

Quick Start Guide for Healthcare Providers



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Patents

One or more patents apply to this software, including without limitation U.S. Patent Nos. 7,099,896; 7,110,955.

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About This Guide

This guide is intended for healthcare providers who use the web-based software application, commonly referred to as the PatientKeeper Physician Portal™, to access patient information from their institution's systems. This software application is accessed via a desktop, laptop, or tablet PC.

This “quick start” guide gives a general overview of the most commonly used features of the PatientKeeper Physician Portal application--it is not intended as a comprehensive user manual. For a full explanation of all features, please refer to the *PatientKeeper Physician Portal User's Guide*.

Logging Into Physician Portal

To access the Physician Portal application, you must have either a tablet, desktop, or laptop PC that has connectivity to your institution's computer systems. If your institution allows you to access their systems from an off-site location, such as from your home or a remote office, you would typically use a VPN connection to do so. Your system administrator can provide you with the proper software and instructions for this type of connection.

At initial implementation of the PatientKeeper system, your system administrator will provide you with the following information:

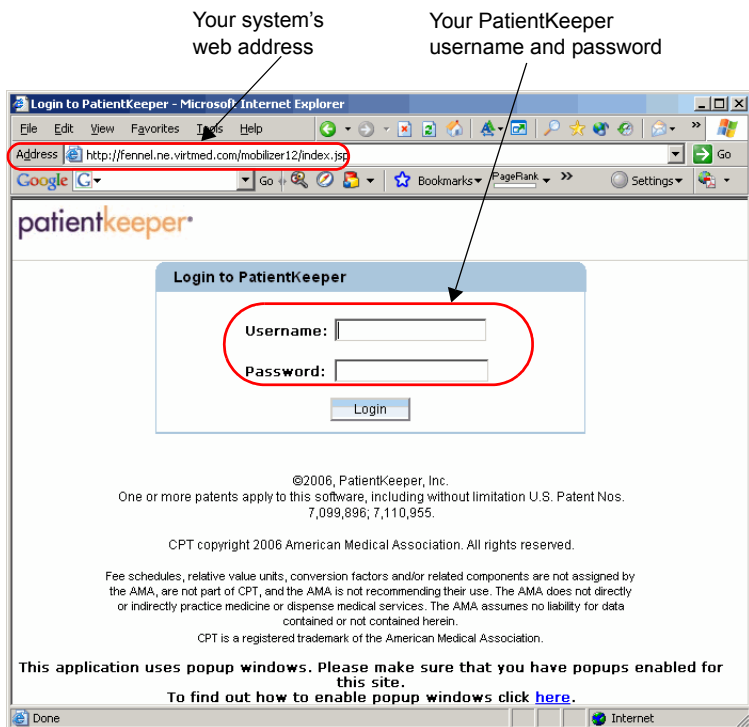
- ❖ The web site address for the PatientKeeper application at your institution.
- ❖ A username and password for the application.

You can use this information with your standard internet web browser to access the PatientKeeper application. The PatientKeeper application uses pop-up windows to display patient information. If your internet browser has a pop-up blocker, be sure that you have turned off the blocking feature.

To access the application, follow these steps:

1. Enter the web site address for the PatientKeeper system that was provided by your system administrator. You might want to save this address in your “Favorites” folder.

The PatientKeeper Login window appears.



2. Enter your PatientKeeper **Username** and **Password**. Please note that usernames and passwords are *case sensitive*.
3. Click the **Login** button.

The system opens a second window which displays the main Physician Portal application. The **Login** window also remains open. You must not close the **Login** window; doing so logs you out of the application.

Introduction to Physician Portal

When you have finished logging in, the **Patient List** tab is immediately displayed. The **Patient List** tab is the main access point for patient information. Many of the elements found on the **Patient List** screen can also be found on the main screens of the other PatientKeeper tabs. These features behave in a similar manner across the entire application, and are described below.

The screenshot shows the PatientKeeper Physician Portal interface. The browser title bar indicates the user is 'User: cwbresnahan (3)' in 'Microsoft Internet Explorer'. The interface includes a top navigation bar with tabs: 'Patient List', 'Patient Summary', 'Patient Search', and 'Preferences'. A 'Provider Directory' link, 'Help', and 'Logout' button are also present. The 'Patient List' tab is active, showing a table of patients. The table has columns for 'Name (29)', 'Desc/Reason', and 'Location'. The patient 'DARR, MOLLY' is highlighted. To the right of the table, there are links for 'Pt Summary', 'Overview', 'Patient Detail', 'Visits', 'Allergies', 'Clinical Notes', 'Medications', 'Lab Results', 'Order Status', 'Problems', 'Test Results', and 'Vitals & I/O'. Below the table, there are buttons for 'Add', 'Remove', 'Send', 'Get', 'Print', and 'Refresh'. The 'Visits' section on the right shows a table with columns for 'Arrival', 'Provider', and 'Disch'. The 'Visit Detail' section shows a table with columns for 'Visit Number', 'Reason For Visit', 'Arrival Date', 'Discharge Date', and 'Financial Class'. The 'PK Patient Key' is 144250.

1. Tabs for navigation

2. Username & access level

3. Filter drop-down lists

4. Provider Directory, Help & Logout options

5. Column headings for sorting

6. Click to select items

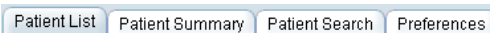
7. Scroll bars

8. Buttons

9. Hypertext links

1. Tabs for Navigation

Each major category of information is located on a tab in the PatientKeeper system. Simply click on a tab to view the information contained on it. The number of tabs that are displayed depend upon the options your institution has chosen to implement, as well as your security access level. Most healthcare providers see the following tabs:



2. Username and Access Level

The title bar of the window displays the name of the user who is currently logged into the system, as well as their access level. If another user leaves the application open on a desktop, you should log them out and log in as yourself prior to using the system.



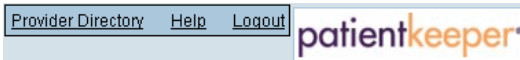
3. Filter Drop-Down Lists

Filters are used to decrease the number of items that are currently displayed on the screen (patients, medications, lab results, visits, etc.), allowing you to momentarily focus on a particular subset. Most screens have a pre-defined list of commonly used filters, similar to this filter list found on the **Patient List** tab. Click on the drop-down list to select a filter. Select **All** from any filter list to revert back to the full list of items.



4. Provider Directory, Help, and Logout Options

The **Provider Directory, Help, and Logout**



options are located in the upper right corner of every screen. The **Provider Directory** is an optional feature that may or may not be available at your organization. It is similar to a telephone book containing contact information for providers associated with your organization.

5. Column Headings for Sorting

Most columns throughout PatientKeeper can be used to sort the displayed data. Simply click on the column heading once to sort the list in ascending order, and click on it again to sort in descending order.

The orange arrow indicates that this list is sorted in alphabetical order by last name

Name (5) ▼	Desc/Reason	Location
AYERS, MITCHELL	18Y M d:0	PKHospital
BLUNT, JAMES	37Y M 12/07/2006 New Patient	OP-G.ClinG.A.PKHospital
CHEEVERS, LEROI	64Y M d:4 Acute MI	5G.501.A.PKHospital

6. Selecting Items from Displays of Information

Many screens display information in a table format, consisting of columns and rows. The rows might contain patients, visits, lab results, etc. In many instances, you must select a row in order to perform some type of action on it. For example, you must select a patient from your patient list, in order to view a list of their visits. To select a row, just click on it. When a row is selected, the background color changes from white to light orange. To deselect a row, click on it again. In options where it is appropriate to select more than one row, you can do so by continuing to click on row after row. You do *not* need to hold down the control key to select more than one row.

JAMES, FRANCINE	68Y F d:47 Fever	UH.I.101..A
JOUETT, FLETCHER	24Y M d:46 Migraine	UH.I.519..B

← Patient is selected

7. Scroll Bars

When the current display is longer or wider than one page, use the vertical or horizontal scroll bars to view the entries at the bottom or right side of the page.

