All the speakers and planning committee members have listed no financial interest/arrangement that would be considered a conflict of interest.
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INTRODUCTION TO ENTERPRISE EHR – CLINICAL INQUIRY

Logging in to Enterprise EHR

For secure access to the Enterprise EHR system, it is important to log in with a user name and password that are not shared with any other system users. It is also important to log off the system when work is complete.

1. From the desktop, double-click the Enterprise EHR icon. The Allscripts Enterprise EHR Login page displays.

2. Enter the Login ID and Password.
   - Some users have access to more than one organization.
   - Instead of clicking the New Session button to log in, these users should click the Options button to display the Login Options dialog box.
   - From the System field, select the appropriate organization and click the Login button.

3. Click the New Session button.
The user’s default page displays with the floating **Clinical Toolbar**.
Navigating within Enterprise EHR

Enterprise EHR is a series of modules accessed within a role-based workplace. The system utilizes simple point-and-click navigation. This makes it easy to lock the Enterprise EHR session when stepping away from the workstation and then unlock it upon return.

- The **Role** is the user’s role within the organization (according to security privileges). In the following example, the **Role** is **Provider**.
- The **Vertical Toolbar (VTB)** is **Role** dependent and is a menu of options corresponding to specific functional areas within Enterprise EHR.
- The **Horizontal Toolbar (HTB)** displays the tabs (or functional areas) available from the option selected on the **VTB**.
- Refer to the following table for descriptions of the buttons on the Enterprise EHR **Toolplace**, which can be used at anytime from anywhere in the system.
- The **Patient Banner** provides a way to search for and select a patient. When a patient is selected, the **Patient Banner** displays the patient’s demographic information.

- **To hide the VTB**, click the **Hide VTB** button. The **VTB** is hidden, and the **Hide VTB** button toggles to the **Show VTB** button.
- **To show the VTB**, click the **Show VTB** button. The **VTB** displays and the **Show VTB** button toggles to the **Hide VTB** button.
The following table describes the buttons displayed on the Enterprise EHR Toolplace.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Tools" /></td>
<td>Displays a drop-down menu, including the <strong>Show/Hide Clinical Toolbar</strong> option for displaying or hiding the <strong>Clinical Toolbar</strong>.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Accesses Enterprise EHR system help.</td>
</tr>
<tr>
<td><img src="image" alt="Lock" /></td>
<td>Locks the Enterprise EHR session.</td>
</tr>
<tr>
<td><img src="image" alt="Logoff" /></td>
<td>Logs off Enterprise EHR.</td>
</tr>
</tbody>
</table>

### Locking and Unlocking Enterprise EHR

To ensure patient confidentiality, the Enterprise EHR session should be locked when stepping away from the workstation.

- From any page, click the **Lock** button. The **Session Locked** page displays.
- Enter the **Password** and click the **Resume** button to log back in to **Enterprise EHR**.

### Logging out of Enterprise EHR

1. From any page in Enterprise EHR, click the **Logoff** button. The **Windows Internet Explorer** dialog box displays.
2. Click the **OK** button. The **Allscripts Enterprise EHR Login** page displays.
3. Close the browser window.
1. From any page where available, click the **Personalize** link. The **Personalize** page displays.

2. Select the desired default settings.

3. Click the **OK** button.
Changing Print Sites in Enterprise EHR

1. From the **Vertical** toolbar, select **User Options**. The **Site** page displays.

2. Click the **Select Site** button. The **Site Selector** page displays.
3. Double-click the appropriate site location. The new location displays on the Site page.

**Accessing Help**

From the Toolplace in the upper-right of any page, click the Help button. The Help page displays.

The Help page only lists generic Enterprise EHR help topics.
Accessing the Daily Schedule

A schedule of appointments may be viewed for one or more providers. Information such as patient demographics, appointment details or patient appointment history is accessible from the schedule.

The appointments displayed on the **Daily Schedule** are determined by the group of appointment statuses selected. Appointment status originates from the practice management system. The following groups of appointment statuses display: **All Appointments**; or **Arrived, Pending and Rescheduled**; or **Arrived, Pending, Rescheduled**, or **No Show**; or **Canceled, No Show** and **Bumped**.

- The registration and scheduling information is sent via interface to Enterprise EHR. This allows users to monitor their schedules directly from Enterprise EHR without having to switch into the Practice Management System (PMS).
- It is important to understand what demographic data is interfaced with Enterprise EHR from the PMS.
1. From the **Vertical** toolbar, select **Chart**. The **Daily Schedule** page displays.

2. From the **Daily Schedule** page, select the **Provider** from the drop-down menu.

   - Click the **All** button to search for a provider not listed in the drop-down menu.

   - The **Pt Loc** and **Pt Status** columns are populated using the associated fields on the **Clinical Toolbar**.

   - The **Daily Schedule** and **Note** pages are integrated allowing the user to launch the **Note** page for an appointment from the **Daily Schedule**.

   - Click the **Note** icon in the **N** column for the desired appointment to display the **Note**.
Navigating the Daily Schedule

The **Last Updated** field displays the last date and time the data on the **Daily Schedule** was refreshed. To display the most current schedule information, click the **Refresh** icon.

To display the **Daily Schedule** for a particular day of the week, select that day on the **Day of the Week** toolbar.

Click the **Go To Today** icon to display the **Daily Schedule** for the current date.

Click the **Previous Week** icon to display the **Daily Schedule** for the same day of the previous week.

Click the **Next Week** icon to display the **Daily Schedule** for the same day of the next week.

To the right of the **Provider** field, notice the **AM**, **PM** and **Total** fields.

- The **AM** field displays the number of appointments on the schedule for the morning.
- The **PM** field displays the number of appointments on the schedule for the afternoon.
- The **Total** field displays the total number of appointments on the schedule for the day.

- Select an appointment on the **Daily Schedule** to display the associated patient demographics on the **Patient Banner**.
- **Double-click** an appointment on the **Daily Schedule** to display the associated **Clinical Desktop** of current patient information, such as active problems and medications, allergies and encounters.
Viewing Multiple Provider Schedules

It is possible to view the schedule of appointments for up to four providers at one time. Information such as patient demographics, appointment details or patient appointment history is visible for any of the provider schedules displayed.

1. From the Vertical toolbar, select Chart.
2. From the Horizontal toolbar, select Provider Schedules. The Provider Schedules page displays with four providers’ schedules displayed simultaneously.

- Users can specify up to four default providers for simultaneous viewing. On the Provider Schedules page, click the Personalize link to display the Personalize page.
- Select a default value from the Default Providers 1, 2, 3, and 4 drop-down menus.
- Only available when logged in as a member of the Clinical Staff.
Using the All Provider View

Provider scheduling can be enhanced to accommodate a larger number of providers that can be viewed using the All Providers view. Up to 20 providers can be viewed at one time, giving a bigger picture of the day’s scheduling.

1. From the Vertical toolbar, select Chart. The Daily Schedule page displays.

2. Click the Personalize link. The Personalize page displays.

   ![Personalize settings](image)

   In the Daily section, the following personalization can be set:
   - **Default Provider** – Defines the provider whose schedule displays when the Daily Schedule is accessed.
   - **Automatic Refresh** – Defines how often the Daily Schedule is refreshed by the system.
   - **Double-Click Action** – Defines the page that the system navigates to when an item on the schedule is double-clicked.
   - **Schedule Contents** – Defines the appointments that will display on the Daily Schedule.

3. Click the New button.
4. In the Provider field, enter the search criteria to search for specific providers.
5. Click the Search button.
The list of providers displays.

6. Select the checkbox next to the provider(s) to be added to the All Provider view. The selected provider(s) displays in the Provider(s) Selected accumulator table.
7. Click the **OK** button to return to the **Personalize** page.
8. Click the **OK** button to return to the **Daily Schedule**.
9. On the **Daily Schedule**, select the **All Providers** view from the drop-down menu.

The page now displays a **Provider** column.

When viewing appointments with the **All Providers** option, only appointments scheduled within 30 minutes of the actual time of the visit are visible.
Searching for a Patient

1. From the Patient Banner, click the Select Patient drop-down arrow.
2. Select Search from the drop-down menu. The Select Patient page displays.

3. In the **Patient** field, enter at least three letters of the patient’s last name and at least three letters of the first name.
4. Click the **Search** button.
5. **Double-click** the desired patient. The patient’s information displays in the **Patient Banner**.
Personalizing the Select Patient Page

When searching for a patient on the Select Patient page, the system defaults to search by the patient name. Users can personalize this page so that the default search criterion better suits his or her process.

1. From the Select Patient page, click the Personalize link. The Personalize page displays.

2. In the Default Field for Patient Search field, select the desired default search criterion from the drop-down menu.

3. Click the OK button.
Viewing the Patient Banner

The Patient Banner displays demographic information pertaining to the selected patient below the Horizontal toolbar (HTB). The following table describes available information that displays on the Patient Banner.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MRN</td>
<td>Medical Record Number</td>
</tr>
<tr>
<td>DOB</td>
<td>Date of Birth</td>
</tr>
<tr>
<td>Age</td>
<td>Patient Age</td>
</tr>
<tr>
<td>Sex</td>
<td>Patient Gender</td>
</tr>
<tr>
<td>PCP</td>
<td>Patient Primary Care Provider</td>
</tr>
<tr>
<td>H Phone</td>
<td>Home Telephone Number</td>
</tr>
<tr>
<td>Allergies</td>
<td>Allergy Status (Yes, No, or Unknown)</td>
</tr>
<tr>
<td>FYI</td>
<td>For your information; informal, non-medical, patient information indicator</td>
</tr>
<tr>
<td>Security</td>
<td>Indicates if the patient information is restricted</td>
</tr>
<tr>
<td>Pri Ins</td>
<td>Patient Primary Insurance</td>
</tr>
<tr>
<td>Note</td>
<td>The Select button opens the Note Selector so that a new note can be created.</td>
</tr>
<tr>
<td></td>
<td>The Go To button navigates the user to the current note for the patient.</td>
</tr>
<tr>
<td></td>
<td>The Close button closes the current note for the patient.</td>
</tr>
</tbody>
</table>

Not all of the demographic information contained in the PMS is interfaced into Enterprise EHR.
Break Glass Security

Whenever secured data is present in the patient chart, users who belong to a classification that contains the Break Glass security code will see a Break Glass button on the Patient Banner.

