NEXTGEN NEPHROLOGY WORKFLOW DEMONSTRATION

This example works through a sample adult nephrology encounter. In this demonstration, the patient has been seen by other USA HSF providers, so most basic history will already be entered into the chart, though we'll touch upon updating this information as well.

This has been prepared for EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

Always begin by performing the 4-Point check.

Patient   Location   Provider   Date

When you first open the chart to the **Intake Tab**, you'll note some red text demanding attention:
Specialty Select a specialty & **Visit type** Select a visit type.

Click select a specialty & make a selection from the picklist; here we'll pick Nephrology.

Then click select a visit type & pick from the list; select Office Visit for this example.

Note whether the patient is listed as **New** or **Established**, since this sometimes needs to be changed. A patient seen elsewhere in the USA system might initially appear as **Established**, but if it's the first time she's been to your office, that would need to be changed to **New**. Conversely, if you've seen the patient before you started using the EHR, but today is the first visit in NextGen, you may need to change the encounter from **New** to **Established**. This patient is new to us, so we'll make that change.

BooBoo Quagmire (F)   DOB: 01/04/1962 (52 years)   Weight: 156.00 lb (70.76 Kg)   Allergies: (2)   Problems: (4)   Diagnoses: (1)   Medications: (0)

Address: 555 Knock Knee Drive   MRN: 000000007767   Emergency Relation: PCP: DUFFY, ROBERT LAMAR ...
         Mobile, AL 36604   Insurance: BCBS OF ALABAMA   Emergency Phone: Referring:
Contact: (251) 555-1234 (Home)   NextMD: No   Pharmacy 1: LINCOLN PHARM...   Rendering: DUFFY, ROBERT LAMAR ...

Alerts OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ❖ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM : "*Intake" ✕

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

🏠 | **Intake** | Histories | SOAP | Finalize | Checkout

[Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management]

Care Guidelines | Global Days   Panel Control: ⊙ Toggle ⊙ ↻ Cycle ↻

General   ⊙

⦿ Established patient   ○ New patient | Historian: [_____]

It's always good to begin by noting whether there are any **Sticky Note** or **Alerts** entries.

BooBoo Quagmire (F)   DOB: 01/04/1962 (52 years)   Weight: 156.00 lb (70.76 Kg)   Allergies: (2)   Problems: (4)   Diagnoses: (1)   Medications: (0)

Address: 555 Knock Knee Drive
Mobile, AL 36604
Contact: (251) 555-1234 (Home)

MRN: 000000007767
Insurance: BCBS OF ALABAMA
NextMD: No

Emergency Relation:
Emergency Phone:
Pharmacy 1: LINCOLN PHARM...

PCP: DUFFY, ROBERT LAMAR ...
Referring:
Rendering: DUFFY, ROBERT LAMAR ...

Alerts   OBGYN Details   Patient   Lipid Clinic Data   Order Admin   ◆ Sticky Note   ❖ Referring Provider   ❖ HIPAA   ❖ Advance Directives   ❖ Screening Summary

03/23/2014 04:27 PM : "*Intake"   ✕

⚠ TOB   ⚠ HTN   ⚠ DM   ⊘ CAD   ⚙

Specialty ▼ Nephrology   Visit Type ▼ Office Visit

Intake | Histories | SOAP | Finalize | Checkout

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

General

Established patient   New patient | Historian:

We call tell by the appearance of the **Alert** button that there is no Alert. But the magenta color & solid diamond tell us there *is* a **Sticky Note**. To review it, click Sticky Note.

Like actual sticky notes, these are things that are nice to know, but aren't meant to be permanent chart records. We note that the patient is the mother of one of the Family Medicine nurses.

Other times a sticky note would be a temporary notice, like Ask about Tdap next visit. RL Duffy 4/13/13. It's good to put your name & date on such things; otherwise, you have no idea whether they're still pertinent when you see them in the future. And you should delete such sticky notes when they're no longer meaningful.

Patient Information

Comments:

USAFM nurse Gretchen's mother.

Save & Close   Cancel

When done click Save & Close.

You can select a **Historian** from the picklist that appears if you click in that box; you can also type in an entry. This is most pertinent if the patient is a child or adult unable to care for herself.

USA FAMILY MEDICINE ▼   DUFFY, ROBERT LAMAR MD   ▼

Logout   Save   Clear   Delete   Patient   History   Inbox   RAD   Medications   Templates   Documents   Images   Orders   Problems   Apps   Close

BooBoo Quagmire (F)   DOB: **01/04/1962 (52 years)**   Weight: **156.00 lb (70.76 Kg)**   Allergies: **(2)**   Problems: **(4)**   Diagnoses: **(1)**   Medications: **(0)**

Address: **555 Knock Knee Drive**   MRN: **000000007767**   Emergency Relation: PCP: **DUFFY, ROBERT LAMAR ...**
Mobile, AL 36604   Insurance: **BCBS OF ALABAMA**   Emergency Phone: Referring:
Contact: **(251) 555-1234 (Home)**   NextMD: **No**   Pharmacy 1: **LINCOLN PHARM...**   Rendering: **DUFFY, ROBERT LAMAR ...**

(Alerts)   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM : "*Intake"   ✕

Relationship of historian: ✕

aunt
brother
daughter
daughter-in-law
father
father-in-law
foster child
foster parent
friend
granddaughter
grandfather
grandmother
grandson
mother
mother-in-law
neighbor
nephew
niece
self
significant other
sister
son
son-in-law
spouse
step daughter
step parent
step son
uncle

Close

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Visit Type ▼ Office Visit

Histories   **SOAP**   **Finalize**   **Checkout**

unizations | Peds Immunizations | My Plan | Procedures | Order Management

Panel Control: ⊙ Toggle ⊙ ↻ Cycle ↻

tient | Historian: [   ]

Note the **PCP**.

If this needs to be changed, click Patient, which opens the **Patient_demographics** template. (We don't need to do that here.)

The **Navigation Bar** is normally hidden at the left; it will slide out if you hover over it. But you probably won't need it very often.

NextGen EHR: BooBoo Quagmire MRN: 000000007767 DOB: 01/04/1962 (Female) AGE: 52 years 2 months - 03/23/2014 04:27 PM : "*Intake"

File   Edit   Default   View   Tools   Admin   Utilities   Window   Help

Logout   Save   Clear   Delete   USA FAMILY MEDICINE   DUFFY, ROBERT LAMAR MD   Patient   History   Inbox   PAQ   Medications   Templates   Documents   Images   Orders   Problems   Apps   Close

BooBoo Quagmire (F)   DOB: 01/04/1962 (52 years)   Weight: 156.00 lb (70.76 Kg)   Allergies: (2)   Problems: (4)   Diagnoses: (1)   Medications: (0)

Address: 555 Knock Knee Drive   MRN: 000000007767   Emergency Relation: PCP: DUFFY, ROBERT LAMAR ...
         Mobile, AL 36604   Insurance: BCBS OF ALABAMA   Emergency Phone: Referring:
Contact: (251) 555-1234 (Home)   NextMD: No   Pharmacy 1: LINCOLN PHARM...   Rendering: DUFFY, ROBERT LAMAR ...

Alerts   OBGYN Details   Patient   Lipid Clinic Data   Order Admin...   ◆ Sticky Note   ❖ Referring Provider   ❖ HIPAA   ❖ Advance Directives   ❖ Screening Summary

03/23/2014 04:27 PM : "*Intake"   ✕   Patient History

Navigation   TOB   HTN   DM   ⊘ CAD   Patie...   Patie...

Intake   Visit Type ▾ Office Visit   New   Lock   Search
History
SOAP   Histories   SOAP   Finalize   Checkout   ⊟   03/23/2014 04:2 PM
Finalize   *USA Intake
Check Out   munizations | Peds Immunizations | My Plan | Procedures | Order Management   ⊞   03/03/2014 03:38 PM
                                                                                                                        ⊞   03/02/2014 02:35 PM
Order Management   Panel Control: ⊙ Toggle ⊚ ↻ Cycle ↻   ⊞   03/01/2014 0 25 PM
Orders/Plan   ys
Standing Orders   02/28/2014 03:22 PM
                                                                                                                             7/2014 03:14 PM
Anticoagulation   02/26/2014 04:45 PM
Procedures   atient | Historian: 6/2014 05:05 PM
Tobacco Cessation
Tuberculin Skin Test
Nutrition

Chart Abstraction
Demographics
Document Library
Immunizations
Patient Comment
Provider Test Action
Vital Signs
Screening Tools
CQM Check
MU Check

Preview   Offline

You can also show or hide the **History Bar** by clicking the History icon at the top.

You can make the **History Bar** do the same auto-hide trick if you click on the thumbtack to turn it sideways.

Address: **555 Knock Knee Drive**
Mobile, AL 36604
Contact: **(251) 555-1234 (Home)**

MRN: **000000007767**
Insurance: **BCBS OF ALABAMA**
NextMD: **No**

Emergency Relation:
Emergency Phone:
Pharmacy 1: **LINCOLN PHARM...**

PCP: **DUFFY, ROBERT LAMAR...**
Referring:
Rendering: **DUFFY, ROBERT LAMAR...**

(Alerts)   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

You can collapse the Information Bar down to a narrower strip if desired; that is particularly helpful on the small-screened laptops. Click this button.

Care Guidelines   Global Days   Panel Control: ⊙ Toggle ⊙ ↺ Cycle ↻

General ⊙

○ Established patient   ⊙ New patient | Historian: [＿＿＿＿＿＿]

Reason for Visit ⊙

☑ Do not launch HPI   ❖ Intake Comments

anemia
chronic kidney disease
diabetes
edema
education
ESRD
hyperparathyroidism
hypertension
kidney stones
proteinuria
renal failure
urinary problems

Additional / Manage

The nurse will probably next enter Vital Signs. It would be more convenient if that section were at the top of this template. So if it's not there already, let's move it there. Click on the Vital Signs heading bar, & drag it up over Reason for Visit. (It can be a little touchy to make the drag work right, you'll eventually get it.)

Vital Signs

Time	Ht (in)	Wt (lb)	BMI	BP	Pulse	Respiration	Temp (F)	Pulse Ox Rest	BSA	Pain level	Comments

The **Info Bar** is collapsed, & **Vital Signs** are at the top.

BooBoo Quagmire (F)   DOB: **01/04/1962 (52 years)**   Weight: **156.00 lb (70.76 Kg)**   Allergies: **(2)**   Problems: **(4)**   Diagnoses: **(1)**   Medications: **(0)**

(Alerts)   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM : "*Intake"   ✕

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Specialty ▼ Nephrology   Visit Type ▼ Office Visit

| 🏠 | **Intake** | **Histories** | **SOAP** | **Finalize** | **Checkout** |

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management
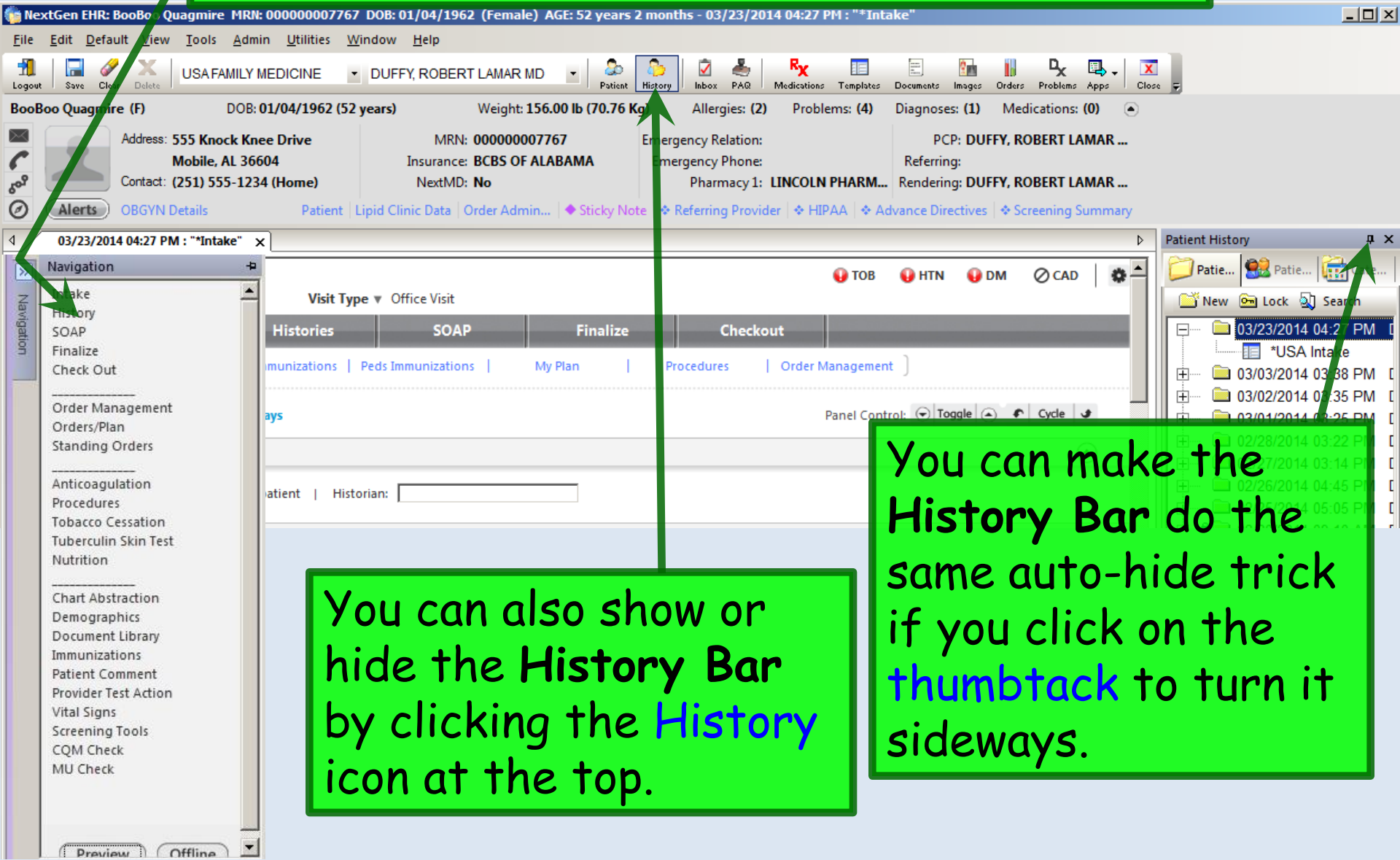
Care Guidelines | Global Days   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↵

General   ⊙

○ Established patient ● New patient | Historian: [   ]

Vital Signs   ⊙

❖ Health Promotion Plan | History | Graph

Time	Ht (in)	Wt (lb)	BMI	BP	Pulse	Respiration	Temp (F)	Pulse Ox Rest	BSA	Pain level	Comments

(Add)   (Edit)   (Remove)

Reason for Visit   ⊙

☑ Do not launch HPI   ❖ Intake Comments

anemia
chronic kidney disease
diabetes
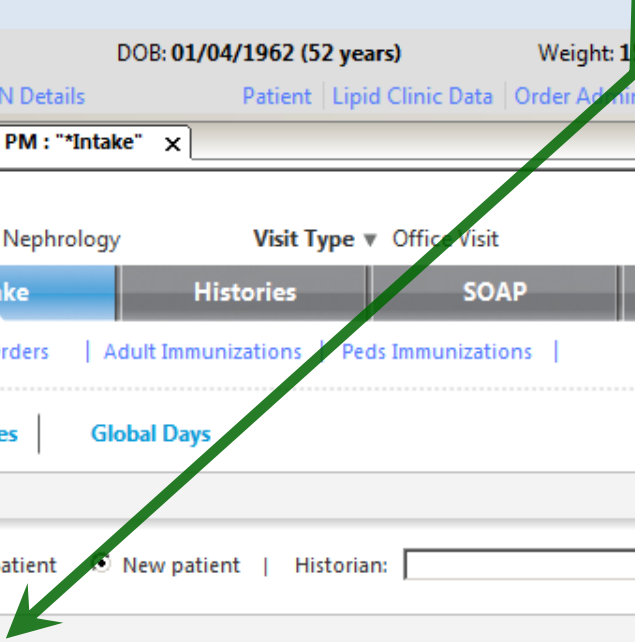
To enter Vital Signs, click Add.

