Lesson 3: Reviewing the Patient Chart

This lesson introduces the use of the chart tabs for reviewing and managing patient chart data.

Learning Objectives

After completing this lesson, you should be able to:

Use the Orders tab to review patient orders.

Use the Results tab to review laboratory and diagnostic test results.

Use the Patient Info tab to review general patient information, such as allergies, health issues and care providers.

Use the Documents tab to review clinical documentation.

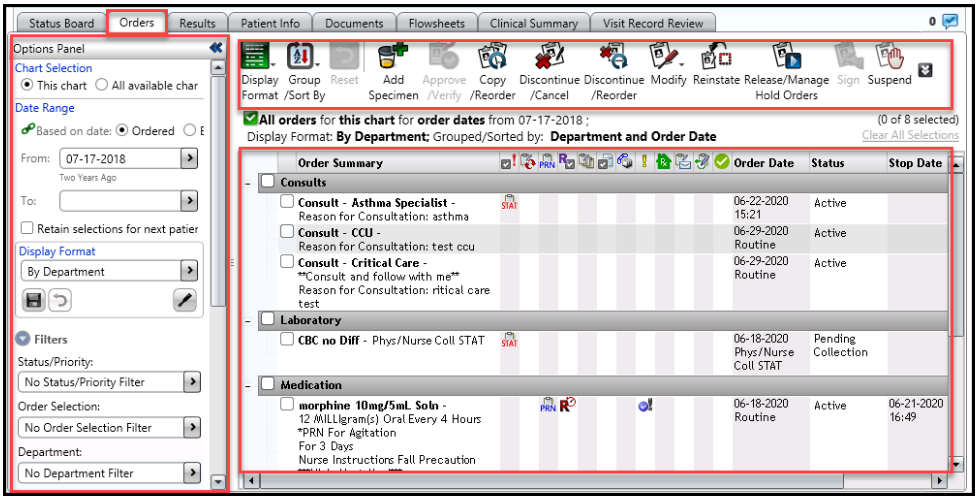
Use the Flowsheets tab to review flowsheet documentation, such as vital sign observations.

Use the Clinical Summary tab to review a summary of the patient chart in a single view.

Use the Visit Record Review tab to review chart documentation for a selected patient visit.

Using the Orders Tab

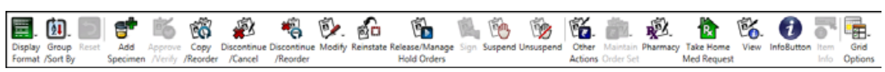
The **Orders** tab displays all order placed on the patient's chart. The orders that appear are based on the filter selections you apply in the **Options Panel** (left panel).



Double-click on an order item to open the **Order Form** details.

Icon Symbols appear in the column grid indicating the order type. Hover your cursor over the icon to display a tooltip.

The **Orders tab toolbar** buttons provide access to actions specific to the **Orders** tab.

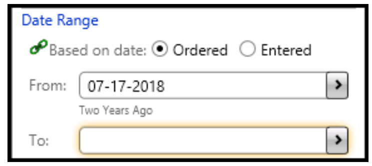
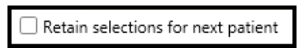
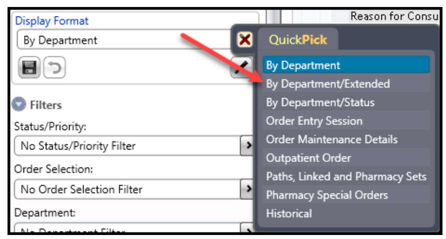
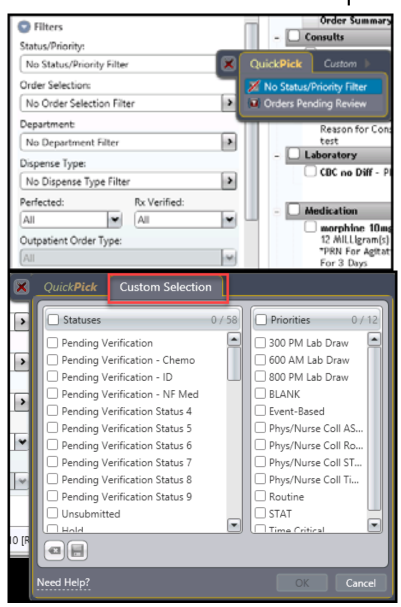


Using the Options Panel

Use the **Options Panel** to select filter options to customize your display view preferences.

The following provides a overview of the filter options in the **Options Panel**.

Filter Section	Description
Chart Selection	This Chart: View orders for the current visit only. All Available Charts: View orders across all visits. 
Date Range	Based on date Ordered: Retrieve orders based on date ordered.