8. Buttons

Many screens contain buttons that allow you to perform some type of action. For example, on the **Patient List** tab, there are buttons that allow you to add or remove patients from your list. Often, you must select an item prior to clicking a button. For example, you must select a patient visit on the **Patient Search** tab prior to clicking the **Add To Patient List** button.

Add To Patient List

9. Hypertext Links





Hypertext links appear as regular blue or red underlined text. When you click on a hypertext link, the system opens a window that displays information related to the option you are currently viewing. You may or may not be able to change the information displayed in the window. Similar to buttons, you must often select an item prior to clicking on a hypertext link. For example,



[Overview](#)
[Patient Detail](#)
[Visits](#)

on the **Patient List** tab you must select a patient prior to clicking on any of the links in this illustration.

10. Icons

There are a variety of standard icons visible on many different screens:

- Printer icon  : sends the contents of the current window to the printer. If you would like to see a preview of the printed report on your screen, prior to sending it to a printer, hold down the **Control** key and then click on the **Printer** icon.
- Refresh icon  : Throughout the day, data is changed in the system. If you leave a particular option displayed on your desktop for an extended period of time, you will not see the latest information. Click the **Refresh** icon to retrieve the most current information from the database and re-display it on your screen.
- Details icon  : Many options contain a **Details** icon whenever a list of patient names or visits is displayed. You can click this icon to view demographic and visit details, to help you confirm whether or not you have selected the correct patient or visit. When you do so, the system displays the standard patient data display screen, which includes demographic, financial, visit, and clinical information. See *The Patient List Tab* on page 8 for more information.
- Mark as Viewed icon  : Any clinical data (lab results, test results, order status, allergies, problems, or clinical notes) that you have not yet viewed on either the Physician Portal application or your handheld device are displayed in **bold** typeface, while those that you *have* viewed are displayed in regular typeface. You can click on this icon to mark all of the currently displayed information for a patient as viewed, without having to individually select and display each item on the Physician Portal application or your handheld device. You might do this if, for example, you had already seen the information in the patient's paper medical record.

- Annotate icon : You can use the **Annotate** icon to add annotations to specific lab result at any time. These are your personal remarks, or reminders to yourself, about the patient's lab results.
- Graph icon : Whenever you see the **Graph** icon, you can graph one or more clinical items. You can graph lab results and vital signs individually, or you can graph two or more of these items together: lab results, vital signs, or medications (see *Multi-Graphing Clinical Data* on page 33).

The Patient List Tab

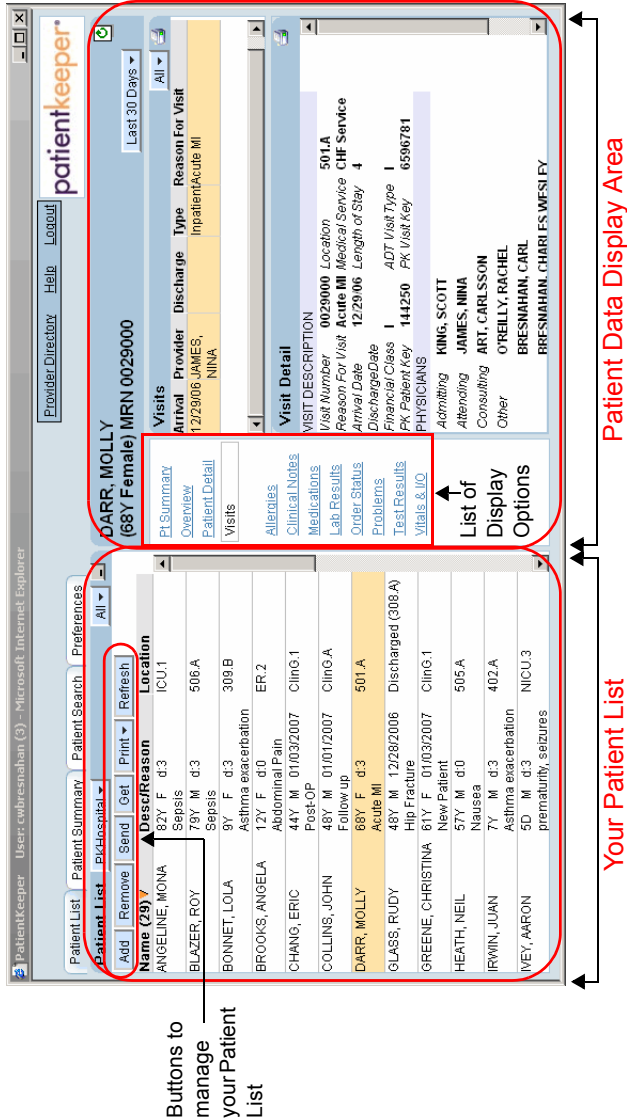
When you first log into the Physician Portal application, the system automatically displays the **Patient List** tab (see Figure 1 on page 9). This tab contains two major elements: your *short patient list* on the left side of the screen, and a *patient data display area* on the right side.

Your *short patient list* consists of all those patients who have a recent inpatient or outpatient visit, and with whom you have some type of active relationship. For example, you might be the attending physician for a patient's inpatient visit, or the scheduled provider on a patient's outpatient appointment.

In the patient list area of the screen, you can sort or filter your list, as well as add or remove patients from your list. You may also be able to send patients to other providers' lists, or choose patients from other providers' lists and add them onto your own list.

The *patient data display area* is used to display demographic, visit, or clinical data for the patients on your short patient list. You must first select a patient from your list prior to displaying information.

Figure 1: Patient List Tab



Patient List **Patient List Area**

Buttons to manage your list. Filter drop-down list

Placeholder patient (quotation marks) →

Authenticated patients (standard name format) →

Manually registered patient (asterisk) →

Name (31)	Desc/Reason	Location
"Fitz, William"	61Y M	walk-in cl
ANGELINE, MONA	82Y F d:4 Sepsis	ICU.1
BLAZER, ROY	79Y M d:4 Sepsis	506.A
BONNET, LOLA	9Y F d:3 Asthma exacerbation	309.B
BROOKS, ANGELA	12Y F d:0 Abdominal Pain	ER.2
CARTER, ROBERT*	61Y M 01/03/2007 chest pain	
CHANG, ERIC	44Y M 01/04/2007 Post-OP	ClinG.1
COLLINS, JOHN	48Y M 01/02/2007 Follow up	ClinG.A
DARR, MOLLY	68Y F d:4 Acute MI	501.A
GLASS, RUDY	48Y M 12/29/2006 Hip Fracture	Discharged (308.A)

Filter drop-down list:


- All
- Hidden
- Placeholders
- Added By User
- Rounding
- O.R. Today
- Office Today
- Office Yesterday
- Office Tomorrow
- All Office Visits
- ICU
- Cardiology Group
- CHF Patients
- Diabetes Patients

Your patient list is located on the left side of the **Patient List** tab. There are a variety of possible sources for these patients:

- **Authenticated patients:** these are standard patients that have been registered on a backend system, such as Cerner® or MEDITECH®. They are displayed in standard name format.
- **Placeholder patients:** these are the temporary patients that you have manually added on your handheld device. You would do this if you needed to enter forms or tasks for a patient who had not yet been registered on your backend system. Their names are enclosed in quotation marks.
- **Manually registered patients:** these are temporary patients that are manually registered directly in the Physician Portal application by ancillary staff (an optional feature that your institution may or may not have implemented). These are patients, who for a variety of possible reasons, were not registered on your backend system. They have an asterisk appended to the end of their names.

