

Introduction To Clipboard

"**Clipboard**" is the name of a Cerner tool that fulfills a wish list item from several clinics: A way for patients to complete things like medical history forms via the patient portal before the actual appointment, thus saving time during the rooming process. Following completion of the MPage 6.9 update, Clipboard is now being implemented and configured for pilot group use and testing.

Keep in mind that this product is evolving. It has a limited set of abilities at present, but those are slated to expand over the next couple of years. And the Unity team needs to observe this initial rollout and develop more experience with the tool before we start trying to implement the coming capabilities.

Broadly speaking, Clipboard will allow us to send a questionnaire to patients via the patient portal. They'll get an Email that they've received a portal communication. When they sign into the portal they'll see that they've been sent a Clipboard to answer. They click on it, and walk through answering the questions.

Some aspects of basic medical history are currently available as questions in Clipboard. These include:

- 1) **Medications.** The patient can see the med list on the chart and indicate that it looks right to them. They can submit additional meds not on the list. They can tell us if they see meds on the list that they are *not* taking. And they complete compliance data to indicate whether or not they are actually taking meds as directed.
- 2) **Allergies.** The patient can see the allergy list on the chart and indicate that it looks right to them. They can request removal of incorrect allergies, and request addition of new ones that are missing.
- 3) **Active Health Issues.** This is worded a bit broadly to patients, apparently by Cerner design, but it is meant to map to the Problem List on the Cerner chart. Patients can request removal of items they question, and request addition of new ones. If they are truly items that belong on the Problem List, providers/staff can accept them, but there will be times that the patient might mention things that are more along the line of "chief complaints," which the office won't add to the chart's Problem List.
- 4) **Procedures and Surgeries.** The patient can see the procedure list on the chart and indicate that it looks right to them. They can request removal of incorrect procedures, and request addition of new ones that are missing.
- 5) **Immunizations.** The patient can see the immunization list on the chart and indicate that it looks right to them. They can request removal/update of incorrect listings, and request inclusion of additional vaccinations that are missing.

Some aspects of the medical history are not currently available via Clipboard, as Cerner is revising their formats. These include:

Family History
Social History

A Clipboard with these questions will appear on the patient's portal site 30 days prior to the appointment date, and if s/he hasn't completed it as the appointment approaches, s/he will receive reminders at 7 and 2 days prior to the appointment. When there are no changes to make, the patient will acknowledge and move on to the next section, so working through it is pretty quick for the patient.

When the patient submits answers to a Clipboard, a designated contact in the clinic, such as a staff pool, will receive a notice in Message Center, so that they can review the submitted information. Alternately, staff rooming the patient on appointment day can view the data at that time. Since much of this is the history confirmation, medication review, and chief complaint-type questions they typically ask and enter via intake PowerForms, this puts the staff ahead of the game as they room the patient, and helps the patient get into the room faster. Of course, this information is available to providers, too.

The basic medical history information from the Clipboard appears on Workflow tabs, or MPages. It is generally indicated with purple diamonds or dots, and text informing you that "Outside records are available for review." In each section of the chart such patient-submitted information will appear under a subheading "Unverified Data from Outside Sources," as compared to data already on the chart in the subheading "Verified Local Record Data."

Below is a review of how this looks, and how to import outside data into the patient's chart. This will focus on Workflow tabs and Clipboard data, but with the MPage 6.9 update we also have other ways to review and incorporate outside data from other sources such as Health Information Exchanges and other medical facilities/other EHRs. So you will see some evolution of this process over time. You may wish to review the CommonWell Introduction document for further information about importing outside records.

In general, you will see the submitted "Unverified data." Clicking on it will give you the opportunity to see any details the patient added, and reveal a button to add or discard the data. When you add data, this is similar to adding a manual entry yourself. You may see required fields that must be completed before the Add button is active. After refresh, the entry will move from the "Unverified" subheading and join the other chart data.

Sometimes patients will have submitted free text entries they have typed, and you may be prompted to perform a search to choose an available corresponding selection to add to the chart. You may find yourself having to do this more often than you'd think necessary. To avoid unacceptably slow patient portal performance, patients only see a relatively short list of results when they perform searches for even correctly-typed terms, e.g., "psoriasis." So the patient has to add psoriasis as a free text entry, and when the staff/provider imports it, s/he will have to search for psoriasis to add it to the chart.

