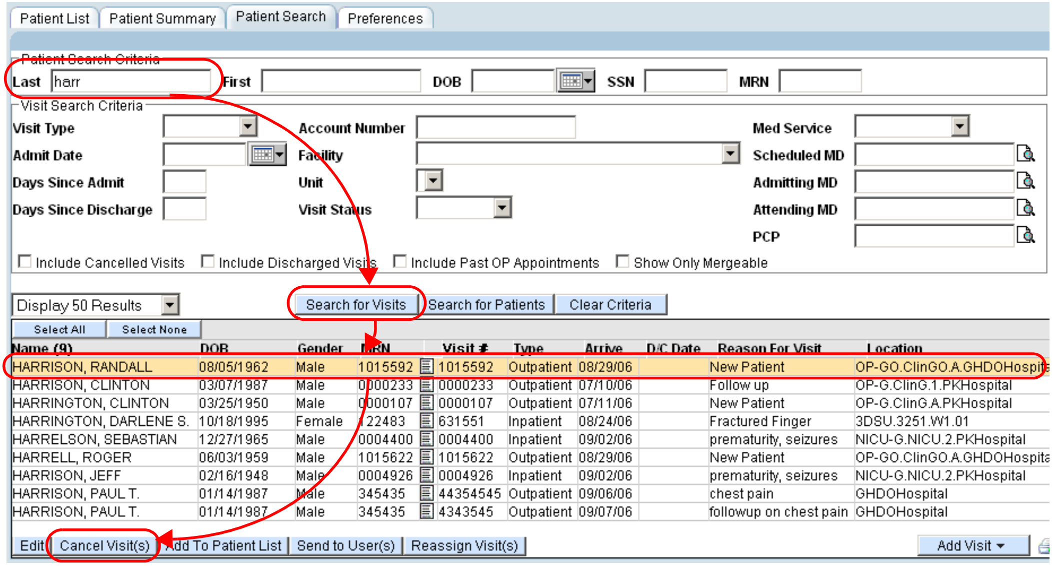
You might cancel a visit if you found that it was posted in error, or if it was cancelled by the patient or provider at the last minute. You can also cancel several appointments at once, as might be necessary if a provider called in sick. At some sites, the system allows users to cancel only those visits that have been manually entered directly in the PatientKeeper system. However, some organizations may also allow users to cancel visits that have been interfaced from the source scheduling or ADT/registration system.

Cancelling visits can be performed on the **Patient Search** tab. Use this feature with caution, as you may not be able to "undo" a cancellation, depending on how your organization has configured the system. Some organizations my include the **Status** field on the visit screen, in which case, you could edit the visit and change its **Status** from "Cancelled" back to "Active." Other organizations may not make the **Status** field visible or editable, in which case, you would have to add a new visit to re-instate the incorrectly cancelled visit. Please note that you can also view the visits that have been cancelled by checking the **Include Cancelled Visits** check box on the patient/visit search screen.

To cancel one or more visits from the **Patient Search** tab, do as follows:

1. Click on the **Patient Search** tab.
2. Locate the visit(s) by entering search criteria and then clicking the **Search for Visits** button.

3. Select one or more visits from the results display by clicking on them.



4. Click on the **Cancel Visit(s)** button.

   A message box appears asking you to confirm that you wish to cancel the visit.