Use the buttons found on this portion of the screen to manage the *contents* of your short patient list:

- **Add** button: you might need to add a patient to your list if, for example, another provider asked for your assistance in caring for one of their patients. When you click on the **Add** button, a search screen appears. Search for the patient you want to add by entering some identifying information, select the patient from the resulting list, define your relationship to the patient (consulting, attending, interested party, etc.), and then click on the **Add** button.
- **Send** button: taking one of the patients on your short list and adding it to another provider's list is called *sending* the patient. You might do this if you wished to consult with another provider regarding a particular patient's care. When you click on the **Send** button, a screen appears showing your entire patient list. Select any patients you want to send, search for and select the receiving provider, and then click on the **Send** button. (**Note:** the patient is now on the recipient's list *and also* still on your own list.)
- **Get** button: the **Get** function is useful when a provider is going off duty, and wishes to pass their patients on to a new provider. The new provider coming on duty should click on the **Get** button. On the screen that appears, they should identify the exiting provider, select some or all of the patients from that provider's list, define their own relationship to those patients, and then click on the **Add Patient(s)** button.
- **Remove** button: you might remove a patient from your short list if an outpatient appointment had been cancelled, or if another provider saw the patient instead of you. When you click on the **Remove** button, a screen appears showing your entire short patient list. Select any patients you want to remove, and then click on the **Remove** button.
- **Profile** drop-down list: this drop-down list controls the profile that is currently active for your web session. Profiles are a combination of settings that allow you to optimize both the amount and composition of patient data currently displayed on the screen and are generally used when a

provider works in more than one facility or location. An administrator (or any user) can design a profile for each location, thereby allowing the user to switch the list of patients that is currently displayed. To apply a profile to your patient list, click on the **Profile** drop-down list, and select a profile name. If you are unsure of what a particular profile will do, hold your mouse pointer over the name of the profile in question, and the system displays a description of it. Since you can apply different profiles on the Physician Portal application and on your handheld device, the **Profile** drop-down list displays a handheld device icon  next to the profile that is currently selected on your handheld device (if you use one).

- **View filter drop-down list:** view filters are applied *after* profiles. You can use view filters to temporarily decrease the number of patients who are displayed in the patient list area of your screen. Your department administrator may have designed filters that are useful in your department. For example, there might be filters that enable you to view just the patients in a particular location or of a particular visit type. In addition, you may design your own personal view filters (please refer to the *Physician Portal User's Guide* for detailed instructions).

Patient Data Display Area

The currently selected patient

Timeframe drop-down list

Patient List

**ADDRESS, DOUG
(15Y Male) MRN 0014032**

Timeframe: Last 30 Days

Visits

Arrival (2)	Provider	Discharge	Type	Reason For Visit
10/13/06			Inpatient	extreme hypertension
10/10/06 03:15PM	GUILLERMO, SANTIAGO		Outpatient	Follow up

Visit Detail

EDIT VISIT


VISIT DESCRIPTION		Location	PKHospital
Visit Number	45345435	Medical Service	11
Reason For Visit	extreme hypertension	Length of Stay	11
Arrival Date	10/13/06	ADT Visit Type	2766
Discharge Date		PK Visit Key	1492292
Financial Class	175045		
PK Patient Key	175045		
PHYSICIANS			
ADMITTING	SMITH, CARL WESLY		
GUARANTOR INFORMATION			

List of Display Options

- Pt Summary
- Overview
- Patient Detail
- Visits
- Allergies
- Clinical Notes
- Medications
- Lab Results
- Order Status
- Problems
- Test Results
- Vitals & I/O

The Patient Data Display area is located on the right side of the **Patient List** tab. Use this portion of the screen to show detailed information about any patient on your list. To see detailed patient information, you must first select a patient from your patient list by clicking on their name, and then select an item from the list of display options. There are two main elements that control this portion of the screen:

- **Timeframe drop-down list:** use this drop-down list to define the date range of the information you wish to view.
- **Display options:** select the type of information you want to display. You may choose from **Pt Summary**, **Overview**, **Visits**, **Patient Detail**, **Problems**, **Vitals & I/O**, **Medications**, **Allergies**, **Lab Results**, **Test Results**, **Order Status**, or **Clinical Notes**.

Note: The Patient Data Display can also be accessed by clicking on the **Details** icon  from any other option in the PatientKeeper system.

Patient List

Displaying Visits

This option displays a summarized list of the patient's inpatient and outpatient visits.

DARR, MOLLY
(68Y Female) MRN 0029000

Last 30 Days

Visits

Arrival	Provider	Discharge	Type	Reason For Visit
12/29/06	JAMES, NINA		Inpatient	Acute MI

Filter by type of visit.

Visit Detail

VISIT DESCRIPTION

Visit Number	0029000	Location	501.A
Reason For Visit	Acute MI	Medical Service	CHF Service
Arrival Date	12/29/06	Length of Stay	4
Discharge Date			
Financial Class	I	ADT Visit Type	I
PK Patient Key	144250	PK Visit Key	6596781

PHYSICIANS

Admitting	KING, SCOTT
Attending	JAMES, NINA
Consulting	ART, CARLSSON
Other	O'REILLY, RACHEL
	BRESNAHAN, CARL
	BRESNAHAN, CHARLES WESLEY
Referring	HENRY, PAULS

- To filter the **Visits** summary display by type of visit, click on the drop-down filter list located in the upper right corner of the **Visits** window.
- To view detailed information for any specific visit, click on that visit's row. A **Visit Detail** window opens below the summary list. The detail screen contains slightly different information, based on whether the visit is inpatient or outpatient. For example, inpatient visits show arrival/discharge dates and admitting provider, while outpatient visits show appointment date and scheduled provider.

Patient List

Displaying Patient Details

This option displays basic demographic information about the patient, as well as the details of their most recent visit.

DARR, MOLLY
(68Y Female) MRN 0029000
Last 30 Days ▾

[Pt Summary](#)
[Overview](#)
[Patient Detail](#)
[Visits](#)
[Allergies](#)
[Clinical Notes](#)
[Medications](#)
[Lab Results](#)
[Order Status](#)
[Problems](#)
[Test Results](#)
[Vitals & I/O](#)

Patient Detail
DEMOGRAPHICS

Name	DARR, MOLLY	Home
Gender	Female	718 Goble Parkway
Age	68Y	Apt. 3
Race		Watertown, MA 04884
DOB	12/22/38	Home (884) 555-4019
SSN	491-30-4884	
MRN	0029000	
Mother's Maiden Name		

CURRENT VISIT
VISIT DESCRIPTION

Visit Number	0029000	Location	501.A
Reason For Visit	Acute MI	Medical Service	CHF Service
Arrival Date	12/29/06	Length of Stay	4
DischargeDate			
Financial Class	I	ADT Visit Type	I
PK Patient Key	144250	PK Visit Key	6596781

PHYSICIANS

Admitting	KING, SCOTT
Attending	JAMES, NINA
Consulting	ART, CARLSSON
Other	O'REILLY, RACHEL
	BRESNAHAN, CARL
	BRESNAHAN, CHARLES WESLEY

Displaying Vitals & I/O

This option displays a list of recent vital sign readings, as well as intake and output measurements for a given patient.

Vital Signs & I/O

Vital Signs

Vital Signs	Most Recent	Previous	24 Hour Min - Max
BP mmHg	126/ 69 04/04/07 06:00AM	120/ 70 04/04/07 01:45AM	118-126/69-73
FSBG mg/dL	115 04/04/07 06:00AM	118 04/04/07 01:45AM	110-125
HR /min	107 04/04/07 06:00AM	105 04/04/07 01:45AM	69-107
O2sat %	97 04/04/07 06:00AM	96 04/04/07 01:45AM	92-97

Intake/Output

	04/04/07	04/03/07	04/02/07
	Shift 2	Shift 3	Shift 1
Net	437	754	546
In	785	1,090	885
Out	348	336	339
IVF	785	800	785
po	0	290	100
Urine			


FSBG Detail

Value	Date	Time
115	04/04/07	06:00am
118	04/04/07	01:45am
124	04/03/07	10:25pm
121	04/03/07	05:45pm
125	04/03/07	02:00pm
110	04/03/07	10:00am
116	04/03/07	06:15am
120	04/03/07	02:25am
125	04/02/07	10:30pm

FSBG Graph

Glyburide

FSBG is graphed against Glyburide

- The summary display is broken into two portions. The top half contains vital sign readings, and the bottom half contains intake/output measurements.
- Click the **Graph** icon  in the top right corner of the summary window to graph vital signs against multiple items (see *Multi-Graphing Clinical Data* on page 33).
- To view detailed information for any specific vital sign reading, click on that vital sign's row in the summary display. Two small detail windows are displayed:
 - ❖ The left detail window displays a history of the readings.
 - ❖ The right detail window automatically graphs all of the readings for the selected vital sign. If the patient has been administered any medications, you can graph the selected vital sign against a medication, by selecting the medication from the drop-down list in the graph window.
- For intake/output, the most recent measurements are listed on the left, with older measurements continuing on to the right.

