

# Provider Training

## Addendum

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## Customizing PowerChart for the User

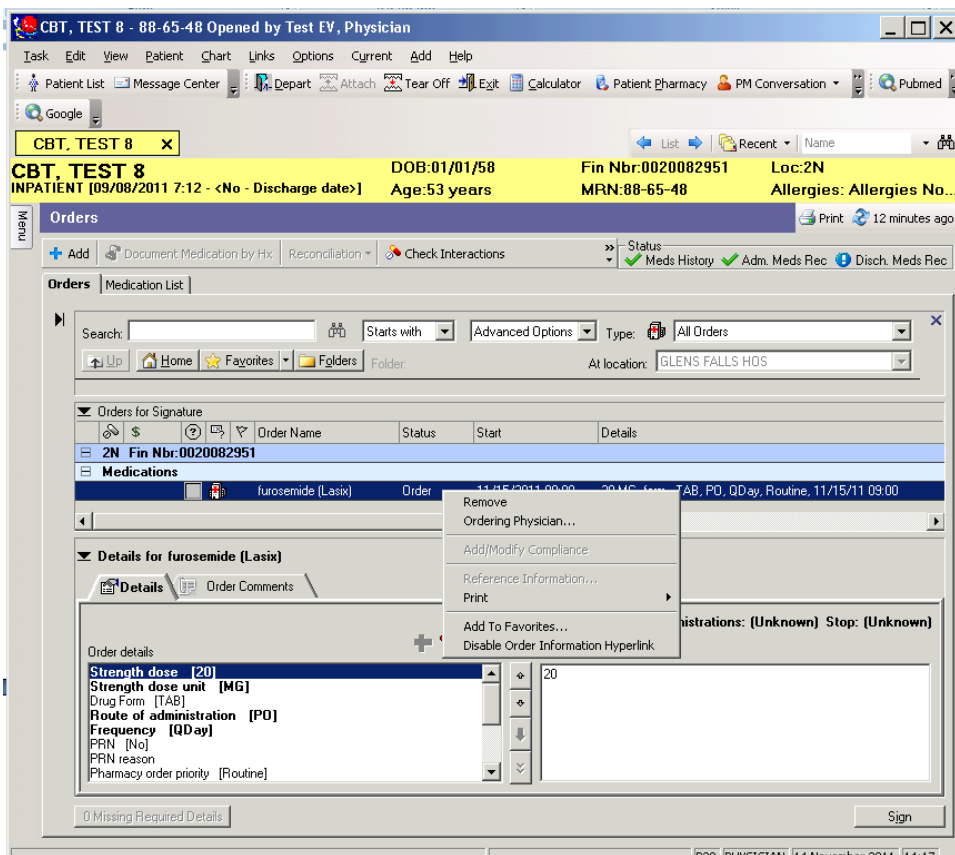
If there are orders and/or Patient Instructions you use frequently and there is little variance in them, they can be customized and saved so details will not need to be entered every time you use them. If there is a modification to one of these, it can be done for just that patient and the favorite will remain as is.

## Creating Orders Favorites/Favorites Folders

### Add Orders to Favorites

Orders can be added to Favorites folders as you go through your day placing orders for your patients. While in the patients chart:

- Click the +Add button
- Search for an order(s) as you would in the normal ordering process.
- Complete all details for the order(s)
- Right click the order (multiple orders may be done at the same time, but they must all have the same Frequency and Start Date/Time and be put in the same favorite folder).
- Select Add to Favorites

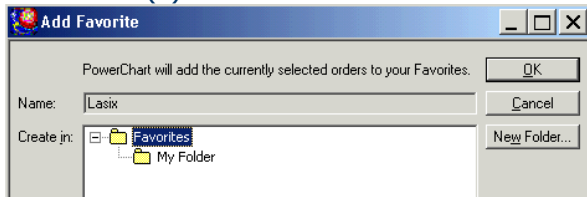


- Select the folder where you want the order located.

### OR

- Create a new folder
  - Click Favorites (or select an already created folder to nest folders)
  - Click New Folder
    - Type the name of the folder.
    - Hit Enter.
      - The order will be placed in this folder automatically
- Click OK.

- Sign the order(s)



The orders placed there will be available for all patients. This can be done without ordering for a patient by opening a patient chart, going through the same process and then closing the chart before signing any orders.