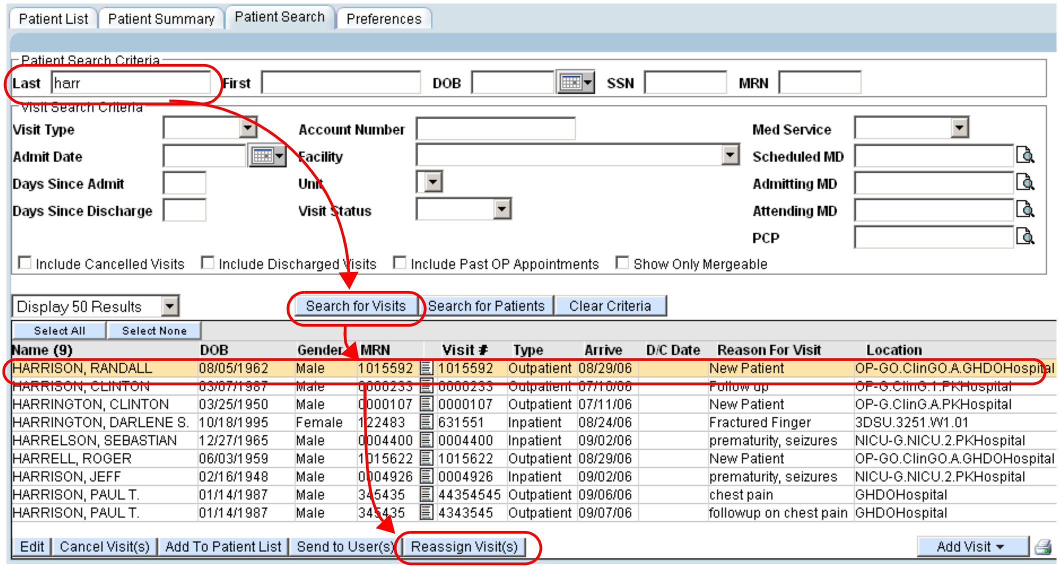
5. Click **Yes** to cancel the visit.

Reassigning Visits to New Providers or Services

The reassign patients function is available on the **Patient Search** tab. You can use it to assign one or more patient visits to a new health care provider or service, such as a new scheduled provider, care manager, hospitalist, night hospitalist, medical service, or whatever roles exist within your organization. It is useful tool in managing patient care across shifts within a health care facility. For example, in an inpatient setting, if a provider is going off duty you can use this option to reassign all of their patients to a new provider. Or in an outpatient setting, if a provider called in sick, you could use this option to reassign their appointments to a new provider. Please note that if the visit was originally posted in a different source system, the provider or service is *not changed* in that system.

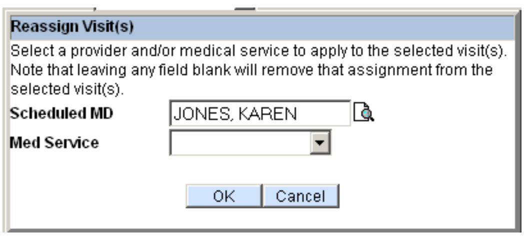
From the **Patient Search** tab, you can reassign patient visits as follows:

1. Click on the **Patient Search** tab.
2. Locate the patient visit(s) by entering search criteria and then clicking the **Search for Visits** button. For example, you might search for all appointments with a particular provider on a particular date.
3. Select one or more visits from the results display by clicking on them.



4. Click on the **Reassign Visit(s)** button.

   A popup window appears displaying a drop-down list for each kind of care provider or service that can accept assignments.



5. Search for and select the appropriate provider and/or service. You may choose to assign patients to a scheduled provider, hospitalist, care manager, attending physician, or medical service group, depending on how your facility is organized.

If you leave any field blank, it effectively removes the previous provider or service from the selected visits.