Patient List

Displaying Medications

This option displays a summarized list of any medication orders the patient has on file. If your source medication system tracks Medication Administration Record (MAR) information, the Physician Portal can also display MARs for each medication order.

BLAZER, ROY
(79Y Male) MRN 0032808

Last Year ▾

Filter by type of medication
Click to multi-graph

All ▾

Discontinued order
Active order

Medications

Promethazine


Import

MAR info for the selected medication

This medication is linked to an order for Meperidine.

Medication (12) ▾	Dose	SIG	Order Start	Order Stop	Last Admin
Insulin-NPH	14 units	SC bid	01/20/07 11:00am	02/03/07 11:00am	01/24/07 05:00PM
Insulin-Regular	1 unit	SC q4h	01/20/07 11:00am	02/03/07 11:00am	01/24/07 07:00PM
Meperidine	100 mg	IM q3h PRN	01/20/07 11:00am	01/23/07 11:00am	01/23/07 11:00AM
Omeprazole	40 mg	po qd	01/20/07 11:00am	01/30/07 11:00am	01/24/07 11:00AM
Promethazine	25 mg	IM q3h PRN	01/20/07 11:00am	01/23/07 11:00am	01/23/07 11:00AM
Simvastatin	40 mg	po	01/20/07	01/30/07 11:00am	01/24/07

Medication Detail	Date/Time ▾	Dose	Admin By	Status
25 mg IM q3h PRN nausea	01/20/07 02:00pm	25 mg	Cohen, Sophia	
Start Date/Time: 01/20/07 11:00AM	01/20/07 02:00pm	25 mg	Rosen, Jackie	
End Date/Time: 01/23/07 11:00AM	01/20/07 08:00pm	25 mg	Stein, Lilian	
Ordered By SMITH, [REDACTED]	01/20/07 11:00pm	25 mg	Dewitt, Yolanda	
Related Orders	01/21/07 02:00am	25 mg	Johnson, Keith	
Meperidine 100 mg IM q3h PRN	01/21/07 05:00am	25 mg	Williams, Chris	Not Given
	01/21/07 08:00am	25 mg	Miller, Madelyn	

- To filter the display by type of medication order, click on the drop-down filter list located in the upper right corner of the window.
- Click the **Graph** icon  to graph any medication against multiple clinical items (see *Multi-Graphing Clinical Data* on page 33).
- Discontinued medication orders are displayed with a line struck through the text of the medication name.

- To view detailed information for any specific medication order, click on that medication's row. One or two detail screens open below the summary list:
 - ❖ The first detail screen shows all known information about the medication order, including the name of the ordering physician, the status of the order, any linked orders, comments, or conditional notes.
 - ❖ The second detail screen appears only if Medication Administration Record (MAR) information is available. It displays information for every date and time the medication was given, or not given.
- To mark a medication order as important, place a checkmark in the **Important** field (located at the top of the detail window). When you do so, a red flag is displayed next to that medication in the summary list.

Patient List

Displaying Allergies

This option displays a list of all known allergies for the given patient.

DARR, MOLLY
(68Y Female) MRN 0029000

Last 30 Days

Allergies

Allergy (3)	Type	Reaction	Severity
Penicillin	Drug	hives	moderate
Sulfonamides	Drug	rash	moderate
Bee sting	Environmental	anaphylaxis	severe

Bee sting

Allergy: Bee sting
Type: Environmental
Reaction: anaphylaxis
Severity: severe
Report Date: 12/29/06
Comments:

- To filter the display by type of allergy, click on the drop-down filter list located in the upper right corner of the window.
- To view detailed information for any specific allergy, click on that allergy's row.

Patient List

Displaying Lab Results

This option displays any lab results the patient has on file.

Select format of summary view

DARR, MOLLY (68Y Female) MRN 0029000 Last 30 Days

Expanded Panels ▼ Limit to: Panels where name contains: Search for a specific panel or component


Date/Time	Panel (30)	Components	Norm	Status
01/02/07 06:00AM	Chem7	151 104 82 96 5.8 16 2.2		Critical F
01/01/07 04:45AM	Thyroid	TSH 2.1N, Free T3 4.1N, T4 5.7N, FTI 6.7N	Normal	F
01/01/07 04:45AM	Coags	PT 15.8HH, INR 1.4HH, PTT 37.9HH	Critical	F

Multi-graph Filter by category or snapshot

Lab test results are organized into *panels* and *components*. A panel can consist of a single component, or a group of components that are performed together. For example, a Prothrombin Time (PT) panel might consist of that single component, while a Complete Blood Count (CBC) panel might consist of a variety of components such as a hematocrit, a hemoglobin, a white blood count, and a platelet count.

- To limit the number of results that the system retrieves, and prevent historical data from being displayed on a day to day basis, use the **Limit to** field. Simply enter the number you want to use as your limit and then press the **Enter** key on your keyboard. For example, you might set your panel limit to 25 and your component limit to 50. The system retrieves the most recent 25 panels or 50 components, and excludes the older results.
- To search for one specific type of panel (for example, CBC or Chem7) or component (for example, INR or PT), type the panel or component name in the search field and then press the **Enter** key on your keyboard.
- To filter the display by lab category (a generalized grouping of panel types) or snapshot (a specific grouping of related lab

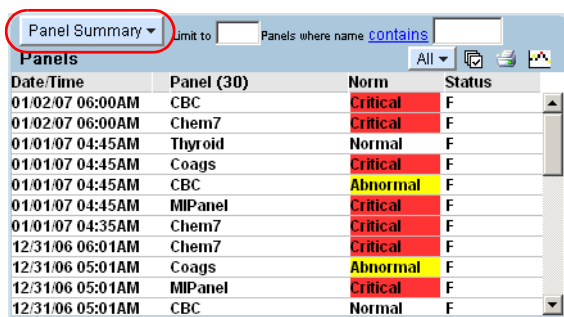
components), click on the drop-down filter list located in the upper right corner of the summary window.

- Click the **Graph** icon  in the top right corner of the summary window to graph any lab result against multiple items (see *Multi-Graphing Clinical Data* on page 33).

Summary Views

The summary window can be viewed in any of four formats, by selecting the format from the drop-down list located in the upper left corner of the window. The formats are listed from the most summarized view to the most granular:

- ❖ Panel Summary: a highly summarized list of panels.






Date/Time	Panel (30)	Norm	Status
01/02/07 06:00AM	CBC	Critical	F
01/02/07 06:00AM	Chem7	Critical	F
01/01/07 04:45AM	Thyroid	Normal	F
01/01/07 04:45AM	Coags	Critical	F
01/01/07 04:45AM	CBC	Abnormal	F
01/01/07 04:45AM	MIPanel	Critical	F
01/01/07 04:35AM	Chem7	Critical	F
12/31/06 06:01AM	Chem7	Critical	F
12/31/06 05:01AM	Coags	Abnormal	F
12/31/06 05:01AM	MIPanel	Critical	F
12/31/06 05:01AM	CBC	Normal	F

Panel Name Normalcy Status Completion Status

- ❖ Expanded Panels: a list of panels, with additional details about the components within them.

Chem 7 in diagram format.

Expanded Panels ▼ Limit to Panels where name contains




All ▼   

Date/Time	Panel (30)	Components	Norm	Status
01/02/07 06:00AM	Chem7	<div> <div>151</div> <div>104</div> <div>82</div> <div>96</div> </div> <div> <div>5.8</div> <div>16</div> <div>2.2</div> </div>	Critical	F
01/01/07 04:45AM	Thyroid	TSH 2.1N, Free T3 4.1N, T4 5.7N, FTI 6.7N	Normal	F
01/01/07 04:45AM	Coags	PT 15.8HH, INR 1.4HH, PTT 37.9HH	Critical	F

↑ Panel Name ↑ Components in the panel and their results ↑ Normalcy Status ↑ Completion Status

- ❖ Component List: a list of components and their results (one row per component).