Medical History

Medications

The **Home Medications** component on Workflow tabs will notify you when unverified outside data has been received:

Home Medications All Visits

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to local record. Finish Later

Last 6 months Last 12 months Last 2 years Lifetime

Medication	Mismatches Identified	Compliance	Originating Source	Last Modified Date	Actions
Compliance Updates (6)					
cetirizine (cetirizine 10 mg oral tablet) 1, daily as needed for allergies, 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
lisinopril (lisinopril 10 mg oral tablet) 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
Unverified Data from Outside Sources (1)					
venlafaxine 150 mg oral capsule, extended release 1 tablet, daily	New medication found	Still taking, as prescribed	Patient	DEC 10, 2018	Add Discard
Verified Local Record Data (0)					

Document History: **Incomplete** Complete History Finish Later

Receipt and acknowledgement of this information is actually the same activity that the staff performs when they record "Medications by History" to start the Medication Reconciliation process as they room the patient. So this tool helps speed that process.

You actually see a couple different types of information. For meds the patient is taking, the patient has to enter compliance responses on the portal. So if this is imported, medication compliance is recorded--something that is measured on several quality programs. To accept the patient's compliance responses, click **Accept**:

Home Medications All Visits

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to local record. Return to Review

Last 6 months Last 12 months Last 2 years Lifetime

Medication	Mismatches Identified	Compliance	Originating Source	Last Modified Date	Actions
Compliance Updates (3)					
cetirizine (cetirizine 10 mg oral tablet) 1, daily as needed for allergies, 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	NOV 01, 2018	Accept Discard
lisinopril (lisinopril 10 mg oral tablet) 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	NOV 01, 2018	Accept Discard
montelukast (Singulair 10 mg oral tablet) 10 mg = 1 tabs, Oral, every evening, 90 tabs, 3 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	NOV 01, 2018	Accept Discard

In cases where the patient's med list has not changed, this may be all that needs to be done.

However, the patient may have stated there are other meds that are being taken:

Home Medications All Visits

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to local record. Finish Later

Last 6 months | Last 12 months | Last 2 years | Lifetime

Medication	Mismatches Identified	Compliance	Originating Source	Last Modified Date	Actions
Compliance Updates (6)					
cetrizine (cetirizine 10 mg oral tablet) 1, daily as needed for allergies, 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
lisinopril (lisinopril 10 mg oral tablet) 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
Unverified Data from Outside Sources (1)					
venlafaxine 150 mg oral capsule, extended release 1 tablet, daily	New medication found	Still taking, as prescribed	Patient	DEC 10, 2018	Add Discard
Verified Local Record Data (0)					

Document History: **Incomplete** Complete History Finish Later

Here, since the EHR found a match for the patient's submission, we could just click **Add**. Or we could click the new med to view/modify details, then **Add**:

Home Medications

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to local record. Finish Later

Last 6 months | Last 12 months | Last 2 years | Lifetime

Medication	Mismatches Identified	Compliance	Originating Source	Last Modified Date	Actions
Compliance Updates (6)					
cetrizine (cetirizine 10 mg oral tablet) 1, daily as needed for allergies, 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
lisinopril (lisinopril 10 mg oral tablet) 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
Unverified Data from Outside Sources (1)					
venlafaxine 150 mg oral capsule, extended release 1 tablet, daily	New medication found	Still taking, as prescribed	Patient	DEC 10, 2018	Add Discard
Verified Local Record Data (0)					

Add Discard X

venlafaxine 150 mg oral capsule, extended release

Outside Records

Originating Source
Patient

Action
Add venlafaxine 150 mg oral capsule, extended release 1 tablet, daily

Compliance
Still taking, as prescribed

Originating Author
TSHIRT ZZTEST

Last Modified Date
DEC 10, 2018

Order Comments
--

If the patient submitted a free text entry, we can click on it to view details:

Home Medications

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to local record. Finish Later

Last 6 months | Last 12 months | Last 2 years | Lifetime

Medication	Mismatches Identified	Compliance	Originating Source	Last Modified Date	Actions
Compliance Updates (3)					
cetrizine (cetirizine 10 mg oral tablet) 1, daily as needed for allergies, 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
lisinopril (lisinopril 10 mg oral tablet) 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
montelukast (Singulair 10 mg oral tablet) 10 mg = 1 tabs, Oral, every evening, 90 tabs, 3 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient	DEC 10, 2018	Accept Discard
Unverified Data from Outside Sources (1)					
Birth Control Pill	New medication found	Still taking, as prescribed	Patient	NOV 01, 2018	Add Discard
Verified Local Record Data (0)					

Add Discard X

Free-text medication. Cannot add free-text medications to the chart. Select a codified medication.