6. Click the **OK** button to reassign the patient(s) to the selected provider and/or service.

Moving Visits from One Patient to Another

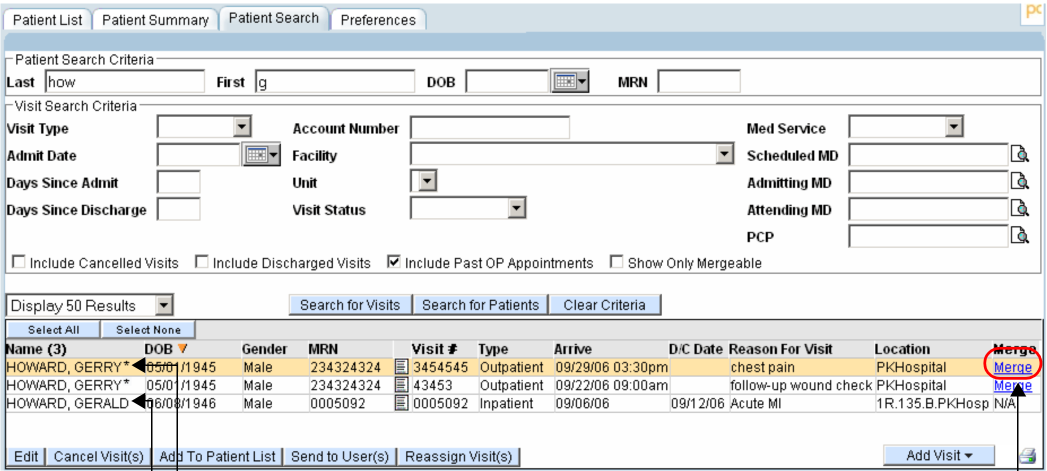
Visits can be moved from one patient to another. This action can be customized to suit your organization's needs, so that only appropriate visits are allowed to be moved. For example, some organizations might allow only manually added visits to be moved, while others might allow any visit to be moved (both manually added and authenticated). The most common reason for moving a visit is the case where a visit is accidentally entered for the wrong patient. For example, a clerk might accidentally enter a visit for Anne Jones when they should have entered it for Angela Jones. In this scenario, the user selects the "candidate" visit (e.g., the incorrect visit for Angela Jones) and moves it to the "target" patient (e.g, the correct patient, Anne Jones).

Moving a visit is just what it sounds like: the system takes all of the visit data (date, time provider information, insurance information, and guarantor information) and moves it from one patient record to another. Depending on how your system is configured, you may or may not be able to undo a move that was made in error. In some organizations, you can simply move the visit back to the original patient. In other organizations, you will have to cancel the visit that was incorrectly moved, and manually re-enter the visit for original patient.

To move a visit from one patient to another, follow the steps below.

1. Click on the **Patient Search** tab.
2. Locate the candidate visit by entering search criteria and then clicking the **Search for Visits** button. Your organization may have implemented a search criteria field that specifically selects visits for which it allows moves. If so, there may be a

check box labeled **Show only Mergeable**, **Merge Candidates**, or something similar.



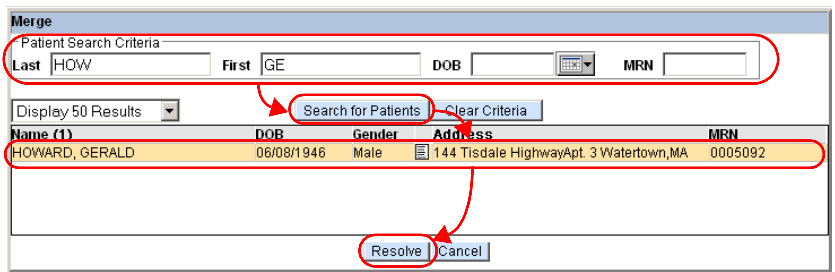
In this example, we have selected the 9/29/06 visit that was incorrectly entered on Gerry Howard's record.

We will move it to Gerald Howard's record.

Click here.

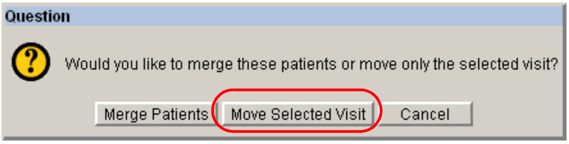
3. Identify the candidate visit that you want to move, and click on the Merge link (located in the **Merge** column on the far right side of the screen).

4. The system opens the Merge screen, where you can search for the target patient onto whose record you wish to move this visit. If necessary, edit the search criteria to describe the target patient, and then click the **Search for Patients** button. The system displays patients that match your search criteria.