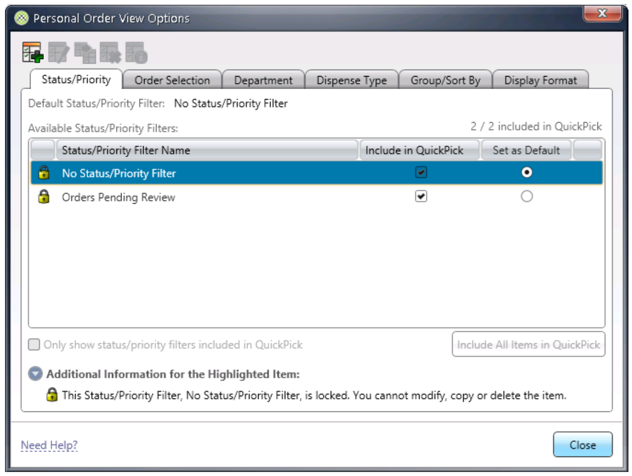
Filter Section	Description
	Based on date Entered: Retrieve orders based on date they were entered. **From / To:** Enter or select a day, month and year, or select a **relevant date** from the drop-down (for example, Today or Three Days Ago). 
Retain Selections for next patient	Select to retain filter options when a different patient is selected. 
Display Format	Select a display view from the **QuickPick** drop-down. 
Filters	Click the arrow next to an option to display its **QuickPick** list or select **Custom** to select specific criteria. 

Creating Custom Order Filters

TO CREATE A PERMANENT FILTER:

1. In the **Display Format** section, click the **Preferences** button.

   The Personal Order View Options window appears.



   Note: If a lock icon appears next to a filter type, the filter is a system-supplied filter and cannot be modified or deleted.

2. Select the appropriate tab option for the filter type you want to create.

   Status/Priority - Create a filter to view orders by **status** or **priority**, for example, **Active orders**.

   Order Selection - Create a filter to view orders by **type**, for example, **Respiratory orders**.

   Department - Create a filter to view orders by **department**, for example, **Laboratory orders**.

   Dispense Type - Create a filter to view orders by **dispense type**, for example, **Chemo IVPB** orders.

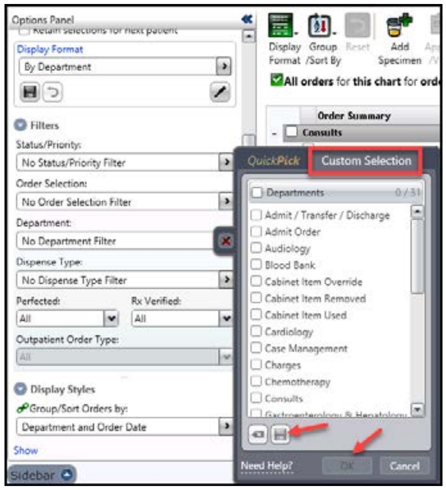
   Group/Sort By - Create a filter to view orders based on **group by** or **/sort by** filtering, for example, **Requested by**.

   Display Format - Create a filter to view orders that may include both **filters** and **group/sort by** options. For example, you may want to create a 'Favorite' display format.

3. Click the **Add New** toolbar button to open the **Add New** window to apply respective filter details for the selected tab.

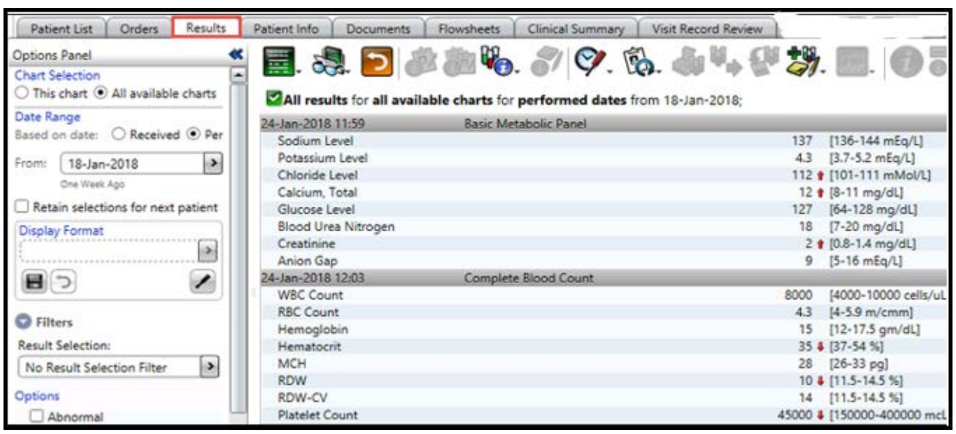
TO CREATE A TEMPORARY FILTER:

- Select the order item(s) to include in the filter view and click **OK** to save as a **Temporary Filter** or click the **Save Selections** icon to save as a **Permanent Filter**.

