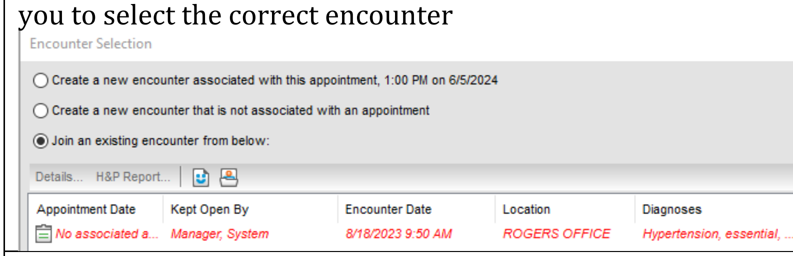
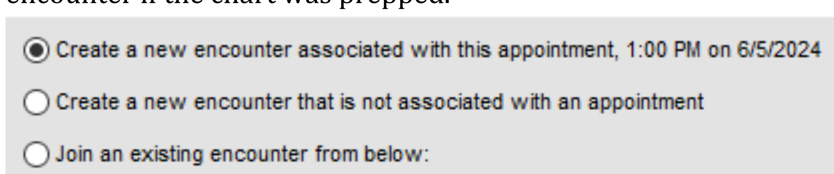
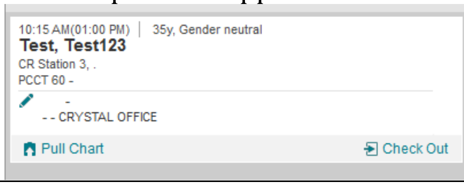
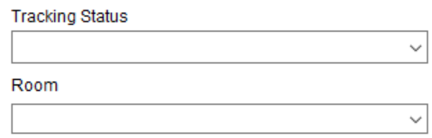
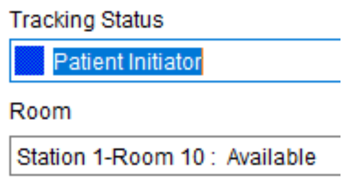
Patient rooming process

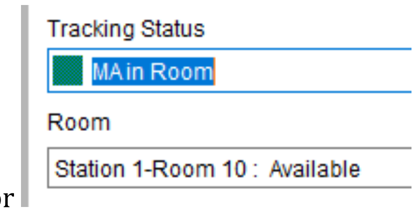
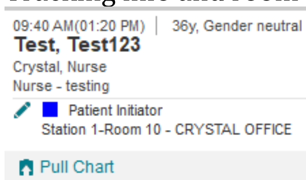
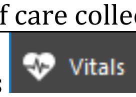
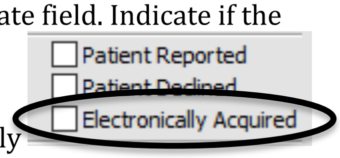
Patient tracking screen – four columns shown:

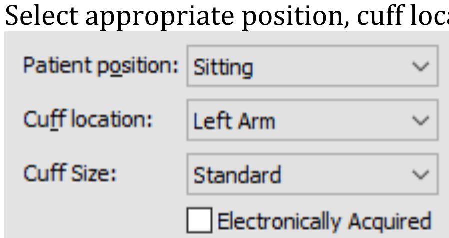
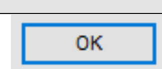
Pending	Upcoming appointments for the day
Checked In	Patients waiting in lobby to be seen
Started	Support staff rooming patient/seeing provider
Checked Out	Patients who have completed visit with provider

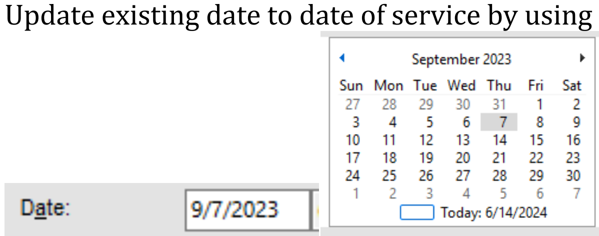
Step	EHR section	Details
1a.	Start Appointment	Select Patient Tracking [Patient Tracking] from upper left corner of desktop screen
		Click on patient name to select appointment. A popup will appear
		Click on [Start] on bottom right corner of popup to begin appointment. Click on [Save and Start] to activate appointment
		To begin encounter, select [Pull Chart] from patient's name in the started column.
		Chart will automatically open attached to the appointment provider and time of visit
		If another encounter is open the system will automatically prompt you to select the correct encounter 
		Select correct encounter – either new encounter or join existing encounter if the chart was prepped.  and click OK [OK]
		A reminder screen will popup if there are applicable Reminders. Review for needed information click [Close] or [X] on the top bar of the popup to close the reminder screen.

<table>
<tr><td rowspan="3">1b.</td><td rowspan="3">Update patient tracking</td><td>Click on patient's appointment from tracking screen.