Birth Control Pill

Birth Control Pill X Q

Outside Records

Originating Source
Patient

Action
Add Birth Control Pill

Compliance
Still taking, as prescribed

Originating Author
TSHIRT ZZTEST

Last Modified Date
NOV 01, 2018

You might just **Discard** it and ask the patient about it later. Or if you've left it there until you can talk to the patient, you can address it further. If you elicit enough information to identify the drug, you can search, select, update details, and then **Add** the medication:

Home Medications

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to the chart.

Medication	Mismatches Identified	Compliance	Originating Source
Compliance Updates (3)			
cetirizine (cetirizine 10 mg oral tablet) 1, daily as needed for allergies, 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient
lisinopril (lisinopril 10 mg oral tablet) 0 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient
montelukast (Singulair 10 mg oral tablet) 10 mg = 1 tabs, Oral, every evening, 90 tabs, 3 Refill(s)	Compliance update requested	Still taking, as prescribed	Patient
Unverified Data from Outside Sources (1)			
Birth Control Pill	New medication found	Still taking, as prescribed	Patient
Verified Local Record Data (0)			

Add Discard

Free-text medication. Cannot add free-text medications to the chart. Select a codified medication.

Birth Control Pill

ortho Tri

- Ortho Tri-Cyclen
- Ortho Tri-Cyclen Lo
- Ortho Tri-Cyclen Lo oral tablet
- Ortho Tri-Cyclen oral tablet

Compliance
Still taking, as prescribed
Originating Author
TSHIRT ZZTEST
Last Modified Date
NOV 01, 2018

When all entries have been addressed, the purple "Unverified data" notices go away, and the data is added to the chart:

Home Medications All Visits

Last 6 months Last 12 months Last 2 years Lifetime

Medication	Mismatches Identified	Compliance	Originating Source	Last Modified Date	Actions
Unverified Data from Outside Sources (0)					
Verified Local Record Data (7)					
cetirizine (cetirizine 10 mg oral tablet) 1, daily as needed for allergies, 0 Refill(s)	--	Still taking, as prescribed	Local Record	OCT 30, 2018	--
montelukast (Singulair 10 mg oral tablet) 10 mg = 1 tabs, Oral, every evening, 90 tabs, 3 Refill...	--	Still taking, as prescribed	Local Record	OCT 30, 2018	--
venlafaxine (venlafaxine 150 mg oral capsule, extended release) 1 tablet, daily, 0 Refill(s)	--	Still taking, as prescribed	Local Record	DEC 10, 2018	--
zonisamide (zonisamide 100 mg oral capsule) 200 mg = 2 cap, Oral, Daily, 60 cap, 0 Refill(s)	--	Still taking, as prescribed	Local Record	NOV 01, 2018	--

Document History: **Incomplete** Complete History Finish Later

Remember, at this point the staff is completing Medications By History, the initial step in Medication Reconciliation. To finish that off, click **Complete History**:

Document Medication by Hx

ZZTEST, TSHIRT DOB:12/12/90 Age:27 years Meas Wt:80 kg Sex:Male MRN:051333643 PCP:Duffy DBA, L... Patient Portal: Yes
Allergies: chloramphenicol, TEGretol... Clinic FIN: 1200004978 [Visit Dt: 11/... Loc:Family Medicine Health Plan:AETN...

Medication History Reconciliation Status
Meds History Admission Outpatient

No Known Home Medications Unable To Obtain Information Use Last Compliance

Order Name	Status	Details	Last Dose Date/Time	Information Source	Compliance	Compliance Comments
Home Medications						
montelukast (Singulair...)	Prescribed	10 mg = 1 tabs, Oral, every evening, 90 tabs, 3 Refill(s)		Patient	Still takin...	
lisinopril (lisinopril 10 ...)	Documen...	0 Refill(s)		Patient	Still takin...	
cetirizine (cetirizine 10 ...)	Documen...	1, daily as needed for allergies, 0 Refill(s)		Patient	Still takin...	
zolpidem (Ambien)	Documen...	0 Refill(s)		Patient	Not taking	
zonisamide (zonisami...	Prescribed	200 mg = 2 cap, Oral, Daily, 60 cap, 0 Refill(s)		Patient	Still takin...	
venlafaxine (venlafaxi...	Documen...	1 tablet, daily, 0 Refill(s)		Patient	Still takin...	

