Trinity Health

EpicCareLink

The Patient Chart

Accessing the Patient Chart

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

1. Click 👤 **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 his chart.**

To view your admitted patients

1. **Select the** **Patient List** **navigation tab 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.**
2. **Select a patient's name to view additional patient-specific information in the report pane.**
3. **If you view a report frequently, click to add a button for the report to the toolbar. From that page, you can also remove your report toolbar buttons, rearrange the order of buttons, and rename the reports.**
4. **Click 📁 to open a patient's chart.**

NOTE: 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 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.**

NOTE: 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 her chart yet, or she 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, date of birth, and gender 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.**

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. From the **Home** screen, click 🔧 in the **Event Monitor** section.
2. Choose which types of events you'll receive notifications for in the **Event Filter** section. To receive notifications for all the available event types, select the **Events I Will Receive** check box.
3. Choose which events you'll receive notifications for by selecting one of the options in the **Relationship Filtering** section:
   - 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.
   - Only events associated with a provider, department, or vendor in my group (recommended). 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.
   - Only events associated with me.
   - Only events associated with certain providers or departments. This option includes only events associated with the providers or departments you select.
4. **Choose who your notifications are sent to in the In Basket Settings section:**
   - 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.
   - 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.

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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.

Sign up a Patient for MyChart

1. **Open a patient's chart and then click Activate for MyChart in the patient header.**
2. **Print the page that appears and give it to the patient or enter the patient's email address and click Email Code to send them the activation code.**

Write a Message to the Patient

Send a secure patient message to a patient who uses MyChart.

1. **Open a patient's chart and then click Send patient message in the patient header.**
2. **Enter a subject and select a message type for your message.**
3. **Enter your message.**
4. **Indicate whether you want to be notified if the patient hasn't read the message by a certain date.**
5. **Indicate whether you want the patient to reply directly to you or to a pool.**
6. **Click Send.**

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.**

NOTE: To view details on several rows at once, select the check boxes in those rows, and then click "Start Review"

3. **To send a message to the patient's PCP regarding an office visit, click Ask a Question, fill out the message form, and click ✔ Send Message.**

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 Billing Encounter filter.**
3. **Click ✔ Apply to make the results of your search appear.**

NOTE: To remove the search criteria and begin a new search, click "Clear All"

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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.

3. Click Lab Flowsheets to graph lab result data. 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.

NOTE: 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.
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.
For more information about a problem, click the "View Report" link

View a patient's current medications

Select the Patient tab and click Medications.
For more information about a medication click "View Details"

Trinity Health

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.

View a patient's billing information

To view information about the patient's eligibility for health plans, coverages, service areas, networks, and more, select the Patient tab and click Billing Info. You can expand and collapse the sections in the Services section and use the Jump to search bar to find specific services.

You can also see details about a particular coverage on the Benefits Summary page to:

- Determine whether a particular service is covered in or out of network
- Determine whether a coverage is active
- Determine whether benefits for a particular service are metered and what the limits are for each level of benefits
- Determine what the patient portion will be for a particular service
- Review a complete summary of benefits