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# Tribal Knowledge – What you need to know to get the most out of Practice Partner

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MIX 2012

# Disclaimer

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- I have never seen this presentation, which was originally given by Robert Pierce, MD
- Glee has done it, and will be available to keep me honest and on track, however he commented that if he did the full talk it would take about 10 minutes, total
- I learned a lot last night going over the slides with on-line help, but there are still things I didn't get.

# Tribal Knowledge Agenda

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- Features
- Utilities
- Practice Partner “Underground”

# Tribal Knowledge Agenda

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Assumes comfort with the basic system

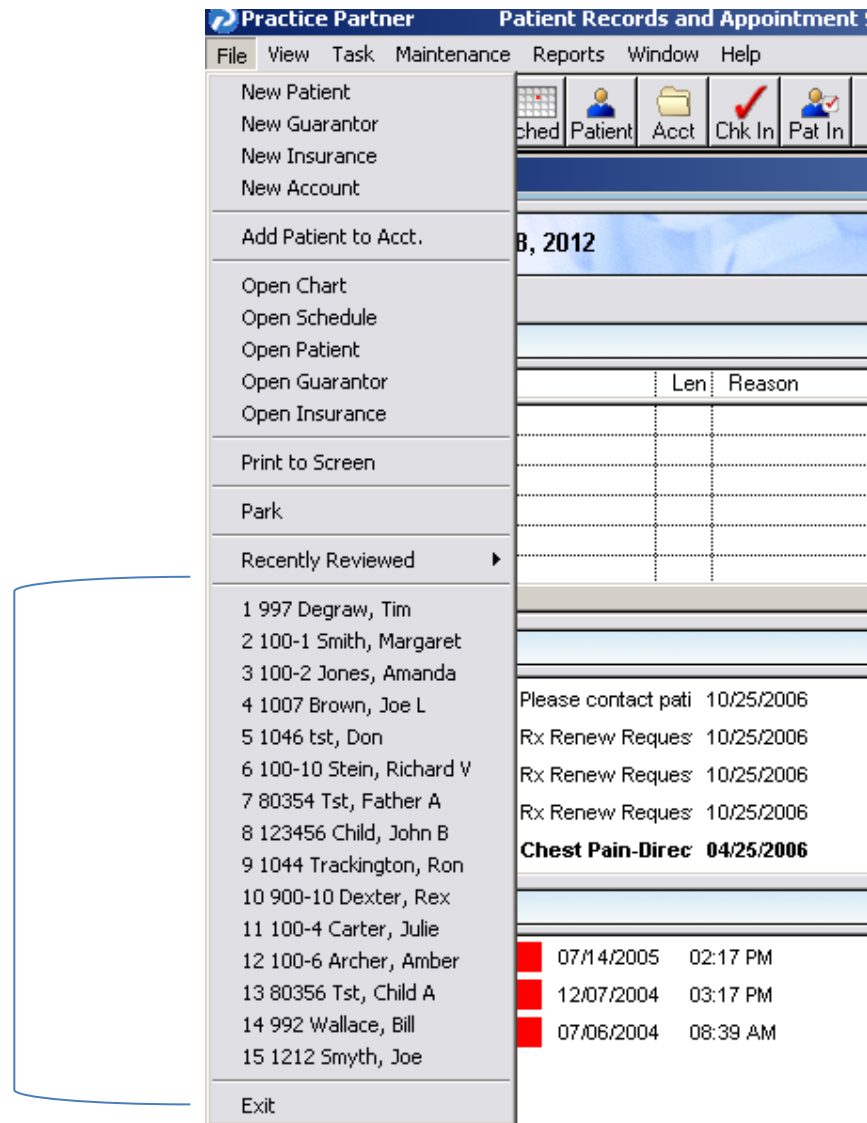


# Features – General/Chart

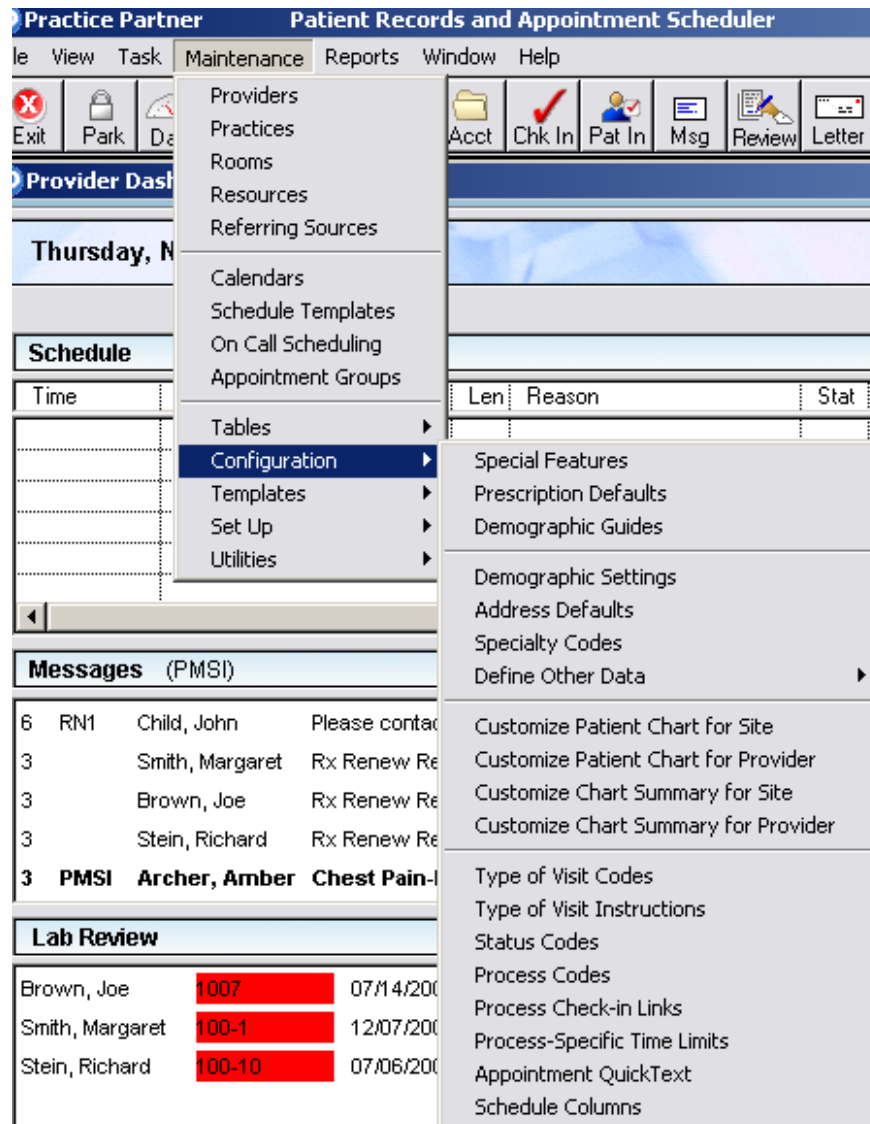
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- File -> most recent charts
- Customize chart by site or by provider
- Customize chart summary for site or by provider
- Patient messages section
- Add logos to printed charts - Special Features, Records 4, Practice Maintenance, Records

# File → Recent Charts



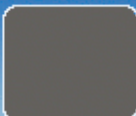
# Customize Chart/Summary: Site/Provider




# Customize Chart

**Patient Chart Configuration for Site**

**Rex Adams**

Next Appointment: 

Sex: Text ID: Text Status 

Age: Text DOB: Text

Chart Summary Problem List

Progress Notes Health Maintenance

Past Medical History

Social History

Family History

Consults

Hospital Reports

Letters

Misc Info / Documents

Flowsheets

Client Elements

Order

Misc Info / Documents

Misc Info / Documents

HIPAA

Prenatal

Patient Msg


Home: Last Appt:  
Work: Acct Type:  
Cell:

Acct Plan 1: Acct Plan 3  
Acct Plan 2: Acct Plan 4

**Configuration**

Choose Category: Letters System Default: Letters Current Definition: Letters

Rename Category: System Icon: Current Icon:

Icon: 