</td></tr>
<tr><td>Pop-up will open allowing you to set the tracking status and room


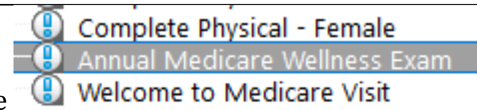
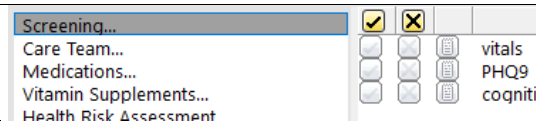
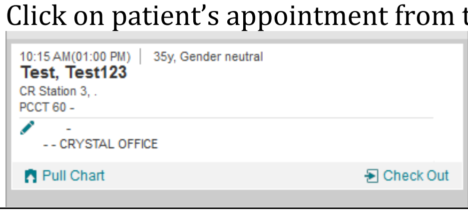
using the drop-down menu.


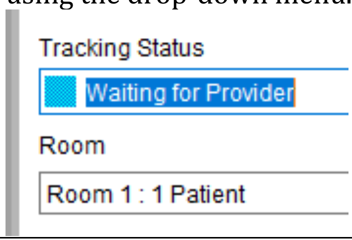
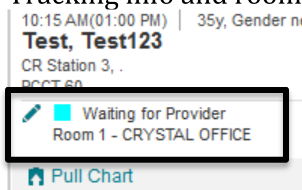
or

</td></tr>
<tr><td>Tracking info and room number will show on patient's appt

</td></tr>
<tr><td rowspan="6">2.</td><td rowspan="6">Vitals – collect vitals by following reference sheet instructions. Collect patient weight and height before exam room.</td><td>Obtain appropriate vitals for patient age and reason for visit using standard of care collection techniques</td></tr>
<tr><td>Click Vitals  from the left column to add patient vitals to encounter note</td></tr>
<tr><td>Click plus sign  from the top left corner of the vitals section to enter new vitals data. A popup will appear for data entry.</td></tr>
<tr><td>Enter each reading into the appropriate field. Indicate if the measurement was taken electronically


Select appropriate position, cuff location, and cuff size

</td></tr>
<tr><td>Once entered click  from the bottom right corner to save info to patient's chart.</td></tr>
</table>

		For all blood pressures 140/90 or higher a BP recheck MUST be performed after five minutes and added to the vitals following the above process.
3.	History	Click Hx History from the left column to edit/add history items in Allergy, Social, and Medications. A new screen will open.
3a.	Allergy	Select Allergy from the main list in the left column. A new screen will appear.
		Patient's allergies will be listed under the Allergy folder Allergy Amoxicillin *PENICILLINS* [1. Review each allergy individually with patient
		Add allergies to encounter by highlighting and double-clicking each name or selecting Include Active from the top bar.
		Select allergy name from Current Encounter section. Located at the bottom of the screen. Double click or click to edit information. A popup will appear.
		Update manifestations (if needed) by adding preloaded details Manifestations Abdominal pain Anaphylaxis or free typing in the comments section Comments located at the bottom of the popup.
		Update existing date to date of service by using the calendar ...  . Located in the upper right corner of the popup
		Click OK to save from the bottom right corner of the popup
		If a new allergy is to be added, click Search from the top bar on the allergy screen.
		Enter allergy name in Search term field Search Term: then select Search
		Add allergies to encounter by highlighting and double-clicking each name

		Select allergy name from Current Encounter section. Located at the bottom of the screen. Double click or click to edit information – follow instructions from above
		Click Reconcile from the top bar to finalize once all allergies have been reviewed
3b.	Social	See Social history process. Refer to expectations to identify appropriate components for age of patient.
3d.	Medications	Select Medication from the main list in the left column. A new screen will appear.
		Patient's medications will be listed under the Current Medications folder Current Medications metFORMIN (1,000m. Review each medication with patient
		Add medications to encounter by highlighting and double-clicking each name or selecting Include Current from the top bar on the screen
		Select medication name from Current Encounter section. Double click or click to edit information. A popup will appear with different areas that can be changed.
		Update medication details Strength: Dosage: 1 Frequency: daily and click OK from the bottom right corner to save
		If a new medication is to be added, click Search located in the top bar of the screen.
		Add medication(s) to encounter by highlighting and double-clicking each name – enter medication details as above
		Click Reconcile to finalize once all medications have been reviewed Located in the top bar of the screen.
4.	Reason for Visit	Click Reason for Visit from the left-hand column to add reason patient is seeing provider to encounter. A new screen will appear.
		Reason for visit is added to encounter through Exams / Complaints (top bar of screen) or Patient Words (middle of screen) depending on provider preference or appointment type.

		For Patient Words click in text box and add reason pt is seeing provider and associated details
		For Exams / Complaints visit templates are added from My Short Lists My Short Lists, Master List Master List, or Free Text Free Text. Some providers prefer Previous Complaints Previous Complaints instead. All are located on the top bar of the screen.
		Select appropriate template  and double click to add to encounter
		A pop-up will open  complete required sections
		Click OK from bottom right corner to save.
		Continue adding complaints until all are added to encounter
5.	Send chart to provider	Click to send chart. Located in upper left corner above patient banner. A popup will appear.
		Select provider from drop down list To: Riley, Jennifer MD. Upper left corner
		Select room number from subject drop down list or free text room number Subject: Upper left corner
		Click Send to transfer chart to provider. Upper left corner.
6.	Update patient tracking	Click on patient's appointment from tracking screen. 

		Pop-up will open allowing you to set the tracking status and room  using the drop-down menu. 
		Tracking info and room number will show on patient's appt 
		Update tracking status of patient during appointment

Updated 3/2025