Component List ▼ Limit to Components where name contains

All ▼   

Date/Time ▼	Panel	Component (205)	Low	Norm	High	Range	Status
01/28/07 04:35AM	MIPanel	Ratio			5.5HH	0-2.5	F
01/28/07 04:35AM	CBC	MCHC		32N		31.0-37.0 %	F
01/28/07 04:35AM	CBC	MCV		81N		80.0-100.0 fL	F
01/28/07 04:35AM	Coags	INR			1.21H	0.8-1.2	F
01/28/07 04:35AM	MIPanel	CPK			800HH	38-174 ng/mL	F

↑ Name of panel to which the component belongs ↑ Component name ↑ Result value in the Low, Norm, or High column ↑ Normal range for the test

- ❖ **Component Table:** a table of components. Component types are listed on the vertical axis, with each occurrence of a component on the horizontal axis.

Component Table

Limit to Components where name contains

All

Dates and times the component tests were performed.

Components	01/02/07 06:00AM	01/01/07 04:45AM	01/01/07 04:35AM	12/31/06 06:01AM	12/31/06 05:01AM	12/30/06 02:40PM	12/30/06 02:20PM
Hb	12.4 N	12.3 N			12.1 N	12 N	
Na	151 H		144 N	139 N			142 N
PT		15.8 HH			15.1 H	14.3 H	
CPK		251 H			276 H	452 HH	
TSH		2.1 N			1.4 N	1.2 N	
Hct	40.2 N	38.1 N			37.2 N	37.1 N	
K	5.8 HH		5.6 H	5.5 H			5.2 H
INR		1.4 HH			1.28 H	1.36 HH	
CKMB		5.1 H			6.3 H	6.3 H	

Component names

Values of the results, listed for each date and time the component test was performed.

Detail Views

From any of the four summary views listed above, you can click on a row or table cell to see detailed information about that panel or component. One or more of a variety of detail windows is displayed, depending on the type of item that you selected.

- ❖ Clicking on a panel opens the Panel Table, which contains information about the panel you selected, as well as additional instances of the same type of panel.

Panel Table

Click here to maximize this window.

	01/02/07 06:00AM	01/01/07 04:35AM	12/31/06 06:01AM
Na	151 H	144 N	139 N
K	5.8 HH	5.6 H	5.5 H
Cl	104 N	104 N	102 N
HCO3	16 L	17 L	18 L
BUN	32 HH	28 HH	25 HH
Cr	2.2 HH	2.1 HH	1.6 H
Glu	96 N	88 N	105 N

The panel you originally selected.

Additional occurrences of the same type of panel.

- ❖ Clicking on a panel also opens the Panel Detail window, which displays additional details about the selected panel.

Date and time of the panel. →

		Range
Na	151 H	135-148 mEq/L
K	5.8 HH	3.6-5.0 mEq/L
Cl	104 N	96-109 mEq/L
HCO3	16 L	18-23 mEq/L
BUN	32 HH	7.0-18.0 mg/dL
Cr	2.2 HH	0.5-1.3 mg/dL
Glu	96 N	60-109 mg/dL


Numeric results of the components within this panel.

Normal ranges for each component test.

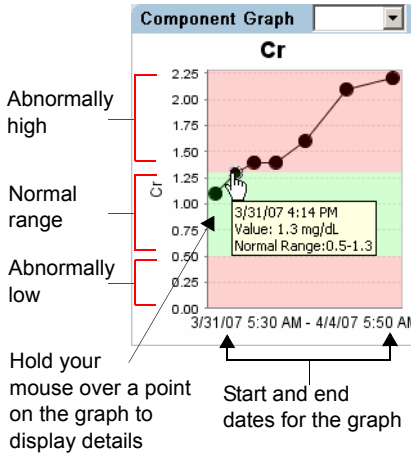
- ❖ When viewing a list or table of components, clicking on a component's row or table cell opens the Component Details screen. This screen shows you detailed information about that one specific component lab result.

Value	96
Date/Time	01/02/07 06:00AM
Norm	N
Range	60-109 mg/dL
Status	F

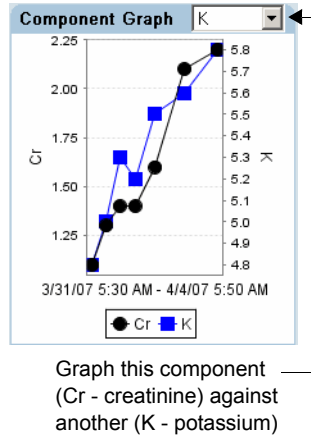
- ❖ When viewing a table, clicking on a component name in the left-most column displays a graph of all results for that type of component. You can also click on the **Graph**

icon  from the Component Details screen to display this same graph.

Standard Component Graph



Two Components Graphed Together



To display the exact value for a specific point on the graph, hold your mouse pointer over that point.

While viewing the graph of a single component, you can graph it against another component. Just select the second component from the drop-down list in the upper right corner.

Displaying Test Results

This option shows you a summarized list of the text-based clinical results of tests that have been performed on a patient. The most common types of test results that you might be able to see include radiology, pathology, microbiology, blood bank, or other test types that involve clinical interpretation.

DARR, MOLLY
(68Y Female) MRN 0029000

Last 30 Days

Test Results

Date/Time	Test (8)	Status
12/29/06 12:00pm	EKG	F
12/30/06 08:00am	ECHO	F
12/30/06 11:30am	Angio-Cardiac	F
12/31/06 06:00am	Micro - blood culture	F
12/31/06 08:00am	Chest x-ray	F
12/31/06 02:30pm	CT-abdomen	P
01/01/07 01:50pm	MRI - brain	F
01/01/07 06:45pm	ECHO	P

EKG Detail

Search ischemia

☒ Important

Date/Time 12/29/06 12:00pm Status F

EKG
 Ordering Physician: Killian, Elizabeth
 Interpreted by: Hunter, Kelly
 Performed by: Paly, Meredith
 Procedure: 12-Lead EKG
 Indication: Pt presents with acute chest pain, known history of AMI, CHF, CAD
 Test: 12 Lead EKG
 Findings:
 ST elevation in aVR, V1, and V2 indicating anterior MI. ST depression in II, III, and aVF may represent inferior ischemia or reciprocal changes. ST depression and T wave inversion in I, V5, and V6

- To filter the display by type of test, click on the drop-down filter list located in the upper right corner of the window.
- To view detailed information for any specific test result, click on that test result's row.
- Use the **Search** field at the top of the detail window to find all instances of a particular word or phrase in the test result. First type in the desired phrase ("ischemia" in our example), and then click on the magnifying glass icon. Click repeatedly on the icon to move to each subsequent occurrence of that word or phrase in the test result.
- To mark a test result as important, place a checkmark in the **Important** field (located at the top of the detail window). When you do so, a red flag is displayed next to that test result in the summary list.

Patient List

Displaying Clinical Notes

This option displays a summarized list of any clinical notes the patient has on file.

DARR, MOLLY
(68Y Female) MRN 0029000

Last 30 Days

Clinical Notes

Date	Note Type (3)	Author
12/29/06	Nursing Assessment	Reid, Sarah
12/29/06	History and Physical	Hoffman, Thomas
12/31/06	Consult	Bernard, Hilary

Filter by type of note

Clinical Notes

Nursing Assessment Detail

Date/Time: 12/29/06 02:45pm Status

Author: Reid, Sarah

Nursing Assessment

Service: General Surgery/ Critical Care
(from H and P and intake interview; pt incoherent, but spouse appears knowledgeable of medical history)

CODE STATUS: FULL CODE

REASON FOR ADMISSION:

Confusion, Left LE soft tissue infection

CHIEF COMPLAINT:

Confusion, **Pain**

History:

68y yo presents in obtunded state and grabbing L calf in pain. Complicated PMHx significant for ESRD on HD, DM (type II), CAD status-post AMI (10 yrs ago) with 5 vessel CABG, class IV CHF, HTN, CVA status-post bilateral CEA (1 yr ago), PVD status-post bypass (15 yr ago).

