

# Chapter 5

## The Patient's Chart

# Chapter 5 Content:

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- Overview
  - The Face Sheet
  - The Care Tree
  - File Menu
  - Edit Menu
  - Actions Menu
  - New Menu
-

# 1. Overview



# 1. Overview

➤ Contains comprehensive **Face Sheet** for static information

Adams, Patti G 06/29/42

File Edit Windows Actions New

**Patient**  
Adams, Patti G 06/29/42  
Age: 67 yrs 5 mns 4 days.  
198 Elm St  
Sherman, TX 77521  
Home #: (214) 766-7676  
Mobile #: (214) 777-7987  
E-Mail: mom5645566@aol.com  
SS#: 876-45-6676  
Marital Status: Married  
Sex: F  
Employer: Home Engineer

**Allergies**  
Codeine  
Other Sensitivities:  
erythromycin causes nausea

**PMHX**  
HTN 401.9  
DM, Adult Onset,NID, Controlled 250.00  
HTN 401.9  
cholecystectomy 1998, TAH BSO 1999  
Serious Injuries:  
Any Broken Bones?

**FMHX**  
HTN 401.9

**Social History**  
Unrestrained Driving, Tobacco Use,  
Mental Stressors:  
Financial Pressures:

**Chart Note**  
Friend of Mrs Bibi.  
Received informational letter on  
Naproxen.

**Problem List**  
HTN 401.9  
DM, Adult Onset,NID, Controlled 250.00  
Hypercholesterolemia 272.0

**Routine Meds**  
Diovan 80mg i po q am  
Glucophage XR 500mg i po bid  
Lipitor 10mg i po q am  
Aleve 275 mg i q 12 hrs  
Aspirin 325mg ii po qid prn  
OTC Meds:  
fish oil, glucosamine

**Default Pharmacy**  
Default Pharmacy Not Set

**Uncharted Tests**  
Pending: 04/17/2009 CBC

**Chart Evaluation**  
Done Everyone Age 14 yrs to 105 yrs DT every 520 wks P  
Done Females Age 35 yrs to 110 yrs Mammogram every 5  
Not Done Everyone Age 35 yrs to 105 yrs EKG every 104 w

**Diagnosis Hx**  
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12/27/2004 Flu 487.1  
12/21/2004 Allergic Rhinitis 477.9  
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12/16/02 Insect Bite, Nonvenomous 919.4  
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ms, Patti G 06/29/42  
Encounters  
Immunizations  
Medications  
Lab  
Imaging  
Medical Tests  
Flow Sheets  
Text Records  
Excuses/Notes  
File Cabinet  
Photo  
Correspondence  
H&Ps  
Reports To Patient  
Chart Evaluations

Edit X

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Adams, Patti G 06/29/42

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Photo of Patti G Adams

Edit X

## 2. The Face Sheet



# 2. The Face Sheet

➤ PopUp Text and Preferences Lists set up for rapid data selection

Adams, Patti G 06/29/42

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Edit X

# 2. The Face Sheet

- PopUp Text and Preferences Lists set up for rapid data selection
- Social history, past medical and family medical history lists customized for each clinic on SpringCharts server

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● Immunizations  
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● Reports To Patient  
● Chart Evaluations

**Photo**  
A small portrait photo of a woman with blonde hair, smiling.

# 3. Editing the Face Sheet



# 3. Editing the Face Sheet

## ➤ Allergies

- ❖ Allows the adding/editing of drug allergies and other sensitivities
- ❖ Popup text is available to choose the sensitivity or add descriptive text to the sensitivity

Adams, Patti G 06/29/42

File Edit Windows Actions New

**Allergies**

Codeine  
Penicillin V

**Other Sensitivities:**

Peanuts causes rash  
erythromycin causes nausea

Drug

**Previous Prescriptions:**

Lipitor 10mg i po q am #30 rf x5  
Glucophage XR 500mg i po bid #60 rf xprn  
Diovan 80mg i po q am #30 rf x3  
Allegra 180mg i po q am #30 rf xprn  
Tamiflu 75mg i po bid #10 rf x0  
Ibuprofen 400mg i po q 6 hr #120 rf x5  
Diovan 80mg i po q am #30 rf x5  
Glucophage XR 500mg i po bid #60 rf xprn  
Lipitor 10mg i po q am #30 rf x5

**Allergy Notes**

Latex  
Peanuts  
Pollen  
Seasonal Allergies  
causes dizziness  
causes nausea  
causes muscle pain  
causes rash  
causes hives