The Break Glass button indicates that a patient’s chart contains confidential information.

Multiple levels of Break Glass may exist in certain situations. In these cases, users are required to enter their ID and Password more than once in order to access certain charts.

To access restricted information, click the Break Glass button. The Patient Security Confirmation page displays a message that requires the user to enter his/her password. This is necessary in order to track and audit the user’s action.

Although it is not a required field, all users must enter a Reason for Access (such as “Participating in care of patient”, “Need to review claim”, “Need to review Denial”, etc.).
Accessing a Patient Profile

From the Patient Banner, click the Information icon. The Patient Profile displays with the selected patient’s profile information.

Information displayed includes:
- Patient name
- Date of birth
- FYI information
- Chart Alerts
- Demographics
- Employer and contact information
- Insurance information (primary, secondary, and tertiary)
- Pharmacy Benefit
- Retail Pharmacy list (maximum of four)
- Mail Order Pharmacy list (maximum of four)
- Associated Providers
- The Directives field contains the patient response to HIPAA or Advanced Directives information
Adding FYI Information

FYI information is equivalent to a memo and not part of the patient’s medical record. The FYI feature is used to document important non-clinical information. Users can create an FYI that appears on the Patient Banner when a patient is in context.

1. From the Patient Banner, click the Information icon. The Patient Profile displays.
2. Click in the FYI section and add comments. The FYI button on the Patient Banner turns yellow.

OR

From the Patient Banner, click the FYI button.

- When adding FYI information, continue to follow the process of adding your Blue ID and date after the comment.
- For example: Pt is hard of hearing/db1234 06/1/2009
Using the Clinical Toolbar

The Clinical Toolbar provides users access to a patient’s chart information from any page within Enterprise EHR. It displays as a “floating” toolbar until the Clinical Desktop is accessed; it is then docked at the top of the page.

<table>
<thead>
<tr>
<th>Icon/Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>qChart</td>
<td>Opens the Clinical Desktop in a separate page.</td>
</tr>
<tr>
<td>Encounter Summary</td>
<td>Displays the Encounter Summary page enabling the user to preview what has been documented during the current encounter.</td>
</tr>
<tr>
<td>Vitals</td>
<td>Displays the Order Details page with the Vitals tab active, enabling the user to enter vital signs for a patient.</td>
</tr>
<tr>
<td>Add New Problem</td>
<td>Displays the Add Clinical Items (ACI) window. The History Builder tab is automatically selected enabling the user to add and update the patient’s problems and historical information.</td>
</tr>
<tr>
<td>Add New Medication</td>
<td>Displays the Add Clinical Items (ACI) window. The Rx/Orders tab is automatically selected enabling the user to order medications.</td>
</tr>
<tr>
<td>Add New Order</td>
<td>Displays the Add Clinical Items (ACI) window. The Problem-Based Orders tab is automatically selected enabling the user to search for and select from all available orderable items.</td>
</tr>
<tr>
<td>Note</td>
<td>Enables the user to create a new note, navigate to the current note in context, or close the current note.</td>
</tr>
<tr>
<td>Post to Encounter</td>
<td>Ensures all problems assessed are automatically added to the Encounter Form for the current encounter and display within the Assessment section in the structured note.</td>
</tr>
<tr>
<td>Commit</td>
<td>Submits and saves information (via the Encounter Summary) that has been entered and/or documented from within the Clinical Desktop. The Commit button turns yellow when the Encounter Summary contains unsaved information.</td>
</tr>
<tr>
<td>Pat Loc</td>
<td>Patient Location – Enables users to track the patient’s current location throughout the course of the visit. This also displays on the Daily Schedule.</td>
</tr>
<tr>
<td>Status</td>
<td>Status – Enables users to label and track the patient’s current status (e.g. “Roomed,” “Provider-Ready,” etc.) throughout the course of the visit.</td>
</tr>
</tbody>
</table>
Show/Hide Clinical Toolbar

1. To hide the Clinical Toolbar, click the Close button (red X) in the upper-right corner of the toolbar.

2. To show the Clinical Toolbar, click the Tools button located on the Toolplace.

3. From the Tools menu, select Show/Hide Clinical Toolbar. The “floating” Clinical Toolbar displays.
Working with the Clinical Desktop

Quickly review a patient’s condition prior to an appointment by viewing an overview of current information for the patient, including active problems and medications, allergies and encounters.

The staff has access to all areas of a patient’s record from the Clinical Desktop. The Clinical Desktop is comprised of the following elements:

- **Clinical Desktop View** – Indicates the configuration of the Clinical Desktop (that is, which components are visible, how the components are laid out on the screen, and so on).
- **Clinical Toolbar** – Icons that allow users to add clinical items, review data, and track patient location and status.
- **Components** – Configurable workspaces, including Problem, Encounter, Meds, Orders, Allergies, Chart Viewer, Patient Worklist, Vitals, and Health Management Plan; these components are described individually in the following sections.
- **Component Groups** – Indicates multiple tabs grouped together on a single component.

1. From the Horizontal toolbar, select the Clinical Desktop tab. The Clinical Desktop displays with patient information organized within components.

2. Select the desired tab within a component. The associated items display.
• The Clinical Desktop view may be changed using the drop-down menu in the upper-left corner.
• Component views may be changed using the associated drop-down menus within each.
• Right-click an item within a component to display a menu of actions associated with the component.

The following table describes additional functionality within the Clinical Desktop.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refresh View" /></td>
<td>Refresh View</td>
<td>Refreshes the information within the associated component.</td>
</tr>
<tr>
<td><img src="image" alt="Edit View" /></td>
<td>Edit View</td>
<td>Provides the user with the ability to edit a component or Chart Viewer view.</td>
</tr>
<tr>
<td><img src="image" alt="Tile/Full Screen" /></td>
<td>Tile/Full Screen</td>
<td>Toggles the Clinical Desktop between a tiled component view and a full-screen component view.</td>
</tr>
<tr>
<td><img src="image" alt="Expand" /></td>
<td>Expand</td>
<td>Expands/Collapses the items and associated information within a component.</td>
</tr>
<tr>
<td><img src="image" alt="New Task" /></td>
<td>New Task</td>
<td>Displays the Task Details page enabling the user to create a new task from the associated component.</td>
</tr>
<tr>
<td><img src="image" alt="FlowSheet" /></td>
<td>FlowSheet</td>
<td>Enables the user to view a graph or &quot;flow&quot; of vitals findings over a period of time.</td>
</tr>
<tr>
<td><img src="image" alt="Graph" /></td>
<td>Graph</td>
<td>Produces a visual graphic of selected vital signs with two or more dated entries. Select the checkbox next to the item(s) in the Graph column and then click the Graph icon.</td>
</tr>
</tbody>
</table>
**Working within Components**

Patient information within a component may be added, edited, or viewed using multiple techniques. The following table describes the methods for accessing information within a component on the **Clinical Desktop**.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Single-click</strong></td>
<td>Highlights an item and activates associated actions at the bottom of the component that may be used with the selected item.</td>
</tr>
<tr>
<td><strong>Double-click</strong></td>
<td>Displays the details of the selected item in a separate window.</td>
</tr>
<tr>
<td><strong>Right-click</strong></td>
<td>Displays a menu of actions that may be used with the selected item.</td>
</tr>
</tbody>
</table>
The buttons on the bottom of a component are used to perform specific actions for the items in the component. The buttons differ depending on the component. The following table defines the buttons found on the bottom of the different components.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Opens the ACI to allow for creation of a new item.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the Details page for the selected item for modification.</td>
</tr>
<tr>
<td>Renew</td>
<td>Renews the selected medication without any changes to the prescription.</td>
</tr>
<tr>
<td>Renew w/Changes</td>
<td>Opens the Medication Details page to allow for the renewal of a prescription with changes.</td>
</tr>
<tr>
<td>Order D/C</td>
<td>Allows the selected medication to be discontinued or continued.</td>
</tr>
<tr>
<td>Verify/Add</td>
<td>Allows the Provider to validate the medication is correct for the patient’s Current Medications list. The medication can then be renewed.</td>
</tr>
<tr>
<td>Annotate</td>
<td>Opens the Details page so that an annotation can be added to the selected item.</td>
</tr>
<tr>
<td>Resolve</td>
<td>Marks the selected problem as resolved.</td>
</tr>
<tr>
<td>Resolve/Assess</td>
<td>Marks the selected problem as assessed and resolved.</td>
</tr>
</tbody>
</table>
Viewing the Problems List

From the Clinical Desktop, select the Medical Problems tab. The Medical Problems component displays a list of the patient’s problems organized by the default view.