0 Missing Required Details Leave Med History Incomplete - Finish Later Document History Done

If the patient had not submitted the Clipboard data, the staff would have to go through everything here line by line. But since that work has already been done, including the more tedious compliance data, you can just click **Document History**, and Medications By History is done. Medication Reconciliation is ready for the provider to sign-off or update as necessary.

Allergies

The **Allergies** component on Workflow tabs will notify you when unverified outside data is available:

Allergies + All Visits ↻

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to local record. Return to Review

Information. Reverse allergy checking is unavailable within the Allergies component.

Substance	Mismatches Ident...	Severity	Reactions	Originating Source	Last Modified Date	Actions
▼ Unverified Data from Outside Sources (1)						
Chloramphenicol	New Allergy found	--	Gray baby syndrome	Patient	NOV 01, 2018	Add Discard
▼ Verified Local Record Data (2)						
minocycline	--	Moderate	Rash	Local Record	OCT 30, 2018	--
Adhesive Bandage	--	Mild	Rash	Local Record	OCT 29, 2018	--

Reconciliation Status: Completed by HealthLife, Portal on OCT 29, 2018 at 14:45 Return to Review

If you feel this entry is incorrect, redundant, or you just want to confirm further with the patient before adding, you can click **Discard**. If you wish to add it, click **Add**. If it can be added directly, that's all you have to do, but most often there will be required details to complete. The details will be displayed on a side-panel to the right. (You also see this if you just click on the entry.):

Allergies Add ▼ Discard ✕

You are viewing unverified data from outside sources. Interaction checking and Clinical Decision Support are not available until data is added to local record. Return to Review

Information. Reverse allergy checking is unavailable within the Allergies component.

Substance	Mismatches Ident...	Severity	Reactions	Originating Source	Last Modified Date	Actions
▼ Unverified Data from Outside Sources (1)						
Chloramphenicol	New Allergy found	--	Gray baby syndrome	Patient	NOV 01, 2018	Add Discard
▼ Verified Local Record Data (2)						
minocycline	--	Moderate	Rash	Local Record	OCT 30, 2018	--
Adhesive Bandage	--	Mild	Rash	Local Record	OCT 29, 2018	--

Reconciliation Status: Completed by HealthLife, Portal on OCT 29, 2018 at 14:45 Return to Review

Free-text allergy. Cannot add free-text allergies to the chart. Select a codified allergy.

Information. Reverse allergy checking is unavailable within the Allergies component.

Chloramphenicol

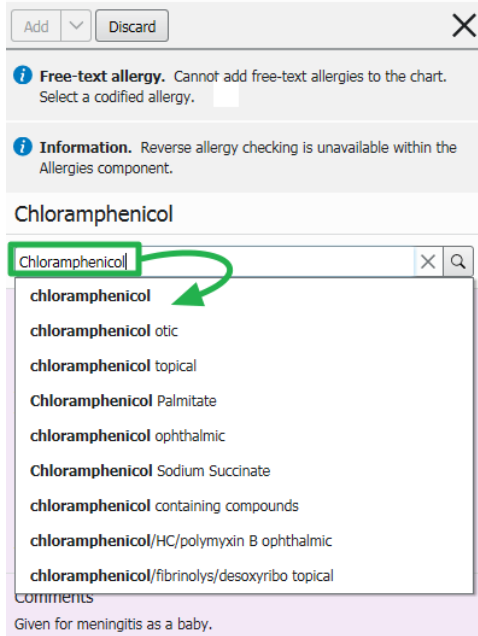
Outside Records

Originating Source	Patient
Action	Add Chloramphenicol
Reactions	Gray baby syndrome
Category	--
Reaction Type	Allergy
Originating Author	TSHIRT ZZTEST
Last Modified Date	NOV 01, 2018

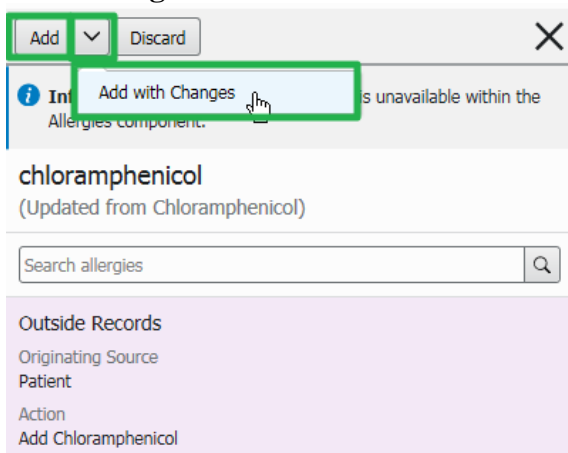
Comments

Given for meningitis as a baby.