### Organize Favorites

- Locate the Favorites button below the search field and click the down arrow next to it.
- Click Organize Favorites
  - Create Folder-a New Folder will appear in the right window. Type the name of the folder.
  - Rename-select an existing folder in the right window and click Rename. Type the new name and hit Enter.
  - Delete-select an existing folder in the right window and click Delete
    - You cannot rename or delete system defined folders
  - Move to Folder-select an existing folder or order and click Move to Folder. Select the folder to hold the order or nest the folder and click OK.

**NOTE:** The system defaults to Sort favorites alphabetically. Unchecking the box in front of that will activate the arrows to the right of the window. Use those arrows to move orders and folders up and down to the order you prefer.

### Home Folder

A Home folder is the default folder to open whenever the orders tab is accessed (via the Table of Contents, the Organizer Chart menu or the Depart process.

- Click  and the folder structure will open.
- Right-click on the desired folder and select 'Set as Home Folder'.




### Creating Custom Instructions/Adding to Personal Folders

#### Create Custom Instructions


- Navigate to the Depart Process
- Click the pencil icon next to Patient Instructions.
  - This window is divided into four panes
    - Upper left-folders by specialty area.
    - Upper right-list of instructions in the selected folder
    - Lower left-instructions selected for this patient
    - Lower right-specifics related to the instruction selected in the lower left pane
- Select the folder in the upper left pane where the system defined instruction is located.
  - Double click the instruction in the upper right pane
  - The name of the instruction will appear in the lower left pane and the specifics in the lower right pane.
  - Make any changes to the system defined instruction.
  - Right click on the name in the lower left pane and select Save a Person Custom Instruction
  - A window will open to name the instruction. Type your custom name and click OK.
  - **NOTE:** The name you type will appear on the patient's discharge instructions.
  - If you use the same instruction with variations on a regular basis, make any changes again and save with a different name. For example:
    - After Heart Valve Surgery-1 Week Follow Up
    - After Heart Valve Surgery-2 Week Follow Up

## Menus and Toolbars

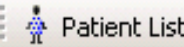



### Task Menu

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
Change Password	None	None	O and PC	Enables you to change your password. Passwords may be of any length and contain any alphanumeric characters.
<b>Reports</b>	None	None	PC	
<b>Print</b>				
MRP Print			O and PC	Prints the open/selected patient's entire chart. If no patient chart is open/selected, the patient search window will open first.
Print	Item workspace		O and PC	Opens the Print dialog box to allow you to print the active item.
Print Screen	NA	NA	O and PC	Prints the current view on the screen.
Refresh	Item workspace	 0 minutes ago	O and PC	Refreshes the screen.
Exit	Action toolbar		O and PC	Closes the application and the open chart.


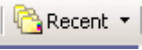


### Edit Menu

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
Copy	Item workspace		O and PC	Copies a selected object such as text or a file. The information cannot be pasted into any area of PowerChart.

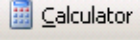

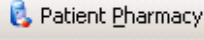
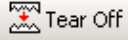

## View Menu

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
Patient List	Organizer Toolbar		O and PC	Opens the Patient List
Message Center	Organizer Toolbar		O and PC	Opens the Message Center
<b>Toolbar</b>				
<b>Navigation Toolbar</b>				
	Links Toolbar		O and PC	Toggles the Links toolbar which contains user defined links to external websites.
	Action Toolbar	See below	O and PC	Toggles the Action toolbar which contains multiple functions described on other menus (e.g. Depart and Clinical Calculator on Chart Menu)
	Notifications Toolbar		O and PC	Toggles the Notifications toolbar which contains the count for unopened items in Message Center.
Patient Toolbar	None	See below	O and PC	Toggles the Patient toolbar which contains multiple functions described on other menus (e.g. Search and Recent on Patient Menu).