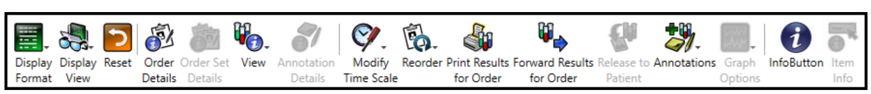


Using the Results Tab

The **Results** tab displays all lab / diagnostic results that have been applied on the patient's chart. The results that appear are based on the filter selections you apply in the **Options Panel** (left panel).



The **Results tab toolbar** buttons provide access to actions specific to the **Results** tab.

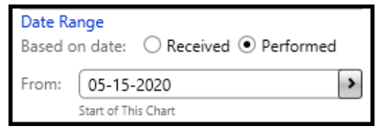
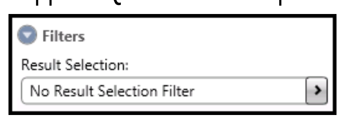


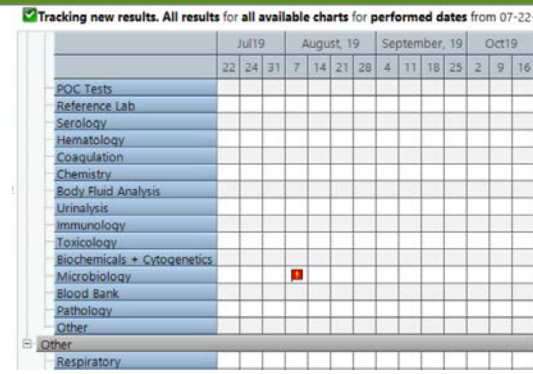
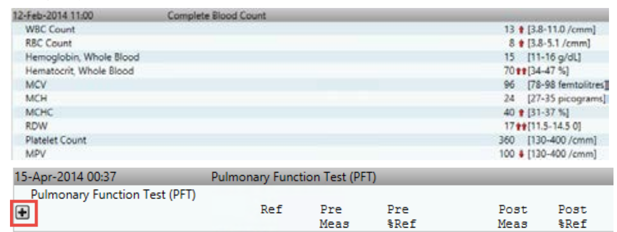
Using the Options Panel

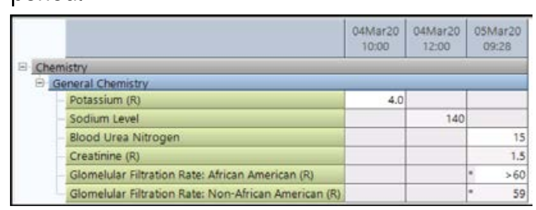
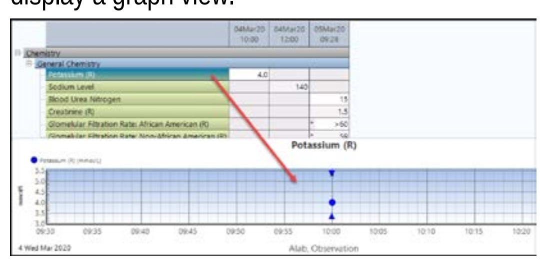
Use the **Options Panel** to select filter options to customize your display view preferences.

The following provides a overview of the filter options in the **Options Panel**.

Filter Section	Description
Chart Selection	This Chart: View results for the current visit only.

Filter Section	Description
	All Available Charts: View result across all visits. 
Date Range	**Based on date Received:** Retrieve results based on date they were received **Based on date Performed:** Retrieve results based on date they were resulted. **From:** Enter or select a day, month and year, or select a **relevant date** from the drop-down (for example, Today or Three Days Ago). 
Retain Selections for next patient	Select to retain filter options when a different patient is selected. 
Display Format	Select a display view from the **QuickPick** drop-down. 
Filters	Click the arrow next to the option to display its system-supplied **QuickPick** list options. 
Options	Select options to further filter the display view for results that apply to the selected option: **Abnormal**, **Annotated only**, **Include pending.**
Display Styles	Select the preferred **Display View** option.
Summary	Displays results in a grid-like view in which a flag will appear in the column cell for the test and date that results are available. **Red flag**: Indicates abnormal numeric results. **Green flag**: Indicates normal numeric results. **Yellow flag**: Indicates textual results Double-click on the flag to view the result details for the individual test and result date.

<table>
<tr><th>Filter Section</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>Report by Order</td><td>Displays results in a detailed list view.