Enter Vital Signs. (Details are reviewed in another demo.)

"Adult Vital Signs" - [New Record]

Height/length measurements:
[ ] ft [ ] in [ ] total in [ ] cm Position: ○ Standing ○ Lying
Last Measured: [/ /] ○ Measured today ○ Carried forward

BMI/BSA calculation:
BMI: [ ]
BSA: ⓘ [ ] m² (Calculate)

☐ Unobtainable:
☐ Patient Refused:

Weight measurement:
[ ] lb [ ] kg Context: ○ Dressed with shoes ○ Dressed without shoes

Temperature: [ ] F [ ] C Site: [ ]

Blood Pressure and pulse:
Systolic: [ ] / Diastolic: [ ] mm/Hg Position: ○ Sitting ○ Standing ○ Lying Side: ○ Right ○ Left
Pulse: [ ] /min ○ Regular ○ Irregular Pulse pattern: ○ Manual ○ Automatic ○ Home monitor Method: Cuff size: ☐ Pediatric ☐ Adult

Respiration and Pulse Ox:
Respiration: [ ] /min Pulse Ox Rest: [ ] % Pulse Ox Amb: [ ] %
Pulse Ox: ○ Room air ○ Oxygen - Method: [ ] [ ]
Pulse Ox measured: ○ Pre-treatment ○ Post-treatment

Peak Flow: [ ]
Method: [ ]

Pain scale:
Pain score: [ ] ⓘ Method: [ ] ◆ HAQ-DI

Comments: [ ]

○ Premenopausal
○ Perimenopausal
○ Postmenopausal

red date: [ ] Time: [ ]

Robert L. Duffy

(◄◄ | ◄ | Clear For Add | Delete | Save | Close | ► | ►►)

Data used in this example:

Ht 66 inches, measured today.
Wt 199 lbs, dressed without shoes.
T 97.7, orally.
BP 158/94 sitting, left arm, manual adult cuff.
HR 80.
Resp 16.
BMI of 32.12 will be calculated.

When done, click Save then Close.

Vital signs now display.

03/25/2014 04:27 PM : "*USA Intake" ✕

General

○ Established patient   ● New patient | Historian: [_____]

Vital Signs

✤ Health Promotion Plan | History | Graph

Time	Wt lbs	Ht in	BMI	Wt kg	Ht cm	BP	Pulse	Resp	TempF	TempC	O-sat	Pain level	Comments
5:12 PM	199.00	66.00	32.12	90.265	167.64	158/94	80	16	97.7	36.5			

Now enter Chief Complaints, or **Reasons for Visit**. The most common complaints used in each clinic will appear on this list. Our patient is here to get established for chronic kidney disease, so click that.

Reason for Visit

☑ Do not launch HPI

- anemia
- chronic kidney disease
- diabetes
- edema
- education
- ESRD
- hyperparathyroidism
- hypertension
- kidney stones
- proteinuria
- renal failure
- urinary problems

_____

Additional / Manage

Chief Complaint

✤ Intake Comments

Diagnostics   Show All

If you don't see the complaint you need, click Additional/Manage. Scroll through the list in the popup to make more selections.

Reason for Visit

☑ Do not launch HPI

anemia
chronic kidney disease
diabetes
edema
education
ESRD
hyperparathyroidism
hypertension
kidney stones
proteinuria
renal failure
urinary problems

Chief Complaint
chronic kidney disease

Additional / Manage

✦ Intake Comments

Reason For Visit   ✕

Select your reasons for visit
chronic kidney disease
diabetes
difficulty urinating
DM/HTN
DM/lipids
dysuria
edema
fever
frequency of urination
headache
hypercalcemia
hyperlipidemia
hyperparathyroidism
hypertension
hypocalcemia
incontinence
kidney concerns (peds)
kidney infection
kidney stones
nocturia
proteinuria
renal failure
upper respiratory infection
UTI

Reason(s) for visit
☐ Follow up
chronic kidney disease   Clear

☐ Follow up
swelling   Clear

☐ Follow up
Clear

☐ Follow up
Clear

☐ Follow up
Clear

☐ Follow up
Clear

Save & Close   Cancel

gnostics   Show All

If you still don't see what you need, just type it in the next open box. In this example she is also complaining of swelling, so we'll type that in.

When done, click Save & Close.

The Reasons for Visit you've entered display.

03/23/2014 04:27 PM : "*USA Intake" ✕

Reason for Visit ▲

☑ Do not launch HPI

✦ Intake Comments

Chief Complaint	History of Present Illness
chronic kidney disease	
swelling	

anemia
chronic kidney disease
diabetes
edema
education
ESRD
hyperparathyroidism
hypertension
kidney stones
proteinuria
renal failure
urinary problems

_____

Additional / Manage

Click Intake Comments to enter some brief information about the patient's complaints.

Intake Comments

CKD followed by MD OOT; he was mentioning possible dialysis soon. Just moved to town. Saw FM last month & got meds refilled, but missed F/U appt. Feet have been swelling worse in last 3-4 wks.

Comment ☐ No medications ☐ Medications reconciled

(Save & Close) (Cancel)

Type a few brief details as pertinent or volunteered by the patient. When done click Save & Close.

Reason for Visit ▲

☑ Do not launch HPI

◆ Intake Comments

	Chief Complaint	History of Present Illness
anemia	chronic kidney disease	
chronic kidney disease		
diabetic	swelling	
ed...		
education		
ESR...		
hyperparathyroidism		
hypertension		
kidney		
proteinuria		
renal		
urinary problems		

Additional / Manage

Moving down the **Intake Tab**, we come to **Medications**. She confirms she's actually taking everything listed here, & nothing else, so click the Medications reconciled checkbox. (A detailed review of the Medication Module is provided in another lesson.)

Diagnostics   Show All

Medications ▲

Patient status: ☐ Transitioning into care ☐ Summary of care received 🗘   ✦ Comment   ☐ No medications   ☐ Medications reconciled

Medication	Sig Description
furosemide 20 mg tablet	1 daily in AM
Lantus Solostar 100 unit/mL (3 mL) Sub-Q Insulin Pen	18 units each evening
lisinopril 10 mg tablet	1 daily

If you have questions about the meds that you are unable to clarify with the patient, DON'T click the **Medications reconciled** checkbox. Instead, use the Comment link (or perhaps better, the Intake Comments link you used under **Reasons for Visit** above), and/or verbally tell the provider.

| ⌂ | Intake | Histories | SOAP | Finalize | Checkout | |

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days

Panel Control: ⊙ Toggle ⊙ ↻ Cycle ⤶

General

○ Established patient ⦿ New patient | Historian:

Vital Signs ⚠ Vital Signs Outside Normal Range

Reason for Visit

Medications

Allergies ⊙

Next, review allergies. Our patient states this list is correct & complete, so click the Reviewed, no change box.

✥ Comment ☐ No known allergies ○ Allergies added today ○ Reviewed, no change

Allergen	Reaction	Medication Name	Comment
CHLORAL HYDRATE	Speaks in tongues		
PEANUT	Heebee Geebies		

Now let's move to the **Histories Tab**.

[Add] [Update]

Orders ⊙

✥ Lab/Radiology Order Processing | Order Management | Immunizations | Standing Orders | Task

	Status	Ordered	Order	Timeframe	Comments
▸ View of All Orders					
Labs					
Diagnostics					
Office Services					
View Immunizations Due					
Procedures					
Referrals					

[Add] [Edit]

A detailed review of data entry on the **Histories Tab** is included in another lesson, so in this example we'll keep it simple.

BooBoo Quagmire (F)   DOB: **01/04/1962 (52 years)**   Weight: **199.00 lb (90.26 Kg)**   Allergies: **(2)**   Problems: **(4)**   Diagnoses: **(1)**   Medications: **(3)**

Alerts   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM: "USA Histories"   ✕

⚠ TOB   ⚠ HTN   ⚠ DM   ⊘ CAD   ⚙

Navigation

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

🏠   Intake   **Histories**   SOAP   Finalize   Checkout

[Standing Orders | Adult Immunizations | Peds Immunizations | Birth History | Procedures | Order Management | Document Library   ]

Care Guidelines | Global Days | History Review

Problem List 4

☐ Show chronic ☐ Show by tracked problem

Problem Description
Open cleft glaucoma
Primary HTN
Tobacco abuse
Type II diabetes mellitus w/o complication

The nurse notes that the **Risk Indicators** have been configured, displaying her HTN, DM, & tobacco abuse.

🔄 Refresh   Add   Edit

OBGYN Detail can be reviewed as desired/pertinent.

Alerts   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ✦ Referring Provider | ✦ HIPAA | ✦ Advance Directives | ✦ Screening Summary

03/23/2014 04:27 PM : "USA Histories"   ✕

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

| 🏠 | Intake | Histories | SOAP | Finalize | Checkout | |

Standing Orders | Adult Immunizations | Peds Immunizations | Birth History | Procedures | Order Management | Document Library

Care Guidelines | Global Days | History Review   *All History Review details are to be reviewed and included in visit note unless user indicates otherwise*   Panel Control: ⊙ Toggle ⊙ ↺ Cycle ↻

Problem List ④   ⊙

☐ Show chronic   ☐ Show my tracked problem   ☐ No active problems   ☐ Reviewed

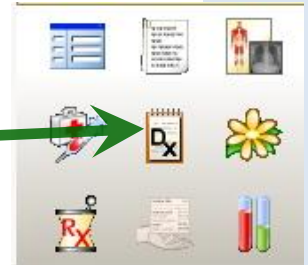| Problem Description	Side	Notes	Addtl
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Tobacco abuse			
Type II diabetes mellitus w/o complication			

◑ Refresh   Add   Edit

The nurse reviews the **Chronic Conditions**. The patient has shown her old notes including a GFR of 40, so the nurse astutely realizes CKD belongs on this list. Click Add.

Problem List | Billing ICD List

Refresh | Preferences | Show All Statuses ▾ | ☐ Show My Tracked Problems Only | ☐ Show Chronic Problems Only

☐ **No Active Problems**

Concept Id	Description	Fully Specified Name	Chronic

The **Problems Module** opens, focused on the **Problem List Tab**.

This is sometimes called the **Diagnosis Module** because of the **Dx Icon** that will open it from the tic-tac-toe board.

To add a new problem, logically enough, click Add Problem.

Add Problem | Re-Code | Resolve | Set Chronic | ✕ Delete | Resources ▾ | View/Add Notes | View History | Reconcile

Add to Billing ICD List | Add to My Tracked Problems | Remove from My Tracked Problems

A review of diagnosis search is covered in the Histories lesson. We'll search for & select Chronic kidney disease stage 3.

Description	Fully Specified Name	Concept Id
🔍 chronic kidney disease		Search

Description	Fully Specified Name	Concept Id
Chronic kidney disease	Chronic renal impairment	236425005
Chronic kidney disease stage 3	Chronic kidney disease stage 3	433144002
Chronic kidney disease stage II	Chronic kidney disease stage 2	431856006
Chronic kidney disease stage two	Chronic kidney disease stage 2	431856006
Stage 2 chronic kidney disease	Chronic kidney disease stage 2	431856006
Chronic kidney disease stage 1	Chronic kidney disease stage 1	431855005
Chronic kidney disease stage 2	Chronic kidney disease stage 2	431856006
Chronic kidney disease stage five	Chronic kidney disease stage 5	433146000
Chronic kidney disease stage four	Chronic kidney disease stage 4	431857002
Chronic kidney disease stage I	Chronic kidney disease stage 1	431855005
Chronic kidney disease stage III	Chronic kidney disease stage 3	433144002
Chronic kidney disease stage three	Chronic kidney disease stage 3	433144002
Chronic kidney disease, stage 2	Chronic kidney disease stage 2	431856006

Results are limited to top 100. Consider refining search.

Select   Cancel

Click Set Chronic, then clear the Onset Date checkbox, since we don't really know what that is.

Click the Accept button, then close the **Problems Module** to return to the **Histories Tab**.