We now search for the correct patient Gerald Howard, select him, and click on the **Resolve** button.

5. Select the appropriate target patient from the search results by clicking on the row containing their name and then click the **Resolve** button.
6. A dialogue box appears asking you whether you would like to merge the patients, or move only the selected visit.



7. Click on the **Move Selected Visit** button. The system then moves the visit onto the target patient's record.
8. After performing a merge function, the system re-displays the **Patient Search** tab, and refreshes the screen based on your initial search criteria. You can use the current criteria, or modify it, to view the newly moved visit.

Merging Patients

Two patients and their associated visit information can be merged together into one patient record. This action essentially says, "these two patients are the same person." The merge function can be customized to suit your organization's needs, so that only appropriate patients and visits are allowed to be merged. For example, some organizations might allow only manually added patients or visits to be merged, while others might allow any patient or visit to be merged (both manually registered and authenticated). Some of the more common scenarios for usage include the following:

- A patient and their associated visit is manually registered in the PatientKeeper system on a temporary basis, prior to being formally registered in the source ADT/Registration system. Once the patient has been formally registered in the source system, the manually registered patient is merged with the authenticated patient, so that all of their data is consolidated into one record. In this scenario, the manually registered patient is referred to as the "candidate," and the authenticated patient is the "target."
- A patient is already registered in your source ADT/Registration system. However, the clerk does not notice this fact and accidentally manually registers the patient and adds a visit in the PatientKeeper system. Now two records exist for the same patient and they are merged to correct the problem. Similar to the scenario above,

the manually registered patient is the “candidate,” and the authenticated patient is the “target.”

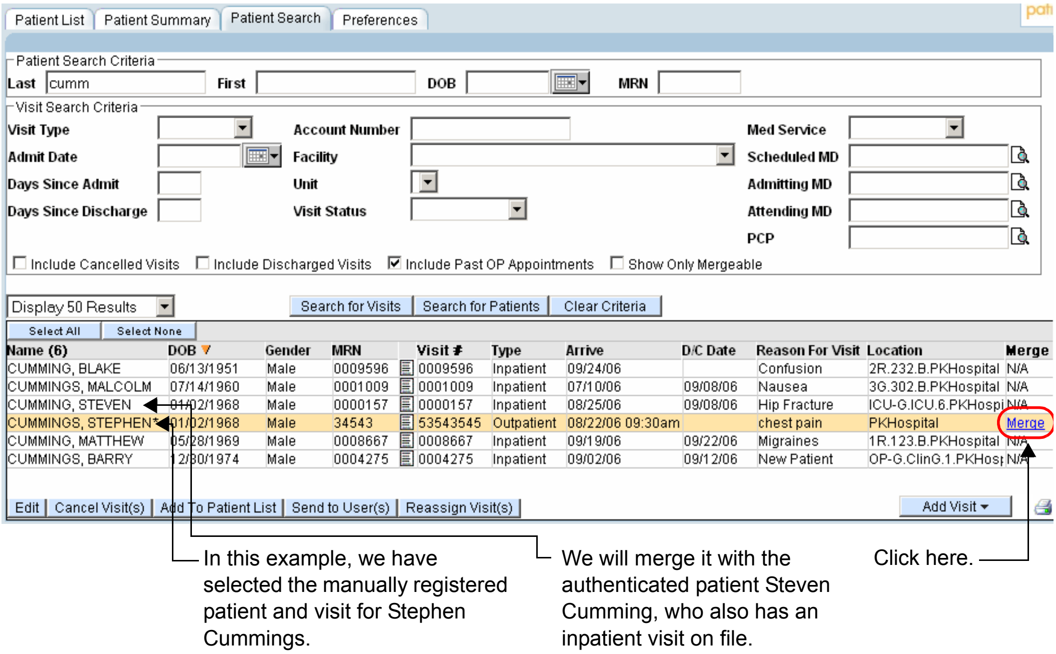
- The same patient is accidentally registered twice in the source ADT/Registration system, with slight differences in demographic data, such as misspelled names. The two authenticated patient records are merged into one to consolidate their information. In this scenario, the “candidate” is the patient with the misspelled name, and the “target” is the one with the correct demographic information.