OK Cancel Help



# Customize Chart Summary

Practice Partner Patient Records

File View Task Maintenance Reports Window Help

Exit Park Dash Chart Sched Patient Acct Msg Chk In Review Letter Prov Help

Provider Dashboard

Thursday, November 08, 2012 DONALD T. STEWART Inactive

**Schedule**

Time	Len	TOV	Stat	T	N

**Messages (DONS)**

9	EVA	Schall, Wendy	UTI
3		Balbani, Daniel	Rx Renew Request
3	EVA	Wigren, Nancy	Diarrhea
3	EVA	Kym, Madeline	Bloodwork

**Lab Review**

Brenden, Dave	892	11/05/2012
Leininger, Michell	856	10/24/2012
Renfro, Claude	857	10/17/2012
Ellsworth, Robert	836	09/11/2012

Close Refresh Overdue Orders

Work: (423)333-3333 Acct Type: Cell:

Acct Plan 1: Acct Plan 3  
Acct Plan 2: Acct Plan 4

Close Refresh Exit Care

**Chart Summary Configuration**

Content Selection:

Pane 1: Visits  
Pane 2: Major Problem  
Pane 3: Allergy  
Pane 4: Medication  
Pane 5: HM Needed  
Pane 6: Most Recent Lab  
Pane 7: Vital Signs

Layout Options:

☐ 4 Panes  
☐ 5 Panes  
☐ 6 Panes  
☒ 7 Panes  
☐ 8 Panes

**Chart Summary Window**

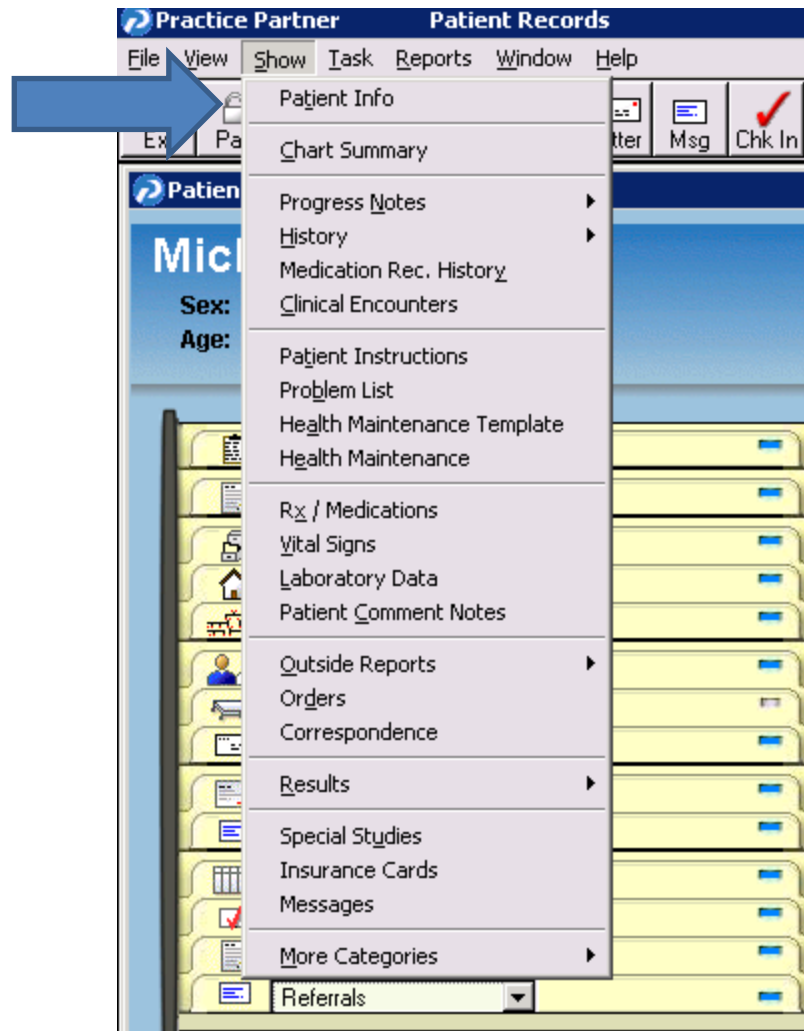
1 2 3 4  
5 6 7

OK Cancel Help

☒ All ☐ Search

# The Show Menu

---



# Show → Patient Info

Port: Mouse, Mickey

## Mouse

ars

Chart Summary

Progress Notes

Past Medical History

Social History

Family History

Consults

Hospital Records

Orders

Correspondence

Flow Charts

Clinical Elements

Patient Instructions


Referrals

Home: (425)555-5555 Last  
Work: (425)555-5555 Acc  
Cell:

st Plan 1: Acct Pla  
st Plan 2: Acct Pla

### Patient Information: Mouse, Mickey

ID: TEST SSN: 111-22-3333 Account Type: Usual Practice: 1  
Age: 72 Sex: M Birthdate: 01/01/1940 HOH:  
Address: 12345 DISNEY LANE Home: (425)555-5555  
City: SAMMAMISH Business: (425)555-5555  
State: WA Postal Code: 98075 Ext:  
Country: Fax:  
Email: kcarle@yorkhospital.com



#### Insurance Carriers

Carrier Name	Account Plan	Carrier Plan Name	Group Number	Insured ID

#### Pharmacy Benefit Carriers

Carrier Name	Account Plan	Carrier Plan Name	Group Number	Insured ID

#### Providers

Usual: DTS  
STEWART  
Primary: DTS  
STEWART

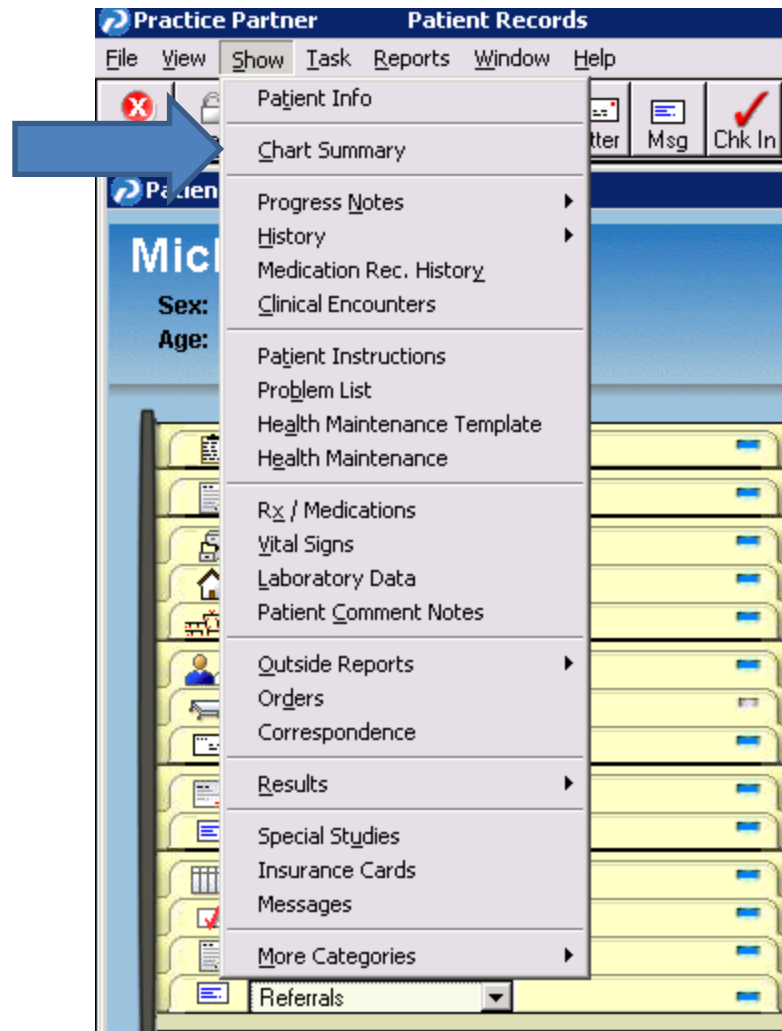
#### Referral Sources

ID	Type	Name
JIMLEGET...	E	Legett, Jim

Close HM Allergies Co-pay Guarantor Insurance

# The Show Menu

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# Show → Chart Summary

**Chart Summary: MOUSE, MICKEY**

**Mickey Mouse**  
Sex: M  
Age: 72 years

Next Appointment: N/A  
ID: TEST  
DOB: 01/01/1940



Visits		Major Problem	Allergy	Medication
Date	Title	Problem		Name
11/08/12	TESTING TEMPLAT	TOBACCO USE DISORD	SULFA	SYNTHROID
10/28/12	OVERWEIGHT	DIABETES TYPE II		DILTIAZEM HCL ER BEADS
10/28/12	10/16/12	OBESITY NOS		NIASPAN
10/28/12	06	ERECTILE DYSFUNCTION		VITAMIN C
10/28/12	05PM	HYPERTENSION	HM Needed	VITAMIN D
10/19/12	TESTING TEMPLAT	HYPERLIPIDEMIA		CROMOLYN SODIUM
09/14/12	TEST	ARTHRITIS	ACE or ARB therapy	ASPIRIN EC
09/14/12	CKD STAGE IV	ARTHRITIS BACTERIA	Anticoagulant	SIMVASTATIN
08/03/12	HYPERTENSION	OSTEOARTHRITIS NOS	Aspirin therapy	MESSAGE TO PHARMACIES
08/03/12	HYPERLIPIDEMIA	MIGRAINE, CLASSIC	Beta blocker	IMITREX