- A problem with an asterisk to the left of the name indicates the presence of an Annotation.
- Double-click the item to display the details including any annotations.
1. From the **Clinical Desktop**, select the **Problem** tab.

2. From the **view** drop-down list, select **Past Medical History**.
The **Problem** component displays with a list of the patient’s medical history organized by the default view.

- A Past Medical History item with an asterisk to the left of the name indicates the presence of an **Annotation**.
- **Double**-click the item to display the details including any annotations.
Viewing Past Surgical History (PSH)

1. From the Clinical Desktop, select the Problem tab.

2. From the view drop-down list, select Past Surgical History.
   The Problem component displays with a list of the patient’s surgical history organized by the default view.

- A Past Surgical History item with an asterisk to the left of the name indicates the presence of an Annotation.
- Double-click the item to display the details including any annotations.
Viewing Family History (Fam Hx)

1. From the **Clinical Desktop**, select the **Problems** tab.

   - From the **view** drop-down list, select **Family History**. The **Problems** component displays with a list of the patient’s family history organized by the default view.

   - A Family History item with an asterisk to the left of the name indicates the presence of an **Annotation**.
   - **Double-click** the item to display the details including any annotations.

2. From the **view** drop-down list, select **Family History**. The **Problems** component displays with a list of the patient’s family history organized by the default view.
Viewing Social History (Social Hx)

1. From the **Clinical Desktop**, select the **Problems** tab.

2. From the **view** drop-down list, select **Social History**. The **Social History Problems** component displays with a list of the patient’s social history organized by the default view.

- A Social History item with an asterisk to the left of the name indicates the presence of an **Annotation**.
- **Double-click** the item to display the details including any annotations.
Viewing Allergies

1. From the Clinical Desktop, select the Allergies tab. The Allergies component displays with a list of the patient’s allergies organized by the default view.

2. If desired, from the view drop-down menu, choose to view the patient’s allergies by Medications or Non-Medications.
   - An allergy item with an asterisk to the left of the name indicates the presence of an Annotation.
   - Double-click the item to display the details including any annotations.
Viewing the Medications List

The **Medications List** is used to view a list of medications for a selected patient, including instructions for use, the number of refills, the dates between which the patient is to take the medication, and other medication-related information.

From the **Clinical Desktop**, select the **Meds** tab. The **Medications** component displays with a list of the patient’s medications organized by the default view.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌟</td>
<td>Preferred formulary status (lowest co-pay)</td>
</tr>
<tr>
<td>😊</td>
<td>Approved formulary status (higher co-pay)</td>
</tr>
<tr>
<td>😞</td>
<td>Non-approved formulary status (full price)</td>
</tr>
<tr>
<td>🚩</td>
<td>Prior Authorization is required</td>
</tr>
<tr>
<td>🌼</td>
<td>Over-the-Counter medication</td>
</tr>
<tr>
<td>⚫️</td>
<td>No formulary information available for the selected medication</td>
</tr>
</tbody>
</table>
1. From the Clinical Desktop, select the Meds tab.

2. From view drop-down list, select Past Medications. The Meds component displays a list of the patient’s past medication history organized by the default view.

- A medication item with an asterisk to the left of the name indicates the presence of an Annotation.
- Double-click the item to display the details including any annotations.
Viewing Immunization History

1. From the **Clinical Desktop**, select the **Health Management Plan** tab.

2. From the **view** drop-down menu, select **Immunization series**. The patient’s immunization history displays.
Accessing Chart Viewer

Use Chart Viewer to view and print any clinical documentation from a patient chart, including notes, referrals, test results, scanned images and consent forms. Chart items can be searched grouped and filtered by various criteria in order to find specific documents quickly and easily.

1. From the **Vertical** toolbar, select **Chart**.
2. From the **Horizontal** toolbar, select the **Clinical Desktop** tab. The **Clinical Desktop** displays.
3. From the desktop view, select the **Clinical Staff Patient View**.
4. Select the **Chart Viewer** tab. The patient’s chart items display.

5. Select the appropriate **View** from the drop-down menu. The recommended view is **All by Section by Sub-Section**.
6. To print a document, highlight and right-click.

7. Select **Print** from the menu and choose a print option.

### Option Description

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected</td>
<td>Prints only the selected document.</td>
</tr>
<tr>
<td>SnapShot</td>
<td>Prints the patient’s active problem, medication and allergy lists, HMP items, as well as a list of encounters.</td>
</tr>
<tr>
<td>Worksheet</td>
<td>Prints the patient’s active problem, medication and allergy lists, along with a list of the patient’s results.</td>
</tr>
<tr>
<td>Chart</td>
<td>Prints the entire chart. <strong>Only a select group of users</strong>, such as Medical Records, is able to print an entire chart.</td>
</tr>
</tbody>
</table>
8. To view a document, double-click the appropriate document to view it in a separate page.
The following table describes the available views when using Chart Viewer:

<table>
<thead>
<tr>
<th>Selected View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encounter</td>
<td>Shows any associated documents to a specific visit date.</td>
</tr>
<tr>
<td>Owner</td>
<td>Shows documents created by a specific staff member.</td>
</tr>
<tr>
<td>Problem</td>
<td>Shows all documents associated with a particular diagnosis/problem.</td>
</tr>
<tr>
<td>Provider</td>
<td>Shows all documents by provider with which they were associated.</td>
</tr>
<tr>
<td>Section</td>
<td>Shows documents separated by the main category under which they fall (e.g., labs, notes, etc.).</td>
</tr>
<tr>
<td>Specialty</td>
<td>Separates documents by specialty type (e.g., Family Practice, Internal Med, OB/GYN, etc.).</td>
</tr>
<tr>
<td>Visit</td>
<td>Shows all items in one list.</td>
</tr>
<tr>
<td>All Items (default view)</td>
<td>Shows all items in one list.</td>
</tr>
<tr>
<td>All by Encounter</td>
<td>Shows any associated documents to a specific visit date.</td>
</tr>
<tr>
<td>All by Owner</td>
<td>Shows documents created by a specific staff member.</td>
</tr>
<tr>
<td>All by Owner by Encounter</td>
<td>Shows documents created by a specific staff member, but further broken down by date of encounter.</td>
</tr>
<tr>
<td>All by Problem</td>
<td>Shows documents associated with a certain problem/diagnosis.</td>
</tr>
<tr>
<td>All by Problem by Encounter</td>
<td>Shows documents associated with a certain problem/diagnosis, but is further broken down by date.</td>
</tr>
<tr>
<td>All by Section</td>
<td>Shows documents separated by the main category under which they fall (e.g., labs, notes, etc.).</td>
</tr>
<tr>
<td>All by Section by Sub-Section</td>
<td>Shows the main document categories and is further broken down by individual sub-folders (e.g., types of labs, types of patient information, etc.).</td>
</tr>
<tr>
<td>All by Specialty</td>
<td>Separates documents by specialty type (e.g., Family Practice, Internal Med, OB/GYN, etc.).</td>
</tr>
<tr>
<td>All Notes</td>
<td>Shows a list of all notes, any type.</td>
</tr>
<tr>
<td>All Results</td>
<td>Shows a list of all results, any type.</td>
</tr>
</tbody>
</table>
Filtering within Chart Viewer

1. After accessing the **Chart Viewer**, select the appropriate **View** from the drop-down menu.

2. Click the **Quick Filter** icon to filter a list of desired records. A **Search** field displays with a list of filtering options. Clicking the **Quick Filter** icon a second time hides the **Search** field.

3. In the **Quick Filters** section, select from one or more categories to narrow the list of chart items further.
Viewing Results

1. From the Clinical Desktop, select the Chart Viewer component.
2. Double-click the desired result or resulted order. The Order Viewer displays with the details of the selected item.

OR

From the Clinical Desktop, select the Meds or Orders component.

Results can be printed, faxed, or copied, among other actions, from this page.
The following table describes the various icons associated with results.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Indicates normal results that are unverified.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Indicates unverified results containing at least one abnormal value.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Indicates normal results that are verified.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Indicates verified results containing at least one abnormal value.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Viewed in <strong>Chart Viewer</strong>, this icon indicates results that have been scanned into <strong>Enterprise EHR</strong>.</td>
</tr>
</tbody>
</table>
REGISTRATION, SCHEDULING AND CHECK-IN WORKFLOWS

Appointment Scheduling

The purpose of this workflow is to schedule a patient for an appointment.

1. The Clinic staff/Call Center determines if patient is new or established by performing a **thorough** search in IDX.
2. If the patient is **New**, the Front Desk needs to obtain and enter the following information: Billing Party, Patient Full Name, Address, Phone Number, Date of Birth, and Social Security Number.
3. If the patient is **Established**, the current demographic information should be **reviewed** for accuracy.
4. Once demographic information is obtained, an appointment, including **Reason for Visit**, is scheduled via IDX.
5. If the appointment is a **Referred Appointment**, enter the Referring Physician on the appointment detail screen.
6. The registration and scheduling information is sent via an interface to Allscripts.

Appointment Preparation

The purpose of this workflow is to prepare the appointment based on whether the patient is **New** or **Established**.

For **New Patients**:
1. No paper chart currently exists and will not be created.
2. Determine at this time if the patient's appointment requires paperwork to be prepared prior to the patient's appointment and proceed accordingly.
3. It is recommended that all necessary documents are scanned at the time the patient arrives for their appointment.