Back to Chart

Print FS

# 3. Editing the Face Sheet

## ➤ Social History

- ❖ Preferences checklist is defined under *Category Preferences* on SpringCharts server
- ❖ Popup text is available to choose defining or descriptive text

Adams, Patti G 06/29/42

File Edit Windows Actions New

Allergies

Social Hx

PMHx

FMHx

Referred By

Chart Note

Routine Meds

Problem List

Chart Alert

Back to Chart

Print FS

**Social History**

Tobacco Use: Mild Smoker

Alcohol Use: No Alcohol Use

Caffeine Use: Yes

Cups Per Day: 3

Marital Status: Married

Occupation: Teacher

**Social Hx**

Nonsmoker

Mild Smoker

Moderate Smoker

Heavy Smoker

Smokeless Tobacco User

Packs Per Day:

When Quit:

No Alcohol Use

Social Drinker

Heavy Drinker

Ounces Per day:

Type of Alcohol:

Cups Per Day:

Yes

**Preferences**

Tobacco Use:

Alcohol Use:

Caffeine Use:

Recreational Drug Use:

Marital Status:

Living Arrangements:

Occupation:

# 3. Editing the Face Sheet

## ➤ Past Medical History & Family Medical History

- ❖ A diagnosis (Dx) is chosen by ICD code or description
- ❖ Preferences checklist is setup on SpringCharts server for rapid entry

Adams, Patti G 06/29/42

File Edit Windows Actions New

Allergies Social Hx PMHX FMHX Referred By Chart Note Routine Meds Problem List Chart Alert

Past Medical History

HTN 401.9  
DM, Adult Onset, NID, Controlled 250.00  
HTN 401.9

Other PMHX

TAH BSO - 1999  
PAST SURGERIES:  
Cholecystectomy - 2005

Dx.

Previous Dx

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Preferences

Asthma  
Bronchitis  
Cancer  
Diabetes  
Gout  
Heart Disease  
Hernia  
High Cholesterol

Back to Chart Print FS

# 3. Editing the Face Sheet

## ➤ Other Providers

- ❖ Referring physicians are first set up in the address book before chosen in the Face Sheet

The screenshot shows a software window titled "Adams, Patti G 06/29/42". The window has a menu bar with "File", "Edit", "Windows", "Actions", and "New". On the left side, there is a vertical list of menu items: "Allergies", "Social Hx", "PMHx", "FMHx", "Other Providers" (which is highlighted with a red bar), "Chart Note", "Routine Meds", "Problem List", and "Chart Alert". The main area of the window is divided into two columns. The left column is titled "Other Providers" and contains a single entry: "Physician Body, Able". The right column is titled "Address" and contains an empty text input field. At the bottom of the window, there are two buttons: "Back to Chart" and "Print FS".

# 3. Editing the Face Sheet

## ➤ Chart Note

- ❖ Enter important information about patient that needs to be seen
- ❖ Popup text is provided for rapid selection of predefined text

Adams, Patti G 06/29/42

File Edit Windows Actions New

Allergies Social Hx PMHX FMHX Referred By Chart Note Routine Meds Problem List Chart Alert

**Chart Note**

Friend of Mrs Bibi.

Received informational letter on Naproxen.

Prefers Hospital  
St. Johns

Related to  
Prefers Lab  
Prefers Hospital  
St. Johns  
Cox Medical Center  
St. Jude's

Religion

Back to Chart Print FS

# 3. Editing the Face Sheet

## ➤ Routine Meds

- ❖ Entering of the patient's current routine medications and over-the-counter (OTC) meds
- ❖ Medications can be edited in the *Edit Rx* window

The screenshot displays a medical software interface for patient Patti G Adams, dated 06/29/42. The main window shows a sidebar with navigation buttons for Allergies, Social Hx, PM-Hx, and Routine Medications. The 'Allergies' section is active, listing 'Allergic to: Codeine, Penicillin v', 'Peanuts causes rash', and 'erythromycin causes nausea'. Below this, the 'Routine Medications' section lists several drugs, with 'Glucophage XR 500mg i po bid #60 rf xprn' highlighted by a red box. A red arrow points from this box to an 'Edit Rx' window. The 'Edit Rx' window is open, showing fields for 'Brand Name: Glucophage XR', 'Generic Name: Metformin', 'Strength: 500mg', 'Directions: i po bid', 'Quantity: 60', 'Refills: prn', 'Date Started: 01/16/2005', and 'Date Stopped'. A 'Reason Stopped' dropdown menu is open, showing options like 'Treatment completed', 'Medication ineffective', 'Side effects', 'Interacted with other medication', 'Allergic reaction', and 'High cost'. The interface includes standard Windows-style menus (File, Edit, Windows, Actions, New) and a toolbar with icons for Save, Cancel, Lookup, Delete, and other functions.