Problems

Problem List | Billing ICD List

Refresh | Preferences | Show All Statuses | ☐ Show My Tracked Problems Only | ☐ Show Chronic Problems Only

Concept Id	Description	Fully Specified Name	Chronic	Secondary Condition	Problem S
Active					
Chronic kidney disease stage 3					
433144002	Chronic kidney disease stage 3	Chronic kidney disease stage 3	☑	☐	Active
Essential hypertension					
59621000	Primary HTN	Essential hypertension	☑	☐	Active
Open-angle glaucoma					
Tobacco dependence syndrome					
Type II diabetes mellitus without complication					

Add Problem | Re-Code | Resolve | Set Chronic | ✕ Delete | Resources ▾ | View/Add Notes | View History | Reconcile

Add to Billing ICD List | Add to My Tracked Problems | Remove from My Tracked Problems

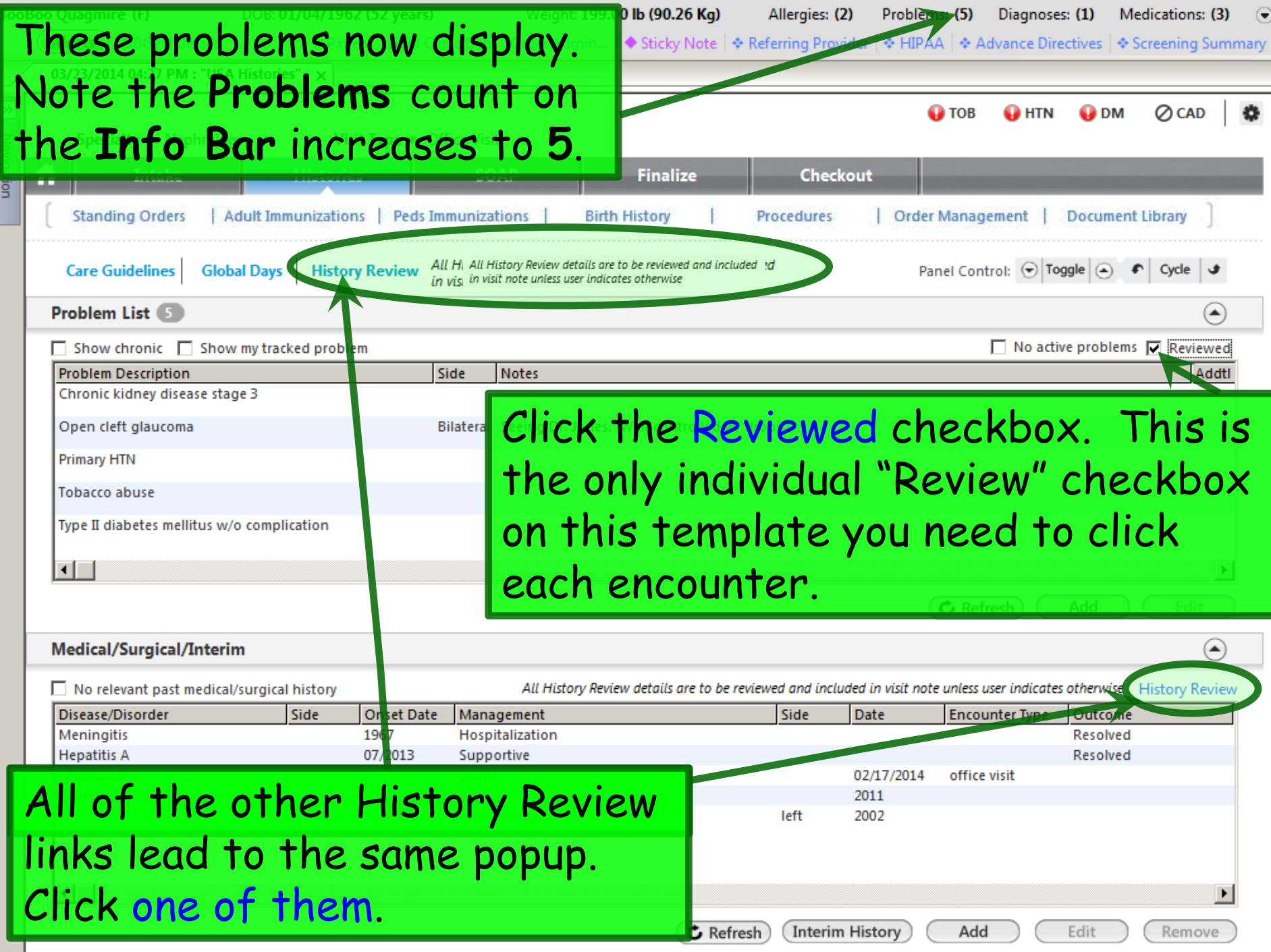Accept | Cancel

Concept Id: 431856006

Description: Chronic kidney disease stage 2   Fully Specified Name: Chronic kidney disease stage 2

Onset Date: ☑ 03/23/2014   Resolved Date: ☐ 03/23/2014   Last Addressed:

Resolved By: Resolved Reason:

These problems now display. Note the **Problems** count on the **Info Bar** increases to **5**.

❖ Sticky Note   ❖ Referring Provider   ❖ HIPAA   ❖ Advance Directives   ❖ Screening Summary

03/23/2014 04: 7 PM : "H A Histories"   ×

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Finalize   Checkout

Standing Orders | Adult Immunizations | Peds Immunizations | Birth History | Procedures | Order Management | Document Library

Care Guidelines | Global Days | History Review | All H | All History Review details are to be reviewed and included d in vis | in visit note unless user indicates otherwise

Panel Control: ⊙ Toggle ⊙ ↻ Cycle ⤵

Problem List 5   ▲

☐ Show chronic ☐ Show my tracked prob em   ☐ No active problems ☑ Reviewed

Problem Description	Side	Notes	Addtl
Chronic kidney disease stage 3			
Open cleft glaucoma	Bilatera		
Primary HTN			
Tobacco abuse			
Type II diabetes mellitus w/o complication			

Click the Reviewed checkbox. This is the only individual "Review" checkbox on this template you need to click each encounter.

↻ Refresh   Add   Edit

Medical/Surgical/Interim   ▲

☐ No relevant past medical/surgical history   All History Review details are to be reviewed and included in visit note unless user indicates otherwis History Review

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Meningitis		196	Hospitalization				Resolved
Hepatitis A		07/ 013	Supportive				Resolved
					02/17/2014	office visit	
					2011		
				left	2002		

All of the other History Review links lead to the same popup. Click one of them.

↻ Refresh   Interim History   Add   Edit   Remove

BooBoo Quagmire (F)   DOB: **01/04/1962** (52 years)   Weight: **199.00 lb (90.26 Kg)**   Allergies: **(2)**   Problems: **(5)**   Diagnoses: **(1)**   Medications: **(3)**

Alerts   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM : "USA Histories"   ✕

⚠ TOB   ⚠ HTN   ⚠ DM   ⊘ CAD   ⚙

Specialty ▼ Nephrology   Visit Type ▼ Office Visit

| 🏠 | Intake | Histories | SOAP | Finalize | Checkout |

Standing Orders | Adult Immunizations | Peds Immunizations | Birth History | Procedures | Order Management | Document Library

Care Guidelines | Global Days | History Review   *All History Review details are to be reviewed and included in visit note unless user in...*

Panel Control: ▼ Toggle ▲ ↻ Cycle ↓

Problem List ⑤

☐ Show chronic   ☐ Show my tracked problem

Problem Description	Side	Notes
Chronic kidney disease stage 3		
Open cleft glaucoma	Bilateral	Seeing Dr. Jo
Primary HTN		
Tobacco abuse		
Type II diabetes mellitus w/o complication		

History Review ✕
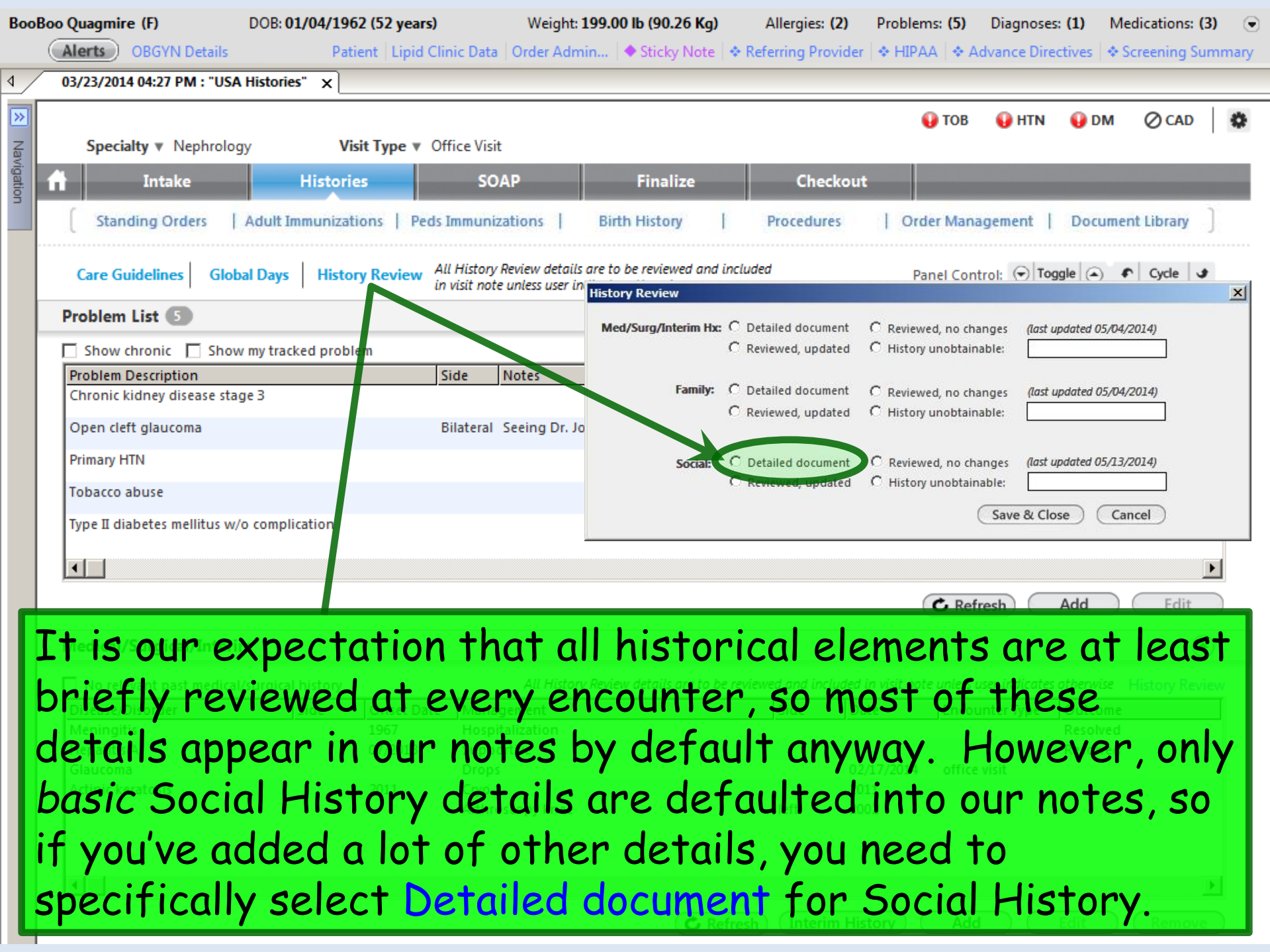
Med/Surg/Interim Hx:	○ Detailed document	○ Reviewed, no changes	*(last updated 05/04/2014)*
	○ Reviewed, updated	○ History unobtainable:	
Family:	○ Detailed document	○ Reviewed, no changes	*(last updated 05/04/2014)*
	○ Reviewed, updated	○ History unobtainable:	
Social:	○ Detailed document	○ Reviewed, no changes	*(last updated 05/13/2014)*
	○ Reviewed, updated	○ History unobtainable:	

Save & Close   Cancel

↻ Refresh   Add   Edit

It is our expectation that all historical elements are at least briefly reviewed at every encounter, so most of these details appear in our notes by default anyway. However, only *basic* Social History details are defaulted into our notes, so if you've added a lot of other details, you need to specifically select Detailed document for Social History.

Now review Medical/Surgical/Interim history. While the Problem List includes ongoing medical issues, the Medical/Surgical/Interim history is for isolated episodes of illness or events such as surgery. There is nothing to add.

Care Guidelines | Global Days | **History Review**   *All History Review details are to be reviewed and included in visit note unless user indicates otherwise*   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

Problem List ⑤   ⊙

☐ Show chronic ☐ Show my tracked problem   ☐ No active problems ☑ Reviewed

Problem Description	Side	Notes	Addtl
Chronic kidney disease stage 3			
Open cleft glaucoma	Bilateral	Seeing Dr. Jones. Well-controlled w/ drops.	1
Primary HTN			
Tobacco abuse			
Type II diabetes mellitus w/o complication			

◀ | ▶

↻ Refresh   Add   Edit

Medical/Surgical/Interim   ⊙

☐ No relevant past medical/surgical history   *All History Review details are to be reviewed and included in visit note unless user indicates otherwise*   History Review

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type	Outcome
Meningitis		1967	Hospitalization				Resolved
Hepatitis A		07/2013	Supportive				Resolved
Glaucoma			Drops		02/17/2014	office visit	
Actinic keratosis		2011	Cryo		2011		
			Arthroscopy knee	left	2002		

◀ | ▶

↻ Refresh   Interim History   Add   Edit   Remove

⦿ TOB   ⦿ HTN   ⦿ DM   ⊘ CAD   ⚙

Specialty ▾ Nephrology   **Visit Type ▾** Office Visit

🏠 | Intake | Histories | SOAP | Finalize | Checkout

Demographics   Order Management   Chart Abstraction

Now move to the **Family History**. We have nothing to add.

Care Guidelines   Global Days   History Review   All History Review details are to be reviewed and included in visit note unless user indicates otherwise   Panel Controls   Toggle   Cycle

Family   ⭐   ▲

☐ No relevant family history ☐ Adopted - no family history known

All History Review details are to be reviewed and included in visit note unless user indicates otherwise   History Review

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments
				No family history of Alcoholism		N	
				No family history of Diabetes mellitus		N	
Father		Y					
Father				Coronary artery disease		N	
Father				Hypertension		N	
Father		Y		Cancer, lung	65	Y	
Mother				Cancer, bowel			
Mother							
Sister				Cancer, breast	49	Y	

Then move to **Social History**. We can review some details by selecting the left side navigation.

Add   Edit   Remove

Social   ▲

History Review   *All History Review details are to be reviewed and included in visit note unless user indicates otherwise*   ⦿ Last documented ○ All ⓘ

- Substances
  - ▸ Tobacco
  - Alcohol/Caffeine
- Statuses
- Lifestyle
- Occupation
- Comment
- Diet History
- Environmental

Encounter Date	Tobacco Use	Tobacco Type	Smoking Status	Usage Per Day	Pack Years	Date Quit
02/26/2014	Yes	Cigarette	Heavy tobacco smoker	1 Packs	35.00	

Encounter Date:Time

Developmental History   Confidential History   Add

To review further details or to make additions click the Add button.

❖ Tobacco
❖ Alcohol/Caffeine
❖ Statuses
❖ Lifestyle
❖ Occupation
❖ Comments
❖ Diet History
❖ Environmental

Save & Close   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

Tobacco Use

Have you ever used tobacco? ○ No/never ● Yes ○ Unknown ❖ Exclusions   ☑ Reviewed   Updated: 03/23/2014

Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:		Years used:	Pack year:	Age started:	Age stopped:
☑ Cigarette	☑	1	Packs	35	35.00		
☐ Cigarillo	☐		cigarillos				
☐ Cigar	☐		cigars				
☐ Pipe	☐		pipes				

Non-Smoking Tobacco Use

Tobacco type:	Use daily:	Usage per day:		Years used:	Age started:	Age stopped:
☐ Chewing	☐		units			
☐ Smokeless	☐		units			
☐ Snuff	☐		units			

*Smoking status: Heavy tobacco smoker   Tobacco use status:

Review & update as necessary. Here we have nothing to add, so we'll click the Reviewed checkbox, then Save & Close.