For **Established Patients**:
1. If applicable, check the patient's appointments for any arrived office visits with other providers. Example: Referrals/consults
2. To check patient's medical record for referral/consult notes, from the **VTB**, click **Chart**.
3. From the **HTB**, click the **Clinical Desktop** tab.
4. Click the **Chart Viewer** component and review for any notes associated with referral/consult appointment(s).
Appointment Check-In

The purpose of this workflow is to check-in the patient via IDX.

1. Verify that the **PCP** (Primary Care Provider) is loaded into IDX.
2. If necessary, add **Referring Provider** to the correct field in IDX.
3. Scan any necessary documents such as signed demographic form, HIPAA, and Insurance cards.

Appointment Check-In with Front Desk Adding Medical History

The purpose of this workflow is to check-in the patient via IDX and then add Medical History.

1. Verify that the **PCP** (Primary Care Provider) is loaded into IDX.
2. If necessary, add **Referring Provider** to the correct field in IDX.
3. Scan any necessary documents such as signed demographic form, HIPAA, and Insurance cards.
4. From the appropriate **Daily Schedule** in Allscripts, *double-click* the patient. The **Clinical Desktop** displays.
5. Per the clinic protocol, only clinical staff or physician will add medical history using the patient intake process.
**CLINICAL INTAKE**

**Introduction to the ACI**

The **Add Clinical Item (ACI)** window allows the entry of the patient’s clinical information in a single location.

- The **History Builder** tab contains secondary tabs for entering or updating Medical History (PMH, PSH, Fam Hx, and Social Hx) as well as Allergies, Med Hx, and Immun Hx.
- The **Rx/Orders** tab contains secondary tabs for ordering and administering medications, ordering labs, tests, follow-up appointments, requesting referrals, or immunizations.
- The **Problem-based Orders** tab contains secondary tabs that organize medication and non-medication orders linked to a specific problem. The two options for problem-based ordering include **CareGuides** and **QuickSets**. **CareGuides** are pre-delivered problem-based order sets, whereas **QuickSets** are automatically developed as the user links orderable items to specific problems. Both options provide efficiency when placing orders.
- After entering or updating all relevant information, click the **OK** button. Clicking the **OK** button does not commit the information to the database; instead, it places the entries in a “Work In Progress (WIP)” status. Placing items in a WIP status allows the user to continue the designated workflow without having to pause and save after every step. The added items can then be reviewed simultaneously after completing the workflow and **Committed** to the clinical record. Another advantage to the WIP status is allowing for corrections prior to committing entries to the record. This avoids having to Enter in Error anything that was added incorrectly. The information is saved to the **Encounter Summary** and is available to the provider to review at the start of the patient encounter.
- The WIP is also valuable if a computer freezes or during a power failure. If the same user logs in to the same terminal and selects the same patient, they get a WIP message to allow them to **Commit** the information for that patient. Information such as free text or dictation does not save to the WIP.
Using Favorites to Search

When adding new clinical items such as allergies or problems to a patient’s record, it is necessary to perform an item search.

- Searching using the **My Favorites List** or **QuickList** is significantly more efficient than searching through a master list of items.
- If a **My Favorites List** has not been created, **Enterprise EHR** automatically searches through the **Specialty Favorites**.
- **Enterprise EHR** automatically conducts incremental searches.
- If the search produces no matching results, click the **Search** icon to utilize the master search capabilities of **Enterprise EHR** or search from the alpha tabs located on the right side of the **ACI**.
- Searches utilizing the alpha tabs are far more efficient for tablet users as there is no need to scroll through lists of items.

<table>
<thead>
<tr>
<th>Search Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Master List</strong></td>
<td><strong>Enterprise EHR</strong> dictionary containing all diagnoses and codes.</td>
</tr>
<tr>
<td><strong>My Favorites</strong></td>
<td>Enables the user to save his/her most frequently used dictionary entries in a user-specific custom list.</td>
</tr>
<tr>
<td><strong>Specialty Favorites</strong></td>
<td>A pre-defined list of items that is relevant to the selected department or specialty. Enables a user to move quickly through a list of items in place of searching through an extensive master list.</td>
</tr>
<tr>
<td><strong>QuickList</strong></td>
<td>Functions as a subset of the <strong>My Favorites</strong> list that contains the most frequently used orderable items. This is a personalized specialty favorites listing per user.</td>
</tr>
</tbody>
</table>
**Searching the ACI**

When adding new clinical items such as allergies or problems to a patient’s record, it is necessary to perform an **item search**.

![Search Tools](image)

<table>
<thead>
<tr>
<th>Search Tools</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Search Field" /></td>
<td>The <strong>search</strong> field allows for the entry of free text.</td>
</tr>
<tr>
<td><img src="image" alt="Green Arrow" /></td>
<td>The <strong>Green Arrow</strong> icon erases the text in the <strong>search</strong> field.</td>
</tr>
<tr>
<td><img src="image" alt="Search" /></td>
<td>If a search produces no matching results, click the <strong>Search</strong> icon to utilize the master search capabilities of Enterprise EHR or search from the alpha tabs located on the right side of the <strong>ACI</strong>.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>The <strong>Refresh</strong> icon clears the text in the <strong>search</strong> field and refreshes the item list.</td>
</tr>
<tr>
<td><img src="image" alt="ICD9" /></td>
<td>When the <strong>ICD9</strong> button displays a green light, the search will only return results associated with ICD9 codes. When the button displays a gray light, all results will display.</td>
</tr>
<tr>
<td><img src="image" alt="My Favorites" /></td>
<td>If a <strong>My Favorites List</strong> has not been created, Enterprise EHR automatically searches through the <strong>Specialty Favorites</strong> (such as Family Medicine).</td>
</tr>
<tr>
<td><img src="image" alt="Alpha Tabs" /></td>
<td>Searches using the <strong>My Favorites List</strong> or <strong>QuickList</strong>. This is much more efficient than hunting through a master list of items.</td>
</tr>
<tr>
<td><img src="image" alt="Alpha Tabs" /></td>
<td>Searches utilizing the <strong>Alpha Tabs</strong> are far more efficient for tablet users as they do not require scrolling through lists of items.</td>
</tr>
</tbody>
</table>
Creating a Favorites List

1. On the ACI, highlight the “favorite” item from the Specialty List.
2. Right-click the highlighted item. A menu displays.
3. Select Favorite Item to add the highlighted item to the My Favorites List. The favorite items display when My Favorites is selected as the search list.

Introduction to the History Builder

The History Builder tab is used to quickly add or edit new historical items to the patient’s record. These items are verified at the beginning of the encounter or recorded during the patient intake process.
The information on the left pane of the **History Builder** tab displays the patient’s chart. In this image, the user is able to view quickly the patient’s Active Problems, Current Meds/Orders, and Allergies. Click the drop-down arrow in each section to view other historical items for the patient.

The tabs on the right pane of the **History Builder** tab are used to add historical items.

**Selecting an Encounter**

The **Encounter selector allows** you to manage the current encounter for the selected patient. The Encounter selector displays when data is added to a **Non-Scheduled patient**. The Encounter selector defaults to today’s date.

1. From the **Encounter selector**, click the **Type** drop-down and select **Chart Update**.
2. To continue, Click the **OK** button.

The Encounter Selector will display anytime that you attempt to add data to a non-scheduled patient’s chart.
There are times when either the provider or the clinical staff will need to print the allergy list.

1. Select the **Allergies** tab.
2. Right-click and select **Print Allergy List**.
3. Select **Print Allergy List**.
The **Print Dialog** box displays.

![Print Dialog](image)

4. In the **Print Dialog** box, select the appropriate server and printer from the provided drop-down lists.

5. Click **OK** to print the list.
Printing Medication History (Med Hx)

There are times when the need arises to print the Medication History, such as the patient requesting a list of medications.

1. Right-click anywhere in the Meds component to display the menu.

2. Scroll to the bottom of the menu. Select Print Medication List.

3. In the Print Dialog box, select the appropriate server and printer from the provided drop-down lists.

4. Click OK to print.

- Only the displayed list will be printed (e.g. Current Medications or Past Medications). To print both Current and Past Medications, the process will need to be executed twice, changing between Current Medications and Past Medications in between.
Printing Immunization History

There are times when the need arises to print the Immunization History, such as the patient requesting a list of immunizations.

1. Select the **Immunizations Series** view in the HMP component.

2. From the drop-down menu, select **Immunizations Series**.
3. Click **Print** on the toolbar at the bottom of the **Health Management Plan** component.

4. In the **Print Dialog** box, select the appropriate server and printer from the provided drop-down lists.

5. Click **OK** to print.
Viewing the Encounter Summary

The **Encounter Summary** is used to review and edit the information entered during the encounter. It provides users a final opportunity to modify data before saving to the patient’s chart.

On the **Clinical Toolbar**, click the **Encounter Summary** icon.

**OR**

On the **Clinical Toolbar**, click the **Commit** button.

The **Encounter Summary** displays.

