

Chapter 4

The Clinic Administration

Chapter 4 Content:



- Overview
 - Appointment Calendar
 - Patient Tracker
 - ToDos and Reminders
 - Internal Messages
 - Urgent Messages
 - E-Mails
-

1. Overview



1. Overview

➤ Practice View Screen

Suburban Medical Group - SpringCharts

File Edit Productivity Center Utilities Window Recent Charts Open Charts Actions New Help Administration

5:45 PM Monday, October 9, 2006

demo Office Calendar

October 2006	8:00 AM	OPEN	
S M T W Th F S	8:15 AM	OPEN	
1 2 3 4 5 6 7	8:30 AM	Dalton, Sally E 05/28/97	Follow-Up
8 9 10 11 12 13 14	8:45 AM	OPEN	
15 16 17 18 19 20 21	9:00 AM	Sykes, Chris J 05/22/01	Well Child
22 23 24 25 26 27 28	9:15 AM	OPEN	
29 30 31	9:30 AM	Adams, Patti G 06/29/42	Blood Pressure Check

To Do List

- Check Lab Potter, Harry O 10/12/85 10/05/2005
- Check Pt Status Carnijay, Ann W 10/15/67 10/05/2005
- Check Lab Ness, Betsy I 02/04/30 10/05/2005
- Check Lab Livingston, Jeremiah . 02/25/24 10/05/2005

User Center

Click here for:
Support Tools
Documentation
Downloads
...and more

SPRINGCHARTS

Patient Tracker

Waiting Room

Sykes, Chris J 05/22/01 5:13 PM Ready

Exam 1

Adams, Patti G 06/29/42 5:13 PM Nurse Check

Messages

demo 01/10/05 8:10 AM Howard, Martin O 05/21/55

demo 01/10/05 8:10 AM Warner, Ben... 06/18/90

demo 01/10/05 8:10 AM Hudson, Marlene W 02/09/52

demo 01/10/05 8:09 AM Adams, Patti G 06/29/42

demo 01/10/05 8:09 AM Potter, Harry O 10/12/85

jan 03/26/03 8:24 AM Adams, Patti G 06/29/42

jan 07/05/02 4:38 PM Bond, Aaron E 02/25/02

jan 04/15/02 10:35 PM Dalton, Sally E 05/28/97

start 1. Product Overview V9 Microsoft Office Pictu... New Picture (22) - Paint 2. VAR_Training_Gui... Suburban Medical Gr... 5:45 PM

1. Overview

➤ Practice View Screen

❖ Calendar

❖ Appointment Schedule

❖ Patient Tracker with Color-Coding

❖ ToDos with Visual Status Indicators

❖ Detailed Message List with Patient Identifiers

The screenshot displays the SpringCharts software interface. At the top, the window title is "Suburban Medical Group - SpringCharts". Below the title bar is a menu bar with options: File, Edit, Productivity Center, Utilities, Window, Recent Charts, Open Charts, Actions, New, Help, Administration. A toolbar contains various icons for file operations and navigation. The main area is divided into several sections:

- Calendar:** Shows the date "Monday, October 9, 2006" and a calendar grid for the month of October 2006. The current day is highlighted in yellow.
- Appointment Schedule:** A list of appointments for the day, including times, patient names, and procedures. For example, at 8:00 AM, there is an "OPEN" appointment for "demo". Other appointments include "Dalton, Sally E 05/28/97" at 8:30 AM (Follow-Up), "Sykes, Chris J 05/22/01" at 9:00 AM (Well Child), and "Adams, Patti G 06/29/42" at 9:30 AM (Blood Pressure Check).
- To Do List:** A list of tasks with visual status indicators. For example, "Check Lab Potter, Harry O 10/12/85 10/05/2005" is shown with a green indicator.
- User Center:** A section at the bottom left with a "Click here for:" link and icons for "Support Tools", "Documentation", "Downloads", and "...and more".
- Patient Tracker:** A section on the right side showing a "Waiting Room" with one patient, "Sykes, Chris J 05/22/01 5:13 PM", and a status of "Ready". Below this is a "Messages" section with a list of messages, including patient identifiers and times, such as "demo 01/10/05 8:10 AM" and "Howard, Martin O 05/21/55".

The Windows taskbar at the bottom shows the "start" button and several open applications: "1. Product Overview V9", "Microsoft Office Pictu...", "New Picture (22) - Paint", "2. VAR_Training_Gui...", and "Suburban Medical Gr...". The system clock shows "5:45 PM".