Merging patient records causes the candidate’s visit information to be moved onto the target patient’s record, so that it does not have to be re-entered. If there is a difference in basic demographic information (such as name, address, DOB, etc.,), the demographics on the target patient take precedence over the demographics on the candidate patient. If at any point a user discovers that a candidate has been merged with the wrong target, they can be unmerged, and thereby restored to their original independent states (see *Unmerging Patients* on page 181).

To merge a patient and all their visits with another patient, follow the steps below.

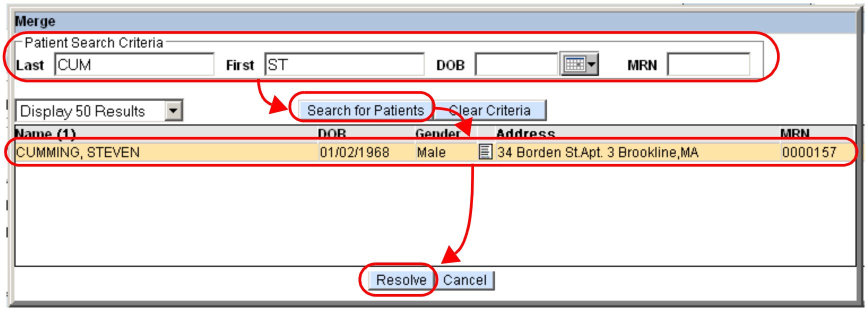
1. Click on the **Patient Search** tab.
2. Locate the candidate patient and their visit(s) by entering search criteria and then clicking the **Search for Visits** button. Your organization may have implemented a search criteria field that specifically selects visits for which it allows merges. If so,

there may be a check box labeled **Show only Mergeable**, **Merge Candidates**, or something similar.



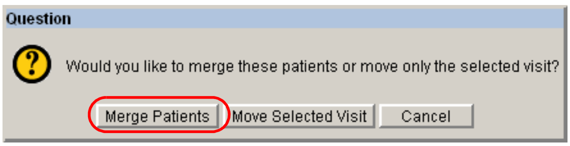
3. Identify the candidate patient and visit that you want to merge, and click on the Merge link (located in the **Merge** column on the far right side of the screen). If the candidate patient has more than one visit, just click on the Merge link for any *one* of those visits.
4. The system opens the Merge screen, where you can search for the target patient with whom you wish to merge this candidate patient and visit(s). Note that the system automatically fills in the **Last**, **First**, and **DOB** fields for you, based on the candidate visit that you selected on the **Patient Search** tab.

If necessary, edit the search criteria to describe the target patient with whom you want to merge the candidate patient. Then click the **Search for Patients** button. The system displays patients that match your search criteria.