- To filter the display by type of note, click on the drop-down filter list located in the upper right corner of the window.
- To view detailed information for any specific note, click on that note's row.
- Use the **Search** field at the top of the detail window to find all instances of a particular word or phrase in the note. First type in the desired phrase ("pain" in our example), and then click on the magnifying glass icon. Click repeatedly on the icon to move to each subsequent occurrence of that word or phrase in the note.
- To mark a note as important, place a checkmark in the **Important** field (located at the top of the detail window). When you do so, a red flag is displayed next to that note in the clinical notes summary list.

Patient List

Displaying Order Status

This option lets you see the status of the ordering process within your source order entry system, as well as the status from the department that processes the order. Depending on how your source order entry system is configured, you might be able to view the status of orders for the following types of items: tests, dietary needs, consults, notes, etc.

DARR, MOLLY
(68Y Female) MRN 0029000

Last 30 Days

Order Statuses

Date	Order (15)	Status
12/29/06 11:00am	AM MI Profile	F
12/29/06 11:00am	Diet: Na restricted	F
12/29/06 11:00am	AM CBC	F
12/29/06 11:00am	Routine d-sticks	F
12/29/06 11:00am	Admit to Cardiology	F
12/29/06 11:00am	Diagnosis: Acute MI	F
12/29/06 11:00am	AM Chem 7	F
12/29/06 11:00am	Blood culture	F
12/29/06 11:00am	O+ 2 units; typed and crossed	P
12/29/06 11:00am	Vitals per routine	F
12/29/06 12:00pm	EKG	F

AM Chem 7 Detail

Status: F

Department Status

Start Date: 12/29/06 11:00am

Stop Date: 12/29/06 11:00am

Ordering Physician: JAMES, NINA

Details

- To view detailed information for any specific order, click on that order's row.

Patient List

Displaying Problems

This option displays a patient's history of diagnoses. Providers can enter diagnoses for their patients using the Problem List module on their handheld device.

DARR, MOLLY
(68Y Female) MRN 1052135 Last 5 Years

Problem List

Entered	Description (2)
03/02/07	410.01: Acute myocardial infarction of anterolateral wall, initial episode of care
03/02/07	428.1: Left heart failure

Problem Detail

Description

Problem 428.1: Left heart failure

Created 03/02/07 12:20am

Classification

Course

Hidden false

Status

Confirmation

Life Cycle Active

Modified 03/02/07 12:20am

Resolved

Comments

- To view detailed information for any specific problem on the list, click on its row. A **Problem Detail** window appears below the summary list.

Patient List

Displaying an Overview

This option displays a high-level summary of the patient. It is a composite of two other display options: **Visits** and **Clinical Notes**. The overview simply stacks these displays one above the other, to facilitate viewing different types of information all in one glance.

DARR, MOLLY
(68Y Female) MRN 0029173

Last 30 Days ▾

Overview (highlighted in red circle)

Visits (highlighted in red circle)

Arrival	Provider	Discharge	Type	Reason For Visit
12/30/06	JAMES, NINA		Inpatient	Acute MI

Clinical Notes (highlighted in red circle)

Date	Note Type (3)	Author
01/01/07	Consult	Bernard, Hilary
12/30/06	Nursing Assessment	Reid, Sarah
12/30/06	History and Physical	Hoffman, Thomas

Visit Detail (highlighted in red circle)

ADD CHARGE TO THIS VISIT

VISIT DESCRIPTION

Visit Number: 0029173 Location: 501.A

Reason For Visit: Acute MI Medical Service: CHF Service

Arrival Date: 12/30/06 Length of Stay: 4

Discharge Date:

Financial Class: I ADT Visit Type: I

PK Patient Key: 145033 PK Visit Key: 6623792

PHYSICIANS

Admitting: KING, SCOTT

Attending: JAMES, NINA

Consulting: PAULA, PARIS

Other: SUN, JENNIFER

O'BANNON, TIM

BRESNAHAN, CHARLES WESLEY

← Visits

← Clinical Notes

← Detail window

- To see more detailed information about a particular visit or clinical note, click on the row containing that item. The system opens the appropriate detail window for that item in the bottom right corner of the screen.

Patient List

Displaying a Pt Summary

The **Pt Summary** display option shows a list of all unviewed clinical data for the currently selected patient. It simply takes all of the unviewed items that would normally appear as bold text in the **Allergies**, **Clinical Notes**, **Medications**, **Lab Results**, **Order Status**, **Problems**, and **Test Results** display options, and lists them all in one window. This is quick way for you to see “what’s new?” for the patient. You can then click on any clinical data item in the list to see further details about it.

BROOKS, ANGELA
(12Y Female) MRN 1074235

Last 7 Days

Pt Summary Patient Summary Limit to 25 items Options...

Type	Date	Description (14 of 14)	Details
Allergy		NKDA	DA - Reaction: none - none
Note	04/05/07 08:25AM	Consent	Author: Levy, Helen
Note	04/05/07 08:35AM	ER Note	Author: Levy, Helen
Note	04/05/07 08:45AM	Operative Note	Author: Levy, Helen
Medication	04/05/07 08:20AM	Acetaminophen - 160 mg po q6h PRN	Last Admin:
Medication	04/05/07 08:20AM	Ibuprofen - 200 mg po q8h PRN	Last Admin:
Order	04/05/07 08:15AM	CBC now	Status: F

Operative Note Detail Search [] Important

Date/Time: 04/05/07 08:45am Status

Author: Levy, Helen

Operative Note

PREOPERATIVE DIAGNOSES:

1. RIGHT OVARIAN TORSION

POSTOPERATIVE DIAGNOSES:

1. OVARIAN ENDOMETRIOMAS.

TITLE OF SURGERY:

1. EXAMINATION UNDER ANESTHESIA.

2. EXPLORATORY LAPAROTOMY.

All the new clinical items for this patient.

Details for the selected item (a clinical note).

There are additional buttons and controls on the **Pt Summary** display option that enable you to perform a variety of activities. All of the buttons and controls listed below function in exactly the same manner as the do on the **Patient Summary** tab. Please refer to *The Patient Summary Tab* on page 35 for detailed instructions on these topics.

- Click on a column heading to change the sort order of the display
- Use the **Limit to** field limit the number of clinical items that are currently displayed



- Click on the **Options** button to select only those categories of clinical data that you wish to view
- Click on the **Mark as Viewed** button to mark as viewed some or all of the currently displayed clinical items
- Click on any clinical item's row to view additional details about it

Multi-Graphing Clinical Data

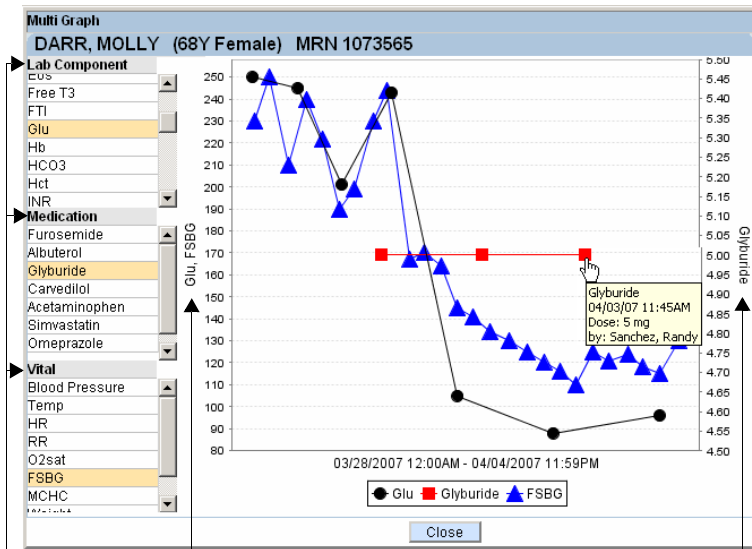
As described in previous sections, vital signs and lab results can be graphed from their respective display options:

- ❖ Vital signs are automatically graphed when an individual vital sign is selected. You can also graph the selected vital sign against a medication. (See *Displaying Vitals & I/O* on page 16.)
- ❖ Lab components are automatically graphed when an individual component is selected. You can also graph the selected component against another component. (See *Displaying Lab Results* on page 20.)