2. Appointment Calendar



2. Appointment Calendar

- ❖ Block out time in the schedule
- ❖ Add *New* patients to the schedule
- ❖ Add *Existing* patients to the schedule
- ❖ View all appointments for *Existing & Registered* patients
- ❖ Chart a 'No Show'

The screenshot displays the 'Office Calendar' interface. The main window shows a list of appointments with time slots from 8:00 AM to 11:45 AM. The 10:00 AM slot is highlighted with a red box, showing a 'NEW' appointment for 'Kelsey Hamilton' at '10:00 AM' with the note 'Pre-Employment Physical'. An 'Edit Appointment' dialog box is open over this appointment, showing the patient name 'Kelsey Hamilton', the note 'Pre-Employment Physical', and the date '01/05/2007' at '10:30 AM'. The dialog box includes buttons for 'Choose Patient', 'Block This Time', 'Chart No Show', 'Get Chart', 'Track Pt', and 'Pt Info', along with 'Done', 'Cancel', 'Delete', and 'Cut' buttons at the bottom.

Time	Status	Patient	Note
8:00 AM	OPEN		
8:15 AM	OPEN		
8:30 AM	OPEN		
8:45 AM	OPEN		
9:00 AM		Sykes, Chris J 05/22/01	Well Child
9:15 AM	OPEN		
9:30 AM		Adams, Patti G 06/29/42	Blood Pressure Check
9:45 AM	OPEN		
10:00 AM	NEW	Kelsey Hamilton	Pre-Employment Physical
10:15 AM	OPEN		
10:30 AM	OPEN		
10:45 AM	OPEN		
11:00 AM	OPEN		
11:15 AM	OPEN		
11:30 AM	OPEN		
11:45 AM	OPEN		

3. Patient Tracker



3. Patient Tracker

- Shows at a glance the current location and the status of all patients

Edit Appointment

Today Sunday 09/11/2005 9:30 AM

Patient: Adams, Patti G 06/29/42

Note: Blood Pressure Check

Registered Pt: Adams, Patti G 06/29/42

Buttons on the right:
Change Patient
Block This Time
Chart No Show
Get Chart
Track Pt
Pt Info

Buttons at the bottom:
Done
Cancel
Delete
Cut

3. Patient Tracker

- Shows at a glance the current location and the status of all patients
- Add patients to the *Patient Tracker* as soon as the patient arrives

Edit Appointment

Today Sunday 09/11/2005 9:30 AM

Patient: Adams, Patti G 06/29/42

Note: Blood Pressure Check

Registered Pt: Adams, Patti G 06/29/42

Buttons: Change Patient, Block This Time, Chart No Show, Get Chart, **Track Pt**, Pt Info

Buttons: Done, Cancel, Delete, Cut

3. Patient Tracker

- Shows at a glance the current location and the status of all patients
- Add patients to the *Patient Tracker* as soon as the patient arrives
- Display *Patient Tracker* as the main large window option

Edit Appointment

Today Sunday 09/11/2005 9:30 AM

Patient: Adams, Patti G 06/29/42

Note: Blood Pressure Check

Registered Pt: Adams, Patti G 06/29/42

Buttons: Change Patient, Block This Time, Chart No Show, Get Chart, **Track Pt**, Pt Info

Bottom Buttons: Done, Cancel, Delete, Cut

3. Patient Tracker

➤ Color Coding – The six color options are defined by each clinic.

Edit Tracker

Adams, Patti G 06/29/42

Time In 11:50 AM

Status

Location Exam 1

Time Out

Tracker Group Show All

Location: Exam 1, Exam 2, Exam 3, Exam 4, Lab, Nurse Station, Checkout Desk

Status: Ready, Lab, Xray, Shot, Nurse Check, Doctor Check, EKG, Cast

Tracker Group: Show All

Done Cancel Delete Pt Info Get Chart CheckOut

SPRINGCHARTS
Electronic Health Records

3. Patient Tracker

- Color Coding - The six color options are defined by each clinic.
- Location and Status - The *Location* and *Status* allocations enable the clinic to know exactly where each patient is located in the facility and the status of each patient.

Edit Tracker

Adams, Patti G 06/29/42

Time In: 11:50 AM

Status: [Color Bar]

Location: Exam 1

Time Out:

Tracker Group: Show All

Location: Exam 1, Exam 2, Exam 3, Exam 4, Lab, Nurse Station, Checkout Desk

Status: Ready, Lab, Xray, Shot, Nurse Check, Doctor Check, EKG, Cast

Tracker Group: Show All

Done Cancel Delete Pt Info Get Chart CheckOut

SPRINGCHARTS
Electronic Health Records

3. Patient Tracker

- Color Coding - The six color options are defined by each clinic.
- Location and Status - The *Location* and *Status* allocations enable the clinic to know exactly where each patient is located in the facility and the status of each patient.
- Tracker Group - Clinics with multiple offices can access the same database across the Internet.