In this example it was a free text entry by the patient, so you'll have to search for the allergen and select from the search results:



The **Add** button then becomes available. You can click **Add** or use the dropdown arrow to **Add with Changes**:



Either way, you'll be shown any missing required details, marked with red asterisks. Complete the details, and then you can click **Save** to enter it into the chart:

Save
Cancel
✕

Information. Reverse allergy checking is unavailable within the Allergies component.

chloramphenicol
(Updated from Chloramphenicol)

PROBLEMS

Add Chloramphenicol

Reactions

Gray baby syndrome

Category	Reaction Type
--	Allergy

Originating Author	Last Modified Date
TSHIRT ZZTEST	NOV 01, 2018

*** Severity**

Severe ▼

*** Category**

Drug ▼

Reactions

Gray baby syndrome ✕

Add reaction

*** Status**

Active ▼

Reaction Type

Allergy ▼

Source

Select ▼

Onset Date

At/On ▼ Year ▼

1990

Comments

Given for meningitis as a baby.

The purple "Unverified data" notice goes away, and the allergy will be added to the chart (though you may have to refresh the component to see that):

Allergies (3) + All Visits ↻

Add allergy Q

Substance	Severity	Reactions	Category	Status	Reactio...	Source	Comments
chloramphenicol	Severe	Gray baby syndrome	Drug	Active	Allergy	--	Patient Comment: Given for meningitis as a ba...
minocycline	Moderate	Rash	Drug	Active	Allergy	Patient	--
Adhesive Bandage	Mild	Rash	Environment	Active	Allergy	--	--

Active Health Issues

The **Problems** tab on the **Histories** component on Workflow tabs will notify you when unverified outside data is available:

Histories All Visits ↻

◆ Problems
Procedure
Family
Social

◆ Outside Records. Outside records are available for review. Return to Review

Last 6 months
Last 12 months
Last 2 years
Lifetime

Name	Mismatches Identified	Classification	Originating Source	Last Modifi...	Actions
▼ Unverified Data from Outside Sources (2)					
Low back pain ◆	New chronic problem found	Patient Stated	Patient	OCT 30, 2018	Add Discard
Psoriasis ◆	New chronic problem found	Patient Stated	Patient	NOV 01, 2018	Add Discard
▼ Verified Local Record Data (3)					
Active asthma	--	Medical	Local Record	JUL 09, 2018	--

We may not want to add something as nonspecific as "Low back pain" to the problem list, at least before discussing further with the patient to learn further details. So you could click **Discard** to remove that, or leave it as a reminder to discuss further with the patient.

But we'll add psoriasis. Click on it to see details:

The screenshot shows the 'Histories' interface. At the top, there are tabs for 'Problems', 'Procedure', 'Family', and 'Social'. Below these is a section for 'Outside Records' with a table listing medical records. The table has columns for Name, Mismatches Identified, Classification, and Originating Source. One record for 'Psoriasis' is highlighted in blue, with a message 'New chronic problem found' and 'Patient Stated' in the Classification column. To the right, a sidebar for 'Psoriasis' is visible, containing a search bar and a section for 'Outside Records' with details like 'Originating Source: Patient' and 'Action: Add Psoriasis as chronic problem'.

If it were added by the patient as a direct search match on the Patient Portal, you could click **Add** here and be done. But in this example, the limited search tool on the Patient Portal didn't give the patient a match, so s/he had to enter it as free text. So we'll need to perform a search; select the desired match:

This screenshot shows a search interface for 'Psoriasis'. At the top, there are 'Add' and 'Discard' buttons. Below is a message: 'Free-text problem. Cannot add free-text problems to the chart. Select a codified problem.' A search bar contains 'psori' and a dropdown menu is open, showing several options: 'Psoriasis (L40.9)', 'Other psoriasis (L40.8)', 'Scalp psoriasis (L40.9)', and 'Plaque psoriasis (L40.0)'. A green arrow points to the 'Psoriasis (L40.9)' option.