- To remove an item, select the checkbox to the left of the desired item in magenta. The checkmark is removed from the associated checkbox.
- To modify an item, right-click the desired item and select the appropriate action from the displayed menu.
The following table describes the items on the **Encounter Summary** toolbar.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View By: Problem</td>
<td>Filters the <strong>Encounter Summary</strong> by problem or type.</td>
</tr>
<tr>
<td>Pat Loc: 04 Exam Room</td>
<td>Expands all of the folders on the <strong>Encounter Summary</strong>.</td>
</tr>
<tr>
<td>Status: Departed</td>
<td>Displays the patient’s location and allows it to be changed.</td>
</tr>
<tr>
<td></td>
<td>Displays the patient’s status and allows is to be changed.</td>
</tr>
<tr>
<td></td>
<td>Creates a new task.</td>
</tr>
<tr>
<td></td>
<td>Displays a menu to allow the user to add additional items to the patient’s chart or create a new task.</td>
</tr>
</tbody>
</table>

### Committing Information to the Encounter Summary

On the bottom of the **Encounter Summary**, click one of the following buttons to perform the appropriate action.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Pt.Ed</td>
<td>Prints a copy of all actions taken during the encounter for the patient including ordered medications, labs, imaging, follow-ups, referrals, supplies, or patient instructions as appropriate.</td>
</tr>
<tr>
<td>Continue</td>
<td>Returns the user to the <strong>Clinical Desktop</strong> without saving the patient information.</td>
</tr>
<tr>
<td>Save and continue</td>
<td>Commits/Saves the patient information and returns the user to the <strong>Clinical Desktop</strong>.</td>
</tr>
<tr>
<td>Save</td>
<td>Commits/Saves the patient information without closing the <strong>Encounter Summary</strong>.</td>
</tr>
<tr>
<td>Delete Unsaved</td>
<td>Deletes all items in magenta text displayed on the <strong>Encounter Summary</strong>.</td>
</tr>
</tbody>
</table>
Printing the Immunization List

1. With the patient in context, navigate to the Immunizations Series flowsheet of the HMP on the Clinical Desktop view.
2. From the Action bar, click Print.
3. If not already defaulted, select the printer.
4. Click OK.
NON-PATIENT VISIT OVERVIEW

The term “Non-Patient Visit Workflow” actually refers to a collection of process flows that may directly or indirectly pertain to a patient’s encounter. These process flows also relate to the day-to-day functions within the organization including internal and external communication, record keeping, etc.

The Non-Patient Visit Workflow includes the following areas of Allscripts:

- Call Processing
- Tasking
- Worklist Management
- Health Management Plans (HMPs)
- Document Management
- Scan
Processing a Call

The **Call Processing** functionality in Allscripts is designed to allow staff to efficiently gather, route, communicate, and document patient phone calls. The primary mechanism used to route calls is via tasking. The **Call Processing** page contains patient demographic information as well as information pertaining to the call in process.

1. From the **Vertical** toolbar select Call Process, and from the **Horizontal** toolbar, select **Call Process**. The **Call Processing** page displays.

2. Click the **Select Pt** button.

3. Enter the patient’s last name, at least three letters of the first name, and press the **Enter** key.

4. Double-click the desired patient. The patient information displays in the Patient Banner.

5. Select the **Patient is Caller** checkbox, if applicable. The patient’s information populates the **Call Processing** page.

6. Verify and, if necessary, add or edit the patient’s phone number.
   - Enter the caller's relationship to the patient.
   - Enter up to two phone numbers and select the type from the drop-down.

7. Select the appropriate **User** or **Team** from the **Route To** drop-down menu.
8. Select the appropriate reason for the call from the **Reason for Call** drop-down menu.

9. Enter the appropriate detail information in the **Comments** field.

Refer to the *Using a Text Template* procedure for more information about entering **Comments** with a template.

10. Click **Copy to Task**.
11. Select the desired task type from the **Task** drop-down menu.
12. Select the desired priority for the task from the **Priority** drop-down menu.
   - **Routine** - overdue at 7 days
   - **ASAP** - overdue at 2 days
   - **Urgent** - overdue at 1 hour and must be accompanied by a phone call.
14. Enter additional text, if desired, in the **Comments** field.
15. If applicable, select the desired **Create Notify Task When** checkbox for this task.
16. Click **OK**.

**AND / OR**

17. Click **Copy to Note**. The **Note Selector** page displays.
Refer to the **Copying a Task to Note** section for more information about using the **Copy to Note** function.
   - Although the call information still displays on the page, the information has been sent to the appropriate user/team. Click the **Clear Form** button.
   - **Personalize** Set the personalize page to automatically clear.
Personalizing the Call Processing Page

1. Click the **Personalize** link in the upper-right corner of the **Call Processing** page. The **Personalize** page displays.

2. Select the **General** options to default on the **Call Processing** page by selecting the appropriate checkbox(es).
   - Select the first three options.
   - The most popular option is **Clear Call Processing screen when click Copy to Task button**.
   - This option clears the **Call Processing** page when the **Copy To Task** button is clicked so that a visual confirmation is received that the task was copied successfully.

3. In the **Route to Default** section, select a **User** or a **Team** only if you send every call to the same person or team.

4. Select the appropriate user from the drop-down menu or click the **All** button to search for the user.

5. Select the **Default sort for My Calls** from the drop-down menu.

6. Click the **OK** button.
Accessing Unfinished Calls

1. From the **Vertical** toolbar, select **Call Process**.
2. Select **Unfinished Calls** from the **Horizontal** tabs. The **Unfinished Calls** page displays.

3. Select the appropriate call.
4. Finish entering call information as described above and **Copy to Task**.

   - **Unfinished calls** may be edited, deleted, and copied to a note or task from this page by the user who placed them in Unfinished status.
   - **A new call can be started from the Unfinished Calls page by clicking the Start New button.**
Using a Text Template

Text Templates contain standard content and are used to facilitate complete and consistent entry of information in the Comments field. Multiple text templates can be combined and if additional information is needed, free text can be entered directly into the Free Text page.

1. Click the Text Templates button to access the list of Text Templates. The Free Text page displays.
2. From the **Text Templates** section, select the appropriate template from the scrolling list. The selected text template displays on the left-hand side of the page.

3. Enter the required data into the template. Use the **Tab** key to advance to the next text field indicated within the brackets.
The following table describes the placeholders available for text entry within a template.

<table>
<thead>
<tr>
<th>Placeholder</th>
<th>Name</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>[  ]</td>
<td>Text Entry</td>
<td>Onset: [  ] days ago. Enter text between the brackets.</td>
</tr>
<tr>
<td>[text]</td>
<td>Multiple-Choice</td>
<td>Progression: Pain is [increasing] [decreasing] [unchanged]. Click the appropriate option(s).</td>
</tr>
<tr>
<td>Text [ ]</td>
<td>Optional Text</td>
<td>Triggers: [None] [Exertion] [Stress] Other: [  ]. Enter text between the italicized brackets. If no text is entered between the italicized brackets, then the optional text does not display in the note.</td>
</tr>
</tbody>
</table>

4. Click the Spell Check button, if desired.
5. Click OK. The Call Processing page displays with the completed text template in the Comments section.
6. **Click Copy to Task.** The Task Detail page displays with all of the information from the call.

![Task Detail Webpage Dialog](image)

7. From the **Task** drop-down field, select the **desired task type**.

8. Select the appropriate **User** or **Team** from the **Route To** drop-down menu.

9. Select the desired priority for this task from the **Priority** field.
   - **Routine** - overdue at 7 days
   - **ASAP** - overdue at 2 days
   - **Urgent** - overdue at 1 hour

10. Enter additional text, if desired, in the **Comments** field.

11. If applicable, select the desired **Create Notify Task When** checkbox for this task.

12. **Click OK** to activate the new task.
Viewing the Task List

An Allscripts task is defined as a request to either supply information or perform an action. **Tasks** are both created and completed in the system either manually or automatically (that is, triggered by the system because of specific activities). Utilizing tasks promotes effective communication and maximizes efficiency.

1. From the **Vertical** toolbar, select **Chart**. From the **Horizontal** toolbar, select **Task List**. The **Task List** page displays.

- The **Task List** page may be sorted in ascending or descending order using any of the column headings displayed by clicking the arrows to the right of the column name.
- The table below describes each column displayed on the **Task List** page.
<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
</table>
| P      | Indicates the **Priority** (level of urgency) for the selected task. The three priorities are:  
- Urgent  
- ASAP  
No indicator displayed indicates a task that should be completed on a Routine basis. |
| D      | **Delegated** indicates whether responsibility for the task has been assigned to another person. |
| Task   | Describes the particular information or action required by the task. |
| Patient| Patient with whom the task is associated. If blank, the task is not associated with a specific patient. |
| Assigned To | Person or team to whom “ownership” of the task is assigned. |
| Created By | Indicates whether the task was manually created (name of the person who created the task) or system-generated. |
| Created On | Date and time the task was created. |
| Status | Task status. Statuses may include:  
- **Active** — Indicates a task for which the activate date has been reached, but has **not** yet been completed.  
- **In Progress** — indicates a task that is currently being performed.  
- **Complete** — Indicates a task that has been performed or completed.  
- **Inactive** — Indicates a task for which the activate date has not yet been reached.  
- **Removed** — Indicates a task that has been removed rather than completed. |
| Due    | Task due status.  
- **Indicates a task for which the due date has been reached, but has not yet been completed.**  
- No indicator displayed indicates a task for which the due date has not yet been reached. |
| MRN    | **(Medical Record Number)** MRN of the patient with whom the task is associated. |

Once a **Task** is completed, it can always be accessed in the **Current Patient – All** View.
2. Select the appropriate view from the **View** drop-down menu. The table below describes the three default task views available on the **Task List** page.

<table>
<thead>
<tr>
<th>Task View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Active Tasks</td>
<td>Displays active tasks for the person currently logged into the system.</td>
</tr>
<tr>
<td>Current Patient – Active</td>
<td>Displays only active tasks associated with the patient currently displayed in the <strong>Patient Banner</strong>.</td>
</tr>
<tr>
<td>Current Patient – All</td>
<td>Displays all tasks associated with the patient currently displayed in the <strong>Patient Banner</strong>.</td>
</tr>
</tbody>
</table>
Managing Tasks

After selecting the **Task List** page and sorting the information, the task list is ready to be “worked.”