Edit Tracker

Adams, Patti G 06/29/42

Time In 11:50 AM

Status

Location Exam 1

Time Out

Tracker Group Show All

Location: Exam 1, Exam 2, Exam 3, Exam 4, Lab, Nurse Station, Checkout Desk

Status: Ready, Lab, Xray, Shot, Nurse Check, Doctor Check, EKG, Cast









Tracker Group: Show All

Done Cancel Delete Pt Info Get Chart CheckOut

SPRINGCHARTS
Electronic Health Records

3. Patient Tracker

➤ Patient Information - The patient demographic information can be viewed, printed, and edited from the *Patient Tracker* window.

Patient Tracker		change schedule	find appts for patient	print schedule
Waiting Room				
Sykes, Chris J 05/22/01 11:50 AM	Ready			
Exam 1				
Adams, Patti G 06/29/42 11:50 AM	Nurse Check			
Exam 3				
Fernandez, Pam . 10/19/83 12:53 PM	Doctor Check			
Lab				
Dalton, Sally E 05/28/97 12:53 PM	Lab			
Checkout Desk				
Tynan, Brandi I 03/15/79 12:54 PM	Ready			
Done				
Sutherland, Christian E 09/22/39 12:55 PM	Done			

3. Patient Tracker

- Patient Information - The patient demographic information can be viewed, printed, and edited from the *Patient Tracker* window.
- CheckOut - The system logs the check-in and the check-out time for each patient entered into the *Patient Tracker*.

Patient Tracker		change schedule	find appts for patient	print schedule
Waiting Room				
Sykes, Chris J 05/22/01 11:50 AM	Ready	■		
Exam 1				
Adams, Patti G 06/29/42 11:50 AM	Nurse Check	■	■	
Exam 3				
Fernandez, Pam . 10/19/83 12:53 PM	Doctor Check			■
Lab				
Dalton, Sally E 05/28/97 12:53 PM	Lab	■	■	
Checkout Desk				
Tynan, Brandi I 03/15/79 12:54 PM	Ready		■	■
Done				
Sutherland, Christian E 09/22/39 12:55 PM	Done			

3. Patient Tracker

- Patient Information - The patient demographic information can be viewed, printed, and edited from the *Patient Tracker* window.
- CheckOut - The system logs the check-in and the check-out time for each patient entered into the *Patient Tracker*.
- Tracker Archive - A record of patients tracked through the *Patient Tracker* is kept in the *Tracker Archive*.

Patient Tracker		change schedule	find appts for patient	print schedule
Waiting Room				
Sykes, Chris J 05/22/01 11:50 AM	Ready	■		
Exam 1				
Adams, Patti G 06/29/42 11:50 AM	Nurse Check	■	■	
Exam 3				
Fernandez, Pam . 10/19/83 12:53 PM	Doctor Check			■
Lab				
Dalton, Sally E 05/28/97 12:53 PM	Lab	■	■	
Checkout Desk				
Tynan, Brandi I 03/15/79 12:54 PM	Ready		■	■
Done				
Sutherland, Christian E 09/22/39 12:55 PM	Done			

4. ToDos and Reminders



4. To/Dos and Reminders

- ❖ Create a personal ToDo item – Creates **Green** color bar
- ❖ Link a ToDo item to a patient – Creates **Blue** color bar
- ❖ Send a ToDo item to a co-worker
- ❖ Schedule a ToDo for a future date.

The screenshot shows a 'New ToDo/Reminder' dialog box with the following elements:

- Title:** Add to ToDo/Reminder List...
- Task:** Call Pt / Check Lab
- To:** demo (recipient), bob (selected from dropdown)
- Assignee:** Adams, Patti G 06/29/42
- Schedule:** Send on 01/12/2007
- Buttons:** Send, Cancel, Link to a Patient, Send Later
- Task List:** Check Lab, Call Pt, Order Supplies, Check XRay, Check Pt Status

Red arrows point to the task text, the 'To' dropdown, the 'Link to a Patient' button, and the 'Send Later' button.