# 3. Editing the Face Sheet

## ➤ Problem List

- ❖ Allows the adding/editing of the patient's ongoing medical problems – select by code or description
- ❖ Popup text is available to select from predefined *Problem List* text

The screenshot shows a medical software window titled "Adams, Patti G 06/29/42". The interface includes a sidebar with navigation buttons: Allergies, Social Hx, PMHX, FMHX, Referred By, Chart Note, Routine Meds, Problem List (highlighted), and Chart Alert. The main area is divided into three sections:

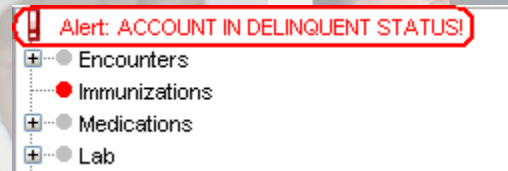
- Problem List:** Contains a list of current medical problems: HTN 401.9, DM, Adult Onset,NID, Controlled 250.00, and Hypercholesterolemia 272.0. This list is circled in red.
- Problem List Text:** Contains predefined text options: Allergic Rhinitis 477.9, Bronchitis 466.0, and Fatigue/Malaise 780.79. This list is also circled in red.
- Previous Dx:** A scrollable list of past diagnoses including HTN 401.9, Well Adult v70.0, Cellulitis 682.9, Allergic Rhinitis 477.9, Viral Syndrome 079.99, Allergic Rhinitis 477.9, DM, Adult Onset,NID, Controlled 250.00, Hypercholesterolemia 272.0, Abnormal Blood Chemistry 790.6, Acne 706.1, Anemia 285.9, Arthritis 716.90, Bronchitis 466.0, Conduct Disorder 312.81, Degenerative Disk Disease 722.6, DM II Uncontrolled 250.02, and Fatigue/Malaise 780.79.

Two red arrows point to the "Dx" field and the "Problem List" dropdown menu, indicating where to click to edit or add a problem.

# 3. Editing the Face Sheet

## ➤ Chart Alert

❖ Allows for the inclusion of important text that will appear in red above the *Encounters* category on the charts' care tree

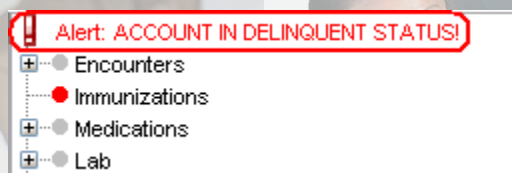


- ❖ Popup text is available to select from predefined text
- ❖ Chart Alert does not print out on Face Sheet form

# 3. Editing the Face Sheet

## ➤ Chart Alert

- ❖ Allows for the inclusion of important text that will appear in red above the *Encounters* category on the charts' care tree



- ❖ Popup text is available to select from predefined text
- ❖ Chart Alert does not print out on Face Sheet form

## ➤ Other Information

- ❖ Diagnosis, Prescription, and Procedure History portions of the Face Sheet are extracted from the patient's various encounters
- ❖ Primary Ins. added to Face Sheet by clicking on the *Insurance* header on the bottom left side of the patient's chart

# 4. The Care Tree



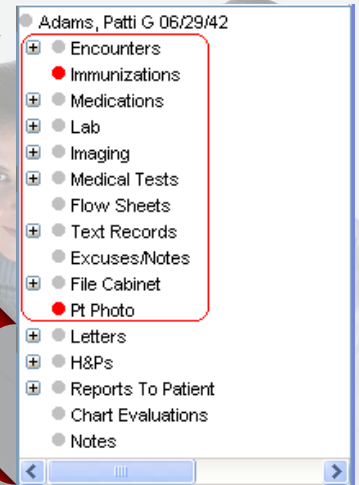
# 4. The Care Tree

❖ Expand categories by clicking on the '+' symbol

❖ Preset categories cannot be altered or edited

❖ Additional thirty categories can be added to the care tree list

❖ Documents can be opened and resave under a different category heading by selecting the [Change Tab] button