Most Recent Lab		Vital Signs	
Date	Lab Names		
10/28/12	Last Visit Date	Date	10/28/2012
10/28/12	Last Weight	Height	
10/28/12	Last Estimated GFR	Weight	
10/28/12	Body Mass Index	BMI	

Close

# Messaging Sections in Chart

**Patient Chart: Mouse, Mickey**

## Mickey Mouse

Sex: M  
Age: 72 years

Next Appointment: N/A  
ID: TEST  
DOB: 01/01/1940




Chart Summary	Problem List
Progress Notes	Health Maintenance
Past Medical History	Rx / Medications
Social History	Vital Signs
Family History	Laboratory Data
Consults	Images
Hospital Records	Radiology / Imaging
Letters	Cardiology
Orders	Pathology
Correspondence	Special Studies
Flow Charts	Insurance Cards
Clinical Elements	Messages
Patient Instructions	Visits
Referrals	Patient Msg

Blue arrows point from the 'Clinical Elements' and 'Referrals' sections to the 'Messages' and 'Patient Msg' sections respectively.

# Patient Msg

Patient Chart: Mouse, Mickey

Patient Messages : Mouse, Mickey

[Mickey Mouse]


- Archived
- Deleted
- Inbox
- Pending
- Selected
- Sent

*	!	Att	From	Subject	Received	Type
	3		DONS	kfsldjfsfsjdlkfdsjlf		
*	3		Mickey Mouse(TE	out of cheese, ple	03/28/2008	
	3		DONS	Testing message.	10/10/2007	
	8		CAROLINE	INFECTIVE EARS	11/30/2006	
	3		PMSI	test	01/09/2006	
	9		CAROLINE	PHONE SEABECK	09/08/2006	
*	9		CAROLINE	DR BILL MCKEE F	09/07/2005	
	9		CAROLINE	PHONE RE DINNI	11/08/2005	
	9		CAROLINE	phone reference	11/08/2005	
*	3		CML		07/13/2005	
*	9		JIM	Dr. Seth Fader retu	04/29/2005	
*	9		JIM	freind call	03/21/2005	
*	9			Angela Harty	12/10/2004	
*	3		CML	Call Wed night	11/13/2004	
*	9		CML	Macros	11/03/2004	
*	9		JIM	MAIN LAB LETTE	08/20/2004	
*	3		CML	MAIN LAB LETTE	08/19/2004	

Close New Delete View Link Change Op Print Select

Referrals

Patient Msg



List

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# Enable Logos



**Special Features <Records>:**

Order Entry 1	Scheduler 1	Scheduler 2	Scheduler 3	Scheduler 4
Records 5	Records 6	Records 7	Records 8	Records 9
General	Records 1	Records 2	Records 3	<b>Records 4</b>

**Report Logo**

☒ Enable Logo on chart reports ☒ Scale Logo on chart reports

☒ Enable Title on chart reports

Default Practice for chart reports:

**Messaging**

Refresh messaging every  seconds

☐ Autoarchive Inbox messages over  days old. ☒ Show Bcc when creating message.

☐ Autoarchive Sent messages over  days old. ☒ Include Original message in reply.

Users of Practice Partner Patient Records, when sending messages to Patients or Consultants, may set the "Date to Activate" in the future. Web View checks for such messages once every 24 hours, and if it finds any messages scheduled to be delivered on that day, delivers those messages to the recipients' Web View inboxes and sends them an e-mail notification. Please indicate below the time at which you wish that process to occur.

Message Delivery Time:

**E&M Coding**

☐ Use E&M Coding Assistance E&M Labels color:

☒ Display E&M Labels as default E&M Guidelines:

☐ Add E&M Calculation Details to Note Default Visit Type:

OK Cancel Help



# Where You Put the Logo

**Practice Maintenance <Edit>: 1**

Code:  Name:  Status:

General 1   General 2   **Records**   Scheduler   Billing   Other Data

Report Headings:

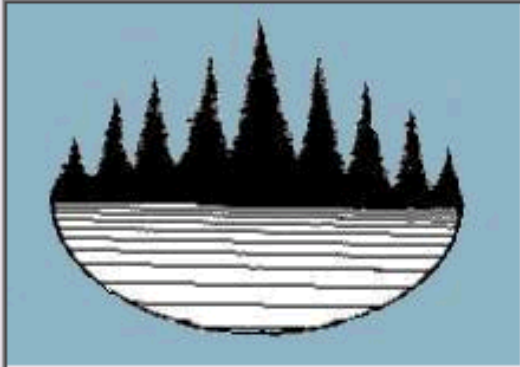
Line 1:

Line 2:

Line 3:

Line 4:

Logo:



# Features – General/Chart

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- Auto-save notes, Special Features - Records 3
- Search radio button/View -> List of Notes
- Knowledge Base
- Unsaved and Unsigned notes reports
- Missing PN reports

# Auto Save Notes

**Special Features <Records>:**

Order Entry 1	Scheduler 1	Scheduler 2	Scheduler 3	Scheduler 4
Records 5	Records 6	Records 7	Records 8	Records 9
General	Records 1	Records 2	<b>Records 3</b>	Records 4

**Auto Save Notes**

☒ Enable Auto Save of Progress Notes

Auto Save Path:

Auto Save Interval:

**Lab Review**

☒ Use Lab Review Templates

Default Lab Review Message template:

Default Lab Review Note template:

Original Provider must sign lab on forward

☒ Review Tabular Laboratory Data

☒ Enable parallel review of lab and notes. (but not progress notes)

☒ If Laboratory Data restricted, show asterisks.

☒ Original Provider must sign progress note on forward.

☒ Original provider must sign non-progress note documents on forward.

☒ Open chart on notes review

☒ Open chart on lab review

☒ Activate lab review for lab in note

☒ Activate lab review for lab in loaded note

OK Cancel Help

# Search Radio Button

**Patient Chart: Mouse, Mickey**

**Mickey Mouse** Next Appointment: N/A  
Sex: M ID: TEST  
Age: 72 years DOB: 01/01/1940

Inactive

Chart Summary  
Progress Notes  
Past Medical History  
Social History  
Family History  
Consults  
Hospital Records  
Letters  
Orders  
Correspondence  
Flow Charts  
Clinical Elements  
Patient Instructions  
Referrals

Problem List  
Health Maintenance  
Rx / Medications  
Vital Signs  
Laboratory Data  
Images  
Radiology / Imaging  
Cardiology  
Pathology  
Special Studies  
Insurance Cards  
Messages  
Visits  
Patient Msg

Home: (425)555-5555 Last Appt: N/A  
Work: (425)555-5555 Acct Type:  
Cell:

Acct Plan 1: Acct Plan 3  
Acct Plan 2: Acct Plan 4

small and likes cheese  
dangerous to give warfarin  
BITES WHEN HANDLED

Close Refresh Exit Care

All Search


Summary Chart Prog Notes Rx / Meds Recent Lab Lab Tables Vitals Hlth Maint Prob List Flow Chart

TEST 72y Male Opera

# Special Criteria Window

**Mickey Mouse**  
Sex: M  
Age: 72 years

Next Appointment: N/A  
ID: TEST  
DOB: 01/01/1940

  
Inactive ☐

- Chart Summary
- Progress Notes
- Past Medical History
- Social History
- Family History
- Consults
- Hospital Records
- Letters
- Orders
- Correspondence
- Flow Charts
- Clinical Elements
- Patient Instructions
- Referrals

Home: (425)555-5555    Last Appt:  
Work: (425)555-5555    Acct Type:  
Cell:

Acct Plan 1:    Acct Plan 3:  
Acct Plan 2:    Acct Plan 4:

Close    Refresh    Exit Care

☐ All    ☒ Search

**Special Criteria Window**  
Fill in the choices you want and leave the others blank  
by Provider:  by Practice:   
By Date:  
Specific:  ,  ,  ,   
Range:  to  ;  to   
By Problem:   
or:   
or:   
By Text Pattern:  mammogram  
or:   
or:   
by Oldest Notes: Show  oldest notes  
OK  
Cancel  
Help

dangerous to give warning  
BITES WHEN HANDLED

# View → List of Notes

The screenshot shows a medical software interface with a menu bar and a toolbar. The 'View' menu is open, showing options like 'Tool Bar', 'Status Bar', 'Go To Bar', and 'List of notes'. A blue arrow points to the 'List of notes' option. Below the menu, a window titled 'Progress Notes: Mouse, Mickey' is open. It displays a list of notes for Mickey Mouse, ordered by date with the most recent first. The notes are as follows:

Date	Provider	Problem
11/08/12	STEWART, DONALD T.	TESTING TEMPLATE
10/28/12	STEWART, DONALD T.	10/16/12
10/19/12	STEWART, DONALD T.	TESTING TEMPLATE
09/14/12	STEWART, DONALD T.	TEST
08/03/12	STEWART, DONALD T.	AODM
08/03/12	STEWART, DONALD T.	EDIT TOOLS
06/19/12	STEWART, DONALD T.	TESTING TEMPLATE
05/31/12	STEWART, DONALD T.	TESTING TEMPLATE
05/28/12	STEWART, DONALD T.	CONGESTIVE HEART FAILURE
05/18/12	STEWART, DONALD T.	X
05/04/12	STEWART, DONALD T.	AODM

At the bottom of the window, there are buttons for 'OK', 'Cancel', and 'Help'. Below these buttons, there are fields for 'Home: (425)555-5551', 'Work: (425)555-5551', and 'Cell:'. There are also buttons for 'Close', 'Refresh', and 'Exit Care'. At the very bottom, there are radio buttons for 'All' and 'Search'.

# Knowledge Base

**Practice Partner Patient Records**

File View Show Task Reports Window Help

Exit Park Data

**Patient Chart**

**Mickey**  
Sex: M  
Age: 72 years

Next Appointment: N/A  
ID: TEST  
DOB: 01/01/1940

Problem List  
Health Maintenance  
Rx / Medications  
Vital Signs  
Laboratory Data  
Images  
Radiology / Imaging  
Cardiology  
Pathology  
Special Studies  
Insurance Cards  
Messages

Review Data  
Messages  
Provider / Practice Selection  
To Do  
New Progress Note  
Letters  
Provider Schedule  
QuickText  
Patient Education  
McKesson SupplyManager  
Knowledge Base  
World Wide Web  
New Orders  
Orders  
Patient Registries  
Electronic Encounter Forms  
Create Electronic Encounters from Schedule  
Add-ons  
Scan  
Timing  
Check-in  
Import Medical Summary

PMSI - Knowledge Base - Practice Partner Knowledge Base

File Task Bookmarks Maintenance Help


Back Forward Search Print Help

Location: file:///Q:/ppart/home.practicepartner.html

**Guidelines by Condition:**

Allergy and Immunology	Musculoskeletal Disease
Cardiovascular Disease	Neonatology
Dental Disease	Nephrology
Dermatology	Neurology
Digestive Disease	Nutrition and Metabolism
Ear, Nose and Throat Disease	Obstetrics
Endocrine Disease	Oncology
Gynecology	Ophthalmology
Health Promotion/Disease Prevention	Poisonings
Hematology	Pulmonary Disease
Infectious Disease	Trauma
Mental Disorders	Urology

**Practice**



Guidelines by Special

Online Medical Information

Online Patient Education

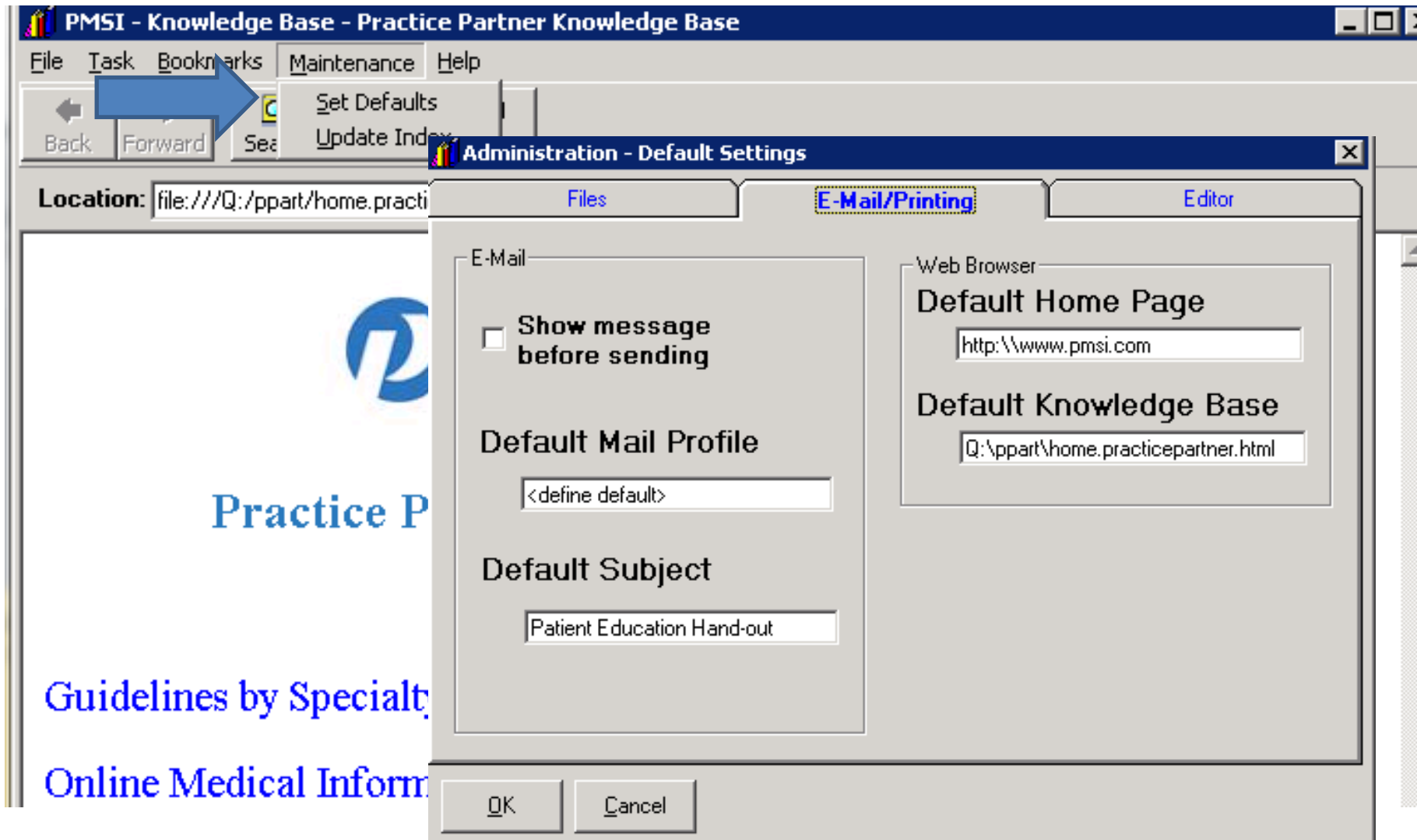
Online Journals

Visit our web site at <http://www.practicepartner.com/>

home.practicepartner



# Knowledge Base Defaults



# Unsaved and Unsigned Reports

The image displays a screenshot of a medical software interface with two main panels. The left panel shows the 'Task' menu, and the right panel shows the 'Reports' menu. A blue arrow points from the 'Task' menu to the 'Reports' menu, and another blue arrow points from the 'Patient Records' sub-menu to the 'Unsaved Progress Notes' and 'Auto-Saved Notes' items in the 'Task' menu.