When the action required by a task is performed within Allscripts, the associated task is automatically completed by the system. For example, the act of signing a note within Allscripts automatically completes the task requiring signature of the note.

However, a task that cannot be performed (or verified) within Allscripts must be manually completed in the system. For example, a telephone call cannot be made within Allscripts; therefore, after a telephone call has been made, the associated task must be manually completed in the system.

Working a task list includes the following activities:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing more information about a task</td>
<td>Select the task then click <strong>Details</strong>. The system displays the <strong>Task Details</strong> page for that task.</td>
</tr>
<tr>
<td>Marking the status of a task as In Progress</td>
<td>Select the task then click <strong>In Progress</strong>. The name of the user who performed this action displays in the <strong>Comments</strong> box.</td>
</tr>
<tr>
<td>Performing or Completing a task</td>
<td>Select the task then click <strong>Go To</strong>. The system displays the workspace from which a task’s action must be performed. For example, if working a Sign Note task, click <strong>Go To</strong> to display the <strong>Note Authoring Workspace</strong> and sign the note.</td>
</tr>
<tr>
<td>Reassigning a task</td>
<td>Select the task and then click <strong>Reassign</strong>. Indicate the new owner’s name; select an Allscripts user or a team.</td>
</tr>
<tr>
<td>Removing a task</td>
<td>Select the task and then click <strong>Remove</strong>. The system requires a reason why the task is being removed to be indicated. Enter additional details as appropriate.</td>
</tr>
<tr>
<td>Replying to a task</td>
<td>Select the task then click <strong>Reply</strong>. Indicate who should receive the reply, and then enter an appropriate comment. You can also edit the task’s priority if appropriate.</td>
</tr>
<tr>
<td>Copying a task to a note</td>
<td>Select the task then click <strong>Copy to Note</strong>. If a note is not in context, then the system displays the <strong>Note Selector</strong>; select the appropriate note.</td>
</tr>
</tbody>
</table>
1. Highlight the task from the **Task List**.

2. Click **In Progress** from the **Task List** page. This alerts other team members that the task is being addressed.

3. From the **Comments** section, review the task information.
4. Click the Details button to open the task details page.

5. In the Comments section type any additional information or possible follow-up actions. Text Templates can also be used for additional comments.

6. If the task requires additional follow-up by a user or team, select the appropriate Assign To radio button.

7. Verify that the Priority (ASAP, Routine, or Urgent) is correct based on the urgency of the task.

8. Click OK, the task is sent to the designated user or team for additional follow-up. The Task page displays.

- If the task was assigned to a user or team, it is no longer on the user’s task List.
- If the task was not assigned to a user or team, it remains as an active task on the user’s task list. Click the Done button to complete the task.
- If a task is completed, additional information can no longer be added to the comments section.
The following buttons are available as options to aid in working the Task List:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>Displays the <strong>Task Details</strong> page for the task in context.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Changes the status of the task to alert clinic personnel that the task is</td>
</tr>
<tr>
<td></td>
<td>being addressed. The <strong>Comments</strong> box displays that performed this action.</td>
</tr>
<tr>
<td>Go To</td>
<td>Displays the workspace from which a task’s action must be performed. For</td>
</tr>
<tr>
<td></td>
<td>example, clicking <strong>Go To</strong> for a <strong>Sign Note</strong> task displays the <strong>NAW</strong> to</td>
</tr>
<tr>
<td></td>
<td>allow editing, signing, and finalizing the note.</td>
</tr>
<tr>
<td>Reassign</td>
<td>Allows the user to send the task to a specific user or team for action.</td>
</tr>
<tr>
<td>Remove</td>
<td>Allows the user to remove the task from the system. The system requires a</td>
</tr>
<tr>
<td></td>
<td>reason to be indicated for why the task is removed. Additional comments</td>
</tr>
<tr>
<td></td>
<td>can be entered as appropriate.</td>
</tr>
<tr>
<td>Reply</td>
<td>Allows the user to send a reply back to the sender of the task. The task’s</td>
</tr>
<tr>
<td></td>
<td>priority can also be edited.</td>
</tr>
<tr>
<td>Copy to Note</td>
<td>Copies the task to a note. If a note is not in context, the system displays</td>
</tr>
<tr>
<td></td>
<td>the <strong>Note Selector</strong>; select the appropriate note.</td>
</tr>
<tr>
<td>Undelegate</td>
<td>Sends the task back to the <strong>Assigned To</strong> user or provider.</td>
</tr>
<tr>
<td>Print List</td>
<td>Prints the entire task list for the selected view.</td>
</tr>
<tr>
<td>Print Task</td>
<td>Prints the selected task.</td>
</tr>
<tr>
<td>Original</td>
<td>When a notification that a task was completed is received, clicking on</td>
</tr>
<tr>
<td></td>
<td><strong>Original</strong> displays the original task sent previously.</td>
</tr>
<tr>
<td>Done</td>
<td>Completes the selected task and removes it from the list. <strong>Note:</strong> The</td>
</tr>
<tr>
<td></td>
<td>system displays the <strong>Done</strong> button instead of <strong>Go To</strong> if a task</td>
</tr>
<tr>
<td></td>
<td>must be performed manually outside of Allscripts. In this case, click **</td>
</tr>
<tr>
<td></td>
<td>Done** to complete the task.</td>
</tr>
</tbody>
</table>
Personalizing the Task List Page

1. Click the **Personalize** link in the upper-right corner of the **Task List** page. The **Personalize** page displays.

2. Depending on your workflow, set the **General** radio button to either **User** or **Team**.
3. If appropriate, in the **Default Assigned To** field select a specific user or team.
4. Unless you have a very specific duty, the **Default Task Type** should remain blank.
5. **Automatic Refresh** should remain at 5 minutes.
6. Select **Always Show Note Selector When Copy Task to Note**.
7. Click the **OK** button.
Creating a New Task

1. Click the **New Task** button on the **Clinical Desktop**.  
   **OR**
   Click the **New...** button on the **Task List**. The **Task Detail** page displays.

2. Verify that the **Concerning patient** radio button is selected.
3. Select the appropriate **User** or **Team** radio button in the **Assign To** area.
4. Select the desired **User** or **Team** name from the **Assign To** drop-down menu or click the **All** button and search for the appropriate recipient.
5. From the **Task** drop-down field, select the desired task type.
6. Select the desired priority for this task in the **Priority** field.

- **Routine** - overdue at 7 days
- **ASAP** - overdue at 2 days
- **Urgent** - overdue at 1 hour

7. Enter the desired text for the person receiving this task to read in the **Comments** field.

8. If applicable, select the desired **Create Notify Task When** checkbox for this task.

9. Click **OK** to activate the new task.

- **Routine** - overdue at 7 days
- **ASAP** - overdue at 2 days
- **Urgent** - overdue at 1 hour

- Tasking is only to be used for patient-related messages.
- Tasking is not to be used for personal messages between staff that are not patient-related.
- Tasking is only to be handled during “non clinic” hours. The Worklist is to be used during the normal clinical workflow.
WORKLISTS

Viewing a Worklist

Readily accessible, up-to-date test results enhance clinical decision-making, and thus directly affect the quality of patient care. Allscripts quickly and conveniently displays current test results via a Worklist. A Worklist is a series of orders and resultable orders within a patient record that meet the criteria defined in the Worklist view. Worklists provide an organized and efficient way to authorize medication orders, verify lab and test results, and process follow-ups and referrals.

Worklist items and tasks are not the same thing. Tasks are assigned to an owner; Worklist items are linked to a specific patient. In some cases, a task is a reminder that a Worklist item exists, but the inverse is not true. A best practice is to check the Worklist first then follow up with any remaining Task List items.

Cross-Patient Worklist:

The Cross-Patient Worklist displays a list of order or result-related items for multiple patients. The Cross-Patient Worklist is useful when it is not necessary to view the patient’s chart. Clinical Staff has access to the Cross-Patient Worklist.

1. To view a Cross-Patient Worklist, select Chart from the Vertical toolbar.
2. From the Horizontal toolbar, select Worklist. A list of patients with items requiring attention displays.
3. Select the appropriate view from the View drop-down menu. A list of patients with items requiring attention displays.
4. Highlight the desired patient name. A list of items requiring attention displays.
Scheduling Referral or Follow-Up Appointments from the Worklist

Follow-Up requests generate an order with a **Hold-for Scheduling** status on the Orders Clinical Staff Worklist. Referral requests generate an order with an **Active** status on the Referrals Worklist. The clinical staff is responsible for scheduling the appointment and changing the appointment status of the order.

1. From the Horizontal toolbar, select **Worklist**.
2. From the left pane, highlight a patient.
3. From the right pane, locate the order in the **Hold for-Scheduling** or **Active** section, depending on the order type.
4. Highlight the order, click **Edit** or right-click and select **Edit** from the menu.

   To view detailed information for the selected order, double-click the item to display the **Order Viewer**.

5. Enter the required information on the order detail screen; including the selection of a provider from the **External Provider** field (Do not select the **Internal** radio button).

   The location should default to **Other**.

6. Update the **To Be Done** date to reflect the date of the patient appointment.
7. If necessary, adjust the **Overdue** date.
8. Change the **Communicated by** field to **Record** if a copy of the requisition is not needed.
9. Open the **Additional Details** section. Verify the ordering, managing, and supervising provider(s).
10. Update the **Appointment Status** field.