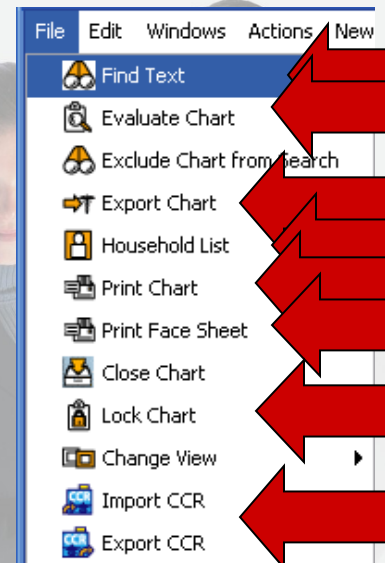


# 5. File Menu



# 5. File Menu

- ❖ **Find Text** ~ allows for the searching of specified text in the chart
- ❖ **Evaluate Chart** ~ will analyze the chart to indicate if the patient is up to date with preset tests, screenings, and procedures
- ❖ **Export Chart** ~ export any portion of the chart as a text file
- ❖ **Household List** ~ displays all patients that share the same home phone number
- ❖ **Print Chart** ~ enables the printing of the entire chart or selected portions of the charts
- ❖ **Print Face Sheet** ~ prints the entire patient's Face Sheet
- ❖ **Lock Chart** ~ security clearance given to specific users to lock a chart
- ❖ **Continuity of Care Record (CCR)** ~ Import CCR and Export CCR patient medical data from one provider's EHR program to another



# 6. Edit Menu

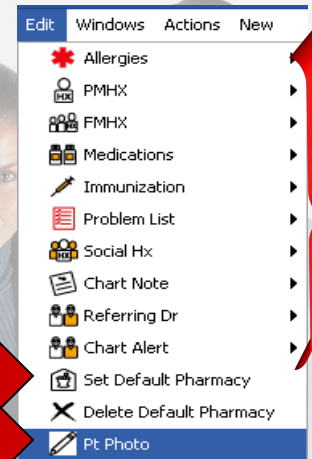


# 6. Edit Menu

❖ **Face Sheet** ~ provides another way to access specific panels in the comprehensive Face Sheet

❖ **Default Pharmacy** ~ patient's pharmacy is chosen from a list of pharmacies set up in address book and stored in the Face Sheet

<b>Routine Meds</b>
Lipitor 10mg i po q am Aleve 275 mg i q 12 hrs Aspirin 325mg ii po qid prn HCTZ 12.5mg i q am Lopressor 100 mg i po bid Wellbutrin XL 300mg i po q am Glyburide 2.5 mg i po bid
OTC Meds: fish oil, glucosamine
<b>Default Pharmacy</b>
Walshop Pharm 214767766



❖ **Add Patient Photo** ~ allows inclusion of the patient's photograph into the chart. Photo imported either from computer or directly from digital camera or scanner

# 7. Actions Menu



# 7. Actions Menu

❖ **Lab:** *Graph Type* ~ enables the practitioner to view multiple occurrences of the same lab type to analyze trends over time

❖ **Order New Lab, Imaging, and Medical Tests:**

Tests include laboratory tests, imaging tests, and medical tests

❖ **Managing and Charting Tests:**

**Pending Tests** ~ When the tests come back from the testing facility, the results are manually entered into the pending test area. Lab results can be automatically entered via *SpringLabs Reference Lab* interface option

**Completed Tests** ~ Once results are entered the tests move to the completed test area and await the physician's check

**Patient's Chart** ~ Once the tests are viewed by the physician they are stored in the patient's chart under the appropriate category



	010705	121904	042085
WBC	8.9	8.7	6.0
RBC	4.6	4.9	5.0
HGB	13.2	12.3	13.0
HCT	37.8	36.9	39.0
MCV	88.7	85.4	85.0
MCH	27.9	28.5	30.0
MCHC	34.8	33.7	34.0
RDW	12.3	14.3	12.0
Platelet	378.9	375.9	200.0
Neutrophils	45.1	89.5	45.0
Eos	1.8	1.1	0.0
Lymphocytes	55.6	47.6	39.0
Monocytes	8.9	5.9	8.0
Sedimentation	16	19	0.0
Basophils	1.8	3.2	0.0