**Task Menu:**

- Review Data
- Messages
- Provider / Practice Selection
- To Do
- New Progress Note
- Letters
- Provider Schedule
- QuickText
- Patient Education
- McKesson SupplyManager
- Knowledge Base
- World Wide Web
- New Orders
- Orders
- Patient Registries
- Electronic Encounter Forms
- Create Electronic Encounters from Schedule
- Add-ons
- Scan
- Timing
- Check-in
- Import Medical Summary
- Data Loader
- Speech Recognition
- Unsaved Progress Notes
- Auto-Saved Notes

**Reports Menu:**

- Patient Registration
- Missing Progress Notes
- AS/PR Referrals
- Patient Inquiry
- Overdue HM List
- Batch Communication
- Data Export
- PDA Export
- Patient Records
- Orders
- Public Health Agency Surveillance
- Logon Audit
- Audit Trail
- Health Information
- Administration Audit

**Sub-menu for Patient Records:**

- Print Clinical Summary for Patient
- Print Chart Summary
- Print Partial Chart
- Print Complete Chart
- Export Medical Summary
- Print Notes
- Unsigned Notes
- Unsaved Notes
- Formulary
- Access Log Report
- Immunizations
- Prescription Output Log Report

**Next Appointment: N/A**  
**ID: TEST**  
**DOB: 01/01/1940**

# Features – General/Chart

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- Confidential Chart Tabs
- Note Compare/View -> Contributions
- Ordering templates (space as first character)
- Maintenance with chart open Dash -> Maintenance
- Windows tab carries a list of all open tiles/windows

# Note Before Editing

**Progress Notes: Mouse, Mickey**

**Mickey Mouse** Notes ordered by date with most recent first.

ID: TEST Age: 72 years DOB: 01/01/1940

.D: 11/08/12 : 10:36pm  
.T: Test note compare

testing, testing, testing

Here I insert the problem list:

Rx: LISINOPRIL 40MG 1 TAB once daily  
Rx: CELEBREX 200MG 1 TAB twice daily  
Rx: CORGARD 10mg 1 daily  
Rx: FOSAMAX 70MG 1 TAB Q7D  
Rx: IMITREX 100MG  
Rx: MESSAGE TO PHARMACIES  
Rx: SIMVASTATIN 40 mg 2 once daily  
Rx: ASPIRIN EC 81MG 1 TAB once daily  
Rx: CROMOLYN SODIUM 4% 1GTT four times daily  
Rx: VITAMIN D 1,000 IU 1 Daily  
Rx: VITAMIN C 500MG 1 TAB twice daily  
Rx: NIASPAN 500mg 1 daily  
Rx: DILTIAZEM HCL ER BEADS 120MG 1 CAP twice daily  
Rx: SYNTHROID 0.150MG 1 TAB once daily

But then I deleted it

# SIGNED BY DONALD T STEWART, MD (DTS) 11/08/2012 10:39PM

Close  
Newer  
Older  
New  
Edit  
Print  
Fax  
Image

Undo  
Redo

Cut  
Copy  
Paste  
Paste Text  
Delete

Delete Note

Find  
Replace

Table

Check Spelling

Hide E&M Labels  
Recalculate E&M Code  
Hide delete label markers  
Gray unselected Quick Text Label Markers  
Gray delete label lines  
Note Compare

Notes ordered by date with most recent first.

DOB: 01/01/1940

Close

Newer

Older

New

Edit

Print

Fax

Image

# REVISIONED BY DONALD T STEWART, MD (DTS) 11/08/2012 10:39PM  
# REVISED BY DONALD T STEWART, MD (DTS) 11/08/2012 10:42PM

# Note Compare

Changes to Note: from 11/08/2012 to 11/08/2012 Mouse, Mickey

.D: 11/08/12: 10:36pm  
.T: Test note compare

testing, testing, testing and more testing

Here I insert the problem list:

~~Rx: LISINOPRIL 40MG 1 TAB once daily-~~  
~~Rx: CELEBREX 200MG 1 TAB twice daily-~~  
~~Rx: CORGARD 10mg 1 daily-~~  
~~Rx: FOSAMAX 70MG 1 TAB Q7D-~~  
~~Rx: IMITREX 100MG-~~  
~~Rx: MESSAGE TO PHARMACIES-~~  
~~Rx: SIMVASTATIN 40 mg 2 once daily-~~  
~~Rx: ASPIRIN EC 81MG 1 TAB once daily-~~  
~~Rx: CROMOLYN SODIUM 4% 1GTT four times daily-~~  
~~Rx: VITAMIN D 1,000 IU 1 Daily-~~  
~~Rx: VITAMIN C 500MG 1 TAB twice daily-~~  
~~Rx: NIASPAN 500mg 1 daily-~~  
~~Rx: DILTIAZEM HCL ER BEADS 120MG 1 CAP twice daily-~~  
~~Rx: SYNTHROID 0.150MG 1 TAB once daily-~~

But then I deleted it

Close

Print

Pt Msg

Online Sum

Reply

# Features – Hotkeys

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- F5: Sign a note
- F6: Insert template
- ESC: Close the note
- SHFT-F8, ALT-I-P: Insert Individual Problems
- ALT F7: Insert Quicktext
- ALT-0171: «
- ALT-0187: »
- Many others

# Features – Progress Notes

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- Partial note markers
  - For uploading dictated text
- .CC: feature; use PRUtils setting to control whether signature is required when viewing
- Insert Individual Problems
  - SHIFT-F8 to bring up the individual problem dialog
  - SHIFT-select to multiselect
- Insert images into body of note
  - Insert Image from File dialog



# Insert Individual Problem, Shift-F8

Progress Notes: Mouse, Mickey

**Mickey Mouse** Notes ordered by date with most recent first. Inactive

ID: TEST Age: 72 years

Arial 10 B I

Allergic Rhinitis Nos (477.9)  
Underweight (783.22)  
ASTHMA (493.90) «\*DxP\_Asthma»  
OVERWEIGHT (728.02)  
Additional Problems evaluated today: «\*...»

.DX: CYSTITIS NOS : 595.9

.MP: CKD Stage IV : 585.4  
.CE: Renal\_Status: CKD IV

«DXType»  
«DXTop50»  
Glucose Control: «del» «Improved» «\*Worse» «Unchanged» «\*Almost» «ToGoal» «NotToGoal» «\*Unknown»  
Blood Pressure: «del» «Improved» «\*Worse» «Unchanged» «\*Almost» «ToGoal» «NotToGoal» «\*Unknown»  
Lipids: «del» «Improved» «\*Worse» «Unchanged» «\*Almost» «ToGoal» «NotToGoal» «\*Unknown»  
«\*NextProb»  
«\*E&MCode»


**Insert Problem**

Major Problems | Other Problems | Diagnosis

Problem Name	Code	Status
TOBACCO USE DISORD	305.1	Active
CKD STAGE IV	585.4	Active
ALLERGIC RHINITIS NOS	477.9	Active
Underweight	783.22	Active
ASTHMA	493.90	Active
OVERWEIGHT	728.02	Active
DIABETES TYPE ii	250.00	Active
OBESITY NOS	278.00	Active
ERECTILE DYSFUNCTION		Active
HYPERTENSION	401.9	Active

Insert As:  
☐ Major Problem ☒ Diagnosis ☐ Name Only (No Dot Code)

OK Cancel Help



# Three New Problems Inserted

**Progress Notes: Mouse, Mickey**

**Mickey Mouse** Notes ordered by date with most recent first.

ID: TEST Age: 72 years DOB: 01/01/1940

Arial 10 B I U [List Icons] 100%

Allergic Rhinitis Nos (477.9)  
Underweight (783.22)  
ASTHMA (493.90) <\*DxP\_Asthma>  
OVERWEIGHT (728.02)  
Additional Problems evaluated today: <\*> <\*SeeTitle> <\*AllAbove> <\*AsAbove> <\*> 23 mL/min  
...>

.DX: CYSTITIS NOS : 595.9

.DX: TOBACCO USE DISORD : 305.1  
.DX: ALLERGIC RHINITIS NOS : 477.9  
.DX: DIABETES TYPE ii : 250.00

.MP: CKD Stage IV : 585.4  
.CE: Renal\_Status: CKD IV

<DXType>  
.....  
<DXTop50>

Glucose Control: <del> <Improved> <\*Worse> <Unchanged> <\*Almost> <ToGoal>  
<NotToGoal> <\*Unknown>

Blood Pressure: <del> <Improved> <\*Worse> <Unchanged> <\*Almost> <ToGoal>  
<NotToGoal> <\*Unknown>

Lipids: <del> <Improved> <\*Worse> <Unchanged> <\*Almost> <ToGoal> <NotToGoal>  
<\*Unknown>