   Once the status is changed to **Scheduled** and the data is **Committed**, the option to change providers is no longer available.

11. Enter the prior authorization number in the **Fin Auth #** field if needed.
12. To enter annotations, open the **Order Annotations** section and document specifics of the appointment and patient notification as needed.
13. Click **OK**. The Worklist displays.

14. To save, access the **Encounter Summary** by clicking **Commit** on the Clinical Toolbar.

15. From the **Encounter Summary**, click **Save and Continue**. Magenta text changes to black.
Printing/Mailing Patient Results

1. Navigate to the **Printing Tasks** tab on the HTB.
2. Change the Task view to the clinic specific **Mail/Print** task view.
3. Check the boxes next to those to be printed **OR** check the top 'P' box to print all listed documents.
4. The **Print Dialogue** window displays.
   - If necessary, select a printer and an appropriate document header.
   - Click **OK**.
     - The tasks are automatically marked as **Done**.
5. It is recommended that the key pieces of information for the patient to review be highlighted prior to mailing.
6. To document that the results were mailed, navigate to the **Chart Viewer** component on the **Clinical Desktop**.
7. Locate the **Results Note**.
6. The date of the document should be the date the results were reviewed.
8. **Right**-click and select **Edit**.
9. Navigate to the **Verified Results** note section.
10. Highlight the first **Order/Result** in the list
    - To highlight all items, hold the **Shift** key and highlight the last **Order/Result** in the list.
11. With the order names highlighted, right-click and select **Annotate**.
   
   If preferred, it is possible to right-click and annotate on the orders/results individually instead of as a group.

12. Type the annotations that are to be applied to all results **OR** click **TT** to use a text template.

13. Click **OK** until the template/annotations are saved and you are returned to the Worklist.
   
   If you must enter a second annotation, it is necessary to **Commit** the first one prior to entering a second; if you do not, the second annotation overlays the first.

14. Click **Save and Continue**.

15. Repeat the above documentation steps for each printed result to be mailed.
HEALTH MANAGEMENT PLANS

Viewing a Health Management Plan

Allscripts Health Management Plan (HMP) provides a tool to prescribe and monitor periodic events related to patients’ health maintenance and disease management. Although neither tasks nor orders are generated from an HMP, alerts are created when an HMP item is near due or overdue. These may be viewed on the Clinical Desktop.

Physicians are able to view health management alerts from the Clinical Desktop. Health Management Alerts are visual indicators that a patient has an orderable item, with a status of either Overdue or Near Due. Health Management alerts occur because of Health Management Plans (HMP), which are defined as the creation and review of scheduled periodic orderable events related to patient disease and health management issues.

An orderable event can be any of the following:

- Medication
- Follow-up or Referral
- Immunization
- Diagnostic test or Imaging study

An important point to keep in mind is that the HMP component consists of only the following three items:

- Orders or Results linked to a Problem
- Medications linked to a Problem
- Order Reminders
1. From the **Clinical Desktop**, select a view containing the patient’s **Health Management Plan (HMP)**.

2. Select the **Health Management Plan** component. The patient’s **HMP** displays.

3. Select the desired view from the drop-down menu in the upper-left corner of the component.
   - Items listed in a patient’s **HMP** may be viewed by *double*-clicking the desired item.
   - If modifications to the selected item are desired, click the **Edit** button within the item viewer.
   - Clicking the **New** button launches the **ACI** with the **Rx/Order** tab selected, allowing the user to add a new orderable item for the selected patient.
   - To invalidate a result, *right*-click and select **Enter in Error**.
The table below describes the available HMP views.

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Management</td>
<td>Displays an overview of what is being treated for the patient. By default, these items are organized by <strong>Problem</strong>. The HMP can also be grouped by <strong>Specialty Problem</strong> or <strong>Problem Type</strong>.</td>
</tr>
<tr>
<td>Reminders/Alerts</td>
<td>Displays the active order reminders for the patient’s problems; can be grouped by <strong>Problem</strong> or <strong>Alert Type</strong>.</td>
</tr>
<tr>
<td>Immunizations Series</td>
<td>Displays the immunizations that are recorded for the selected patient.</td>
</tr>
<tr>
<td>Flowsheets</td>
<td>Displays a list of flowsheets defined for the organization and created by the system administrator.</td>
</tr>
<tr>
<td>Vital Signs/Findings</td>
<td>Displays a flowsheet of the selected patient’s vitals data.</td>
</tr>
<tr>
<td>Normative Growth</td>
<td>Enables selection of normative growth charts, defaulting to the appropriate chart for the patient based on age and sex. Two grouping options are available: <strong>0-36 Months Graph</strong> and <strong>2-20 Years Graph</strong>.</td>
</tr>
</tbody>
</table>
There are several buttons located at the top of the HMP component.

The following table describes their use:

<table>
<thead>
<tr>
<th>Name</th>
<th>Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>🔄</td>
<td>Refreshes the data within the component.</td>
</tr>
<tr>
<td>Flowsheet</td>
<td>📈</td>
<td>Displays a flowsheet view with data from the items checked on the previous view. If the user has not checked items with enough data to graph, the system displays the message, “There needs to be at least one item with more than one value to display a graph.”</td>
</tr>
<tr>
<td>Graph</td>
<td>📈</td>
<td>Generates a graph with data from the items checked from the previous view. If the user has not checked items with enough data to graph, the system displays the message, “There needs to be at least one item with more than one value to display a graph.”</td>
</tr>
<tr>
<td>Expand/Restore</td>
<td>📁</td>
<td>Expands or contracts the data within the component. By clicking the <strong>Expand/Restore</strong> button, it is possible to expand or contract all data items within the component simultaneously. <strong>Tip:</strong> For a complex patient with many problems displaying in the HMP component, it is a best practice to expand just one problem at a time to focus on the details for that single problem, rather than having the details for all problems expanded.</td>
</tr>
<tr>
<td>New Task</td>
<td>📝</td>
<td>Displays the <strong>Task Detail</strong> page to create a new task. Allscripts populates the <strong>Task Detail</strong> page with the selected patient’s name in the <strong>Concerning Patient</strong> box. It also sets the <strong>Assign To</strong> value to <strong>User</strong> and sets the <strong>User</strong> box to the current user. This occurs whether or not an item is selected in the HMP component.</td>
</tr>
</tbody>
</table>
The system displays the following values in the columns to the right of the problem and/or medication and order:

<table>
<thead>
<tr>
<th>HMP Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item Name</strong></td>
<td>Displays the item(s) actively associated to the patient’s HMP.</td>
</tr>
<tr>
<td><strong>Schedule</strong></td>
<td>If the provider has scheduled another instance of the order, then the system displays an abbreviation for that schedule. For example, Q 1 Year indicates the item is a recurring order, due once per year. If there is a value in this column, it is possible to double-click the value to edit the schedule in the Health Management Reminder Details page.</td>
</tr>
</tbody>
</table>
| **Graph** | Select the checkboxes to graph the selected items by clicking the Graph button.  
**Note:** For the system to graph the selected items there has to be at least two data points for each item. If the user has not checked items with enough data to graph, the system displays the message, “There needs to be at least one item with more than one value to display a graph.” |
| **Most Recent** | Displays the most recent result for an orderable item or the Sig for a medication. Double-click this cell to display the Order Details page. The Most Recent and Date columns are outlined in blue for easy recognition. |
| **Date** | If the item is an orderable item (for example, medication, lab order, and so on), the system displays the date on which the order was executed. |
| **Trend** | If the item is an orderable item that has occurred multiple times, the system displays a “spark graph.” The spark graph is a small image that enables the provider to see trends in measurements. |
| **To Do** | If the item is an orderable item, then the system indicates the date on which the next instance of the order is due. The To Do column is outlined in red for easy recognition. |
| **Incomplete** | If the item is an orderable item and the To Do date is in the past, then the system indicates the date on which the order was due.  
**Note:** An item can be incomplete because the results have not returned yet for a test. As soon as the results come back either electronically or by manual entry, the system automatically completes and deletes the item from the Incomplete column. (For example, a dietician referral could be listed as incomplete because it has a task associated with it to set it up.) |

A best practice when using the HMP is to move right-to-left:
- If there is an entry in the Incomplete column, right-click in the cell to display a context menu.
- If there is no entry in the Incomplete column, but there is an entry in the To Do column, right-click in the cell to display a context menu.
- If there are no entries in the Incomplete or To Do columns, right-click in the Most Recent column to display a context menu.
- If action needs to be taken on an order reminder and there are no entries in the Incomplete or To Do columns, right-click in the Schedule column to display a context menu.
MONITORING WORKFLOWS

Monitoring the Print/Fax Queue

The Print/Fax Queue is used to monitor the status of printed and/or faxed documents and prescriptions.

1. From the Vertical toolbar, select User Options.
2. From the Horizontal toolbar, select Print Queue. The Job Queue lists all print and fax jobs.

The Job Queue can be filtered using the following View options:
- Current Queue
- Archived Yesterday
- Archived 5 Days Ago
- Archived 10 Days Ago
- The default selection is Current Queue
The **Job Queue Status Filter** tabs can be clicked on to show only those print and fax jobs that meet the criteria of the filter.