4. To/Dos and Reminders

To Do List	
Check Lab Sykes, Chris J 05/22/01 09/24/2007	<input checked="" type="checkbox"/>
Check Test Underhagen, Robert Q 08/20/68 09/24/2007	
Order Supplies 09/24/2007	
Check Pt Status Sykes, Chris J 05/22/01 09/24/2007	
TimeClock Request	

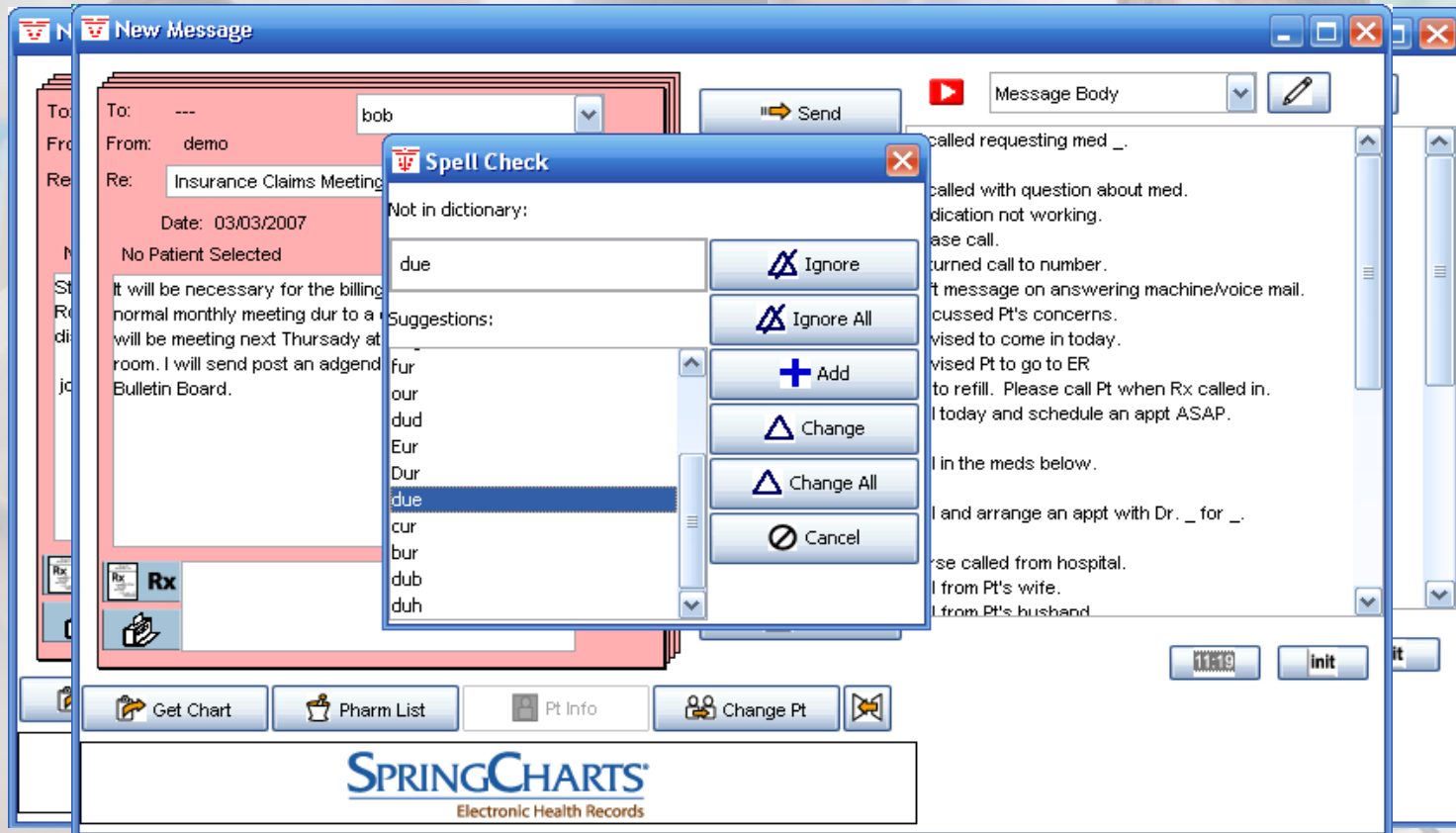
- ❖ Checked items are completed – will be removed next time user logs on
- ❖ Blue Bar indicates related to patient – will roll over each day
- ❖ Green Bar indicates personal item – will roll over each day
- ❖ Orange Bar indicates a request for a time clock adjustment