OK  
Cancel  
QT Auto  
Print  
Fax  
Image  
Spelling  
Insert Table

# Features – Progress Notes

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- Finding old progress notes
  - Note lists
  - Search
- .K: dot code and associated QT
- Print Range Select - Special Features, Records  
2

# Features - Dashboard

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- Note Status in Dashboard
  - Configuration -> Schedule Columns
- Bars active and actionable

# Features – Problem List

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- Problem ordering and outline
- Alternative lookups to Diagnosis and Procedure code master tables
- Default settings for diagnosis and procedure lookup on Special Features, Record 5

# Features - Letters

---

- .ILR: dot code
- Page Setup Templates: Different header for 1st vs other pages; Images in header
- Omit signature lines and dot codes when printing letters, Special Features, Record 7

# Features - Orders

---

- Arrow Keys to expand and collapse order tree
- Order Entry Rule Files
- PPART.INI setting ShowAllPracticeOrders=ON

# Features – EM Coding

---

- Defaults for 1995, 1997 or both for EM coding
- Add EM coding detail to the note
- .VT dot code = Visit Time



# Features - Prescriptions

---

- Choose mandatory fields in Prescription defaults
- Check food allergies when checking allergies
- PPART.ini SubstitutionOKDefault
- TrackRxNumber=ON - for output log report
- Rx templates “on the fly”

Prescription: Mouse, Mickey <New>

Rx Template Code:   ☒ by Template Code ☐ by Indication(s)

Date:  Medication:  Size:

Take:  Frequency:  ☐ PRN  Route:

Duration:  Amount:  Refills:

Print:   Prov:  DONALD T. STEV ☐ Outside

Indication 1:

Indication 2:

Note:

Pharmacy:

Formulary:

Plan:

Extended Sig:

Code:

☐ Create Sig Template

- |   |   |  |  |
|---|---|--|--|
| <input type="checkbox"/> Use Extended Sig         | <input type="checkbox"/> Limit Refills              | <input checked="" type="checkbox"/> Drug Interaction Check | <input type="checkbox"/> New Rx Template |
| <input type="checkbox"/> Use Extended Sig Only    | <input checked="" type="checkbox"/> Substitution OK | <input checked="" type="checkbox"/> Allergy Check          |  |
| <input type="checkbox"/> Use Patient Instructions | <input type="checkbox"/> Update Progress Note       |  | <input type="checkbox"/> OTC             |

Wholesale: (no price) per unit. Total: (no price) Generic: (no price) per unit. Total: (no price)

Actual Total:

# Features - Prescriptions

---

- Multi-renew
- .ALR: dot code and Allergies Reviewed feature
- .IAL2 dot code (shows last review date)
- On No Meds feature
- Prescription format file variables
  - %prov\_signature (faxed Rx only)
  - %RxTracking
  - %prac\_logo
- Uncheck allergy and DI

# Features - Prescriptions


---

- Dose Advisor
- Dose Calculator
- Provider specific prescription configuration templates
- Add flag to medications screen
- PPART.INI  
ShowCoverageDetailsOnPrescriptionsDialog=ON

# Dose Calculator

Prescription: Flintstone, Fred <New>

Rx Template Code: AMOXCL125  ☒ by Template Code ☐ by Indication(s)  
Rx Template Name: AMOXICILLIN CLAVULANATE 125MG

Date: 11/09/12 Medication: AMOXICILLIN-POT CLAVULANATE Size: 125-31.25 

Take:  Frequency: three times daily  ☐ PRN Route: ORAL

Duration: 10  Amount: 30TAB Refills: 0

Print:  Prov:  ☐ Outside

Indication 1:    
Indication 2:    
Note:   
Pharmacy:

Formulary:   
Plan:

Extended Sig:  Code:    
☐ Create Sig Template

☐ Use Extended Sig ☐ Limit Refills ☒ Drug Interaction Check ☐ New Rx Template  
☐ Use Extended Sig Only ☒ Substitution OK ☒ Allergy Check  
☐ Use Patient Instructions ☐ Update Progress Note ☐ OTC

Wholesale: per unit. Total: Generic: per unit. Total:  
Insurance Total: (no price)

# Dose Calculation

Prescription: Flintstone, Fred <New>

Rx Template Code: AMOXCL125  ☒ by Template Code ☐ by Indication(s)

Rx Template Name: AMOXICILLIN CLAVULANATE 125MG

Date	Medication	Size	
11/09/12	AMOXICILLIN-POT CLAVULANATE	125-31.25	
Take	Frequency	Route	

**Dose Calculator for: Flintstone, Fred**

**AMOXICILLIN-POT CLAVULANATE 125-31.25 ORAL**

Vitals

Weight:  Height:

Calculated body surface area =

Dosing Parameters

per  kg ☒ per day ☐ per dose Frequency:

Dose

AMOXICILLIN-POT CLAVULANATE 125-31.25 ORAL


Take:

Insurance Total: (no price)

# Dose Advisor

Prescription: Flintstone, Fred <New>

Rx Template Code: AMOXCL125  ☒ by Template Code ☐ by Indication(s)  
Rx Template Name: AMOXICILLIN CLAVULANATE 125MG

Date: 11/09/12 Medication: AMOXICILLIN-POT CLAVULANATE Size: 125-31.25 

Take:  Frequency: three times daily  ☐ PRN Route: ORAL

Duration: 10  Amount: 30TAB Refills: 0

Print:   Prov:  ☐ Outside


Indication 1:    
Indication 2:    
Note:   
Pharmacy:

Formulary:  Plan:

Extended Sig:  Code:    
☐ Create Sig Template

☐ Use Extended Sig ☐ Limit Refills ☒ Drug Interaction Check ☐ New Rx Template  
☐ Use Extended Sig Only ☒ Substitution OK ☒ Allergy Check  
☐ Use Patient Instructions ☐ Update Progress Note ☐ OTC

Wholesale: per unit. Total: Generic: per unit. Total:  
Insurance Total: (no price)



# Features - Labs

---

- Recently reviewed
- High/low range table colors can be changed
- Creat clearance formula, Special Features, Records 7
- Select and Msg buttons in lab review
- Patient Comment button for WebView



# Features – Health Maintenance

---

- Populate HM based on note titles - Special Features, Records 6
- Populate HM based on CE and VS recording
- Populate HM based on synonyms
- Info file is a link that will open when a HM item is double clicked

# Features – Health Maintenance

---

- HM\_DATE and COUNT in HM Rule files
- PPART.INI settings for [Scan]

# Features - Messages

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- .ILR: dot code
- Critical lab messages
- Message templates
- Message signature
- Titling will xref HM!

# Features – System Security

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- PRUtils settings
- Chart access controls
- Audit trail
- Audit reports

# Utilities

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- Template Search and Replace
- Convert HM Maintenance
- Age Health Maintenance Template
  - UpdatePatHmAgeTemplates.exe
- Laboratory Data Conversion
- MRGTMPLW.exe
- ExportTemplates.exe
- Autoissue
- OrderDefSetup.exe