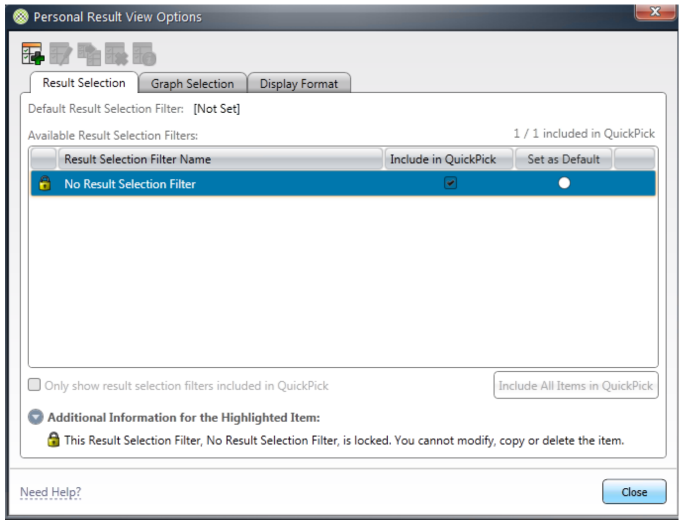
Red arrows indicate abnormal numeric results that are high/low (single up/down arrow) and critically high/low (double up/down arrow).
Textual results will display a plus (+) sign to expand to view additional detailed text results.</td></tr>
<tr><td>Trend</td><td>Displays a trend view of numeric result values across a period.

</td></tr>
<tr><td>Trend & Graph</td><td>Provides the ability to click on a test description to display a graph view.

</td></tr>
<tr><td>Sort by Order</td><td>Select the view sort order of Ascending or Descending.</td></tr>
</table>

Creating Custom Result Filters

TO CREATE A CUSTOM FILTER:

1. Click the **Preferences** button in the **Display Format** section.

   The Personal Result View Options window appears.



2. Select the appropriate tab option for the filter type you want to create.

   Result Selection - Create a filter to view results based on **result type**, for example, **Laboratory** results.

   Graph Selection - Create a **graph** filter to view results based on a **result type**.

   Display Format - Create a favorite display format view.

3. Click the **Add New** toolbar button to open the **Add New** window to apply respective filter details.

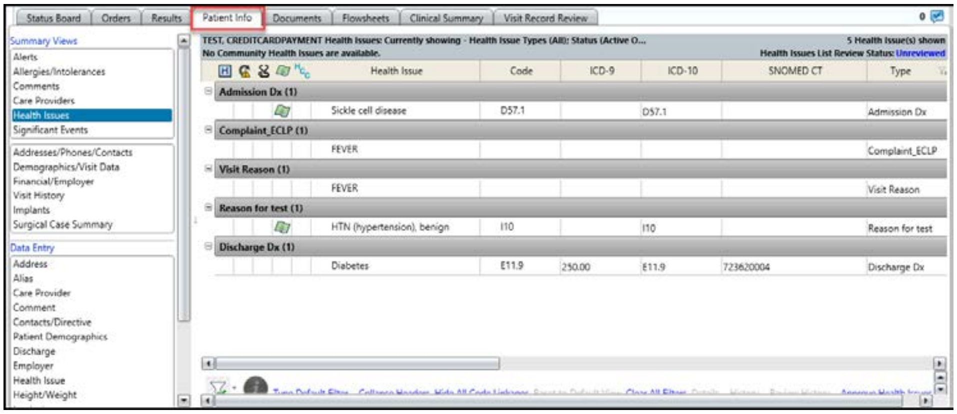
Note: If a lock icon appears next to a filter type, the filter is a system-supplied filter and cannot be modified or deleted.

Using the Patient Info Tab

The **Patient Info** tab allows you to quickly access a patient's health and demographic information.

To view data, select an option from the **Summary View** list.

Note: Your ability to view or perform actions on the Patient Info tab is controlled by security rights.



