EpicCare Link - Patient Chart
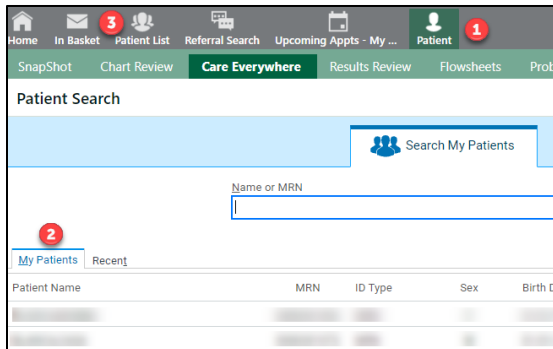
Accessing the Patient Chart

Select your patient's chart from a list of current patients

1. Click ![Patient icon]**Patient** and go to the **My Patients** tab.

   □ If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.

2. Click a patient's name to open their chart.

3. To view a list of currently admitted patients, click ![Patient List icon]**Patient List** and select the tab for admitted patients. For patients to appear on this list, you must have a provider relationship of PCP, attending, admitting, or treatment team on the admission.
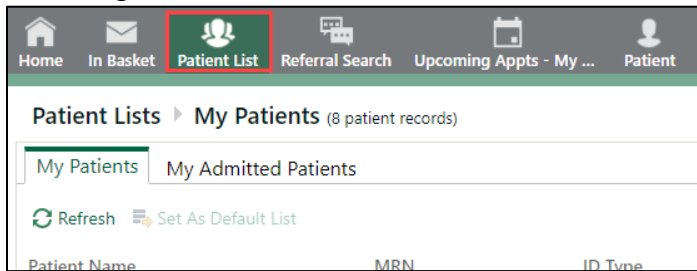
4. Select a patient's name to view additional patient-specific information in the report pane.

> ℹ️ To see only the patients for whom you are the PCP, select your name in the **Filter by provider** field.

Search for a patient's record based on name or MRN

1. Click ![Patient icon]**Patient** and enter the patient's name or MRN.
2. In the Search Results window, click the name of the patient whose chart you want to open.

> ℹ️ In two clicks, you can quickly open a patient chart that you recently had open. In the **Search My Patients** section of the Patient Search activity, select the **Recent** tab and then click the name of the patient.

What if I can't find a patient?

If you don't find a patient using the methods above, you might not have been granted access to their chart yet, or they might not have a record in the system. Use the **Search All Patients** section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in the case of an emergency. Note that you must enter the patient's first and last name when using this method.

1. If your initial search returns no results, click **Search All Patients** from the Search Results window.
2. Complete all of the required fields, and then click 🔍 **Search**.

3. Select the patient record you want to open, select the reason you need access to the patient's chart in the **Reason** field, and add any comments. Enter any additional comments and click ✔ **Accept**.

> ℹ️ If the patient's record doesn't exist, you can create one in EpicCare Link by clicking **Create a New Chart** in the Patient Search activity.

Remove a patient from your patient list

You can remove a patient from your list if you no longer need access to them. For example, you might remove a patient from your list if the patient moves away.

1. From the list of patients, hover over the patient you want to remove and click ✖.

2. Review the information in the window that appears to confirm that you want to remove the patient, then click ✔**Remove Patient**.

Monitoring Your Patients

Event Monitor allows you to monitor events that occur in your patients' care, such as inpatient admissions or discharges, outpatient visits, or new lab results. You can view these events on the home screen or in your In Basket.

Target your event notifications

To focus on the medical events that matter most to you, use event and relationship filters in Event Monitor. You can tailor which types of events you're notified of and for which patients. For example, you can choose to be notified of only the events associated with you or certain providers in your group. You're associated with an event if you're the attending provider, admitting provider, referring provider, a treatment team member, a care team member, or the patient's PCP.

1. Go to **Menu > Settings > Event Settings**.
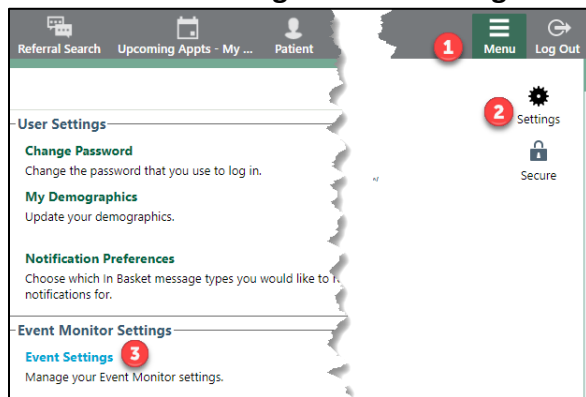
2. Choose which types of events you'll receive notifications for in the Event Filter section.
3. Choose which events you'll receive notifications for by selecting one of the options in the Relationship Filtering section:

   a. **All events for patients in my group**. This option includes events for any patient that you have access to. For example, if you choose to receive referral notifications, you are notified of any authorized referrals, even if the referral isn't to you or your group.
   b. **Only events associated with my group.** For example, if a patient you have access to is admitted to the hospital, and the patient's PCP is in your group, you receive a notification even if the PCP isn't associated with the admission.
   c. **Only events associated with me (recommended)**.
   d. **Only associations that I select**. This option includes only events associated with the relationships you select.