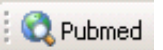
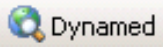
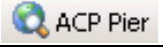

## Patient Menu

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
Search	Patient Toolbar		O and PC	Opens the Person Search dialog box
Recent	Patient Toolbar		O and PC	Displays the last 10 charts you have viewed
Previous Patient's Chart	Patient Toolbar		PC	Takes you to the previous chart in the active list. This icon is only available if the open chart was selected from a patient list rather than a search.
Next Patient's Chart	Patient Toolbar		PC	Takes you to the next chart in the active list. This icon is only available if the open chart was selected from a patient list rather than a search.
Add Patient to a Patient List ►(custom list name)	Patient Toolbar		PC	A dropdown of custom lists will display. Click on the correct list and the patient is added to that list.
<b>New</b>				
Orders	None	None	O and PC	Allows you to add a new order(s) to the open/selected patient's entire chart. If no patient chart is open/selected, the patient search window will open first.
Allergies	None	None	O and PC	Allows you to add a new allergy to the open/selected patient's entire chart. If no patient chart is open/selected, the patient search window will open first.








**Chart Menu** (requires a patient to be highlighted or the last chart viewed will open except as noted)

<b>Activity</b>	<b>Associated Toolbar/Area</b>	<b>Icon</b>	<b>O=Organizer PC=Patient Chart</b>	<b>Purpose</b>
Results Review	None	None	O and PC	Opens the Results Review workspace in the active Patient Chart.
Allergies	None	None	O and PC	Opens Allergies workspace in the active Patient Chart.
Orders	None	None	O and PC	Opens Orders workspace in the active Patient Chart.
Medication List	None	None	O and PC	Opens the Medication List workspace in the active Patient Chart.
Clinical Notes	None	None	O and PC	Opens Clinical Notes workspace in the active Patient Chart.
Critical Care	None	None	O and PC	Opens Critical Care workspace in the active Patient Chart.
Document Viewing	None	None	O and PC	Opens Document Viewing workspace in the active Patient Chart.
Form Browser	None	None	O and PC	Opens Form Browser workspace in the active Patient Chart.
I_O	None	None	O and PC	Opens I_O workspace in the active Patient Chart.
Inpatient Summary	None	None	O and PC	Opens Inpatient Summary workspace in the active Patient Chart.
MAR Summary	None	None	O and PC	Opens MAR Summary workspace in the active Patient Chart.
Overview	None	None	O and PC	Opens Overview workspace in the active Patient Chart.
Med Ref/Browser	None	None	O and PC	Opens Med Ref/Browser workspace in the active Patient Chart.
Pt Info	None	None	O and PC	Opens Pt Info workspace in the active Patient Chart.
Clinical Calculator	Action Toolbar	 Calculator	O and PC	Opens the Clinical Calculator which can be used as a regular calculator or select a formula and enter the necessary values. Does NOT require a chart to be open and anything done here does not apply to a specific patient nor will the result of a formula post to a chart.
Depart Process	Action Toolbar	 Depart	O and PC	Launches the Depart Process. Patient must be highlighted.
Patient Pharmacy	Action Toolbar	 Patient Pharmacy	O and PC	Launches Patient Preferred Pharmacy window for documenting pharmacy to be used for ePrescribe
Tear Off This View	Action Toolbar	 Tear Off	PC	Performs a 'screen shot' in another window allowing you to look at two areas of the chart at the same time.
<b>Chart Accessed By</b>				
Most Recent	None	None	O and PC	Displays the list of users most recently accessing the chart.
All Providers	None	None	O and PC	Displays the list of all users having accessed the chart.
Close Charts	Action Toolbar	 Exit	O and PC	Closes the application and the open chart.

**Institutional Links Menu** (cannot be toggled off and on and dropdown will expand with personal links created on the toolbar)

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
PubMed	Institutional Links Toolbar		O and PC	Launches PubMed externally.
Dynamed	Institutional Links Toolbar		O and PC	Launches Dynamed externally.
ACP Pier	Institutional Links Toolbar		O and PC	Launches ACP Pier externally
Clinical Pharmacology	Institutional Links Toolbar		O and PC	Launches Clinical Pharmacology externally.
External website	Links Toolbar		O and PC	Launches individually defined external websites. The user can define and name the icon for two websites to add to the menu and toolbar.