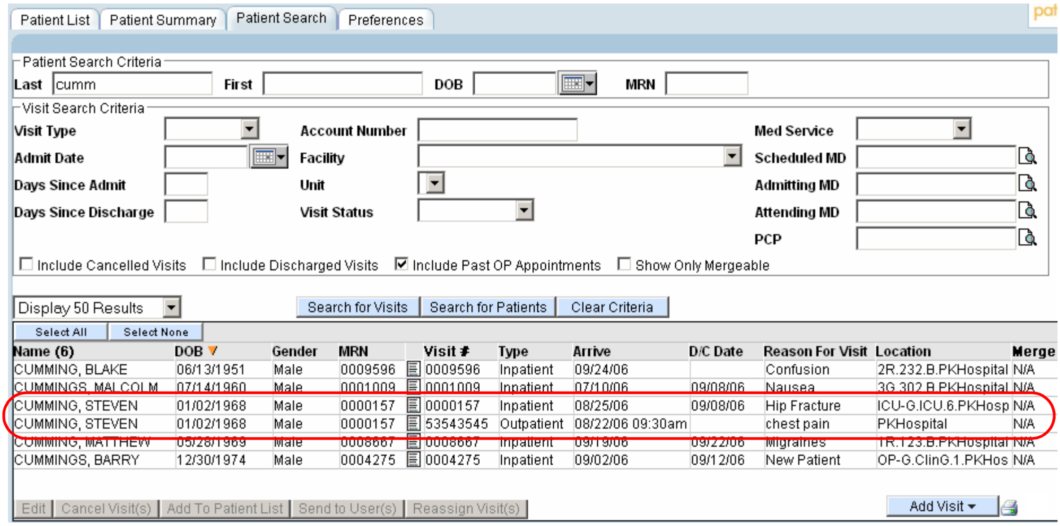
We now search for the authenticated patient Steven Cumming, select him, and click on the **Resolve** button.

5. Select the appropriate target patient from the search results by clicking on the row containing their name and then click the **Resolve** button.
6. A dialogue box appears asking you whether you would like to merge the patients, or move only the selected visit.



7. Click on the **Merge Patients** button. The system then merges the candidate patient with the target patient, and moves all of the candidate patient's visits to the target patient's record.

8. After performing a merge function, the system re-displays the **Patient Search** tab, and refreshes the screen based on your initial search criteria. You can use the current criteria, or modify it, to view the newly merged patient and visits.



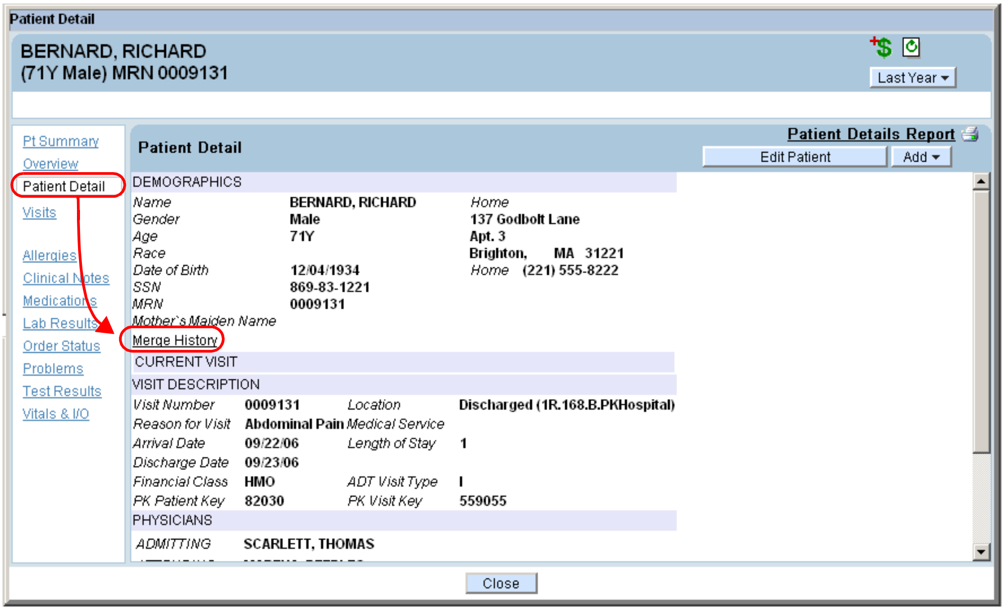
The visit for Stephen Cummings (the manually registered patient/visit) and Steven Cumming (the authenticated patient) are now both listed under Steven Cumming (the authenticated patient).

Unmerging Patients

If a candidate patient and their visit(s) have been incorrectly merged with the wrong target patient, you can unmerge them. Use the Merge History display to view the details of the two original records that were merged, and then decide whether or not they need to be unmerged.