4. Choose who your notifications are sent to in the In Basket Settings section:

   a. **Any user in my group**. Your notifications are sent to a group of users at your organization, and any of the users can access the message and mark it as Done, which removes it from the In Baskets of all the users in the group. This option helps reduce the risk of duplicate follow-up and can save time.

b. **Only me**. You are the only user who can mark the notifications as Done. Other users might still see and act on the same notifications, but they can't mark the message as Done. This option helps ensure that you see every notification.

View a patient's recent events

Select the **Home** tab and hover over each type of event in the Event Monitor section to review recent events for your patients.

If necessary, you can view more information about events and mark them as Done in In Basket by clicking the name of the patient in the Patient column.

> For more information on In Basket, refer to In Basket: Viewing Messages.

Open a patient's chart from an event message

Select the In Basket message for the patient's event and click 👤 **Select Patient** to open the patient's chart.

Reviewing the Patient Chart

Review the patient's chart before a visit

1. Open the patient's chart, click **Chart Review**, and select a tab that includes information you want to review.
2. To view more detail, such as a specific patient visit, click the date link that appears in the row.
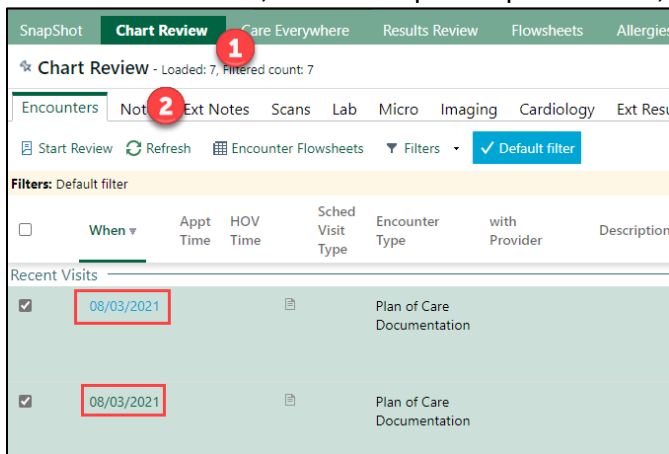
> (i) To view details on several rows at once, select the check boxes in those rows, and then click 🔲 **Start Review**.
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>
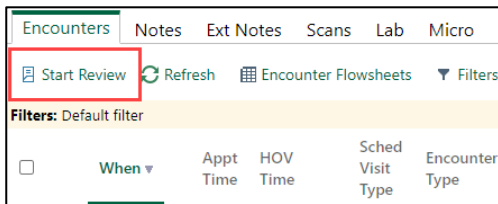
3. To send a message to the patient's PCP regarding an office visit, open the specific encounter you would like to send the message for.

   a. Click the **Order Date** hyperlink to open the encounter report.
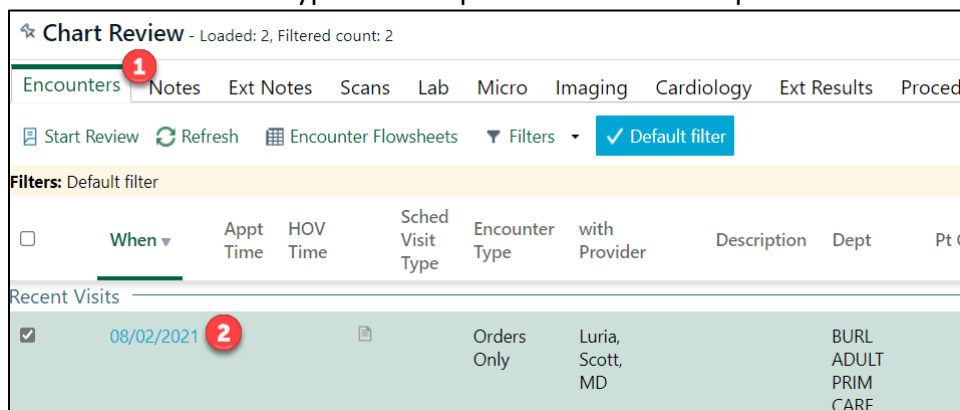
b. Click **Ask a Question** to open the Encounter Question window

c. Fill out the message form, and click ✔ **Send**.

Find information quickly in the patient's chart

For patients with large charts, you can enter text in the **Search Chart** field to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.

Use filters to narrow the list of information you see

You can also use filters to find visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select a tab.
2. Click ▼**Filters** and select a filter type. Then, select check boxes next to the values that you want to see. For example, select Encounter Type, and then select the Hospital Encounter filter.
3. Click ✔ **Apply** to make the results of your search appear.