<table>
<thead>
<tr>
<th>Job Queue Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All job requests based on User privilege. User /Admin</td>
</tr>
<tr>
<td>Failed</td>
<td>The job request was picked up for processing and failed. These are shown in red.</td>
</tr>
<tr>
<td>Canceled</td>
<td>User or Administrator canceled the request.</td>
</tr>
<tr>
<td>Idle</td>
<td>Unprocessed job request; waiting for spooler to pick it up.</td>
</tr>
<tr>
<td>On-Hold</td>
<td>Unprocessed job is in a pending state.</td>
</tr>
<tr>
<td>Active</td>
<td>Currently in a processing state.</td>
</tr>
<tr>
<td>Posted</td>
<td>Crystal Report which has been pre-processed by a Print Center.</td>
</tr>
<tr>
<td>Complete</td>
<td>Successfully processed to completion.</td>
</tr>
</tbody>
</table>
Specific information listed for each print and fax job includes the following:

- Queued (Date/Time job was received)
- Type (Filter type Print or Fax)
- Destination
- MRN
- Status
- User
- Progress
3. By default, the **Job Queue** lists all jobs for all sites. To filter or personalize the list by site, click the **Personalize** link. The **Personalize** page displays.

4. Select the **Site** and **Job Type** filters.

5. To view details of a job, highlight and click **Details**.
The **Print Request** page displays.

<table>
<thead>
<tr>
<th>ID: 1218</th>
<th>Status: Complete</th>
<th>Type: SCRIPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Completed Successfully</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General</th>
<th>Job Items</th>
<th>Audit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org: Creighton Medical Associates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Site: Family Medicine-Old Market Clinic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User: providera</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient: PATA, BILL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SSN: 111223333</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MRN: 08000329</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Queued Date: 07-22-2010 14:14:00.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority: 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Server:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printer Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spooler Name: EHR-TEST</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Information accessed in the **Details** button include:
- Org and Site info
- User
- Patient Name and Job Date and Time
- Priority
- Printer Server, Printer Name and Spooler Name
- Job Items and Audit tabs

6. **Submit** To reprint or refax a job, highlight and click **Resubmit**.

7. **Cancel** To cancel a job, highlight and click **Cancel**.
Completing Tasks

Some tasks are created automatically. These tasks are referred to as “auto-generated” or “system-generated” tasks. In the task list, the Created by column for system-generated tasks shows System. Other tasks are manually generated and the name of the user who created the task displays in the Created by column.

There are two ways for a task to be completed – manually and through use of the system.

1. Manual completion is required when the task is requesting something that cannot be tracked and verified by the system. For tasks that must be manually completed, the Done button is typically enabled. The GoTo... button is normally not enabled.
   - For example, if a physician has a Follow Up task, Allscripts cannot verify that the follow up action was made.
   - To complete those tasks, the user performs the requested action and then marks the task as complete selecting it from the task list and pressing Done.

2. Some tasks can be completed by use of the system. This process is referred to as “auto-completion”. For tasks that can be auto-completed, the GoTo... button is enabled. The Done button is normally not enabled.
   - For example, a Sign Note task that can be auto-generated can be completed by reviewing and signing the progress note in question.
   - Allscripts does not require the user to manually indicate that the task is complete – it is auto-completed by the action of submitting.
   - The user typically auto-completes tasks by selecting the task and pressing GoTo..., then performing the requested action.

3. However, some tasks allow for use of both buttons.
   - A primary example is the Go to Enc Form task. Pushing the GoTo... button from the task list (with a Go to Enc Form task selected) takes the user to the Encounter Form in question.
   - Because Allscripts cannot verify that the document was actually reviewed, the user is required to return to the task list and manually mark the task as complete by pressing the Done button.
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABN</td>
<td>Advance Beneficiary Notice.</td>
</tr>
<tr>
<td>AKA</td>
<td>Also-known-as, or alias.</td>
</tr>
<tr>
<td>Appointment Status</td>
<td>Indicates whether a patient has arrived (Arr), rescheduled (Rsc) or canceled (Can); is pending (Pen) or a no show (NSH); or has been bumped (BMP).</td>
</tr>
<tr>
<td>CareGuide</td>
<td>Allows the association of a template with an active problem or defaulted Active Problem List entry of Health Maintenance (which corresponds to patient characteristics of age and sex). The CareGuide template then becomes available for ordering and creation of customized patient education documents.</td>
</tr>
<tr>
<td>Chart Alert</td>
<td>An alert within the Clinical Toolbar pertaining to the selected patient. This alert is the equivalent of a red underlined note on the front of a paper chart.</td>
</tr>
<tr>
<td>Chart Viewer</td>
<td>Located within the Clinical Desktop of Allscripts; displays clinical documentation from a patient chart, including notes, referrals, test results, scanned images and consent forms.</td>
</tr>
<tr>
<td>Clinical Desktop</td>
<td>Indicates the configuration of the Clinical Desktop. Users can personalize views for different types of patients, such as pediatric, Adult, Cardiology, etc.</td>
</tr>
<tr>
<td>Clinical Toolbar</td>
<td>Icons that allow users to add clinical items, review data, and track patient location and status.</td>
</tr>
<tr>
<td>Daily Schedule</td>
<td>Located in Schedule on the VTB of Allscripts; displays the schedule of appointments for a provider.</td>
</tr>
<tr>
<td>Dictation Marker</td>
<td>A place holder enabling users to add a dictation within a clinical note. Dictation markers may be pre-defined within note templates.</td>
</tr>
<tr>
<td>DOB</td>
<td>Date of birth.</td>
</tr>
<tr>
<td>ECP</td>
<td>Encounter Care Provider.</td>
</tr>
<tr>
<td>EHR</td>
<td>Electronic Health Record.</td>
</tr>
<tr>
<td>Encounter Form</td>
<td>The paper form that enables physicians to designate diagnoses, visit charges, and procedure charges for a patient encounter.</td>
</tr>
<tr>
<td>Favorite List</td>
<td>Allows user to save most frequent used dictionary entries in a separate list.</td>
</tr>
<tr>
<td>FYI</td>
<td>For your information - informal patient information indicator.</td>
</tr>
<tr>
<td>HIPAA</td>
<td>Health Insurance Portability and Accountability Act.</td>
</tr>
<tr>
<td>HMP</td>
<td>Health Management Plan.</td>
</tr>
<tr>
<td>HPI</td>
<td>History of Present Illness.</td>
</tr>
<tr>
<td>HTB</td>
<td>Horizontal Toolbar - displays the tabs (or functionality) available within the sections selected on the VTB.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Hx</td>
<td>History.</td>
</tr>
<tr>
<td>ID</td>
<td>Identification.</td>
</tr>
<tr>
<td>Master List</td>
<td>Allows the user to search from all values within a given dictionary.</td>
</tr>
<tr>
<td>MRN</td>
<td>Medical Record Number.</td>
</tr>
<tr>
<td>NKA</td>
<td>No Known Allergies.</td>
</tr>
<tr>
<td>NKDA</td>
<td>No Known Drug Allergies.</td>
</tr>
<tr>
<td>Note Authoring Workspace (NAW)</td>
<td>A separate dialog enabling users to document clinical notes using a table of contents, note forms, section entry, rendered note viewer, and output documents.</td>
</tr>
<tr>
<td>Note Forms</td>
<td>Serve as the building blocks of a note. These contain various controls enabling users to document the associated note section. Note forms may be pre-defined for individual note sections.</td>
</tr>
<tr>
<td>Note Selector</td>
<td>A dialog used to specify style, specialty, visit type, and owner when creating a new note.</td>
</tr>
<tr>
<td>Output Documents</td>
<td>Defined documents based on the note input template. A viewer is provided to preview the selected document.</td>
</tr>
<tr>
<td>Patient Banner</td>
<td>Located below the HTB; displays demographic information pertaining to a selected patient.</td>
</tr>
<tr>
<td>PCP</td>
<td>Primary care provider.</td>
</tr>
<tr>
<td>PHI</td>
<td>Protected Health Information.</td>
</tr>
<tr>
<td>PMH</td>
<td>Past Medical History.</td>
</tr>
<tr>
<td>PMS</td>
<td>Practice Management System.</td>
</tr>
<tr>
<td>Pri Ins</td>
<td>Displays the selected patient’s primary insurance within the Patient Banner.</td>
</tr>
<tr>
<td>PSH</td>
<td>Past Surgical History.</td>
</tr>
<tr>
<td>Quick List</td>
<td>Subset of the favorites list that includes just the items the users selects most often.</td>
</tr>
<tr>
<td>QuickSet</td>
<td>Groups of previously ordered medications and non-medications. They provide the user with an efficient way of entering problem-related orders.</td>
</tr>
<tr>
<td>RFP</td>
<td>Referring Provider.</td>
</tr>
<tr>
<td>ROS</td>
<td>Review of Systems.</td>
</tr>
<tr>
<td>SnapShot</td>
<td>Located in Chart Viewer as a Print option; displays current information for a selected patient, including active problems and medications, allergies and encounters.</td>
</tr>
<tr>
<td>Specialty</td>
<td>A list of specialty, or department, items commonly used.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Favorites List</td>
<td></td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number.</td>
</tr>
<tr>
<td>Allscripts Toolplace</td>
<td>Located in the upper-right corner of the page; change the password, lock</td>
</tr>
<tr>
<td></td>
<td>the Allscripts session or logoff the system.</td>
</tr>
<tr>
<td>Workplace</td>
<td>Located in the upper-left corner of the page; defined by the user role</td>
</tr>
<tr>
<td></td>
<td>within the organization (according to security privileges).</td>
</tr>
<tr>
<td>VTB</td>
<td>Vertical Toolbar; displays links to Allscripts available functionality,</td>
</tr>
<tr>
<td></td>
<td>which are dependent upon the Workplace.</td>
</tr>
</tbody>
</table>