In addition to functionality above, *multi-graphing* is available from the **Medications**, **Lab Results**, and **Vitals & I/O** display options. Multi-graphing allows you to select several medications, vital signs, and lab results, and graph them all together. To multi-graph clinical data, follow these steps:

1. Select a patient on the **Patient List** tab, or click on the **Details** icon  from another option.
2. Select the amount of information you wish to display by clicking on the **Timeframe** drop-down list.
3. Click on the **Graph** icon  located in the upper right corner of either the **Medications**, **Lab Results**, or **Vitals & I/O** display option.
4. In the Multi-Graph window, click on the lab components, medications, and vital signs that you want to graph. You may

select more than one of each. (To deselect an item, click on it again.)



Select the lab components, medications, and vital signs you want to graph

- Glu (glucose) and FSBG (finger stick blood glucose) share a similar scale.

Glyburide has its own-
scale

As you select each item, it is automatically graphed. The date range is always graphed on the horizontal axis and each clinical item is graphed on a vertical axis. If the clinical items share a similar numeric range, they are graphed on the same vertical axis, as in the example above (Glucose and FSBG). If you select many items with differing ranges, additional graphs may be displayed, stacked vertically, so that you can compare them over the same date range.

To display the exact value for a specific point on the graph, hold your mouse pointer over that point.


The Patient Summary Tab

Each patient's clinical data is constantly changing: new lab tests are performed, new clinical notes are written, etc. The **Patient Summary** tab presents the provider with all new clinical data for all of the patients on their short patient list. This is a quick way to see "what's new?" for your entire patient list. Once you view a particular item, whether via this option or any other option in the PatientKeeper system, that item is marked as viewed and is removed from the **Patient Summary**.

Please note that there is also a display option called **Pt Summary** on the standard Patient Data Display. This is an almost identical option, as it also displays new unviewed clinical data. However, the **Pt Summary** option contains information for *one* individual patient, while the **Patient Summary** tab contains information for *all* of the patients on your short patient list. Please refer to *Displaying a Pt Summary* on page 31 for more information.

To view the Patient Summary report, follow these steps:

1. Click on the **Patient Summary** tab and the report is displayed.

The Patient Summary report contains columns for the **Patient** name, the **Details** icon , the **Type** of clinical data item, the **Date** of the item, a brief **Description** of the item, and important **Details**. The actual information shown in the

Date, Description, and Details columns varies by the **Type** of clinical data involved.

Annotations in the screenshot:

- Profile drop-down list
- Timeframe
- Limit field
- Viewing options
- Patient List filters
- Mark items as viewed

Patient	Type	Date	Description (250 of 963)	Details
BROOKS, ANGELA	Order	04/03/07 08:15AM	Chem 7 now	Status: F
BROOKS, ANGELA	Test Result	04/03/07 08:20AM	US - pelvis	Status: F
CHANG, ERIC	Allergy		Sulfonamides	Drug - Reaction: rash - moderate
CHANG, ERIC	Note	04/03/07 09:50AM	Progress Note	Author: Levy, Helen
CHANG, ERIC	Lab Panel	04/01/07 02:30PM	Chem7	Norm: Normal Status: F
CHANG, ERIC	Lab Panel	04/01/07 02:30PM	CBC	Norm: Normal Status: F
CHANG, ERIC	Test Result	04/03/07 09:45AM	Chest x-ray	Status: F
COLLINS, JOHN	Allergy		Penicillin	Drug - Reaction: hives - moderate
COLLINS, JOHN	Allergy		Latex	Environmental Reaction

US - pelvis Detail

Date/Time: 04/03/07 08:20am Status: F

US - pelvis

Abdominal/Pelvic Ultrasound

Ordering Physician: Stackhouse, Samuel

Interpreted by: Powell, Matthew

Sex: Age: 12

Requesting Location: Emergency Services

USPelvis Non-OB

CLINICAL HISTORY:

R/O Abdominal Pain, Vomiting, R/O Torsion, R/O appendicitis



Click on any row to see the clinical details.

- You can now perform any of the following actions to change the amount, type, or format of the displayed information.
 - ❖ **Select the date range** of the information you wish to display by clicking on the **Timeframe** drop-down list.
 - ❖ **Select the profile** that you wish to make active for this web session by clicking on the **Profile** drop-down list.
 - ❖ **Select a view filter** to control the patients from your short list that are currently displayed in the report by clicking on the **View Filter** drop-down list.
(See *The Patient List Tab* on page 8 for information on profiles and view filters.)
 - ❖ **Change the sort order** of the report by clicking on any column heading.
 - ❖ **Limit the amount of information to view** by using a combination of the **Limit to** field and the current sort order. Type a number in the **Limit to** field and then press

the **Enter** key on your keyboard. If the report were sorted in reverse chronological order by date, and you entered 50 in the **Limit to** field, it would show only the 50 most recent items.

- ❖ **Select the type(s) of clinical data to view** by using the **Options** button. For example, if you interested in viewing only allergies and medications click the checkboxes for just those items. The Lab Panels item allows you to select the criticality of the lab results that you want to see, if any at all (critical, abnormal, all, or none).
3. Once the summary display is showing the clinical items that are of interest to you, you can:
- ❖ **View additional details for any clinical item** by clicking on that item's row. The system displays the same detail window(s) that would normally appear if you had clicked on the same type of data item in it's own display option in the Patient Data Display. Please refer to the following sections for more information about the various detail displays:
 - + *Displaying Medications* on page 17
 - + *Displaying Allergies* on page 19
 - + *Displaying Lab Results* on page 20: please note that there are several detail windows for lab results. The ones that appear in **Pt Summary** are the Panel Table and Panel Details windows
 - + *Displaying Test Results* on page 26
 - + *Displaying Clinical Notes* on page 27
 - + *Displaying Order Status* on page 28
 - + *Displaying Problems* on page 29
 - ❖ **Mark the clinical data as viewed** by clicking the **Mark as Viewed** button. You are presented with two options:
 - + **Mark All Viewed**: click this option to mark as viewed *all* of the items in the summary display.
 - + **Mark All Viewed Before Today**: click this option to mark as viewed all of the items in the summary view

that *have a date earlier than today*. This includes all allergies in the current display (even though they do not have a date associated with them).

Only those items that are currently displayed on the report are marked as viewed when you select either of these options. For example, if you had set your **Options** to view only Allergies and Medications, only the allergies and medications would be marked as viewed. Since the nature of this option is to show only *unviewed* items, once you click the **Refresh** icon , or log out and back in, the items you marked as viewed are removed from the display. You can always look at these items again by clicking on their respective display options in the Patient Data Display (available on the **Patient List** tab, or by clicking the **Details** icon ).

The Patient Search Tab

Your institution may have chosen to implement the **Patient Search** tab. The primary difference between the **Patient List** and **Patient Search** tabs is that the **Patient List** tab is used for patients who *are* on your short patient list, while the **Patient Search** tab can be used to display information about *any* patient (both those that are and are not on your short patient list). On the **Patient List** tab, the patients on your short patient list are already pre-selected for you and displayed on the left side of the screen. On the **Patient Search** tab, you must first search for a patient, before you can perform any activities.

1. Click on the **Patient Search** tab to display the **Select Patient** window, where you can search for the patient you wish to view.
2. Use any combination of the search fields at the top of the screen to identify the patient or visit you wish to view, and then click on the **Run Predefined Search**, **Search for Visits**, or **Search for Patients** button. (Note: the **Run Predefined Search** button is an optional feature that may not appear on all systems.)
 - ❖ The **Run Predefined Search** and **Search for Visits** buttons let you search for patient visits. It returns *one entry per visit* for the patient. If a patient has had multiple visits that match your search criteria, each of those visits is listed. Keep in mind that if a patient does not have any visits that match your criteria, then they do *not* appear in the search results. You might use one of these buttons if you want to find a specific patient visit to add to your short patient list, or to send to another user.
 - ❖ The **Search for Patients** button lets you search the complete patient list, regardless of whether or not the patient has had any visits. The **Search for Patients** button returns only *one entry per patient record*. You might use this button if you simply want to display

demographic, visit, or clinical data, regardless of the visit it is associated with.