**Patient List Menu** (Only displays in Organizer when a Patient List is open)

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
List Maintenance	Item workspace		O	Opens the Modify Patient Lists dialog box to allow you to build or modify patient lists.
Add Patient			O	Allows you to add the selected patient to a custom list. This option is not available on a location list.
Remove Patient from List			O	Allows you to remove the selected patient from a custom list. This option is not available on a location list.
Assign Lifetime Relationship	None	None	O	Enables you to assign a specific relationship with the patient. A patient must be selected for this option to be active.
Assign Visit Relationship	None	None	O	Enables you to assign a visit-specific relationship with the patient. A patient must be selected for this option to be active.
Sort	None	None	O	Opens the Sort dialog box that allows the user to sort the active list by a maximum of three options in ascending or descending order.
Select All Patients			O	Selects all patients in the currently open list.
Clear All Selections			O	Clears the selection of patients currently selected.
Customize Columns			O	Opens the Customize Columns Tool so you can change column sequence and inclusion/exclusion of columns on Patient Lists.
Properties			O	Opens the Properties dialog box to allow you to limit the patients retrieved based upon filter criteria.

**Inbox Menu** (Only displays in Organizer when Message Center is open)

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
Manage Configuration	None	None	O	Opens the configuration dialog box to set user level preferences
Manage Out of Office	None	None	O	Opens the Out of Office Dialogue Box
Manage Pools	None	None	O	Currently not in use
Manage Preferences	None	None	O	Opens the Behavior Prefs dialog box to set user level preferences
Manage Proxy	None	None	O	Currently not in use
Show Completed	None	None	O	Toggles Show Completed off and on. When on, completed items will display in Inbox.
Show Preview Pane	None	None	O	Toggles Show Preview Pane off and on. When on, a Preview Pane displays with order details at the bottom of the workspace window.

**Help Menu**

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
Message Center	None	None	O	Help information about Message Center. Displays only when Message Center is open.
Patient List	None	None	O	Help information about Patient List. Displays only when Patient List is open.
*Table of Contents Item*			PC	Help information about the currently displayed Table of Contents item.
Navigation	None	None	O and PC	Help content for navigating the Organizer and the Patient Chart.
HNA Help Topics	None	None	O and PC	
About PowerChart	None	None	O and PC	Displays information relative to PowerChart which could be helpful when calling the help desk.

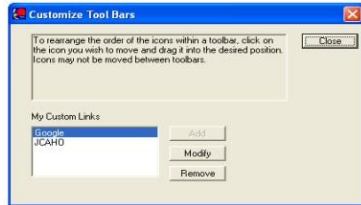
**Other Menus in the Patient Chart** (These menus are specific to context)

Context	Menu	Context	Menu	Context	Menu
Results Review	Time Scale Menu	Clinical Notes	Index Menu	I & O	Options Menu
	Options Menu		Documents Menu		Documentation Menu
Allergies	Allergy Menu	Critical Care	Time Scale Menu	Inpatient Summary	Orders Menu
Orders and Medication List	Current Menu		Options Menu		Navigation Menu
		Add Menu	Document Viewing	Documentation Menu	MAR Summary
		Form Browser	Options Menu	Patient Info	Options Menu

## Toolbars Help

### Working with Toolbars

- The user can drag the left edge of the toolbar to adjust the width of the toolbar.
- Icons hidden due to the width allotted are accessed by clicking on the down arrow at the right edge of a toolbar.
- The icon order on a toolbar is adjusted by right-clicking on the toolbar and selecting Customize.
- With the following dialog box open, click and hold the icon to move and drag it to the desired location. Release the mouse button. When all adjustments have been made, select close on the open dialog box.



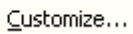
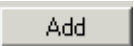



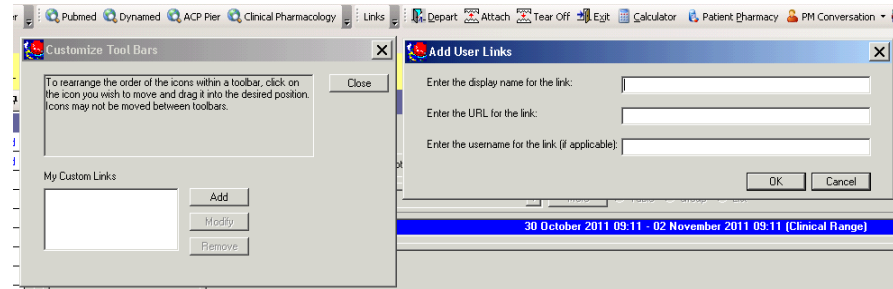
OR

- Move the entire toolbar by clicking and holding the handle  and then dragging the toolbar down to display all icons.