The details will display, *and there is an important detail for you to notice*. There is a **Classification** field, and it says **Patient Stated**, since at the moment the patient added this entry. Patient-Stated problems do not display in encounter documents. So if we really want to add this to the chart, we need to change this. Click the **dropdown arrow** next to the **Add** button and select **Add with Changes**:

This screenshot shows the details for 'Psoriasis'. At the top, there are 'Add' and 'Discard' buttons. The 'Add' button has a dropdown arrow next to it, and a green box highlights the text 'Add with Changes' next to it. Below is a search bar and a section for 'Outside Records' with details like 'Originating Source: Patient' and 'Action: Add Psoriasis as chronic problem'. The 'Classification' field is highlighted with a green box and shows 'Patient Stated'. Other fields include 'Confirmation: Confirmed', 'Originating Author: TSHIRT ZZTEST', 'Last Modified Date: NOV 01, 2018', and 'Comments: Intermittent flares; I've been given various steroid creams for it.'

Click the **Classification dropdown arrow**, and change it to **Medical**. After that, update any other details desired and click **Save**:

Save **Cancel** **X**

Psoriasis (L40.9)
(Updated from Psoriasis)

Outside Records
Originating Source
Patient
Action
Add Psoriasis as chronic problem
Onset Date
2005
Classification
Patient Stated
Confirmation
Confirmed
Originating Author
TSHIRT ZZTEST
Last Modified Date
NOV 01, 2018
Comments
Intermittent flares; I've been given various steroid creams for it.

Onset Date
01 / 01 / 2005

Problem Type
Chronic
Status
Active

Classification
Patient Stated
Historic
Medical
Patient Stated
Interim/Initial

Confirmation
Confirmed

Intermittent flares; I've been given various steroid

The purple "Unverified data" notice disappears (after refresh if necessary), and the new problem is added to the chart:

Histories All Visits

Problems **Procedure** **Family** **Social**

Last 6 months Last 12 months Last 2 years Lifetime

Name	Mismatches Identified	Classification	Originating Source	Last Modified	Actions
Active asthma	--	Medical	Local Record	JUL 09, 2018	--
Psoriasis	--	Medical	Local Record	NOV 01, 2018	--

Procedures and Surgeries

The **Procedures** tab on the **Histories** component on Workflow tabs will notify you when unverified outside data is available:

Histories All Visits

Problems **Procedure** **Family** **Social**

You are viewing unverified data from outside sources. Clinical Decision Support is not available until data is added to local record. Return to Review

Procedure	Mismatches Id...	Date	Originating Sou...	Last Modified...	Actions
Unverified Data from Outside Sources (1)					
Vasectomy reversal	New procedure found	2010	Patient	NOV 01, 2018	Add Discard
Verified Local Record Data (2)					
Rotator cuff repair	--	2009	Local Record	OCT 30, 2018	--

If you click on the new entry or its **Add** button, the details display on the side panel:

Histories

Problems Procedure Family Social

You are viewing unverified data from outside sources. Clinical Decision Support is not available until data is added to local record.

Procedure	Mismatches Id...	Date	Originating Sou...	Last
Unverified Data from Outside Sources (1)				
Vasectomy reversal	New procedure found	2010	Patient	NOV
Verified Local Record Data (2)				
Rotator cuff repair	--	2009	Local Record	OCT

Add Discard

Free-text procedure. Select a codified procedure.

Vasectomy reversal

Search within CPT4 Vasectomy reversal

Outside Records

Originating Source Patient

Action Add Vasectomy reversal

Procedure Date 2010

Originating Author TSHIRT ZZTEST

Last Modified Date NOV 01, 2018

Details can be updated as desired. But in this case, since we allow free text procedure listings, you can click the **Add** button to add the entry to the chart. The purple "Unverified data" notice disappears (after refresh if necessary), and the new procedure is added to the chart:

Histories

Problems Procedure Family Social

Search within CPT4 Add procedure

Procedure	Surgeon	Implant	Date
Surgical Records (0)			
Procedures (3)			
Vasectomy reversal	--	--	2010
Rotator cuff repair	--	--	2009