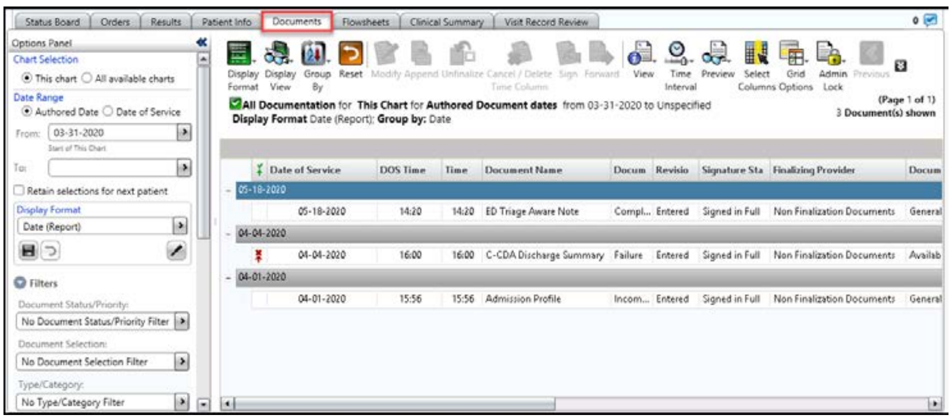
Summary View Options

Summary View Option	Description
Alerts	Displays alerts triggered in Sunrise (acknowledged or unacknowledged) while performing an action (for example, Duplicate Medication alert trigger during order entry).
Allergies/Intolerances	Displays allergy and intolerance history.
Comments	Displays certain text information that has been configured to populate the **Patient Header** (for example, Code Status, Precautions).
Care Providers	Displays all providers assigned to the patient in a care provider role (for example, Attending, Consulting).
Health Issues	Displays all health issue (problem) types added to the patient chart (for example, Admitting Dx, Past Surgical Hx).
Significant Events	Displays all past and current significant health events entered on the patient, such as social behavior or an event that occurred during the patient's visit.
Address/Phones/Contacts	Displays address, phone and/or contact information captured during registration.
Demographics/Visit Data	Displays demographic and visit data captured during registration.
Financial/Employer	Displays financial and employer information captured during registration.
Visit History	Displays all past and present visit history. **To open a chart for a single or multiple visit**: Select the visit(s) in the list, and then click the **Open Visit(s)** link in the bottom right of the window. 

Summary View Option	Description
	Note: The selected visits will open on a **Temporary List**.
Implants	Displays patient implant devices.
Surgical Case History	Displays surgery case details. Note: This category is only available if the **Sunrise Surgery** application is installed.

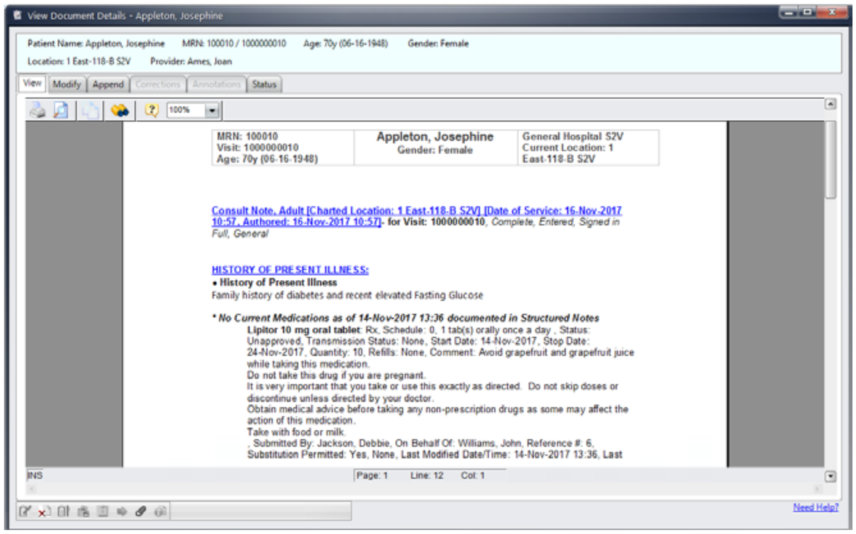
Using the Documents Tab

The **Documents** tab displays all documents added to the patient chart. Documents are displayed in the **Display View** section based on the selections you make in the **Options Panel**.



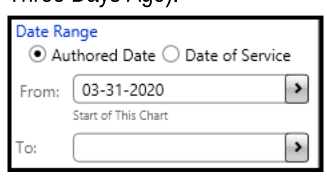
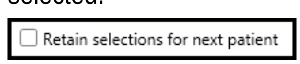
The **Documents tab toolbar** buttons provide access to actions specific to the **Documents** tab.

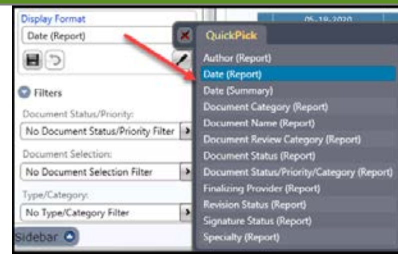
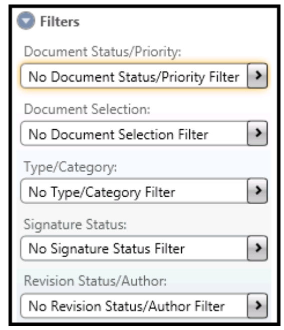
Double-click on a document to view document details.



Using the Options Panel

Use the **Options Panel** to select filter options to customize your view preference.