### Links Toolbar

The Links Toolbar is user specific.

- Click 
- Select  . The window on the left will open.
- Click  on the open window. The window on the right will open.
- Enter the information for the URL and click 
- A new toolbar icon will be created for each URL added.
- The name of the link will be added to the Links menu.



## Toolbar Icons Not Associated with Menu Activities

Activity	Associated Toolbar/Area	Icon	O=Organizer PC=Patient Chart	Purpose
Person of Interest	Patient Toolbar		O and PC	Shows the open chart and the dropdown allows you to navigate to a specific area of the patient chart without clicking back into the chart.
PM Conversation	Action Toolbar		O and PC	Not currently in use.
Patient Product Inquiry	Action Toolbar		O and PC	Shows the list of products currently associated with that patient.
Open	Message Center workspace		O	Opens the selected item in Message Center.
Forward Only	Message Center workspace		O	Opens the selected item(s) in Message Center.
Select Patient	Message Center workspace		O	Selects all items in Message Center related to the currently selected patient.
Select All	Message Center workspace		O	Selects all items in Message Center.
Customize	I&O		PC	Located in the workspace, this icon allows you to customize the columns and other preferences in I&O 2G.
Graph	Results Review		PC	Located in the workspace, this icon allows you to graph any numerical result. The graph can include any number of results (e.g. respiratory rate and blood pressure). The graphs may be looked at individually or combined to compare trends. The individual graphs will indicate normal highs and lows for the results.

## Tips

The following tips are suggestions for using PowerChart more efficiently:

- Press TAB to move between fields.
- To change the sort order of any information contained in a table or flow sheet, click the column heading by which you want to sort.
- Many buttons in PowerChart include ToolTips, a description displayed when you move the cursor over a button, giving additional information about the feature.
- Select multiple items from a list by selecting the first one, pressing SHIFT, and selecting the last one.
- In Results Review change the view to 'Group' to see results stacked by date to more easily view trends.

Vital Signs	Peripheral Pulse Rate	Respiratory Rate	Systolic Blood Pressure	Diastolic
10/27/11 12:00	85	16	H 185	68
10/27/11 10:37	H 110	12	H 145	89
10/26/11 10:39	100	14	H 165	80
10/26/11 10:36	88	14	H 158	60
10/25/11 10:35	99	16	H 185	90
08/08/11 14:39	100	H 24	129	L 39
07/27/11 10:19	99	16	H 167	L 59
07/27/11 09:00	100	12	125	87
07/26/11 10:17	88	L 10	H 189	86

## Data Crosswalk Results Review

Embedded Tab Name	Data On Embedded Tab	Old Tab Location
Quick View	Basic Oxygen Info Breath Alcohol Test Care Notes ED Nursing Notes Lab Documents Lab Results Last BM Measurements Orthostatic Vital Signs Pain Assessment Pain Scales Pathology Reports POC Glucose Radiology Reports Visit Information Vital Signs Weight Change Info	Assessments Assessments Assessments ECC Summary Lab Lab Assessments Assessments Assessments Assessments Assessments Clinical Documents Lab/Med View Radiology Assessments Vital Signs Assessments
Lab	All Laboratory Results	Lab Anatomic Path
Radiology	Cat Scan Diagnostic Radiology Interventional Radiology Mammography Nuclear Medicine Radiology Addendums Ultrasound	Radiology Radiology Radiology Radiology Radiology Radiology Radiology
Assessments	ADLs Body System Assessments Dialysis ESI Functional Nutritional Pins/Wires Psychosocial/Psychiatric Tubes/Drains	Assessments Assessments Assessments Assessments Assessments Assessments Assessments Assessments Assessments
Vital Signs	Vital Signs	Vital Signs
Transcription	Transcribed Documents	Transcription
Hx Transcription	Historical Transcribed Documents	Hx Transcription
Meds Recvd 48Hrs	Meds Recvd 48Hrs	Meds Recvd 48Hrs