> ℹ️ To remove the search criteria and begin a new search, click ⬦ **Clear All**.

View trending data in graph or table format in Chart Review

1. In Chart Review, select the check box for the data you want to view. For example, select specific visits or lab tests.
2. Select the type of flowsheet that you want to create.

   ▫ Click ▦ **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
   ▫ Click ▦ **Lab Flowsheets** to graph lab result data.

3. Click and drag to select the table cells that contain data that you want to graph.
4. Click ▨ **Line Graph** or ▥ **Bar Graph** to create a graph of the selected data.

View a patient's trending lab results in Results Review

1. Select the **Patient** tab and click **Results Review**.
2. Select the date range for the results data you want to see and click ✔ **Accept**.
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.
4. To view more columns of results, click ◀ **Load More**. To view all columns of a patient's results for the time range that you selected, click ⏮ **Load All**.
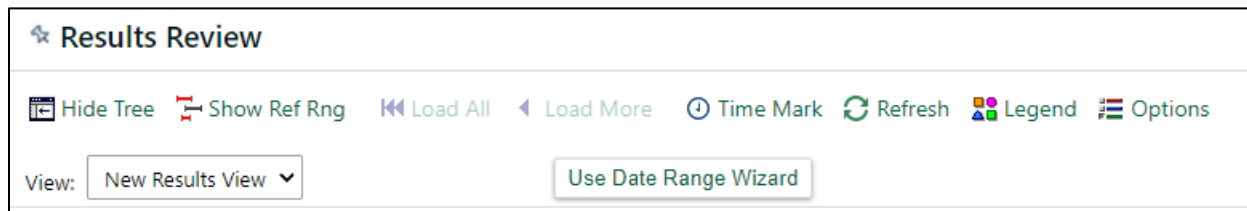
> (i) Click ⏱ **Time Mark** so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.

Customize the way results appear

1. In Results Review, click 📋 **Options**.
2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.
3. Set your other default preferences, such as the default number of columns to show, using the other options.
4. Click ✔ **Accept**.
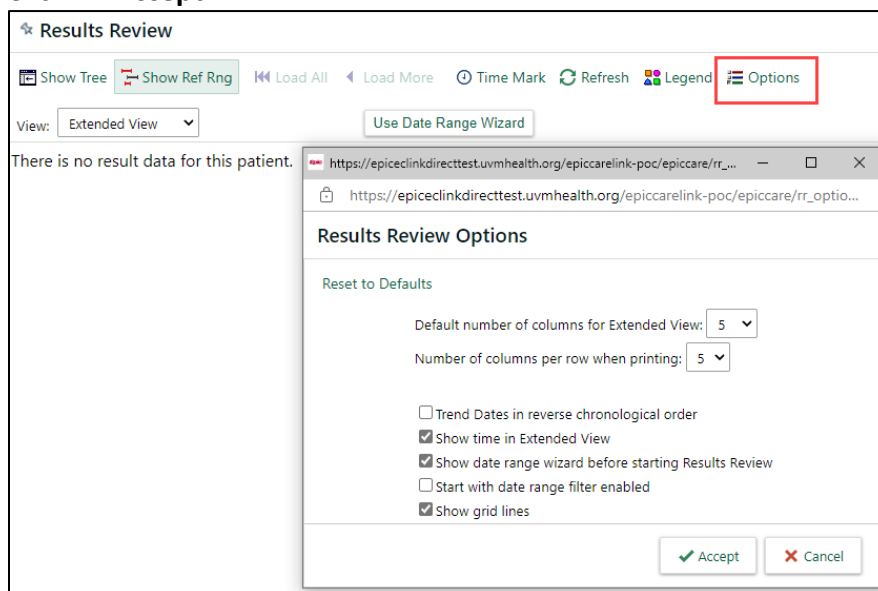
View a patient's allergies

Select the **Patient** tab and click **Allergies**.
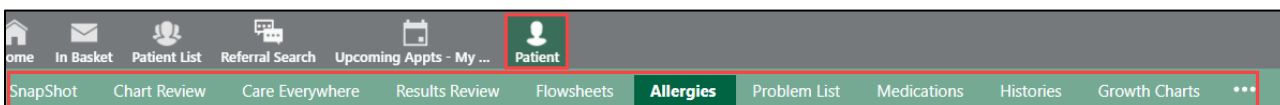
> (i) For more information about an allergy, select the allergy and click 🖼 **View History**.

View a list of the patient's current medical problems

Select the **Patient** tab and click **Problem List**.

> (i) For more information about a problem, click the **View Report** link.

View a patient's current medications

Select the **Patient** tab and click **Medications**.

> (i) For more information about a medication, click **View Details**.

View a patient's history

Select the **Patient** tab and click **Histories** to see a report with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity.

> (i) For a high-level summary of the current patient's chart, select **SnapShot** from the Clinical Review menu.

View a patient's demographics

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, emergency contacts, and more.