Filter Section	Description
Chart Selection	This Chart: View documents for the current visit only. All Available Charts: View documents across all visits. 
Date Range	Authored Date: Retrieve document based on date authored. Date of Service: Retrieve documents based on date of service. From / To: Enter or select a day, month and year, or select a **relevant date** from the drop-down (for example, Today or Three Days Ago). 
Retain Selections for next patient	Select to retain filter options when a different patient is selected. 
Display Format	Select a display view from the QuickPick drop-down.

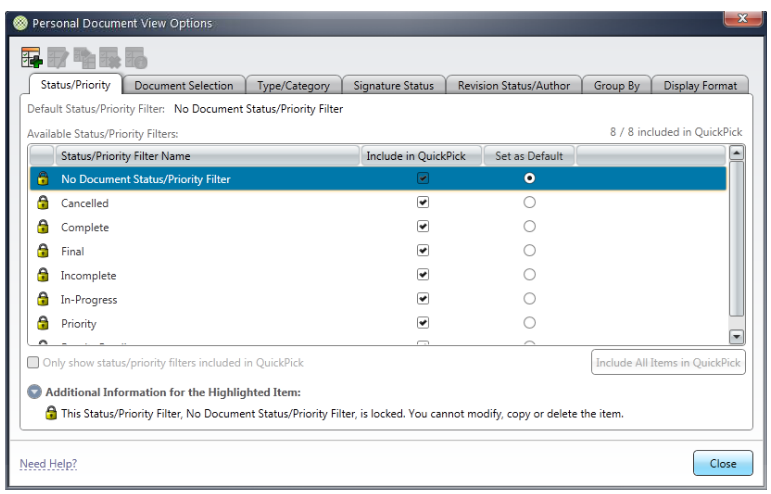
Filter Section	Description
	
Filters	Click the arrow next to an option to display its **QuickPick** list or select **Custom** to select specific criteria. 

Creating Custom Document Filters

To Create a Custom Filter:

1. Click the **Preferences** button in the **Display Format** section.

   The Personal Document View Options window appears.



2. Click the appropriate tab option for the filter type you want to create.

   Status/Priority - Create a filter to view documents based on **status/priority**.

   Document Selection – Create a filter to view documents based on **document type**.

Type Category – Create a filter to view documents based on **type/category**.

Signature Status – Create a filter to view documents based on **signature status**.

Revision Status/Author – Create a filter to view documents based on **revision status/author**.

Group By – All of the **Group By** filter options are system-supplied and does not provide the ability to create additional personal filters.

Display Format - Create a filter to view documents based on a preferred **display format**.

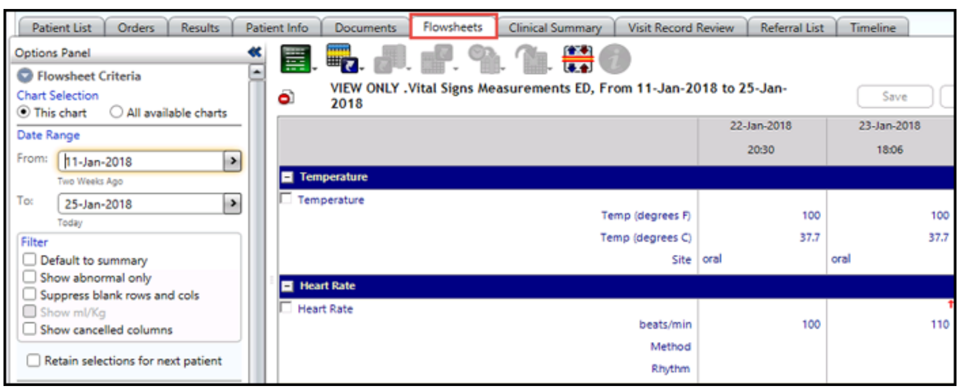
3. Click the **Add New** toolbar button to open the **Add New** window to apply respective filter details.

Note: If a lock icon appears next to a filter type, the filter is a system-supplied filter and cannot be modified or deleted.

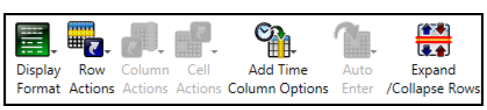
Using the Flowsheets Tab

The **Flowsheets** tab allows you to view, chart and monitor clinical data for assessment and intervention observations documented across repeatable intervals.

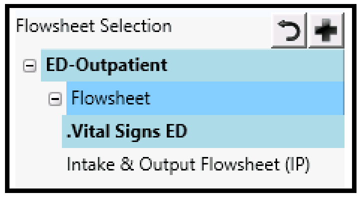
For example, the ED Nurse may need to capture vital sign assessment every 2 hours. The ED Provider will have the ability to view the information on this tab as needed.