Done Print

# 7. Actions Menu

## ❖ **Diagnosis List, Medications List, and Procedure List:**

~ Shows all diagnoses, medication and procedures that have been assigned within the patient's office visit notes

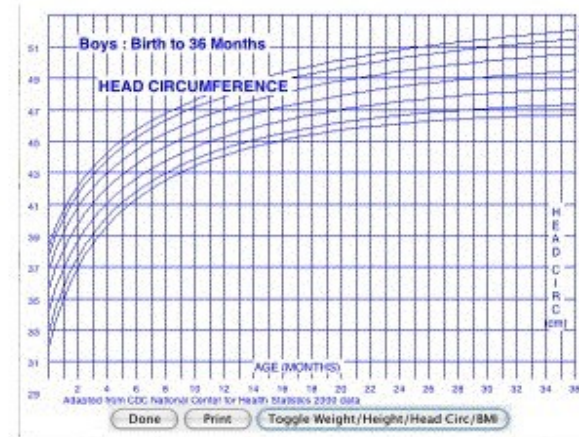
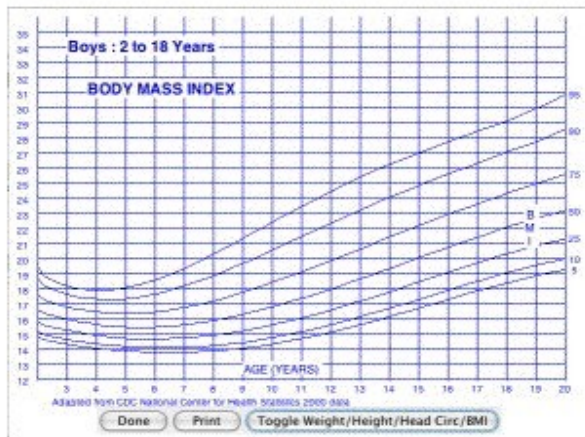
❖ **Immunization:** Allows the entry of patients' past immunizations and the viewing of the immunization record



# 7. Actions Menu

❖ **Graph Vital Signs:** Allows the viewing of blood pressure (BP), height/weight data, body mass index (BMI), and body fat percentage for adults. Head circumference is graphed for infants.

- Actions
- New
- Lab
- Diagnosis List
- Immunization
- Medications List
- Procedures List
- Imaging
- Med Tests
- Graph Vital Signs

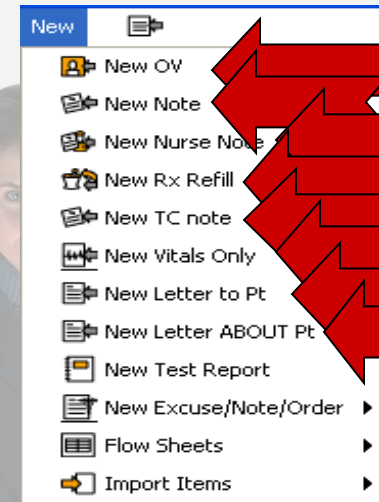


# 8. New Menu



# 8. New Menu

- ❖ **New OV:** Creates a new office visit note for an encounter with the patient
- ❖ **New Note:** Creates a blank note that can be billed
- ❖ **New Nurse Note:** Creates a patient encounter note with a nurse. Similar to the new office visit note but not as extensive
- ❖ **New Rx Refill:** Creates a new medication refill form to be printed out or fax electronically directly to the pharmacy
- ❖ **New TC note:** Creates a new telephone call encounter form
- ❖ **New Vitals Only:** Creates a new vitals form for use when a patient comes to the medical clinic for the sole purpose of having the vitals taken
- ❖ **New Letter to Pt:** creates a new letter addressed to the patient
- ❖ **New Letter ABOUT Pt:** Creates a new letter concerning the patient. Recipient name and address information retrieved from address book



# 8. New Menu

- ❖ **New Form:** Creates an electronic questionnaire for Patient or Guardian
- ❖ **New Test Report:** Creates a blank test reporting form that will send test results to the patient along with test explanation
- ❖ **New Excuse/Note/Order:**
  - ~Provides printable forms for work or school absentee excuses
  - ~Provides printable forms for general notes
  - ~Provides printable forms for the ordering of lab, imaging, and medical tests
- ❖ **Flow Sheets:** Two types of flow sheets allow for the creation of simple documents for repeated use – text format and spreadsheet format
- ❖ **Import Items:** Allows the import of a text file (.txt) or an image (.jpg or .gif) into the patient's care tree