Encounter Date▽	Tobacco Type	Usage Per Day	Years Used	Pack Year	Status	Age Started	Age Stopped
02/26/2014	Cigarette	1 Packs	35.00	35.00	Heavy tobacco smoker		

Efforts To Quit Tobacco

Have you ever tried to quit using tobacco? ○ No/never ○ Yes ○ Unknown

Tobacco type:	Month:	Day:	Year:	Longest tobacco free:	Cessation method:	Relapse reason:
	Quit:					

Add   Update   Clear

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

| 🏠 | Intake | Histories | SOAP | Finalize | Checkout |

[Standing Orders | Adult Immunizations | Peds Immunizations | Birth History | Procedures | Order Management | Document Library]

Care Guidelines | Global Days | History Review   All History Review details are to be reviewed and included in visit note unless user indicates otherwise   Panel Control: ⊙ Toggle ⌃ ↺ Cycle ↴

Family   🗨   ⌃

☐ No relevant family history   ☐ Adopted - no family history known

All History Review details are to be reviewed and included in visit note unless user indicates otherwise   History Review

Relationship	Family Member Name	Deceased	Age at Death	Condition	Onset Age	Cause of Death	Comments	
				No family history of Alcoholism		N		
				No family history of Diabetes mellitus		N		
Father		Y						
Father				Coronary artery disease		N		
Father				Hypertension		N		
Father		Y		Cancer, lung	65	Y		
Mother				Irritable bowel disease		N		
Mother				Asthma		N		
Sister				Cancer, breast	49	N		

Add   Edit   Remove

Social   ⌃

History Review   A...

	Substances		Encounter Date	Tobacco Use	Tobacco Type	Smoking Status		Usage Per Day	Pack Years	Date Quit
▸	Tobacco									
	Alcohol/Caff...									
	Statuses									
	Lifestyle									
	Occupation									
	Comment									
	Diet History		Encounter Date/Time							
	Environmental									

Developmental History   Confidential History   Add

Let's say the clinic has standing orders to perform a urinalysis on all patients, & a sugar on all diabetics. Click the Standing Orders link, which can be found in several locations.

On the **Standing Orders** popup, click in the Display order set box. In the ensuing popup, double-click Office Tests.

Office Services

Panel Control: ⊙ Toggle ⊙ ↶ Code ↶

Office Services 0

Orders
(Highlight a row to select)

Display category: ALL

Order Category	Lab Name	Proc. Code	Side	Diagnosis Description
ALL	Allergen immunotherapy, 2+ injections	95117		
ALL	Allergen immunotherapy, one injection	95115		
ALL	Allergen immunotherapy, one injection	95115		BUDD-CHIARI SYNDROME
ALL	Antigen therapy services, single/mult antigen			
ALL	Assay, albumin, urine, microalbumin, semiquan			
ALL	Assay, blood PKU			

Diagnosis

*Order:

*Diagnosis:

Ngkbm Dbp Ofc Orderset Types

Txt Set Type
ALL
Body
Head/Spine
Lower Extremity
Office Meds
Office Tests
ORT
Upper Extremity

Results/Report

Interpretation: [   ] Details
Clinical
indication: [   ]

Details: [   ]

Today's Orders

☐ Submit to Superbil

Status	Office Diagnostic Description	Side

Refresh   OK   Cancel

Quick Task   Place Order   Update

Diagnostic History Entry 0   ⊙

Save & Close   Cancel

Scroll down & find **Glucose blood test** associated with Diabetes…250.00. Select that, then click the **Details**.

Office Services

Panel Control: ⊙ Toggle ⊚ ↩ Cycle ↪

Office Services ⓪ ⊙

Orders
(Highlight a row to select)

Display category: Office Tests

Order Category	Lab Name	Proc. Code	Side	Diagnosis Description	DX Code	De
Office Tests	Flu test, rapid	87804		FLU W RESP MANIFEST NEC	487.1	
Office Tests	Glucose blood test	82962		DMII WO CMP NT ST UNCNTR	250.00	nu
Office Tests	Glucose blood test	82962		DMI WO CMP NT ST UNCNTRL	250.01	nu
Office Tests	Glucose blood test	82962		ABNORMAL GLUCOSE NEC	790.29	nu
Office Tests	Glucose blood test	82962		OTHER ALTER CONSCIOUSNES	780.09	nu
Office Tests	Glucose blood test	82962		URINARY FREQUENCY	788.41	nu

Diagnosis

*Order: Glucose blood test   Procedure code: 82962   Side:

*Diagnosis: DMII WO CMP NT ST UNCNTR   Dx code: 250.00   Status:

Add or... ...Assessment

Results/Report

Interpretation: _____ Details   Normal value/rang...

Clinical indication: _____

Sort By: ⊙ Summary ⊙ Phrase My Phrases | Manage My Phrases

Details: _____

Enter **156 mg/dL**, then click **OK**.

Today's Orders

al order/needs sign-off ☐ Send task automatically   Additional Orders | Task

Value   [x]

156

7	8	9
4	5	6
1	2	3
0	.	

+ − −

Clear

OK   Cancel

Status ▽	Office Diagnostic Description		Interpretation	Result	Performed By	C

Quick Task   Place Order   Update

Diagnostic History Entry ⓪ ⊙

Save & Close   Cancel

Office Services

Panel Control: ⊙ Toggle ⊙ ↻ Cycle ↵

Office Services ⓪ ▲

Orders
(Highlight a row to select)

Display category: Office Tests

Order Category	Lab Name	Proc. Code	Side	Diagnosis Description	DX Code	De ▲
Office Tests	Flu test, rapid	87804		FLU W RESP MANIFEST NEC	487.1	
Office Tests	Glucose blood test	82962		DMII WO CMP NT ST UNCNTR	250.00	nu
Office Tests	Glucose blood test	82962		DMI WO CMP NT ST UNCNTRL	250.01	nu
Office Tests	Glucose blood test	82962		ABNORMAL GLUCOSE NEC	790.29	nu
Office Tests	Glucose blood test	82962		OTHER ALTER CONSCIOUSNES	780.09	nu
Office Tests	Glucose blood test	82962		URINARY FREQUENCY	788.41	nu

Diagnosis

*Order: Glucose blood test   Procedure code: 82962   Side:

*Diagnosis: DMII WO CMP NT ST UNCNTR   Dx code: 250.00   Status:

(Add or Update Assessment)   (Clear)

Results/Report

Click Submit to Superbill, then Place Order.

Interpretation: see detail   Details   Normal value/range: Unit of measure:
Clinical indication:

Sort By: ○ Summary ● Phrase   My Phrases | Manage My Phrases

Details: 156

Today's Orders

☐ Submit to Superbill   ☐ Verbal order/needs sign-off   ☐ Send task automatically   Additional Orders | Task

Status ▽	Office Diagnostic Description	Side	Interpretation	Result	Performed By	Cl

(Quick Task)   (Place Order)   (Update)

Diagnostic History Entry ⓪ ▼

(Save & Close)   (Cancel)

In a similar manner, we'll find Urinalysis, dipstick. Here we'll be presented with a popup to enter U/A results. When done click OK, then Close.

Office Services

Panel Control: ⊙ Toggle ⊙ 🔄 Cycle 🔄

Office Services ⊙   ▲

(Highlight a row to select)   Display category: Office Tests

				DX Code	De ▲
Office Tests	Glucose; quantitative, blood (except reagent strip)	82947			nu
		83036	DMII WO CMP NT ST UNCNTR		250.00	nu
		83036	DMI WO CMP NT ST UNCNTRL		250.01	nu
Office Tests	Hemoglobin				
Office Tests	INR/PT				
Office Tests	INR/PT				

Diagnosis

*Order: Hemoglobi

*Diagnosis: DMII WO C

Results/Report

Interpretation: see detail

Clinical indication:

Details: 7.4

Today's Orders

Status ▽	Office Diagnostic [
completed	Glucose blood test

Urine Dipstick

Urine Dipstick ○ Normal ○ See detail

Color
- ● light yellow
- ○ yellow
- ○ dark yellow
- ○ amber
- ○ bloody

Glucose
- ○ negative
- ○ 100 mg/dl
- ● 250 mg/dl
- ○ 500 mg/dl
- ○ 1000 mg/dl
- ○ 2000> mg/dl

Bilirubin
- ● negative
- ○ small
- ○ moderate
- ○ large

Ketones
- ● negative
- ○ trace
- ○ small
- ○ moderate
- ○ large
- ○ very large

Specific Gravity
- ○ 1.000
- ○ 1.005
- ● 1.010
- ○ 1.020
- ○ 1.025
- ○ 1.030

Blood
- ● negative
- ○ trace non-hem
- ○ mod. non-hem
- ○ trace
- ○ small
- ○ moderate
- ○ large

pH
- ○ 5.5
- ● 6.0
- ○ 6.5
- ○ 7.0
- ○ 7.5
- ○ 8.0
- ○ 8.5

Albumin
- ○ negative
- ○ trace
- ● small
- ○ 1+
- ○ 2+
- ○ 3+
- ○ 4+

Urobilinogen
- ○ normal
- ● 2 mg/dl
- ○ 4 mg/dl
- ○ 8 mg/dl

Nitrite
- ● negative
- ○ positive

Leukocytes
- ● negative
- ○ trace
- ○ small
- ○ moderate
- ○ large

Ok   Cancel

Quick Task   Place Order   Update

Diagnostic History Entry ⓪   ▽

Save & Close   Cancel

Alerts   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM : "*USA Intake"   ✕

Navigation

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Specialty ▼ Nephrology   Visit Type ▼ Office Visit

🏠 | Intake | Histories | SOAP | Finalize | Checkout

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days   Panel Control: ⊙ Toggle ⊙ | ↻ Cycle ↪

General   ⊙
Vital Signs   ⊙
Reason for Visit   ⊙
Medications   ⊙
Allergies   ⊙
Orders   ⊙

❖ Lab/Radiology Order Processing | Order Management | Immunizations | Standing Orders | Task

Status	Ordered	Order	Timeframe	Comments

▸ View of All Orders
Labs
Diagnostics
Office Service
View Immunizations Due
Procedures
Referrals

Now click Generate Intake Note using the button at the bottom of the **Intake** or **Histories** Tab.

Add   Edit

Review of Systems   ⊙

Generate Intake Note

File   Edit   View   Tools   Admin   Utilities   Insert   Format   Table   Window   Help

Logout   Save   Clear   Delete   USA FAMILY MEDICINE   DUFFY, ROBERT LAMAR MD   Patient   History   Inbox   PAQ   Medications   Templates   Documents   Images   Orders   Problems   Apps   Close

BooBoo Quagmire (F)   DOB: 01/04/1962 (52 years)   Weight: 199.00 lb (90.26 Kg)   Allergies: (2)   Problems: (5)   Diagnoses: (1)   Medications: (3)

Alerts   OBGYN Details   Patient   Lipid Clinic Data   Order Admin...   ◆ Sticky Note   ◆ Referring Provider   ◆ HIPAA   ◆ Advance Directives   ◆ Screening Summary

03/23/2014 04:27 PM : *USA Intake   03/23/2014 04:27 PM : Document "intake_note"   x

TX Text

Segoe UI   10   B I U   100%

PATIENT: BooBoo Quagmire
DATE OF BIRTH: 01/04/1962
DATE: 03/23/2014 4:27 PM
VISIT TYPE: Office Visit

History of Present Illness:
1. chronic kidney disease
2. swelling

Intake Comments: CKD followed by MD OOT; he was mentioning possible dialysis soon. Just moved to town. Saw
FM last month & got meds refilled, but missed F/U appt. Feet have been swelling worse in last 3-4 wks.

Problem List:

Problem Description	Onset Date	Chronic	Notes
Tobacco abuse		Y	
Open cleft glaucoma		Y	
Type II diabetes mellitus	01/01/2009	Y	
w/o complication		Y	
Primary HTN		Y	
Chronic kidney disease		Y	
stage 3			

Family History

Relationship	Family Member Name	Deceased

Patient History

Patie...   Patie...   Cate...

New   Lock   Search

☐ 03/23/2014 04:27 PM
   *Intake
   *USA Intake
   Medication
   USA Histories
   intake_note
☐ 03/03/2014 03:38 PM
☐ 03/02/2014 03:35 PM
☐ 03/01/2014 03:25 PM
☐ 02/28/2014 03:22 PM
☐ 02/27/2014 03:14 PM
☐ 02/26/2014 04:45 PM
☐ 02/25/2014 05:05 PM
☐ 02/20/2014 09:10 AM
☐ 02/14/2014 03:56 PM

Custom

The Intake Note is created, summarizing all of the data you've just entered.

Close this, returning you to the Intake Tab.

Ready   NGDevl   USA Health Services Foundation   rlduffy   CAP   NUM   SCRL   03/23/2014

BooBoo Quagmire (F)   DOB: **01/04/1962 (52 years)**   Weight: **199.00 lb (90.26 Kg)**   Allergies: **(2)**   Problems: **(5)**   Diagnoses: **(1)**   Medications: **(3)**

Address: **555 Knock Knee Drive**   MRN: **000000007767**   Emergency Relation: PCP: **DUFFY, ROBERT LAMAR ...**
Mobile, AL 36604   Insurance: **BCBS OF ALABAMA**   Emergency Phone: Referring:
Contact: **(251) 555-1234 (Home)**   NextMD: **No**   Pharmacy 1: **LINCOLN PHARM...**   Rendering: **DUFFY, ROBERT LAMAR ...**

Alerts | OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM : "*USA Intake"   ✕

Navigation

❗TOB   ❗HTN   ❗DM   ⊘CAD   ⚙

Specialty ▼ Nephrology   Visit Type ▼ Office Visit

| 🏠 | Intake | Histories | SOAP | Finalize | Checkout |

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guide   Global D...   Pan...   Cycle ↩

General   ⌄

Vital Signs   ⌄

The patient is ready for the provider. On the
re-expanded **Info Bar** & click the Tracking icon.

Reason for Visit   ⌄

Medications   ⌄

Allergies   ⌄

Orders   ⌃

❖ Lab/Radiology Order Processing | Order Management | Immunizations | Standing Orders | Task

	Status	Ordered	Order	Timeframe	Comments
▸ View of All Orders					
Labs					
Diagnostics					
Office Services					
View Immunizations Due					
Procedures					
Referrals					

Todays Patient Tracking

Click in the Room box & select a room; alternately, you can just type a room number in the box.

Appointment date: 02/21/2014   Today's date: 02/24/2014

Appointment information:

9:00 AM DUFFY MD, ROBERT LAMAR   Reason:

Room:

Status:

Patient Tracking: ment date shown.