The **Flowsheets tab toolbar** buttons provide access to actions specific to the **Flowsheets** tab.

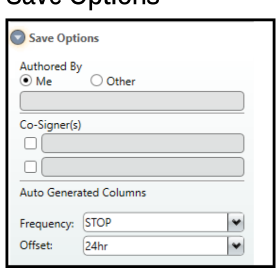


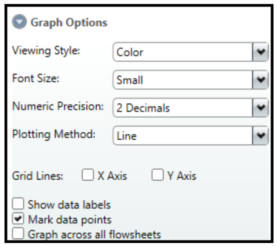
To view flowsheet data: From the **Flowsheet Selection** area, select the flowsheet to bring into context.



Using the Options Panel

Use the **Options Panel** to select filter options to customize your view preference.

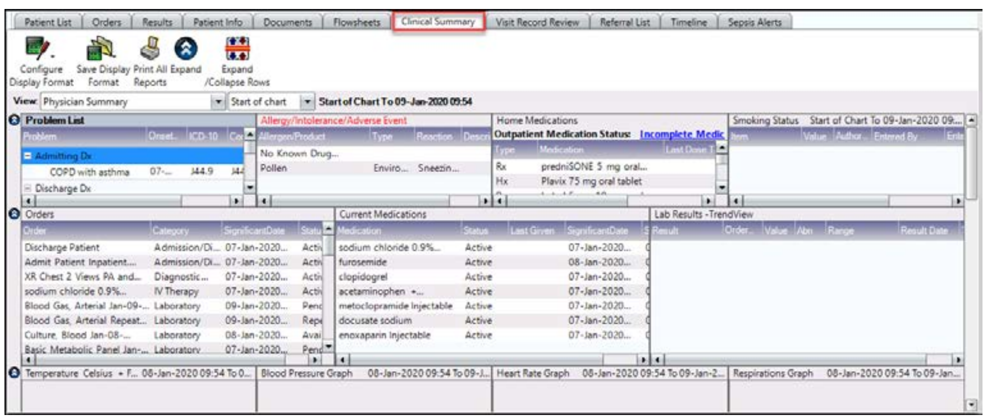
Filter	Description
Chart Selection	This chart – Filter flowsheet data for the current visit. All available charts – Filter flowsheet data across all visits (past and present)
Date Range	Allows you to filter flowsheet data for data range or relevant date (ex. Three Days Ago)
Filters	Default to Summary – sets the default view to a summary display format Show Abnormal Only – filters the view to only display abnormal data values Suppress blank rows and cols – removes any columns and/or rows that do not contain charted data Show ml/kg – view intake and output values in ml/kg instead of the default of ml. Note: The check box is disabled for general flowsheet types. Show cancelled columns – displays all time columns that were cancelled.
Retain selections for next patient	Select this check box when you change filter settings and you want to retain those selections for a different patient you select from the Patient List. Note: If you do not select this box, and you select a new patient from the Patient List, the filters will revert to the default filter settings.
Flowsheet Selection	Use this section to select the flowsheet type you want to view.
Save Options 	Expand this section to access the following options: Authored By Me (default) – this option indicates you are the author of the flowsheet. Other – select this option to search and add another user for whom you are documenting on behalf of. Co-Signer(s) - Select the check box to request up to 2 co-signatures for the flowsheet documentation.

Filter	Description
	Auto Generated Columns - Allows you to set the preferred timeframe for auto-generation of time columns.
Graph Options 	This option is only available when you are in the **Graph View**. This section allows you to change the view options when displaying flowsheet data values in graph view.

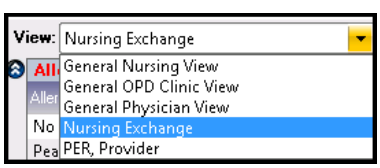
Using the Clinical Summary Tab

The **Clinical Summary** tab may be used for **Patient Hand-Off** / **Clinical Exchange** workflows.

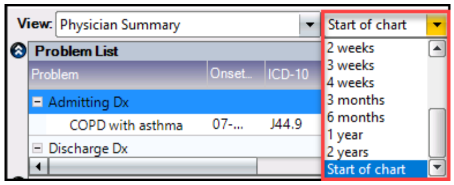
The information presented is a collection of data from different sources of information from various sections of the patient's chart (for example, Results, Documents, Orders) in a summary view.



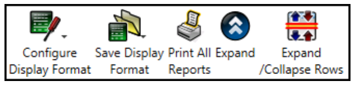
Click the **View** drop-down to select the appropriate view for your role/department.



The default display view date range is **Start of Chart**. To change the date range, click the drop-down next to the **View** field.