At the bottom of the screen, the system displays all patients or visits that match the criteria you entered.

Search Criteria


The screenshot shows the 'Patient Search' tab in the PatientKeeper software. A red box labeled 'Search Criteria' highlights the search input fields, including 'Predefined Searches', 'Patient Search Criteria' (Last, First, DOB, SSN, MRN), and 'Visit Search Criteria' (Visit Type, Visit Number, Med Service, Admit Date, Facility, Scheduled MD, Admit in last N days, Unit, Admitting MD, D/C in last N days, Visit Status, Attending MD, Appointment Date, PCP). Below these are checkboxes for 'Include Cancelled Visits', 'Include Discharged Visits', 'Include Past OP Appointments', and 'Show Only Mergeable'. Buttons for 'Search for Visits' and 'Search for Patients' are also present.

Below the search criteria, a red box labeled 'Matches' highlights the results table. The table has columns: Name (19), DOB, Gender, MRN, Visit #, Type, Admit/Appt, Discharge, and Reason For. The first row is highlighted in yellow and circled in blue, showing 'CARTER, VICKY' with DOB 11/10/1934, Female, MRN 0027093, Visit # 0027093, Type Inpatient, Admit/Appt 12/18/06, Discharge 12/22/06, and Reason For Acute MI. Below the table are buttons for 'Add To Patient List' and 'Send to User(s)'.

Click here to add a patient visit to your patient list or send it to another user.

Click here to view detailed info about the patient.

3. Click on a patient or visit to select it.

- ❖ To add a specific visit to your short patient list, or to send the visit to another provider, click the **Add to Patient List** or **Send to User(s)** button, respectively.
- ❖ To view all of the data associated with the patient, click on the **Details**  icon. The system opens a display window that is identical in functionality to the Patient

Data Display area on the right side of the **Patient List** tab
(see *Patient Data Display Area* on page 13).

The currently selected patient

Patient Detail

CARTER, VICKY
(72Y Female) MRN 0027093

Last 30 Days ▾

Patient Detail

DEMOGRAPHICS

Name	CARTER, VICKY	Home
Gender	Female	29 Murray Lane
Age	72Y	Apt. 3
Race		Cambridge, MA 95417
DOB	11/10/34	Home (417) 555-7870
SSN	424-39-5417	
MRN	0027093	

Mother's Maiden Name

CURRENT VISIT

VISIT DESCRIPTION

Visit Number	0027093	Location	Discharged (630.A)
Reason For Visit	Acute MI	Medical Service	CHF Service
Arrival Date	12/18/06	Length of Stay	4
Discharge Date	12/22/06		
Financial Class	I	ADT Visit Type	I
PK Patient Key	135652	PK Visit Key	6298503

PHYSICIANS

Admitting	TURNER, DOROTHY
Attending	JACOBSEN, ANDY
Consulting	ALEXA, BONO
Referring	SUSAN, WONG

GUARANTOR INFORMATION

Close

Patient Data Display Area

List of Display Options

Vitals & I/O

Preferences

The Preferences Tab

The **Preferences** tab allows you to change your password and edit your personal settings for the **Patient List**, **Lab Results**, and **Problem List** modules, for both the Physician Portal application and your handheld device. This guide only discusses how to change your password. For information on the remaining preference settings, please refer to the *Physician Portal User's Guide*.

When you first click on the **Preferences** tab, the **General Settings** option appears, as illustrated below.

The screenshot shows the 'User Preferences' window with the 'Preferences' tab selected. Under 'Personal Preferences' for 'BRESNAHAN, CHARLES WESLEY', the 'General Settings' tab is active. The form contains the following fields and values:

- Username:** cwbresnahan
- First Name:** CHARLES WESLEY
- Last Name:** BRESNAHAN
- SMS Email Address:** (empty text box)
- Personnel ID:** 144410
- Position:** Unknown
- Departments:** Hospitalist, Stock - Clin Surveill, Stock - Demo Patients, Stock - Hpickers, Stock - Hpickers - Proced, Stock - IP View Filters, Stock - OP View Filters
- Password:** (redacted) with an **[Edit]** button circled in red.

At the bottom, there is a link 'Clear user web settings', a checkbox 'Show Tooltips Above Cursor (Affects THIS computer Only)', and 'Save' and 'Cancel' buttons.

This screen contains basic information such as your username, the departments in which you work, and various identification numbers.

Changing Your Password

There are different types of authentication protocols that can be used to secure access to the data in the PatientKeeper system. These include basic authentication and multi-authentication (MEDITECH Downtime, LDAP, Microsoft ActiveDirectory®, or other). In all cases, each user's password is stored on both their handheld device (if they use one) and on a server. The passwords must match on both server and handheld in order for a user to sync their device.

- You can change the password for your handheld directly on the device itself.
- You may be able to change a your server password using this option in the PatientKeeper application. Whether or not it can be changed here depends on the authentication protocol that your organization has implemented. If you are not able to change it via this option, consult your system administrator to confirm the method that should be used to change your server password.

To change your password, click on **Edit** next to the **Password** field on the **General Settings** screen.

The **Change Password** screen appears:

Change Password:
PSMITH

Enter Your Password

Enter New Password

Enter New Password Again

On the **Change Password** screen you must enter your original password, and then type a new password two times. Passwords are case sensitive, so pay attention to your use of uppercase or lowercase characters. Also, it is important to note that passwords cannot be longer than 16 characters.

If you also use a handheld device to access the PatientKeeper system, you must change the password on that device to match the password you enter here on the Physician Portal application.

Always change your the Physician Portal password first (*before* you change your handheld device password).

Glossary of Terms

Handheld Device

A personal desktop assistant (or PDA) that can be used by providers to access the PatientKeeper system.

Manually Registered Patient

A temporary patient that ancillary staff has manually added in the Physician Portal application, so that tasks or forms could be entered (probably because the patient was not yet formally registered on your institution's backend system). This is an optional feature that may or may not be used at your institution.

Navigational Tabs

Tabs at the top of the PatientKeeper windows that allow you to navigate between the various categories of information (for example, **Patient List**, **Patient Search**, or **Preferences**).

Patient List, or Short Patient List

A customized list of patients for a particular provider. The PatientKeeper system automatically generates it by selecting all patients who have a recent inpatient or outpatient visit, and who have some type of active relationship with the provider. Providers can also add additional patients to their lists, or remove patients.

PatientKeeper Patient Care Suite

The application software you are using to access patient data. It can be used from a desktop computer or a handheld device.

PatientKeeper Mobile Clinical Results

The software component of the PatientKeeper Patient Care Suite that lets healthcare providers access clinical patient data (such as lab results, test results, or clinical notes) from a handheld device.

PatientKeeper Physician Portal

The web-based component of the PatientKeeper Patient Care Suite that lets providers access clinical patient data from a laptop or desktop computer.

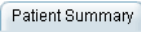
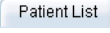
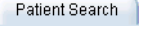
Placeholder Patient

A temporary patient that a provider has manually added on their handheld device, so that forms could be entered (probably because the patient was not yet formally registered on your institution's backend system). This is an optional feature that may or may not be used at your institution.

Sync

The process used to download the latest patient data onto a provider's handheld device, as well as upload the changes they have made back to your institution's network.

Helpful Tips

1. *Save the web address of the PatientKeeper system in your Favorites folder.*
2. *Turn off your internet browser's pop-up blocker when using the PatientKeeper system.*
3. *Use the  tab to see the latest clinical data for your patients.*
4. *Use the  tab to view all demographic, visit, and clinical data for your patients.*
5. *Use the  tab to view all demographic, visit, and clinical data for other provider's patients.*

For help, contact your system administrator.



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