5. Internal Messages



5. Internal Messages

- ❖ Send & receive messages from co-workers
- ❖ Send messages not related to patients
- ❖ E-mail messages across the Internet
- ❖ Multi-send to co-worker groups
- ❖ Save message to Archives
- ❖ Spell-check messages



5. Internal Messages

- ❖ Link messages to patient demographics
- ❖ Access the patient's chart
- ❖ Access patient's routine medications & prescription history

The screenshot displays two overlapping windows from the SpringCharts Electronic Health Records system. The background window is titled "Message Dalton, Sally E 05/28/97" and shows patient demographics for Sally E Dalton, including address, phone numbers, and SSN. A red bracket on the left side of this window indicates the demographic information. A red arrow points from the "Rx" icon in the message window to the "Select Drug" dialog box. The "Select Drug" dialog box is titled "Select Drug for: Dalton, Sally E" and contains an "Allergic to:" field with the value "NKA mold, pollen". Below this, there are sections for "Routine Medications:", "Previous Prescriptions:", and "All Drugs:". The "Routine Medications:" section lists: Allegra 60 mg i po q noon #30 rf x0, Nasacort AQ ii puffs each nostril daily #1 bottle rf xprn, Aleve 275 mg i q 12 hrs #30 rf x0, and Aspirin 325mg ii po qid prn #30 rf xprn. The "Previous Prescriptions:" section lists: Allegra 60 mg i po q noon #30 rf x0, Nasacort AQ ii puffs each nostril daily #1 bottle rf xprn, Aspirin 325mg ii po qid prn #30 rf xprn, and Allegra 30mg i po q am #30 rf xprn. The "All Drugs:" section has a "Find:" field and a search icon. The "Selected Drugs:" section is empty and has a note "(Click on item to remove from list.)". At the bottom of the dialog box are "Save" and "Cancel" buttons. The SpringCharts logo and "Electronic Health Records" text are visible at the bottom of both windows. A red arrow points from the "Get Chart" button in the message window to the "Rx" icon.

5. Internal Messages

- ❖ Link messages to patient demographics
- ❖ Access the patient's chart
- ❖ Access patient's routine medications & prescription history
- ❖ Chart patient's message when completed

New Message

190 Elm St
Sherman, TX 77521
Home #: (214) 673-4123
Home Fax:
Work #:
Work Fax:
Pager:
Mobile #:
E-Mail:
SS#: 111-11-1111
Marital Status: Single
Sex: F
Employer:
Pt ID #: 27

To: --- bob
From: demo
Re: Dalton, Sally E 05/28/97
Date: 12/07/2006 Time: 6:21 PM
Pt: Dalton, Sally E 05/28/97
Call from Pt's mother. Medication not working. Please call.
Eklerd Elm @ Main (214) 654-3322
josmd 6:22 PM

Rx Nasacort AQ ii puffs each nostril daily #i bottle

Send **Send Back** **Email It** **Delete** **Chart It** **Print** **MultiSend** **Spell**

Message Body

Pt called requesting med _.
Pt called with question about med.
Medication not working.
Please call.
-Returned call to number.
Left message on answering machine/Voice mail
Discussed Pt's concerns.
Advised to come in today.
Advised Pt to go to ER
Ok to refill. Please call Pt when Rx called in.
Call today and schedule an appt ASAP.

Call in the meds below.
Call and arrange an appt with Dr. _ for _.
Nurse called from hospital.
Call from Pt's wife

Get Chart **Pharm List** **Pt Info** **Change Pt**

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Electronic Health Records

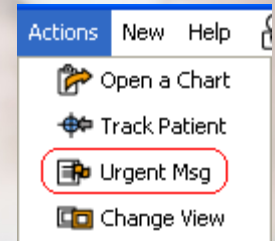
6. Urgent Messages & E-mails



6. Urgent Messages & E-mails

➤ URGENT MESSAGES

- ❖ Messages instantly appear on recipient's screen
- ❖ Urgent messages can be sent into the recipient's message list



6. Urgent Messages & E-mails

➤ URGENT MESSAGES

- ❖ Messages instantly appear on recipient's screen
- ❖ Urgent messages can be sent into the recipient's message list

➤ E-MAILS

- ❖ One e-mail account is setup for the medical office
- ❖ Specific user(s) assigned security clearance to open clinic's e-mail
- ❖ E-mail icon appears alongside user's log-in name
- ❖ E-mail item opens into a *Message* window placing the body of e-mail in the message body
- ❖ Message window attaches patient demographics from the sender if e-mail address is recognized by program