# Other Resources – PP Underground

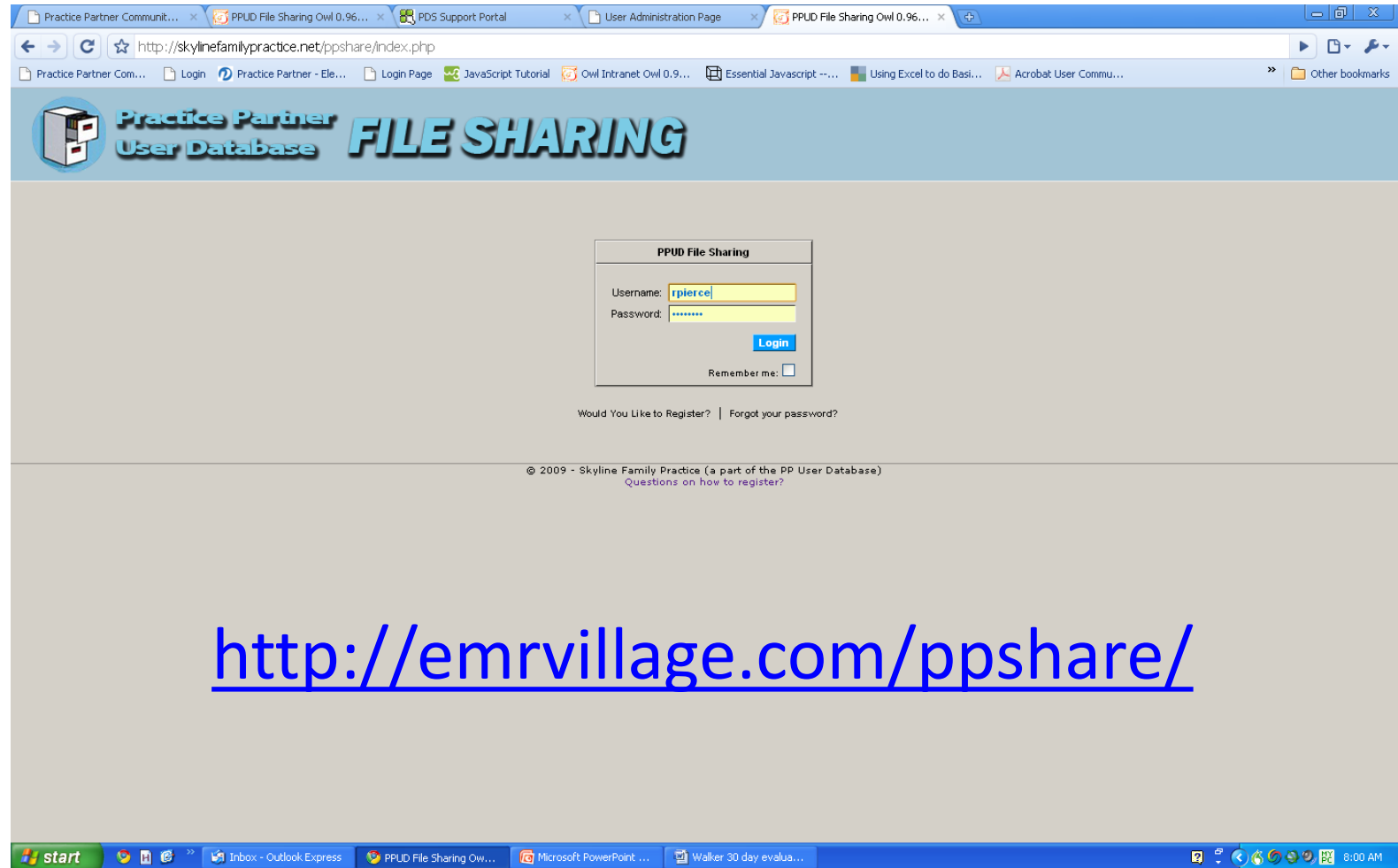
---

***Disclaimer:***

***Not supported by McKesson!***



# Other Resources – EMR Village



<http://emrvillage.com/ppshare/>

# Other Resources – EMR Village

User: rpierce Full Name: Robert Pierce, MD Last on: Feb 18, 2010 at 07:22 pmAdmin Preferences Logout E-Mail Go To Bottom Help

File Information

New: 0Updated: 0My: 117Group: 158

Checked Out: 0Monitored: (13:3)News: 0Special Access: (?:?)

Total: 214

Favorites: NONE SELECTEDGo Delete Add Current

Bulk DownloadBulk MoveBulk E-MailBulk Delete

Add FolderAdd ArchiveAdd DocumentAdd UrlAdd NoteCollapse ViewThumb Nail View

Site Map

Current Folder: Documents

<input checked="" type="checkbox"/>	Doc #	Title	File	Size	Posted by	Modified
<input type="checkbox"/>		1 - News and Info (1:4)	1 - News and Info ▶		Tripp Bradd, MD	Jul 13, 2009 at 03:21 pm
<input type="checkbox"/>		2 - Templates, QText, Clinical Elements and Conditional Logic (7:1)	2 - Templates, QText, Clinical Elements and Conditional Logic ▶		Robert Pierce, MD	Nov 23, 2009 at 01:13 pm
<input type="checkbox"/>		3 - Health Maintenance (3)	3 - Health Maintenance ▶		Robert Pierce, MD	Nov 23, 2009 at 01:14 pm
<input type="checkbox"/>		4 - Knowledge Base (5)	4 - Knowledge Base ▶		Tripp Bradd, MD	Nov 23, 2009 at 01:14 pm
<input type="checkbox"/>		5 - Add-on or other ancillary products (6:2:2)	5 - Add-on or other ancillary products ▶		Tripp Bradd, MD	Nov 23, 2009 at 01:14 pm
<input type="checkbox"/>		6 - Crystal Reports (2)	6 - Crystal Reports ▶		Tripp Bradd, MD	Jul 22, 2009 at 05:43 pm
<input type="checkbox"/>		7 - Process and Office Flow (2:4)	7 - Process and Office Flow ▶		Tripp Bradd, MD	Nov 23, 2009 at 01:09 pm
<input type="checkbox"/>		8 - Tips and Tricks (1:1)	8 - Tips and Tricks ▶		Tripp Bradd, MD	Nov 23, 2009 at 01:10 pm
<input type="checkbox"/>		9 - PPRNET and Other Quality Related documents (2:1:6)	9 - PPRNET and Other Quality Related documents ▶		Tripp Bradd, MD	Nov 23, 2009 at 01:06 pm

Site Map

Add FolderAdd ArchiveAdd DocumentAdd UrlAdd NoteCollapse ViewThumb Nail View

Search

Any Words

☐ Search Within☐ Search Current Folder

User: rpierce Full Name: Robert Pierce, MD Last on: Feb 18, 2010 at 07:22 pmAdmin Preferences Logout E-Mail Go To Top Help

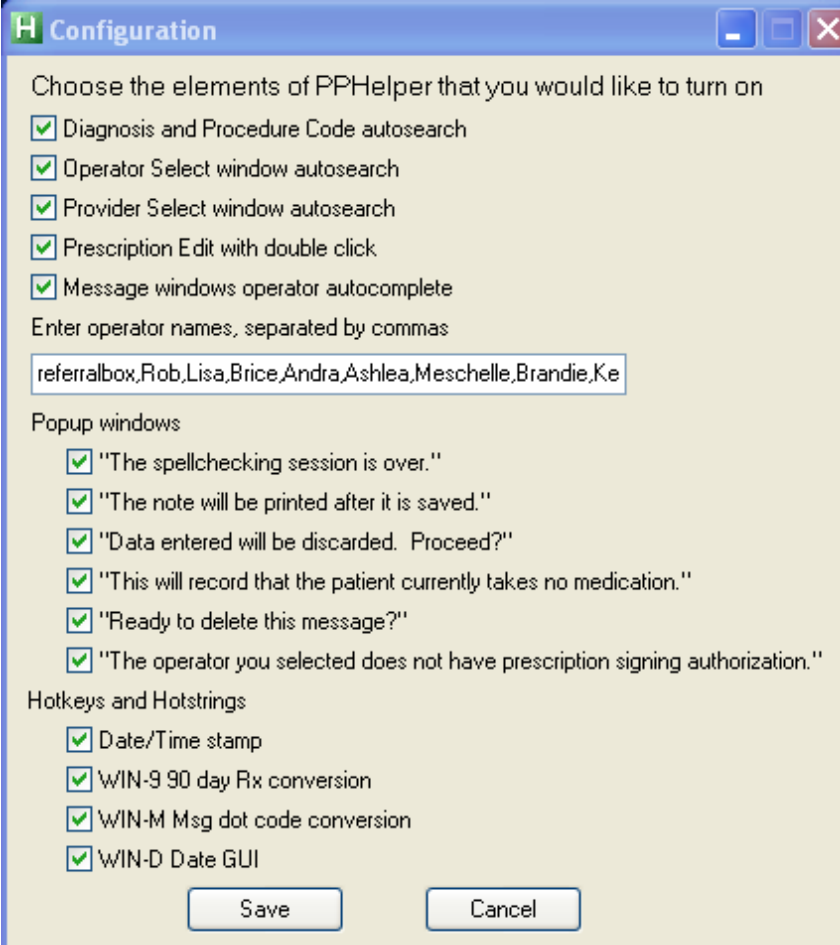


# Other Resources – EMR Village

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- Patient Handouts
- White papers
- Health Maintenance Rule Files
- Templates and Quicktext
- Growth Curves
- Macros
  - Macro Express
  - Autohotkey

# PPHelper



The image shows a Windows-style configuration dialog box titled "Configuration" with a green 'H' icon in the title bar. The dialog has standard minimize, maximize, and close buttons. The main content area is light beige and contains several sections of settings. The first section, "Choose the elements of PPHelper that you would like to turn on", lists five items, each with a checked checkbox: "Diagnosis and Procedure Code autosearch", "Operator Select window autosearch", "Provider Select window autosearch", "Prescription Edit with double click", and "Message windows operator autocomplete". Below this is a text field labeled "Enter operator names, separated by commas" containing the text "referralbox,Rob,Lisa,Brice,Andra,Ashlea,Meschelle,Brandie,Ke". The next section, "Popup windows", lists six items, each with a checked checkbox: "The spellchecking session is over.", "The note will be printed after it is saved.", "Data entered will be discarded. Proceed?", "This will record that the patient currently takes no medication.", "Ready to delete this message?", and "The operator you selected does not have prescription signing authorization.". The final section, "Hotkeys and Hotstrings", lists four items, each with a checked checkbox: "Date/Time stamp", "WIN-9 90 day Rx conversion", "WIN-M Msg dot code conversion", and "WIN-D Date GUI". At the bottom of the dialog are two buttons: "Save" and "Cancel".