Appt Time ▽	Room

Ngkbm Get Dbpicklist Items

List Item	
Checkout	
Exam 1	
Exam 2	
Exam 3	
Exam 4	
Exam 5	
Exam 6	
Lab	
Procedure room	
Waiting room	
X-ray	

Refresh   OK   Cancel

Task   EHR Appointments   Save & Close   Cancel

Todays Patient Tracking

Next, click in the Status box & select waiting for provider.
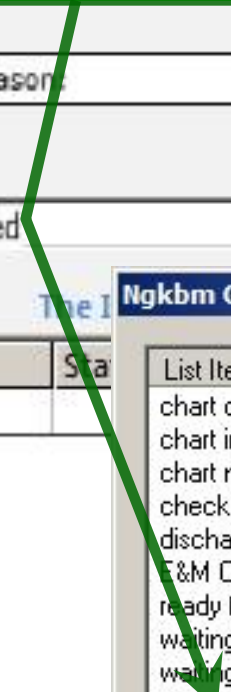
Appointment date: 02/21/2014   Today's date: 02/24/2014

Appointment information:

| 9:00 AM DUFFY MD, ROBERT LAMAR Reason: |

Room: **Status:**

| Exam 1 | | Attended | (Entries uploaded on "Save and Close".)

Patient Tracking: The I

Appt Time ▽	Room	Sta

◄

Ngkbm Get Dbpicklist Items

List Item	
chart complete	
chart incomplete	
chart needs sign-off	
checked out	
discharged	
E&M Code Submitted	
ready for check-out	
waiting for educator	
waiting for nursing	
waiting for provider	
with nursing	
with provider	

Refresh   OK   Cancel

Todays Patient Tracking ✕

Appointment date: 02/21/2014   Today's date: 02/24/2014

Appointment information:

| 9:00 AM DUFFY MD, ROBERT LAMAR Reason: |

Room: Status:
| Exam 1 | | waiting for provider | (Entries uploaded on "Save and Close".)

Patient Tracking: The Inbox will update today's calendar and not the appointment date shown.

Appt Time ▽	Room	Status	Time	Documented By

When done click Save & Close.

(Task) (EHR Appointments) (Save & Close) (Cancel)

Patient

Location

Provider

Date

The provider then opens the chart from the appointment list & performs the 4-point check.

File Edit Default View Tools Admin Utilities Window Help

USA FAMILY MEDICINE ▼ DUFFY, ROBERT LAMAR MD ▼

Logout Save Clear Delete Patient History Inbox PAQ Medications Templates Documents Images Orders Problems Apps Close

BooBoo Quagmire (F)   DOB: 01/04/1962 (52 years)   Weight: 199.00 lb (90.26 Kg)   Allergies: (2) Problems: (5) Diagnoses: (1) Medications: (3)

Address: 555 Knock Knee Drive   MRN: 000000007767   Emergency Relation: PCP: DUFFY, ROBERT LAMAR ...
         Mobile, AL 36604   Insurance: BCBS OF ALABAMA   Emergency Phone: Referring:
Contact: (251) 555-1234 (Home)   NextMD: No   Pharmacy 1: LINCOLN PHARM... Rendering: DUFFY, ROBERT LAMAR ...

Alerts   OBGYN Details   Patient | Lipid Clinic Data | Order Admin | ◆ Sticky Note | ◆ Referring Provider | ◆ HIPAA | ◆ Advance Directives | ◆ Screening Summary

03/23/2014 04:27 PM : "*USA Home Page" ×

⊙ TOB   ⊙ HTN   ⊙ DM   ⊘ CAD   ⚙

Specialty Nephrology   Visit Type ▼ Office Visit

Intake   Histories   SOAP   Finalize   Checkout

Standing Order | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management | Document Library

Care Guidelines | Global Days   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↩

Medical Chart Summary

Allergies
Assessment History
Clinical Guidelines
Communication History
Diagnostics
Family History
HPI's
Labs
Medications
Office Labs
Office Procedures
Past Medical/Surgical History
Patient Provider
Physical Exams
Plans

Date	Time	Temp F	BP	Pulse	Respiration	Ht In	Wt Lb	BMI	BSA	Pain Score	HAQ Score	Pulse
03/23/2014	5:12 PM	97.7	158/94	80	16	66.00	199.00	32.12				
02/26/2014	4:49 PM	98.9	120/84	88	16	66.00	156.00	25.18				
02/25/2014	5:06 PM	99.0	133/86	88	16	66.00	158.00	25.50				

Patient History

Patie... Patie... Cate...

New   Lock   Search

03/23/2014 04:27 PM
  *Intake
  *USA Intake
  Medication
  USA Histories
  intake_note
03/03/2014 03:38 PM
03/02/2014 03:35 PM
03/01/2014 03:25 PM
02/28/2014 03:22 PM
02/27/2014 03:14 PM
02/26/2014 04:45 PM
02/25/2014 05:05 PM

Custom

The provider generally starts on the Home Tab.

It's good to begin by looking for Sticky Notes & Alerts; there are none on this patient.

Also take note of the Risk Indicators.
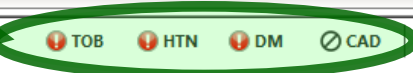
You can select any of the headings on the left to view various aspects of the chart. In particular, this is a good place to look at Office Lab results or review previous vital signs.

Note also you can use the collapsible panels or scroll down to see a lot more information.

03/23/2014 04:27 PM : "*USA [Home Page" X] ⊘ CAD ✱

The Problem List is viewable & editable here.

Specialty ▼ Nephrology   Visit Type ▼ Office Visit

🏠 | **Intake** | **Histories** | **SOAP** | **Finalize** | **Checkout** | |

[Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management | Document Library]

Care Guidelines | **Global Days**   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

Medical Chart Summary   ⊙

Problem List ⑤   ⊙

☐ Show chronic ☐ Show my tracked problems   ☐ No active problems ☐ Reviewed

Last Addressed	Problem Description	Onset Date	Chronic	Secondary	Clinical Status	Provider	Location	Notes
	Tobacco abuse		Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
	Open cleft glaucoma		Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	Seeing Dr. Jones. Well-controlled w/ drop
	Type II diabetes mellitus w/o complication	01/01/2009	Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	
	Primary HTN		Y	N		DUFFY, ROBERT LAMAR	USA FAMILY MEDICINE	

◄ | ►

⟳ Refresh   Add   Edit

History Summary   ⊙

⏱ History Review | All History Review details are to be reviewed and included in visit note unless user indicates otherwise   Confidential

☐ No relevant past medical/surgical history

Disease/Disorder	Side	Onset Date	Management	Side	Date	Encounter Type
▶ Medical						
Surgical/mgmt	Meningitis	1987	Hospitalization			
Interim		07/2013	Preventive			Visit
Social	Actinic keratosis	2011	Cryo		2011	Visit
Family						
Diagnostic						

Likewise, you can review & update everything else that appears on the Histories Tab from here. Select the category of history desired on the left.

Allergies ⌃

❖ Comment ☐ No known allergies ◯ Allergies added today ◉ Reviewed, no change

Allergen	Reaction	Medication Name	Comment
CHLORAL HYDRATE	Speaks in tongues		
PEANUT	Heebee Geebies		

Allergies, meds, vital signs, office labs—everything that can be found on the **Intake** & **Histories Tabs** can be reviewed & if necessary updated from this tab.

Medications ⌃

Patient status: ☐ Transitioning into care ☐ Summary of care received ⭐   ❖ Comment ☐ No medications ☑ Medications reconciled ⓘ

Medication	Sig Description
furosemide 20 mg tablet	1 daily in AM
Lantus Solostar 100 unit/mL (3 mL) Sub-Q Insulin Pen	18 units each evening
lisinopril 10 mg tablet	1 daily

(Add/Update) (Reconcile)

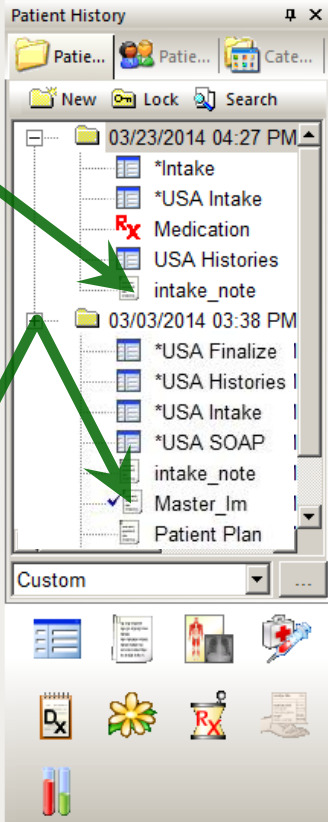**Vital Signs** ⚠ Vital Signs Outside Normal Range ⌃

History | Graph

Time	Ht (in)	Wt (lb)	BMI	BP	Pulse	Respiration	Temp (F)	Pulse Ox Rest	BSA	Pain level	Comments
5:12 PM	66.00	199.00	32.12	158/94	80	16	97.7				

You can also just review the **intake_note** to see a summary as well. Regardless of the method chosen, the provider is responsible for reviewing & confirming this information, & updating it as necessary.

You could also review the **Master_Im** (visit note) from the last visit with the PCP.

File Edit Default View Tools Admin Utilities Window Help

Logout Save Clear Delete   USA FAMILY MEDICINE ▾ DUFFY, ROBERT LAMAR MD ▾   Patient History Inbox PAQ Medications Templates Documents Images Orders Problems Apps Close

BooBoo Quagmire (F)   DOB: 01/04/1962 (52 years)   Weight: **199.00 lb** (90.26 Kg)   Allergies: (2)   Problems: (5)   Diagnoses: (1)   Medications: (3)

Address: **555 Knock Knee Drive**   MRN: **000000007767**   Emergency Relation: PCP: **DUFFY, ROBERT LAMAR ...**
          Mobile, AL 36604   Insurance: **BCBS OF ALABAMA**   Emergency Phone: Referring:
Contact: **(251) 555-1234 (Home)**   NextMD: **No**   Pharmacy 1: **LINCOLN PHARM...** Rendering: **DUFFY, ROBERT LAMAR ...**

Alerts   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ◆ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

03/23/2014 04:27 PM : "*USA Home Page"   ✕

🛈 TOB   🛈 HTN   🛈 DM   ⊘ CAD   ⚙

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

| 🏠 | **Intake** | **Histories** | **SOAP** | **Finalize** | **Checkout** | |

[Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management | Document Library]

Care Guidelines   **Global Days**   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

Medical Chart Summary   ⊙

Allergies	Date	Time	Temp F	BP	Pulse	Respiration	Ht In	Wt Lb	BMI	BSA	Pain Score	HAQ Score	Pulse
Assessment History	3/23/2014	5:12 PM	97.7	158/94	80	16	66.00	199.00	32.12				
Clinical Guidelines	02/26/2014	4:49 PM	98.9	120/84	88	16	66.00	156.00	25.18				
Communication History	02/25/2014	5:06 PM	99.0	133/86	88	16	66.00	158.00	25.50				
Diagnostics													
Family History													
HPI's													
Labs													
Medications													
Office Labs													
Office Procedures													
Past Medical/Surgical History													
Patient Providers													
Physical Exams													
Plans													

Patient History ⊞ ✕

📁 Patie... 👥 Patie... 📇 Cate...

📁 New 🔒 Lock 🔍 Search

⊟ 📁 03/23/2014 04:27 PM
   📄 *Intake
   📄 *USA Intake
   ℞ Medication
   📄 USA Histories
   📄 intake_note
⊞ 📁 03/03/2014 03:38 PM
⊞ 📁 03/02/2014 03:35 PM
⊞ 📁 03/01/2014 03:25 PM
⊞ 📁 02/28/2014 03:22 PM
⊞ 📁 02/27/2014 03:14 PM
⊞ 📁 02/26/2014 04:45 PM
⊞ 📁 02/25/2014 05:05 PM

Custom ▾   ...

Ready   NGDevl | USA Health Services Foundation | rlduffy | | CAP NUM SCRL | 03/23/2014

When you're done reviewing the chart, move to the SOAP tab.

We'll start entering the HPI. First note that you can keep or edit this introductory line—or delete it all together.

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days |

Panel Control: ⊙ Toggle ⊙ ↰ Cycle ↲

Reason for Visit ⊙

Introduction:

This 52 year old female presents for chronic kidney disease and swelling.

☐ Do not launch HPI

◆ Intake Comments

	Reason for Visit	History of Present Illness
anemia	chronic kidney disease	
chronic kidney disease	swelling	
diabetes		
edema		
education		
ESRD		
hyperparathyroidism		
hypertension		
kidney stones		
proteinuria		
renal failure		
urinary problems		

If you didn't previously note them, you can review the nurse's **Intake Comments**.

Next, you have some options as to how to proceed. You can click on one of the **Reasons for Visit** to open the **HPI Popup**. We'll click chronic kidney disease.

Diagnostics   Comments

You can use **picklists**, **checkboxes**, & **bullets** to document elements of the HPI. You can type a little more info in the **Comments** box.

And you can save & reuse presets.

When done click Save & Close.

Nephrology HPI

Information field that has been pre-populated from another HPI must be changed on the original HPI to prevent conflicting documentation.

Concern: chronic kidney disease

Date of initial visit: 03/23/2014

Severity:
moderate

Current pain scale:

Status:
- Stable
- Improving
- Worsening
- Remission
- Relapsed
- Clinically free of disease

Month: Year:
Date of diagnosis:

Initial Symptoms:
- ☐ Fatique
- ☐ Hematuria
- ☑ Hypertension
- ☐ Lethargy
- ☐ Low back pain
- ☐ Shortness of breath
- ☑ Swelling of foot/ankle
- ☐ Weakness
- Other:
- ☐ None

Secondary To:
- ☐ Diabetes Type I
- ☑ Diabetes Type II
- ☐ Diabetic nephropathy
- ☑ Hypertension
- ☐ IGA
- ☐ Interstitial nephritis
- ☐ Membranous nephropathy
- ☐ Multiple myloma
- Other:
- ☐ None

Associated Symptoms/Pertinent Negatives:
- ☐ No associated symptoms
- ☐ No pertinent negatives
- ☐ All others are negative

No Yes
- ○ ○ Abdominal pain
- ○ ○ Anorexia
- ○ ○ Bleeding
- ○ ○ Bone pain
- ○ ○ Bruising
- ○ ○ Chest pain

No Yes
- ○ ○ Chills
- ○ ○ Constipation
- ○ ○ Cough
- ● ○ Diarrhea
- ○ ○ Dizziness
- ○ ○ Dyspnea

No Yes
- ○ ○ Dysuria
- ○ ○ Fatique
- ● ○ Fever
- ○ ○ Headache
- ○ ○ Hives
- ○ ○ Increased thirst

No Yes
- ○ ○ Insomnia
- ○ ○ Mouth sores
- ○ ○ Nausea
- ○ ○ Night sweats
- ○ ○ Pallor
- ○ ○ Petechiae

- ○ ○ Vomiting
- ○ ○ Weight gain
- ○ ○ Weight loss

Comments: Previous Comments

Save & Close   Cancel

TOB   HTN   DM   ⊘ CAD

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

| 🏠 | Intake | Histories | SOAP | Finalize | Checkout | |

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days | Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

Reason for Visit   ⊙

Comments about HPI Popups:

• HPI popups *can* present a rapid way to document key elements of the HPI if the user is very familiar with the popup.