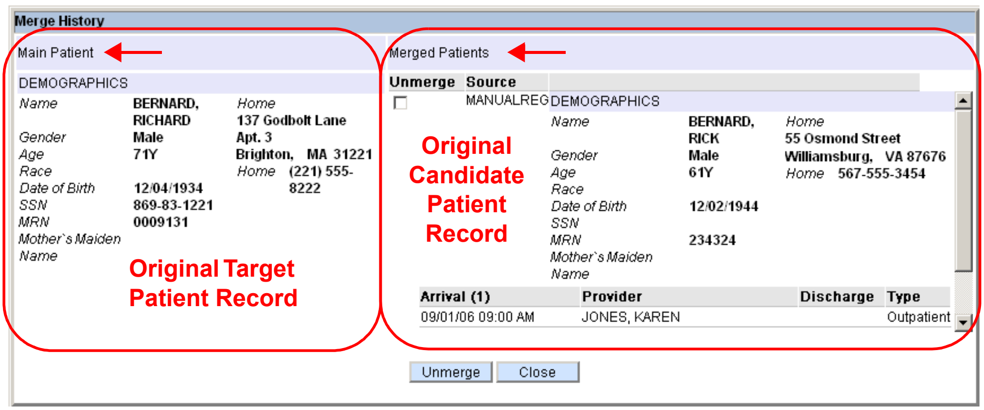
1. Select the target patient on the **Patient List** tab, or select the target patient on the **Patient Search** tab and click the **Details** icon .