**Configuration**

Choose the elements of PPHelper that you would like to turn on

- ☒ Diagnosis and Procedure Code autosearch
- ☒ Operator Select window autosearch
- ☒ Provider Select window autosearch
- ☒ Prescription Edit with double click
- ☒ Message windows operator autocomplete

Enter operator names, separated by commas

referralbox,Rob,Lisa,Brice,Andra,Ashlea,Meschelle,Brandie,Ke

Popup windows

- ☒ "The spellchecking session is over."
- ☒ "The note will be printed after it is saved."
- ☒ "Data entered will be discarded. Proceed?"
- ☒ "This will record that the patient currently takes no medication."
- ☒ "Ready to delete this message?"
- ☒ "The operator you selected does not have prescription signing authorization."

Hotkeys and Hotstrings

- ☒ Date/Time stamp
- ☒ WIN-9 90 day Rx conversion
- ☒ WIN-M Msg dot code conversion
- ☒ WIN-D Date GUI

Save Cancel

# Other Resources – LINK Tools

---

- Framingham Cardiac Risk score
- Framingham Stroke Risk score
- BMI Percentiles
- Pediatric BP assessments
- OFC Percentiles
- FRAX
- Gail Breast Cancer

Practice Partner

Patient Records

File Edit Insert View Show Task Reports Window Help

Exit

Park

Dash

Chart

Close

Patient

Letter

Msg

Sched

Progress Notes: TTest, Adam

Adam Ttest

ID: FFH10939 Age: 65 years

Arial

10

B I U

D: 10/07/11 : 08:01am  
T: [Supertemplate](#)  
PV: [«REG»](#) [«RPP»](#) [«LJP»](#) [«BPW»](#) [«AMW»](#) [«AES»](#)  
CC: [«DEL»](#) [«RPP»](#) [«LJP»](#) [«BPW»](#) [«AMW»](#) [«AES»](#)  
[«HM Elsewhere...»](#) [«Insert VERTICALLY\\*»](#)  
[«HM FFHA...»](#) [«Insert ONLY ONE, use QT at bottom fo](#)  
[«HM Refused...»](#) [«Insert VERTICALLY\\*»](#)  
[«HM Postponed...»](#) [«Insert VERTICALLY\\*»](#)  
[«HM Orders...»](#) [«Insert VERTICALLY\\*»](#)  
[«Shared note signature»](#)  
[«\\*\\*\\* Overdue HM: HEP A, Drug Alcohol Couns, Aspirin, HEARING, AAA, Alcohol Misuse Scr, HGB \\*\\*\\*»](#)  
[«LINK: HMIM\PPART\Decision Tools\HMprototype.html?Spiro](#)  
[«LINK: CVR Tool\IM\PPART\Decision Tools\CVRTool\\_FF](#)  
[«day.no.father.YES.no.Yes.»](#)  
[«Tool FRAX»](#)  
[«Consultants»](#)  
[«ZF...»](#)  
  
[«\\*\\*\\*Use the following to update Exercise Record, if needs](#)  
[«Update Exercise»](#)

Subjective:

Patient presents for followup of the following chronic dise  
ADHD [«del»](#)  
Atrial fibrillation [«del»](#)  
Anxiety [«del»](#)  
Asthma [«del»](#)  
CAD [«del»](#)  
colorectal cancer [«del»](#)

Stroke Risk Assessment Tool

Stroke risk calculations are for:

Adam Ttest

Age:	65
Sex:	male
Systolic blood pressure:	123
Treatment for high blood pressure:	Yes <input type="radio"/> No <input type="radio"/>
History of diabetes:	Yes <input type="radio"/> No <input checked="" type="radio"/>
Smoker:	Yes <input type="radio"/> No <input type="radio"/>
History of heart disease:	Yes <input type="radio"/> No <input type="radio"/>
History of atrial fibrillation:	Yes <input type="radio"/> No <input type="radio"/>
History of left ventricular hypertrophy:	Yes <input type="radio"/> No <input checked="" type="radio"/>
10 year risk of stroke:	26%
*Aspirin recommendation:	use aspirin

\*The recommendation on the use of aspirin is based on the potential benefit in the reduction of MI in men and stroke in women. Shared decision making is strongly encouraged with individuals whose risk is close to (either above or below) the estimates of 10-year risk levels. As the potential CVD benefit increases above harms, the recommendation to take aspirin should become stronger.

# Other Resources – EMR Village

The screenshot shows a web browser window with the URL <http://emrvillage.com/index.php>. The browser's address bar and tabs are visible at the top. The website's header features the EMR Village logo and a quote by Cicero: "We were born to unite with our fellow men, and to join in community with the human race." Below the header is a navigation bar with links to Home, Affiliates, Forums, Blogs, Files, Videos, People, Chat, Search, Store, Articles, Sites, and Ads. The main content area is divided into several sections:

- Welcome:** A large banner image of a village with the text "EMR VILLAGE" overlaid. Below the banner is a greeting "Hello, Robert\_Pierce!" and a "Welcome to the EMR Village!" message. The text describes the site as a place where end-users, value-added resellers, and other service providers can interact, network, and carry on with commerce. A note mentions a trial membership and lists examples of features: increased real time communication, blogs, ads, whiteboard capability, video posting, photo posting, and even scheduling events.
- Latest News:** A section titled "A word about the village - click here" with a date of 01.08.2010 and a five-star rating. The text states: "This village is for all of the folks associate".
- PPUD File Sharing News:** A section titled "Practice Partner User Database FILE SHARING" with a "Coming soon!" announcement. The text says: "The ability to go directly from EMR Village to the Practice Partner User Database File Sharing site. Once you are logged on here as a member, you will not have to log-on there!"

The bottom of the browser window shows the Windows taskbar with the Start button and several open applications, including Proglauncher, EMR Village - Google..., Inbox - Outlook Express, and Microsoft PowerPoint...

# FASText

The screenshot displays the FASText 2.8.0 application window. The main search area shows results for the query "vis, influ". The results table lists items with their RTF, Provider, Type, QuickText Name, and Text of FASText Item. A QR code overlay is present on the right side of the window, with the text "Scan the following code to input the text" and an "OK" button. The status bar at the bottom indicates "Search took 5.1 milliseconds".

**FASText 2.8.0**  
File Tools Maintenance Settings Help

vis, influ   6 matches 1

RTF	Prov.	Type	QuickText Name	Text of FASText Item
				<a href="http://www.cdc.gov/vaccines/pubs/vis/downloads/vis-flu.pdf">http://www.cdc.gov/vaccines/pubs/vis/downloads/vis-flu.pdf</a>
				«IMM-FLU-INTFImmunization - Influenza - Intranasal Live»«LINK: VIS Infl
				«P-INFLUENZA»Influenza: «br»Medications: «br»Acetaminophen for fever «br»
				«IMM-FLU (H1N1»Influenza Vaccine (H1N1)«br»«LINK: VIS Influenza  I:\PPART
				«IMM-FLPN11»Influenza Vaccine & Pneumococcal Vaccine «br»«br»Influer
				«IMM-FLU11» Influenza Vaccine «High dose»«br»«LINK: VIS Influenza  I:\P


FASText Items to Add to Clipboard:

RTF	QuickText Name	Text of FASText Item
-----	----------------	----------------------

Filter by Provider:  Choose Provider (3) ▼

Search took 5.1 milliseconds

Scan the following code to input the text



OK

# Tribal Knowledge – Getting the most out of your EHR

---

Questions?