• For some common complaints you may find yourself saying the same thing repeatedly throughout the day, & using presets may be of help there—though it takes some care not to inadvertently document erroneous or conflicting HPI details when the patient's story differs from the preset.

• And the elements you pick allow the coding assistant to help you bill for the visit—particularly useful for new patient encounters, which require all 3 billing elements.

Comments about HPI Popups:

• But many users find the "pick & click" nature of using HPI popups tedious, slow, & frustrating—and distracting when trying to perform documentation in real time in the exam room.

• The Comments boxes on the HPI popups provide only a limited amount of space to type, which can vary from one to another, so that you never know when you're going to run out of space.

• And when entries from a series of "picks & clicks" are condensed into something resembling English, the result is often awkwardly-worded, not really reflecting any uniqueness of the story or the story-teller. Your eyes glaze over when you read it; sometimes you can't even recognize whether you performed the visit or if it was done by one of your colleagues.

03/23/2014 04:27 PM : "*USA SOAP" ✕

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

🏠 | **Intake** | **Histories** | **SOAP** | **Finalize** | **Checkout** |

[Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management]

Care Guidelines | **Global Days** | Panel Control: ⊙ Toggle ⊙ ↰ Cycle ↩

Reason for Visit   ⊙

Introduction:

This 52 year old female presents for chronic kidney disease and swelling.

☐ Do not launch HPI   ◆ Intake Comments

	Reason for Visit	History of Present Illness
anemia	chronic kidney disease	The patient presents with chronic kidney disease. The initial visit date was 03/23/2014. The patient reports the severity is moderate. The condition is stable. Initial symptoms include hypertension and swelling of foot/ankle. Secondary symptoms include diabetes type II and hypertension. Pertinent negatives include diarrhea, fever, rash and vomiting.
chronic kidney disease		
diabetes		
edema	swelling	
education		
ESRD		
hyperparathyroidism		

There is an alternative many providers will find more comfortable than using the HPI popups. Click the Comments button.

Additional / Manage

(Diagnostics) (Comments)

HOPI Notes ✕

Chief complaint/reason for visit:

(Manage My Phrases)

chronic kidney disease

(My Phrases)

1. Referred to get estab w/ nephrologist after moving to area. Family Medicine's recent notes reviewed, along w/ some records from prev nephrologist in Pensacola, showing GFR of 40, Cr. 3.7. Also has DM & HTN, not optimally controlled. Was out of meds, & just had them refilled at FM. Smoker. No recent eye care.

swelling

(My Phrases)

2. Worsening swelling in legs over last month; thinking back, she says it's actually worsened over last 4-6 mos.

3.

Here you have essentially unlimited space to type the story. Sketch it out with a few words & phrases in real time while interviewing the patient; flesh it out later if desired. You can jump from one complaint to another, just like patients do when telling their story. And you have access to **My Phrases**—a robust way to save & reuse text that you say repeatedly throughout the day. (Setup & use of **My Phrases** is covered in the User Personalization demonstration.)

When done click Save & Close.

(Save & Close) (Cancel)

Your entries are displayed. Note that use of HPI popups & HPI Comments are not mutually exclusive. Especially for new patients you may wish to use the "pick & click" options on the HPI popups for coding purposes, but use HPI Comments to actually "tell the story."

03/

TOB   HTN   DM   CAD

Standing Orders   Adult Immunizations   Immunizations   My   Procedures   Order Management

Global Days   Panel Control: Toggle   Cycle

Reason for Visit

Introduction:

This 52 year old female presents for chronic kidney disease and swelling.

☐ Do not launch HPI   ◆ Intake Comments

Reason for Visit	History of Present Illness
anemia	
chronic kidney disease	chronic kidney disease	The patient presents with chronic kidney disease. The initial visit date was 03/23/2014. The patient reports the severity is moderate. The condition is stable. Initial symptoms include hypertension and swelling of foot/ankle. Secondary symptoms include diabetes type II and hypertension. Pertinent negatives include diarrhea, fever, rash and vomiting.
diabetes	
edema	
education	
ESRD	chronic kidney disease (comments)	Referred to get estab w/ nephrologist after moving to area. Family Medicine's recent notes reviewed, along w/ some records from prev nephrologist in Pensacola, showing GFR of 40, Cr. 3.7. Also has DM & HTN, not optimally controlled. Was out of meds, & just had them refilled at FM. Smoker. No recent eye care.
hyperparathyroidism	
hypertension	
kidney stones	swelling	
proteinuria	
renal failure	
urinary problems	
	swelling (comments)	Worsening swelling in legs over last month; thing back, she says it actually worsened over last 4-6 mos.

Additional / Manage

Diagnostics   Comments

Working down the **SOAP tab**, you come to the **Review of Systems**. Note that some items that are shared with the HPI popups may already be documented. For an established patient, this may be all the ROS you wish to perform.

TOB   HTN   DM   CAD

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

| Intake | Histories | SOAP | Finalize | Checkout |

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days   Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

Reason for Visit

Review of Systems

Constitutional
HEENT
Respiratory
Cardiovascular
Vascular
Gastrointestinal
Genitourinary
Reproductive
Metabolic | Endocrine
Neuro | Psychiatric
Dermatologic
Musculoskeletal
Hematologic
Immunologic

Nephrology - ROS

System	Neg/Pos	Findings
Constitutional	Negative	Fever.
GI	Negative	Diarrhea and vomiting.
Integumentary	Negative	Rash.
Reproductive	Positive	The patient is post-menopausal (Occurred at age 48).

If you need to record further ROS, a good place to start is with the one-screen ROS option you see, which is age & gender-specific. Click Nephrology - ROS.

PHQ

Make additional entries as necessary. You can click on any system heading to take you to a more detailed ROS for that system. And you can save & reuse presets.

When done click Save & Close.

Your new entries display.

You can also directly access other system-specific ROS popups from here to make additions, changes, & deletions.

And you can save & reuse all of these entries, whether entered on the one-screen ROS or the system-specific ones, as discussed in the User Personalization demo.

03/23/2014 04:27 PM : "*USA SOAP" ✕

TOB   HTN   DM   CAD   ⚙

Care Guidelines   Global Days

Panel Control: Toggle   ↻ Cycle ↴

Reason for Visit

Review of Systems

Constitutional
HEENT
Respiratory
Cardiovascular
Vascular
Gastrointestinal
Genitourinary
Reproductive
Metabolic | Endocrine
Neuro | Psychiatric
Dermatologic
Musculoskeletal
Hematologic
Immunologic

Nephrology - ROS

System	Neg/Pos	Findings
Constitutional	Positive	Fatigue.
Constitutional	Negative	Fever.
ENMT	Negative	Otalgia.
Eyes	Negative	Vision loss.
Respiratory	Negative	Cough and dyspnea.
Cardio	Positive	Edema, Leg swelling.
Cardio	Negative	Chest pain, irregular heartbeat/palpitations and syncope.

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

🏠 | **Intake** | **Historie**

[Standing Orders | Adult Immunizatio

Care Guidelines | Global Days |

Continuing down the **SOAP tab**, you can review the **Vital Signs** again. You can add another entry, review a history of previous readings, or see them in graph form.

Reason for Visit

Review of Systems   ⊙

Vital Signs   ⚠ Vital Signs Outside Normal Range   ▲

❖ Health Promotion Plan | History | Graph

Time	Ht (in)	Wt (lb)	BMI	BP	Pulse	Respiration	Temp (F)	Pulse Ox Rest	BSA	Pain level	Comments
5:12 PM	66.00	199.00	32.12	158/94	80	16	97.7				

(Add)   (Edit)   (Remove)

Physical Exam   ▲

                                                    ☀ 💾

Exam	Findings	Details

One Page Exam
Constitutional
Eyes
Nose | Mouth | Throat
Neck | Thyroid
Lymphatic
Respiratory
Cardiovascular
Vascular
Abdomen
Skin | Hair
Musculoskeletal
Extremities
Psychiatric
—————————————
Additional

You'll next move down to the Physical Exam.

(Office Diagnostics)

⬤ TOB   ⬤ HTN   ⬤ DM   ⊘ CAD   ✿

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

First notice the **Office Diagnostics** button. That gives you a chance to review things like urinalyses, pregnancy tests, etc., that your nurse may have done for you through standing orders. Even though you had the chance to review those on the **Home Tab**, it may be that the results weren't available yet when you first went into the room.

Add   Edit   Remove

Physical Exam   ⌃

                                                          🔄   💾

Exam	Findings	Details

One Page Exam
Constitutional
Eyes
Nose | Mouth | Throat
Neck | Thyroid
Lymphatic
Respiratory
Cardiovascular
Vascular
Abdomen
Skin | Hair
Musculoskeletal
Extremities
Psychiatric

Additional

Office Diagnostics

Panel Control: ⊙ | Toggle | ⊙ | ↻ | Cycle ↵

Office Services ②   ⊙

Orders
(Highlight a row to select)   Display category: ALL

Order Category	Lab Name	Proc. Code	Side	Diagnosis Description
ALL	Allergen immunotherapy, 2+ injections	95117		
ALL	Allergen immunotherapy, one injection	95115		
ALL	Allergen immunotherapy, one injection	95115		BUDD-CHIARI SYNDROME
ALL	Antigen therapy services, single/mult antigen	95165		
ALL	Assay, albumin, urine, microalbumin, semiquan	82044		
ALL	Assay, blood PKU	84030		

Diagnosis

*Order: [   ]   Procedure code: [   ]   Side: [   ]

*Diagnosis: [   ]   Dx code: [   ]   Status: [   ]

(Add or Update Assessment)   (Clear)

Results/Report
                                                                                            ✦ Protocols

Interpretation: [   ]   Details   Normal value/range: [   ]   Unit of measure: [   ]

Clinical

Detail: Copy: □ Summary □ Phrase □ Chronic □ Med by PI

Today's Orders   □ Submit to Superbill □ Verbal order/needs sign-off □ Send task automatically   Additional Orders   Task

Status	Order	Description				Provider
completed	Hemoglobin A1c		see detail	7.4		Robert L. Duffy
completed	Glucose blood test		see detail	156		Robert L. Duffy

(Quick Task)   (Place Order)   (Update)

Diagnostic History Entry ⓪   ⊙

(Save & Close)   (Cancel)

This gives you a chance to review any office tests the nurse did via clinic standing orders, if you didn't note them earlier. (Often the results might not have been ready when you first entered the room.) When done click Save & Close.

Physical Exam documentation is performed similarly to the ROS demonstrated above. You can directly access any system from the headings on the left, but you'll often want to start with the age & gender-specific One Page Exam.

Reason for Visit

Physical Exam

One Page Exam
Constitutional
Eyes
Nose | Mouth | Throat
Neck | Thyroid
Lymphatic
Respiratory
Cardiovascular
Abdomen
Skin | Hair
Extremities
Additional

Exam	Findings	Details

Even better, start from a saved preset, as covered in the User Personalization lesson.

While you may well complete the physical exam documentation later after you're done working with the patient, for the ease of discussion I'll go ahead & do it now, illustrating the value of using saved preset exams.

Office Diagnostics

Time	Ht (in)	Wt (lb)	BMI	BP	Pulse	Respiration	Temp (F)	Pulse Ox Rest	BSA	Pain level	Comments
5:12 PM	66.00	199.00	32.12	158/94	80	16	97.7				

Add   Edit   Remove

Physical Exam ⏶

💾

One Page Exam	Exam	Findings	Details
Constitutional			

Eyes

Nose | Mouth | Throat

Lymphatic

Cardiovascular

Abdomen

Skin | Hair

Extremities

Additional

Ngkbm Td Dbp Filter ✕

Set Name
PEFullNlAdultMale-RLD
PEFullNlFemale-RLD

Refresh   OK   Cancel

Office Diagnostics

I'm going to click the Open Preset icon & double-click on PEFullNlFemale-RLD, a preset I've previously saved as my starting point for a typical normal exam for an adult female. It includes items entered via the **One Page Exam** & some of the **system-specific exams**. (Details on setup of these presets are covered in the User Personalization demo.)

Specialty

🏠

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days

Your default normal exam displays. Now let's change the respiratory exam to mention some abnormalities found today. Click on One Page Exam.

Reason for Visit	▼
Review of Systems	▼
Vital Signs ⚠ Vital Signs Outside Normal Range	▼
Physical Exam	▲

One Page Exam
Constitutional
Ears
Nose | Mouth | Throat
Neck | Thyroid
Lymphatic
Respiratory
Cardiovascular
Vascular
Abdomen
Skin | Hair
Musculoskeletal
Extremities
Psychiatric
_____
Additional

Exam	Findings	Details
Constitutional	*	Overall appearance - In no acute distress.
Ears	*	Canal - Right: No excess wax or inflammation, Left: No excess wax or inflammation. TM - Right: Benign, Left: Benign.
Nasopharynx	*	Oropharynx - No redness or drainage.
Neck Exam	Normal	Palpation - Normal. Thyroid gland - Normal.
Breast	Normal	Inspection - Bilateral: Normal. Palpation - Bilateral: Normal.
Respiratory	Normal	Auscultation - Normal. Effort - Normal.
Cardiovascular	Normal	Regular rhythm. No murmurs, gallops, or rubs.
Abdomen	Normal	No abdominal tenderness.
Genitourinary	Normal	No suprapubic tenderness.
Extremity	Normal	No edema.
Neurological	*	Sensory - Grossly normal. Motor - Grossly normal.