2. Click on the **Patient Detail** display item.

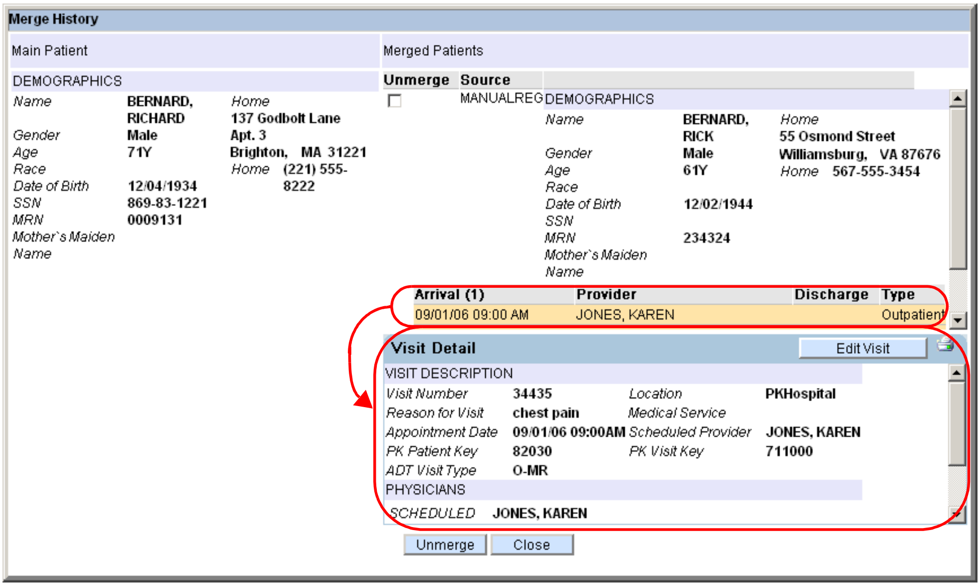


3. Click on the **Merge History** link.

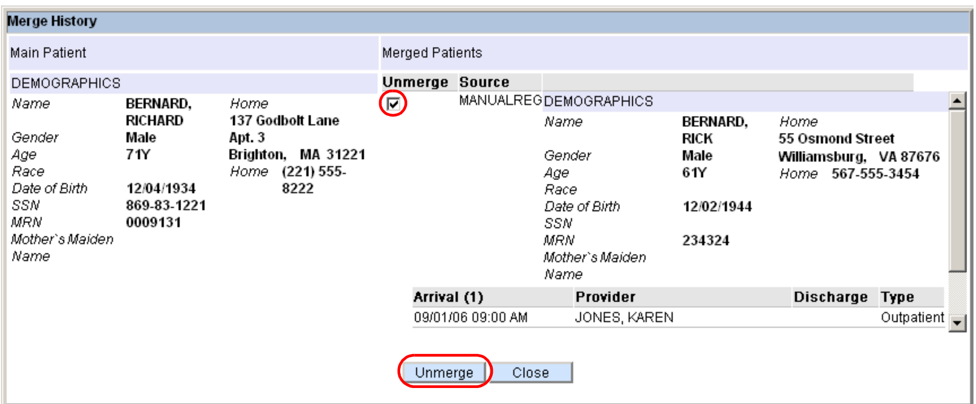
The system then opens the Merge History window. The left side of the Merge History display shows you the details of the original target patient. The right side of the screen shows you information about the candidate patient that was merged with the target, as well as all of the visits that were originally associated with the candidate.



You may click on any visit associated with the candidate patient to see further details about it, such as guarantor or insurance information.



4. If after reviewing the Merge History, you determine that the two patients were merged in error, you can reverse the merge, thereby separating the patient records and restoring them to their original states. To do so, click on the check box in the **Unmerge** column, and then click on the **Unmerge** button at the bottom of the screen.



The patient record is split back into the original separate records for the candidate and target. If necessary, you can now match the candidate patient with the *correct* target patient and merge them, as described in *Merging Patients* on page 177

Common Registration Scenarios

This section provides step-by-step instructions for some common operations. It is intended as a quick reference guide for common tasks.

Scenario 1: Find all patients who were admitted today, and assign them to a specific provider or group.

To complete this scenario, do as follows:

1. Go to **Patient Search**.
2. Set **Days Since Admit** to **0**.
3. Click the **Search for Visits** button.
4. From the search results, click the **Select All** link in the first column.
5. Click the **Reassign Visit** button.
6. In the popup window, select the specific provider or medical service to whom you want to assign these visits.
7. Click the **OK** button in the popup window to complete the reassignment.

Scenario 2: Cancel all visits today for a specific provider.

To complete this scenario, do as follows

1. Go to **Patient Search**.
2. Set **Days Since Admit** to **0** and select the provider in the **Scheduled MD** field.
3. Click the **Search for Visits** button.
4. From the search results, click the **Select All** link in the first column.
5. Click the **Cancel Visits** button.
6. Click the **OK** button in the pop-up window to complete the cancellation.

Scenario 3: Find all patients who were discharged yesterday, and add a discharge diagnosis.

To complete this scenario, do as follows:

1. Go to **Patient Search**.
2. Set **Days Since Discharge** to **1**.
3. Click the **Search for Visits** button.
4. From the search results, click on the **Discharge Date** column heading to sort the results. (The search results include both current and discharged patients.)
5. Click on a visit to select it, and then click the **Edit** button.
6. Enter the required information into the **Discharge Diagnosis** text field.
7. Click the **Save** button to store the information and return to the **Patient Search** screen.
8. Repeat steps 5, 6 and 7 for the next visit.

Scenario 4: Find all patients who were manually registered recently and merge them to authenticated patients.

To complete this scenario, do as follows:

1. Go to **Patient Search**.
2. Set **Days Since Admit** to **7** and check the **Show only mergeable** check box.
3. Click the **Search for Visits** button.
4. From the search results, select a patient visit to resolve by clicking on the **Merge** link for that visit.
5. On the **Merge** screen, enter search criteria to find a potential authenticated patient for resolution and click the **Search for Patients** button.
6. Select the authenticated patient to whom you wish to resolve the visit.
7. Click the **Resolve** button.
8. In the pop-up dialogue, click the **Merge Patients** button. The patients are merged and the **Patient Search** screen is re-displayed.
9. Repeat Steps 4 through 8 for the next patient.

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