Immunizations

The **Immunizations** component on Workflow tabs will notify you when unverified outside data is available:

Immunizations

You are viewing unverified data from outside sources. Clinical Decision Support is not available until data is added to local record. Return to Review

Vaccine	Mismatches Identified	Administ...	Originating Source	Last Action	Last Action Date	Actions
Unverified Data from Outside Sources (2)						
Tetanus shot	New immunization found	--	Patient	Administered	2012	Add Discard
typhoid vaccine, inactivated	New immunization found	--	Patient	Administered	JAN 15, 2017	Add Discard
Verified Local Record Data (1)						
Other Vaccines	--	1	Local Record	Administered	FEB 10, 2007 (16yrs 1m)	--

For demonstration purposes, the patient entered the typhoid vaccine as a direct search match on the portal. So you can click **Add** to add it, or click on it to view the details, then add it:

Immunizations

Add Discard

You are viewing unverified data from outside sources. Clinical Decision Support is not available until data is added to local record.

Vaccine	Mismatches Identified	Administ...	Originating Source	Last Action	Last
Unverified Data from Outside Sources (2)					
Tetanus shot	New immunization found	--	Patient	Administered	2012
typhoid vaccine, inactivated	New immunization found	--	Patient	Administered	JAN
Verified Local Record Data (1)					
Other Vaccines	--	1	Local Record	Administered	FEB

typhoid vaccine, inactivated

Outside Records

Originating Source Patient

Action Add typhoid vaccine, inactivated

Last Action Administered

Last Action Date JAN 15, 2017

Originating Author TSHIRT ZZTEST

Last Modified Date NOV 01, 2018

Comments

But the patient entered "Tetanus shot" as free text, so when you click on it, you're notified that you can't directly add it, and given the opportunity to click **Select Codified Immunization** to search for it:

The screenshot shows the 'Immunizations' section with a notification: 'Free-text immunization. Cannot add free-text immunizations to the chart.' A button labeled 'Select Codified Immunization' is highlighted with a green box. Below the notification, a table lists immunizations:

Vaccine	Mismatches Identified	Administ...	Originating Source	Last Action	Last
▼ Unverified Data from Outside Sources (2)					
Tetanus shot	New immunization found	--	Patient	Administered	2012
typhoid vaccine, inactivated	New immunization found	--	Patient	Administered	JAN
▼ Verified Local Record Data (1)					
Other Vaccines	--	1	Local Record	Administered	FEB

To the right, a 'Tetanus shot' detail panel shows 'Outside Records' with 'Originating Source Patient' and 'Action Add Tetanus shot'. It also lists 'Last Action Administered' on '2012' and 'Originating Author TSHIRT ZZTEST' with a 'Last Modified Date' of 'NOV 01, 2018'.

Scroll down through the available listings and make your selection:

The 'Select Immunizations' modal is open, displaying a list of vaccine options:

- Anthrax
- Cholera
- Diphtheria, Tetanus, and Pertussis
- Haemophilus Influenzae Type B
- Hepatitis A
- Hepatitis B
- Hepatitis B Immune Globulin
- Influenza

After making your selection and adding any desired details, you can add it to the chart. The purple "Unverified data" notice will go away (after refresh if necessary), displaying the vaccinations recorded on the chart:

The 'Immunizations' chart displays a list of recorded vaccinations. The 'Tetanus-Diphtheria' and 'Typhoid' rows are highlighted with green boxes:

Vaccine	Status	Administra...	Next Recommended	Last Action	Last Action Date
▼ Documented/Recommended (9)					
Hepatitis B	Overdue	--	Today	--	--
Tetanus-Diphtheria	--	1	Today	Administered	2012 (21yrs)
Influenza	In Range	--	Today - JUN 30, 2019	--	--
Pneumococcal Conjugate	--	--	DEC 12, 2055	--	--
Pneumococcal Polysaccharide	--	--	DEC 12, 2056	--	--
Zoster	--	--	DEC 12, 2050	--	--
▼ History (8)					
Rotavirus	Aged Out	--	--	--	--
Typhoid	--	1	--	Administered	JAN 15, 2017 (26yrs 1m)

Intake Questions and Data Other Than Medical History

In the future, we will be able to send additional Clipboards to ask other situation/clinic-specific questions. But those capabilities will have to wait for us to complete the product updates in progress in 2019, and for us to gain further familiarity with Clipboard after its initial implementation.