(Office Diagnostics)

Nephrology Exam - PE

Default: [_____]

◆ Constitutional

| Level of distress: | ☐ Normal | [_____] | [_____] |
| Nourishment: | ☐ Normal | [_____] | [_____] |

❖ Head/Face

Facial features:	☐ Normal	[_____]	[_____]
Eyebrows:	☐ Normal	[_____]	[_____]
Skull:	☐ Normal	[_____]	[_____]
Hair:	☐ Normal	[_____]	[_____]

❖ Eyes   ☐ Normal

❖ Ears ❖ Nose/Mouth/Throat

Pinna: R	☐ Normal	[_____]	[_____]
L	☐ Normal	[_____]	[_____]
External nose:	☐ Normal	[_____]	[_____]
Lips/teeth/gums:	☐ Normal	[_____]	[_____]

◆ Cardiovascular

Heart Sounds: ☐ Normal S1 ☐ Normal S2 Murmur: ☐ None Jugular vein: HT: [____] cm

Heart rate: ○ Regular rate   ○ Tachycardia   Degree of tilt: [____]

Rhythm: ○ Regular   ○ Regularly irregular   ○ Irregularly irregular

JVD: ○ Absent   ○ Present

❖ Vascular

	Bruits	Absent	Location:	Severity:
Carotids:	☐	[_____]	[_____]
Abdominal, upper:	☐	[_____]	[_____]
	Pulses	Normal	Right:	Left:
Dorsalis pedis:	☐	[_____]	[_____]
Posterior tibial:	☐	[_____]	[_____]

◆ Extremities ❖ Diabetic Foot Exam

| | | Location: | Side: | Severity: | Type: |
| Edema: | ○ No ● Yes | [_____] | [___] | [_____] | [_____] |

Cyanosis: ○ No ○ Yes

Clubbing: ○ Absent ○ Present

Fistula: ○ No ○ Yes

❖ Musculoskeletal

Extremities overview: ☐ Normal [_____] [_____]

Gait: ☐ Normal [_____]

❖ Neurological

Cranial nerves: ☐ II - XII grossly intact ☐ I grossly intact   ❖ Details

DTRs: ☐ Normal [_____] [_____]

Sensory: ☐ Normal [_____] [_____]

❖ Psychiatric

No Yes
○ ○ Oriented to time, place, person and situation
○ ○ Appropriate mood and affect:

No Yes
○ ○ Poor judgement
○ ○ Poor insight
○ ○ Memory loss

Comments: ☐ Carry forward comments

[_____]

Anterior cervical: ○ No   Axillary: ○ No
Posterior cervical: ○ No   Inguinal: ○ No

(Save & Close) (Cancel)

Using this popup and/or the system popups, edit your entry to reflect today's findings. For this example I'll just change Edema to Yes. When done click Save & Close.

Your completed exam displays on the **SOAP tab**.

Using this combination of presets & editing of only specific pertinent findings, sometimes called **documentation by exception**, is a powerful & rapid way to record an accurate exam, customized to the way you want to say it.

TOB   HTN   DM   ⊘ CAD

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

Review of Systems   ▾

Vital Signs   ▾

Physical Exam   ▲

	Exam	Findings	Details
One Page Exam	Constitutional	*	Overall appearance - In no acute distress.
Constitutional	Ears	*	Canal - Right: No excess wax or inflammation, Left: No excess wax or inflammation. TM - Right: Benign, Left: Benign.
Ears			
Nose | Mouth | Throat	Nasopharynx	*	Oropharynx - No redness or drainage.
Neck | Thyroid	Neck Exam	Normal	Palpation - Normal. Thyroid gland - Normal.
Lymphatic	Breast	Normal	Inspection - Bilateral: Normal. Palpation - Bilateral: Normal.
Respiratory	Respiratory	Normal	Auscultation - Normal. Effort - Normal.
Cardiovascular	Cardiovascular	Normal	Regular rhythm. No murmurs, gallops, or rubs.
Vascular	Abdomen	Normal	No abdominal tenderness.
Abdomen	Genitourinary	Normal	No suprapubic tenderness.
Skin | Hair	Extremity	*	Edema.
Musculoskeletal	Neurological	*	Sensory - Grossly normal. Motor - Grossly normal.
Extremities			
Psychiatric			
Additional			

Office Diagnostics

Reason for Visit ⊙

Review of Systems ⊙

Vital Signs ⊙

Physical Exam ⊙

Assessment/Plan ⊙

My Plan
Diagnostics
Re...
Prin... Procedures
Review/C...om Orders
Vi... ...ions
Office Diagnostics
Physical Therapy Orders
Health Promotion Plan

Moving to the bottom of the **SOAP tab**, you might next perform any of several activities: Document assessments & plans, prescribe meds, order labs, plan X-rays, or request referrals.

For this exercise, let's address Assessment/Plan. Begin by clicking the Add/Update button.

☐ Resident-Attending discussion took place   ☐ Attending saw patient

(Consent) (Procedure Scheduling) (Add/Update) (Remove)
✦ Consent

Provider Comm.   Meds   Procedures   Patient Plan   (Visit Document)   EM Coding   Dictation
(Document Library)

Add or Update Assessment

Assessments	My Plan	A/P Details	Labs	Diagnostics	Referrals	Office Procedures	Cosign Orders

Today's Concerns/Reason for Visit:

1. chronic kidney disease 2. swelling

(Select a row from any grid to add to Today's Assessments) ☑ Add Assessments on 1-click

Diagnosis History ☐ Show Chronic only

Diagnosis Description	Code
Abscess	682.9

Add Common Assessment | Diagnosis Code Lookup

Clinical Problems

☐ Show Chronic ☐ Show My Tracked problems ☐ No active problems

Description	Onset Date
Chronic kidney disease stage 3	
Open cleft glaucoma	
Primary HTN	

My Favorites Favorites Category: [All ▼] Filter: [   ]

Description	Code
Benign essential hypertension	401.1
Coronary artery disease	414.00
Cough	786.2
CVA	434.91

Dx description: [   ] Code: [   ] Status: [   ] Site: [   ]

Impression: [   ] Differential Dx: [   ]

☐ Mark diagnosis as chronic Add assessment to: ☐ Clinical problems ☐ My tracked problems ☐ My favorites (Add/Update)

Today's Assessments

A group of tabbed popups appears; let's call this the **Assessment-Plan Suite**. Here you have multiple ways to select diagnoses. The easiest involve picking something from the patient's previous **Diagnoses History**, the **Problems** list, or your **My Favorites** list. (Details are covered in another lesson.)

Add or Update Assessment

| Assessments | My Plan | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders |

Today's Concerns/Reason for Visit:

1. chronic kidney disease 2. swelling

(Select a row from any grid to add to Today's Assessments) ☑ Add Assessments on 1-click

Diagnosis History ☐ Show Chronic only

Diagnosis Description	Code
Abscess	682.9
Chronic kidney disease, Stage III (moderate)	585.3
Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled	250.00
Unspecified essential hypertension	401.9

Add Common Assessment | Diagnosis Code Lookup

Clinical Problems

☐ Show Chronic ☐ Show My Tracked problems   ☐ No active problems

Description	Onset Date
Chronic kidney disease stage 3	
Open cleft glaucoma	
Primary HTN	

My Favorites Favorites Category: [All ▼] Filter: [ ]

Description	Code
Benign essential hypertension	401.1
Coronary artery disease	414.00
Cough	786.2
CVA	434.91

Dx description: [ ] Code: [ ] Status: [ ] Site: [ ]

Impression: [ ] Differential Dx: [ ]

☐ Mark diagnosis as chronic   Add assessment to: ☐ Clinical problems ☐ My tracked problems

Today's Assessments

#	Description(code) Status Site	Impr...
1	Chronic kidney disease, Stage III (moderate) (585...	
2	Unspecified essential hypertension (401.9)	
3	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled (250.00)	

Here I've made a few selections from the Clinical Problems list.

Now let's document some plans. The **My Plan** tab has some potential, but we're still investigating how well that can be applied to our practice setting. So let's move on to A/P Details.

Assessment Plan Details ✕

| Assessments | My Plan | **A/P Details** | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders |

Today's Assessments: *(Select an assessment and enter the details below.)*

Assessment/Plan Expanded View ⓘ

#	Description	Code	Status
1	Chronic kidney disease, Stage III (moderate)	585.3	
2	Unspecified essential hypertension	401.9	
3	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled	250.00	
4	Tobacco use disorder	305.1	

Selected Assessment: Chronic kidney disease, Stage III (moderate)

(Add) (Edit) (Sort DX) (Remove)

Impression/Comments: (My Phrases)

🎤

(Only the first 215 characters will be displayed in the Diagnosis Module.)

Differential Diagnosis: (My Phrases)

🎤

Plan Details

Previous Patient Details | Previous Provider Details | ✢ Health Promotion Plan

Patient Details: (My Phrases) (Common Phrases)

Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to 40 mg each AM. Get lab work today: CMP, P, CBC. 🎤

Provider Details: (My Phrases) (Common Phrases)

May increase lisinopril later, but I want to look at lab first. Further plans when lab back. 🎤

Record your plans. While you can type your instructions here, you can also use **My Phrases** to greatly reduce your work for things you say repeatedly. (Setup of **My Phrases** is discussed in the User Personalization demo.)

(Save & Close) (Cancel)

| Assessments | My Plan | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders |

Today's Assessments: *(Select an assessment and enter the details below.)*

Assessment/Plan Expanded View ⓘ

#	Description	Code	Status
1	Chronic kidney disease, Stage III (moderate)	585.3	
2	Unspecified essential hypertension	401.9	
3	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled	250.00	
4	Tobacco use disorder	305.1	

If we wanted to order X-rays or Referrals, we could do so using the **Diagnostics** or **Referrals Tabs** above. (We don't use the **Labs Tab** at present, since we have another way to place lab orders.) Those are covered in other lessons, so we won't do that on this encounter.

Previous Patient Details | Previous Provider Details | ✦ Health Promotion Plan

Patient Details: | My Phrases | Common Phrases

Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to 40 mg each AM. Get lab work today: CMP, P, CBC.

Provider Details: | My Phrases | Common Phrases

May increase lisinopril later, but I want to look at lab first. Further plans when lab back.

(Provider details will not print on the patient plan.)

Today's Orders:

Manage My Phrases

When done click Save & Close.

Save & Close | Cancel

Care Guidelines | Global Days | Panel Control: ⊙ Toggle ⊙ ⊹ Cycle ⊙

Reason for Visit ⊙

Review of Systems ⊙

Vital Signs ⊙

Physical Exam ⊙

Assessment/Plan ⊙

Your assessments & plans display.

Assessments	1.	Assessment	Chronic kidney disease, Stage III (moderate) (585.3).
My Plan		Patient Plan	Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to 40 mg each AM. Get lab work today: CMP, P, CBC.
A/P Details		Provider Plan	May increase lisinopril later, but I want to look at lab first. Further plans when lab back.
Labs			
Diagnostics	2.	Assessment	Unspecified essential hypertension (401.9).
Referrals		Patient Plan	Continue all meds as listed. Attn to wt; minimize high-calorie/fatty foods & salt. Exercise daily. Inspect feet daily, as well as wounds at any other location. Follow-up if wounds do not appear to be healing.
Office Procedures			
Review/Cosign Orders			
View Immunizations	3.	Assessment	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled (250.00).
Office Diagnostics			
Physical Therapy Orders			
Health Promotion Plan	4.	Assessment	Tobacco use disorder (305.1).
		Patient Plan	Discussed importance of smoking cessation; it may be the single most important thing you can do for your health. I urge you to quit as soon as possible. Free assistance & nicotine patches are available at www.alabamaquitnow.com or 800-784-8669. A wealth of information & assistance is also available at the American Lung Association, www.lung.org/stop-smoking, or 800-586-4872.

Let's complete her prescriptions. Click Meds.

☐ Resident-Attending discussion took place   ☐ Attending saw patient

(Consent) (Procedure Scheduling) (Add/Update) (Remove)

✧ Consent

Provider Comm.   Meds   Procedures   Patient Plan   (Visit Document) (Document Library)   EM Coding   Dictation

		Last Audit	Status	Medication Name △	Generic Name	Start Date	Stop Date	Sig	Original Start

White ▾ ⚙ Grid Preferences | 52 year Old Female Weighing 199

☐ Status: Active (3 items)

	Active	furosemide 40 mg tablet	FUROSEMIDE	03/23/2014		1 each AM	03/23/2014
	Active	Lantus Solostar 100 unit/mL (3 mL) Sub-...	INSULIN GLARGINE HUM.REC.ANLOG	03/23/2014		18 units each evening	03/23/2014
	Active	lisinopril 10 mg tablet	LISINOPRIL	03/23/2014		1 daily	03/23/2014

Medication Module details are reviewed in another lesson.

We've changed furosemide to 40 mg daily, & we'll ERx that, then return to the **SOAP Tab**.

Prescribe New | Print | Send | Renew ▾ | Interactions ▾ | Stop ▾ | Resources ▾ | Dose Range | Delete | Eligibility | Medication History | Reconcile

Max. daily d

furosemide 40 mg tablet

Sig: 1 each AM Remove Sig Edit Sig...

Quantity: 30 ▾   Units: Tablet ▾   Refills: 5 ▾   ☐ Dispense As Written   Accept   Cancel

Start: ☑ 03/23/2014 ▾   Stop: ☐ 03/24/2014 ▾   Duration: ▯   ☐ Prescribed Elsewhere Source: ▯

Comments: *This field is for nonclinical comments to the pharmacist. Any additional clinical instructions for this prescription should be added using the 'Additional Instructions' segment of the Sig Builder.*

☐ PRN   Reason: ▯ ▾

Problem:
Add...

Provider: DUFFY, ROBERT LAMAR MD ▾

Location: USA FAMILY MEDICINE ▾

Note: Add Note...

Formulary Data:

Last Renewed: Times Renewed: Full History   DUR History   Dispense History   Additional Prescription Detail

Care Guidelines | Global Days |

Panel Control: ▼ Toggle ▲ ✦ Cycle ▼

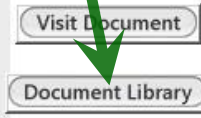| Reason for Visit | ▼ |
Review of Systems	▼
Vital Signs	▼
Physical Exam	▼
Assessment/Plan	▲

Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Review/Cosign Orders
View Immunizations
Office Diagnostics
Physical Therapy Orders
Health Promotion Plan

1.	Assessment	Chronic kidney disease, Stage III (moderate) (585.3).
	Patient Plan	Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to 40 mg each AM. Get lab work today: CMP, P, CBC.
	Provider Plan	May increase lisinopril later, but I want to look at lab first. Further plans when lab back.
2.	Assessment	Unspecified essential hypertension (401.9).
	Patient Plan	Continue all meds as listed. Attn to wt; minimize high-calorie/fatty foods & salt. Exercise daily. Inspect feet daily, as well as wounds at any other location. Follow-up if wounds do not appear to be healing.
3.	Assessment	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled (250.00).
4.	Assessment	Tobacco use disorder (305.1).

The patient needs a work excuse, which might be generated by you or your nurse. Open the Document Library.

☐ Resident-Attending discussion took place   ☐ Attending saw patient

(Consent) (Procedure Scheduling) (Add/Update) (Remove)
✦ Consent

Provider Comm.   Meds   Procedures   Patient Plan   (Visit Document)   EM Coding   Dictation
(Document Library)

You have several options for generating a work excuse.