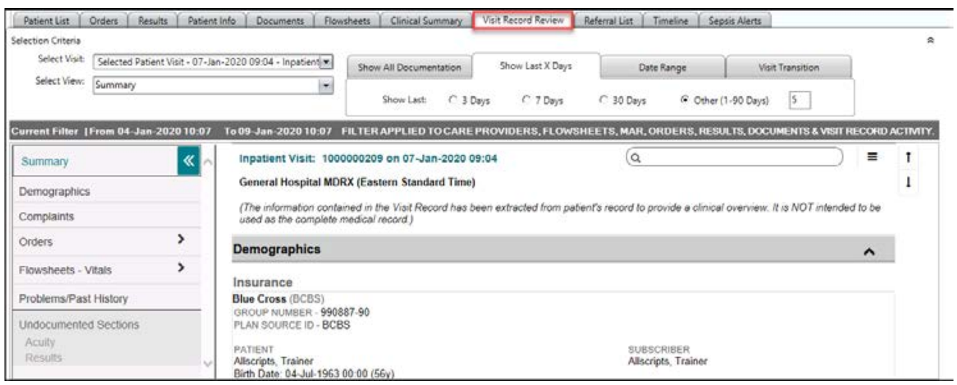


The **tab-level toolbar** buttons provide access to actions specific to the **Clinical Summary** tab.

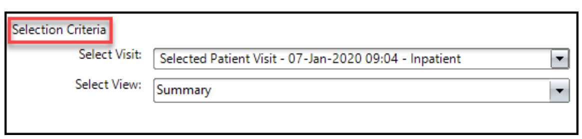


Using the Visit Record Review Tab

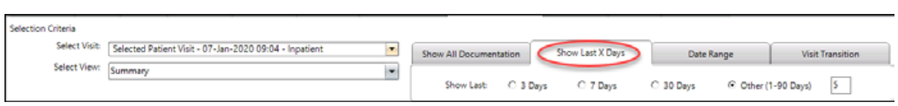
The **Visit Record Review** tab enables you to view a summary of a patient's visit documentation for a selected visit. This saves you time and effort from having to navigate to many different areas in Sunrise to find information on what happened and what was documented during a patient's previous visit (Inpatient or ED).



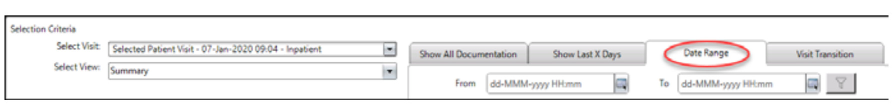
The **Selection Criteria** area enables you to select a patient's visit and view.



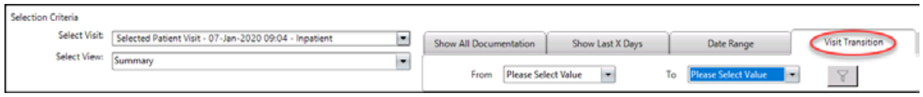
Show Last X Days: Select to display documentation in the Visit Record by the last number of days you select.



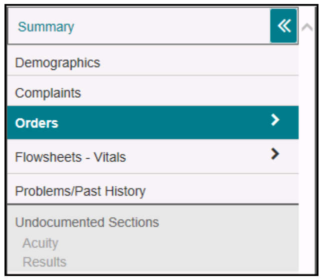
Date Range: Select to enter a specific range of dates to display documentation in the Visit Record.



Visit Transition: Select to display documentation by the visit transition you specify in the Visit Record for the selected visit and view.

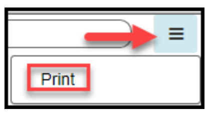


The **Section Navigation** panel (left panel) enables you to quickly navigate to a specific section of the Visit Record by clicking the name of that section.



Note: The Undocumented Sections appear gray shaded indicating the sections of the chart that were not documented for the selected visit.

Click the **Print** icon to open **Print Visit Record** and print record.



Using the Follow-up Board Tab

Note: Detailed instruction on the use of the tab will be covered in detail in a later topic as part of the ED Discharge workflow.

Patients appear on this tab when discharged from the ED. This tab provides as a ‘placeholder’ list with the ability to manage required patient follow-up post discharge (for example, lab results that were not available prior to discharge from ED).

Lesson Review

Having completed this lesson, you should be able to:

Use the Orders tab to review patient orders.

Use the Results tab to review laboratory and diagnostic test results.

Use the Patient Info tab to review general patient information, such as allergies, health issues and care providers.

Use the Documents tab to review clinical documentation.

Use the Flowsheets tab to review flowsheet documentation, such as vital sign observations.

Use the Clinical Summary tab to review a summary of the patient chart in a single view.

Use the Visit Record Review tab to review chart documentation for a selected patient visit.