## Document Viewing

Physician Documentation		Procedure Documentation (continued)	
Admission	Neurology Consultation	Exercise Stress-MPI	NeuroDiagnostics Report
MH Admission Note	OB/GYN Consultation	MUGA Scan	
History and Physical	Oncology Consultation	<b>Oncology Procedures</b>	
Progress Note-Physician	Ophthalmology Consultation	Medical Oncology	Simulation Note
Anesthesiology Consultation	Physiatrist Consultation	Radiation Oncology	
Cardiology Consultation	Plastics Consultation	<b>Surgical Documentation</b>	
Dental/Oral Surgery Consultation	Podiatry Consultation	Anesthesiology Procedures	Neurosurgical Procedures
Dermatology Consultation	Psychiatric Consultation	Cardiology Procedures	Plastics Procedures
Endocrinology Consultation	Pulmonology Consultation	ENT Procedures	Pulmonology Procedures
ENT Consultation	Radiology Consultation	Gastroenterology Procedures	Surgical Procedures
Gastroenterology Consultation	Surgical Consultation	Orthopedic Procedures	Urology Procedures
Infectious Disease Consultation	Thoracic Surgery Consultation	OB/GYN Procedures	
Medical Consultation	Urology Consultation	<b>Nursing Documentation</b>	
Nephrology Consultation		Nursing Progress Note	BHU Nursing Progress Note
<b>Emergency Documentation</b>		Shift Summary Note	BHU Shift Summary Note
ED Note-Physician	ED Discharge Summary	<b>Care Management Documentation</b>	
Emergency Department Report		Care Management Progress Note	Social Services Note
<b>Procedure Documentation</b>		<b>Nutrition Documentation</b>	
Electrocardiogram-EKG	Pharmacologic Stress-MPI	Nutrition Progress Note	
Electrophysiologic Study-EP	PCI (Percutaneous Coronary Intervention)	<b>Respiratory Care Documentation</b>	
Holter Monitor	Balloon Aortic Valvuloplasty	RT Progress Note	
Myocardial Biopsy	Cardiac Catheterization-diagnostic	<b>Ancillary Documentation</b>	
Tilt Table Test	Carotid Ultrasound	Pastoral Care SOAP Note	Lactation Consult
Echocardiogram-Stress	Thrombectomy	<b>Discharge Documentation</b>	
Echocardiogram-Transthoracic	Vein Graft Assessment	Discharge Summary	Patient Depart Summary
Cardiopulmonary Stress Test	Venous Duplex Scan	Clinical Depart Summary	
Stress-ECG	Sleep Study		

## Document Viewing Filters

Status Filter	
Active	Canceled
Anticipated	In Progress
Auth (Verified)	REJECTED
Dictated	In Lab
Final	Superseded
In Error	Transcribed
In Error No View	C_Transcribed
IN Error No MUT	Unauth
Modified	? Unknown
Not Done	

Encounter Type Filter	
Blood donation	Outpatient
Case Management	Phone Msg
Emergency	Preadmit
Home Health	Private Duty
I	Recurring
Inbox Message	Research
Inpatient	Skilled Nursing
O	Wait List
Observation	community health record

**Table of Contents Items with Little Change**

<b>Table of Contents Item</b>	<b>Embedded Tab</b>	<b>Data</b>	<b>Old Tab Location</b>
Allergies	NA	Allergies	Demographic Bar Launch Window Pt Info
Orders	Orders	Orders	Orders
	Medication List	Medication List	Med Profile
Medication List	Orders	Orders	Orders
	Medication List	Medication List	Med Profile
Clinical Notes (Document Viewing to replace)	NA	No change	No change
Critical Care	NA		No change
Form Browser	NA	No change	No change
I & O 2G	NA		I & O
Inpatient Summary	NA	No change	No change
MAR Summary	NA	No change	No change
Overview	Since Last Time	No change	No change
	Summary	No change	
Med/Ref Browser	Drug Reference	No change	No change
	Education Leaflets	No change	
	Reference	No change	
Pt Info	Visit List	No change	No change to remaining tabs
	Patient Demographics	No change	
	PPR Summary	No change	
	Immunizations	No change	

**Tabs Removed**

<b>Table of Contents Item</b>	<b>Tab</b>
Pt Info	Problem List
NA	24 Hour Order Summary
NA	48 Hour Order Summary
NA	Chart Summary
NA	MAR