05/28/2014 10:08 AM : "USA Document Library" ✕

General

After Hours Care Note
Chart Summary
Confidential Note
Controlled Substance Agreement, Full
Controlled Substance Contract, Brief
Counseling Notepad
Discharge Summary-Preliminary
Durable Medical Equipment Order
FreeText
Hospital-Clinic Continuity Note
Immunization Record

Lab Results-All
Lab Results-Last 30 Days
Medication List
Missed Appointment Reminder
Patient Plan
Safety Contract
Telephone Notes/Clinic Memos
Visit Note (Master Document)
Vital Signs History
Weight Loss Program Sheet

Letters

Letter About Patient
Letter To Patient
Letter From Consultant
Letter To Consultant
Work/School Excuse Note
Work/School Excuse Note-FM
Work/School Excuse Note-Peds
Work/School Status, Brief
Work/School Status, Detailed

Assessments and Tools

ACC/AHA ASCVD Risk Estimator
Behavioral Assessments & Tools
Edinburgh Postnatal Depression Scale
    Generate Report   Scoring
Mini Mental Status Exam
Pediatric Symptom Checklist
St. Louis Univ Mental Status Exam (SLUMS)
    SLUMS Diagram   Generate Report

Care Guidelines | Global Days | Panel Control: ⏷ Toggle ⏶ ✢ Cycle ⏷

Reason for Visit	⏷
Review of Systems	⏷
Vital Signs	⏷
Physical Exam	⏷
Assessment/Plan	⏶

Assessments
My Plan
A/P Details
Labs
Diagnostics
Referrals
Office Procedures
Review/Cosign Orders
View Immunizations
Office Diagnostics
Physical Therapy Orders
Health Promotion Plan

1.	Assessment	Chronic kidney disease, Stage III (moderate) (585.3).
	Patient Plan	Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to 40 mg each AM. Get lab work today: CMP, P, CBC.
	Provider Plan	May increase lisinopril later, but I want to look at lab first. Further plans when lab back.
2.	Assessment	Unspecified essential hypertension (401.9).
	Patient Plan	Continue all meds as listed. Attn to wt; minimize high-calorie/fatty foods & salt. Exercise daily. Inspect feet daily, as well as wounds at any other location. Follow-up if wounds do not appear to be healing.
3.	Assessment	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled (250.00).
4.	Assessment	Tobacco use disorder (305.1).
	Patient Plan	Discussed importance of smoking cessation; it may be the single most important thing you can do for your health. I urge you to quit as soon as possible. Free assistance & nicotine patches are available at www.alabamaquitnow.com or 800-784-8669. A wealth of information & assistance is also available at the American Lung Association, www.lung.org/stop-smoking, or 800-586-4872.

One of the Meaningful Use criteria requires patients to receive a summary of the visit.
Click Patient Plan.

☐ Resident-Attending discussion took place   ☐ Attending saw patient

(Consent) (Procedure Scheduling) (Add/Update) (Remove)
✢ Consent

Provider Comm.   Meds   Procedures   Patient Plan   (Visit Document)   EM Coding   Dictation
(Document Library)

A A A | TX Text

Segoe UI ▼ 10 ▼ | B *I* U | ≡ ≡ ≡ ≡ | ≣ ≣ | 100% ▼ ▫ ¶ | A ▼ ≣ ▼ | S x₂ xᶻ

PATIENT PLAN FOR 03/24/2014

Name: BooBoo Quagmire
Date of Birth: 01/04/1962
Date of Visit: 03/24/2014
Visit Type: Office Visit
Location: USA FAMILY MEDICINE

Thank you for choosing us for your healthcare needs. The following is a summary of the outcome of today's visit and other instructions and information we hope you find helpful.

Primary Care Provider
REASON(S) FOR VISIT
chronic kidney disease, s

Assessment/Plan

#	Detail Type	Description
1.	Assessment	Chronic kidney disease Stage II (moderate) (585.2)
	Patient Plan	Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to ... mg each AM. Get lab work today: CMP, P, Ca.
2.	Assessment	Unspecified essential hypertension (401.9).
	Patient Plan	Continue ... As tolerated. Inspect feet daily, as well as wounds at any other location. Follow-up if wounds do not appear to b...

The **Patient Plan** generates. Click the Printer icon to print it, then return to the **SOAP Tab**.

It can be challenging from a time management standpoint to generate a **Patient Plan** before the patient leaves. This will become easier when we have expanded ways to electronically communicate with patients. In the meantime a strategy is to complete a very bare-bones assessment & plan, prescribe meds, then generate the **Patient Plan**. Print this for the patient, then flesh out the details later. Also, you actually have 3 business days to generate this, so patients could just be informed that it will be available then.

Care Guidelines | Global Days | Panel Control: ⊙ Toggle ⊙ ⊹ Cycle ⊙

Reason for Visit ⊙

Review of Systems ⊙

Vital Signs ⊙

Physical Exam ⊙

Assessment/Plan ⊙

Assessments	1.	Assessment	Chronic kidney disease, Stage III (moderate) (585.3).
My Plan		Patient Plan	Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to 40 mg each AM. Get lab work today: CMP, P, CBC.
A/P Details			
Labs		Provider Plan	May increase lisinopril later, but I want to look at lab first. Further plans when lab back.
Diagnostics			
Referrals	2.	Assessment	Unspecified essential hypertension (401.9).
Office Procedures		Patient Plan	Continue all meds as listed. Attn to wt; minimize high-calorie/fatty foods & salt. Exercise daily. Inspect feet daily, as well as wounds at any other location. Follow-up if wounds do not appear to be healing.
Review/Cosign Orders			
View Immunizations	3.	Assessment	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled (250.00).
Office Diagnostics			
Physical Therapy Orders			
Health Promotion Plan	4.	Assessment	Tobacco use disorder (305.1).
		Patient Plan	Discussed importance of smoking cessation; it may be the single most important thing you can do for your health. I urge you to quit as soon as possible. Free assistance & nicotine patches are available at www.alabamaquitnow.com or 800-784-8669. A wealth of information & assistance is also available at the American Lung Association, www.lung.org/stop-smoking, or 800-586-4872.

Now generate today's visit note. One way to do this would be to click Visit Document.

☐ Resident-Attending discussion took place   ☐ Attending saw patient

(Consent) (Procedure Scheduling) (Add/Update) (Remove)

✣ Consent

Provider Comm.   Meds   Procedures   Patient Plan   (Visit Document)   (Document Library)   EM Coding   Dictation

TX Text

Segoe UI   10   B I U   100%

PATIENT: BooBoo Quagmire
DATE OF BIRTH: 01/04/1962
DATE: 03/23/2014 04:27 PM
VISIT TYPE: Office Visit

This 52 year old female presents for chronic kidney disease and swelling.

History of Present Illness:
1. chronic kidney disease
The patient presents with chronic kidney disease. The initial visit date was 03/23/2014. The patient reports the severity is moderate. The condition is stable. Initial symptoms include hypertension and swelling of foot/ankle. Secondary symptoms in...
Referred to get ssdq w/ nephrologist after moving to area. Family Medicine's recent notes reviewed, along w/ some records from ...nephrologist in Pensacola, showing GFR of 40, Cr. 3.7. Also has DM & HTN, not optimally controlled. W...
2. swelling
Worsening s...

Intake Comm...
last month &...

PROBLEM LIST:

Problem Description	Onset Date	Chronic	Notes
Tobacco abuse		Y	
Open cleft glaucoma		Y	Seeing Dr. Jones. Well-controlled w/ drops.

Your visit note displays. You can review & edit it if desired. You can also click the Check Mark to sign it off; this is the same as signing the document in your PAQ.

Navigation

Intake
History
SOAP
Finalize
Check Out

_____
> Order Management
> Orders/Plan
> Standing Orders
> Standing Orders
_____
Anticoagulation
Procedures
Tobacco Cessation
Tuberculin Skin Test
Nutrition
_____
Chart Abstraction
Demographics
Document Library
Immunizations
Patient Comment
Provider Test Action
Vital Signs
Screening Tools
CQM Check
MU Check

Preview   Offline

But it can take 30-60 seconds to generate the document in real time, which can be annoying when you're trying to move on to the next patient. As an alternative, you can generate the note **offline**. To do this, hover the mouse over Navigation to get the **Navigation Bar** to slide out.

When the **Navigation Bar** displays, click Offline.

Panel Control: ▼ Toggle ▲ ✦ Cycle ↻

1. Assessment — Chronic kidney disease, Stage III (moderate) (585.3).
   Patient Plan —
   Provider Plan — May increase lisinopril later, but I want to look at lab first. Further plans when I
2. Assessment — Unspecified essential hypertension (401.9).
   Patient Plan —
3. Assessment —
4. Assessment — Tobacco use disorder (305.1).
   Patient Plan — Discussed importance of smoking cessation; it may be the single most important thing you can do for your health. I urge you to quit as soon as possible. Free assistance & nicotine patches are available at

took place   ☐ Attending saw patient

Consent   Procedure Scheduling   Add/Update   Remove
✦ Consent

Meds   Procedures   Patient Plan   Visit Document   Document Library   EM Coding   Dictation

Comm.

Care Guidelines | Global Days | Panel Control: ⊙ Toggle ⊙ ⊙ Cycle ⊙

Reason for Visit ⊙

Review of Systems ⊙

Vital Signs ⊙

Physical Exam ⊙

Assessment/Plan ⊙

Assessments	1.	Assessment	Chronic kidney disease, Stage III (moderate) (585.3).
My Plan		Patient Plan	Discussed importance of tight control of blood pressure & sugars. Will increase furosemide to 40 mg each AM. Get lab work today: CMP, P, CBC.
A/P Details			
Labs		Provider Plan	May increase lisinopril later, but I want to look at lab first. Further plans when lab back.
Diagnostics			
Referrals	2.	Assessment	Unspecified essential hypertension (401.9).
Office Procedures		Patient Plan	Continue all meds as listed. Attn to wt; minimize high-calorie/fatty foods & salt. Exercise daily. Inspect feet
Review/Cosign Orders			daily, as well as wounds at any other location. Follow-up if wounds do not appear to be healing.
View Immunizations			
Office Diagnostics	3.	Assessment	Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled

Now move to the **Finalize Tab**. You can do this by navigating back to the top & clicking the Finalize Tab, but if you're at the bottom of the **SOAP Tab**, there is a shortcut to get there directly. Click EM Coding.

☐ Resident-Attending discussion took place   ☐ Attending saw patient

(Consent) (Procedure Scheduling) (Add/Update) (Remove)

✦ Consent

Provider Comm.   Meds   Procedures   Patient Plan   Visit Document / Document Library   EM Coding   Dictation

🔴 TOB   🔴 HTN   🔴 DM   ⊘ CAD   ⚙

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

🏠 | **Intake** | **Histories** | **SOAP** | **Finalize** | **Checkout**

[Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management | Document Library]

Care Guidelines | **Global Days**

Panel Control: ⊙ Toggle ⊙ ↶ Cycle ↷

General

○ Established patient   ◉ New patient

Today's Assessment

Provider Sign Off

Physician Sign Off Request:
☐ Submit to supervising physician for review

> E&M coding is reviewed in another lesson. For this exercise, click **Moderate complexity** for Medical decision making, then **Calculate Code**.

Evaluation and Management Coding

Medical Decision Making   View MDM Guidelines | View Risk Table
○ Straight forward   ○ Low complexity
◉ Moderate complexity ○ High complexity

Counseling
☐ Counseled greater than 50% of time and documented content
Total visit time (minutes): [   ]   ❖ Counseling Details
Total counsel time (minutes): [   ]

Evaluation and Management Code
Visit code: [   ] [   ] [   ]
Modifier(s): [ ] [ ] [ ] [ ] [ ]
[Calculate Code] [Submit Code]
[CQM Check]
Calculated EM code: [   ]
Submitted code: [   ]
Calculated eRx code: [   ]
Submitted eRx code: [   ]

❖ Additional E&M Code | ❖ View Other Codes | ❖ SNOMED Visit Type (optional) | ❖ Medicare Preventive Codes

New patient:	Established:	Consultation:	Preventive new:	Preventive established:	Preventive counseling:	Post Op:
○ 99201	○ 99211	○ 99241	○ 99381			○ 99024
○ 99202	○ 99212	○ 99242	○ 99382	○ 99391	○ 99401	**Prenatal:**
○ 99203	○ 99213	○ 99243	○ 99383	○ 99392	○ 99402	**Visit 4-6:**
○ 99204	○ 99214	○ 99244	○ 99384	○ 99393	○ 99403	○ 59425
○ 99205	○ 99215	○ 99245	○ 99385	○ 99394	○ 99404	**Visits greater than 6:**
			○ 99386	○ 99395		○ 59426
			○ 99387	○ 99396		
				○ 99397		

Behavioral Health:
○ 90791 (Initial eval, no med services)

⏻ TOB   ⏻ HTN   ⏻ DM   ⊘ CAD   ✿

Specialty ▾ Nephrology   Visit Type ▾ Office Visit

🏠	Intake	Histories	SOAP	Finalize	Checkout

[Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management | Document Library]

Care Guidelines   **Global Days**   Panel Control: ⊙ Toggle ⊙   ↶   Cycle   ↷

General   ⊙

○ Established patient   ⊙ New patient   PE Type: ⊙ Multi system   ○ Single system: [   ]   E&M Guidelines1997: (Web)

Today's Assessment   ⊙

Provider Sign Off   ⊙

Physician Sign Off Request:
☐ Submit to supervising physician for review

> **If the calculated code is acceptable to you, click Submit Code.**

Evaluation and Management Coding   ⊙

Medical Decision Making   View MDM Guideline | View Risk Table
○ Straight forward   ○ Low complexity
⊙ Moderate complexity   ○ High complexity

Counseling
☐ Counseled greater than 50% of time and documented content
Total visit time (minutes): [   ]   ✦ Counseling Details
Total counsel time (minutes): [   ]

Evaluation and Management Code
Visit code: [99203] [   ] [   ]
Modifier(s): [ ] [ ] [ ] [ ] [ ]
(Calculate Code) (Submit Code)
(CQM Check)
Calculated EM code: [99203]
Submitted code: [   ]
Calculated eRx code: [   ]
Submitted eRx code: [   ]

✦ Additional E&M Code | ✦ View Other Codes | ✦ SNOMED Visit Type (optional) | ✦ Medicare Preventive Codes 🎯

New patient:	Established:	Consultation:	Preventive new:	Preventive established:	Preventive counseling:	Post Op:
○ 99201	○ 99211	○ 99241	○ 99381	○ 99391	○ 99401	○ 99024
○ 99202	○ 99212	○ 99242	○ 99382	○ 99392	○ 99402	**Prenatal:**
⊙ 99203	○ 99213	○ 99243	○ 99383	○ 99393	○ 99403	**Visit 4-6:**
○ 99204	○ 99214	○ 99244	○ 99384	○ 99394	○ 99404	○ 59425
○ 99205	○ 99215	○ 99245	○ 99385	○ 99395		**Visits greater than 6:**
			○ 99386	○ 99395		○ 59426
			○ 99387	○ 99396		
				○ 99397		

Behavioral Health:
○ 90791 (Initial eval, no med services)
○ 90792 (Initial eval, w/ med services)   ○ 90846 (Family/Couple therapy, w/o patient)

The **Checkout Tab** may be utilized by office staff to document completion of various orders, referrals, appointments, etc. The degree & manner of its use will be individualized to the workflow of each clinic.

This concludes the NextGen Adult Nephrology Visit demonstration.

Ham and eggs. A day's work for a chicken, a lifetime commitment for a pig.

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