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A TYPICAL PATIENT FLOW

Check-In

1. Login as Receptionist (User name: receptionist, Password: jan200701)

2. Click on Chart center.

3. During check-in the front desk performs the following tasks.
   - Register a new patient - Click Register a New Patient on the left of the Chart Center screen.
   - Add old service records - Click on the link More… and enter the information in Old Service Records.
   - Attach patient’s documents - Click on Patient Documents from the top of the screen.
   - Add a new encounter - Click on New Encounter in the Menu at the top of the Chart. Important information (entered in the registration screen) such as insurance details, copay can be reviewed.

4. Forward the chart to tech/nurse. Click on Forward. Select/verify the status ‘Patient Waiting in Reception’ and select Nurse/Tech from the forward to list.

5. Close the chart (click on Close) and click on Logout. You are now logged out.
**Nurse Workup**

1. Login as MA (Medical Assistant)/Nurse (User name: nurse, Password: jan200701)

2. Open the Patient Chart forwarded from the front desk.

3. The Nurse/MA performs the following tasks.
   - Click on **Clinical forms**.
   - Open **Nurse Notes**
     1. Enter **Vitals, Allergies, Chief complaints**
     2. Click on the **Pre-visit Investigations** tab and enter any labs to be done before visiting the Doctor
     3. Enter **Active Medications**
   - Add **Old services** of the patient if any.

4. Click ‘Save and Close’. You will be back to the patient’s encounter page.

6. **Forward** the chart to Doctor (select the status and forwarding to person)

7. Close the chart and **Logout**.

**Doctor Encounter**

Login as Doctor (User name: alexander, Password: jan200701)

1. Open the patient's chart from Chart center.

2. If any HMR alerts or Disease Management plans have been initiated for a patient, the alerts are displayed on opening the patient chart. A detailed Clinical alerts summary can be viewed by clicking on **HMR(Disease/Preventive Serv. Mgmt.)** at the top of the Patient chart.

3. Review summary of **Past encounters** (if available) by clicking Encounters in
Summary page.

4. Review old documents by clicking Patient Documents on top of the patient chart or from Summary page using Encounter link.

5. Click current encounter tab.

6. Review Vitals, Allergies, Current Medications loaded from Nurses notes.

7. New Clinical forms can be added (Add New Clinical Forms). Patient’s progress notes can be created as leaves Progress notes or as SOAP templates.

8. Open the Progress notes. enter details under each tab - Subjective, History, Physical Exam, ROS, Assessment, Aftercare, Plan and Investigations.

9. Enter Assessment using Dx code picker.

10. Order Labs by clicking on Investigation tab. Referrals can be made through referral tab.

11. Prescribe medications after opening the Prescription page. Drugs can be prescribed either through drug search or shortcuts.

12. Monitor Growth Graph and Vaccination chart in case of pediatric patient.

13. Add Superbill.

14. Click ‘Save and Close’.

15. Forward the chart to MA/Tech.

16. Close the chart and Logout.
Labs & Referral Ordering

1. Login as MA/Nurse
2. Open the Chart from Alert Page
3. Get the Labs performed & attach the results. (The Lab results are forwarded automatically to the Doctor through Alert)
4. Referrals to Labs or Specialists can be done in New Referral (Encounter page) or Referred to (Investigations tab in Nurse notes)
5. Logout
**Labs & Investigations Review**

1. Login as Doctor
2. Open the Chart from *Alert* page
3. Review the labs & change the status of lab tests
4. Add/Change the progress Notes
   - A. Add/modify medications
   - B. Add/modify Assessment and Plan details
5. Verify the Superbill information
6. Forward the chart to Receptionist for checkout
7. Logout.

**Check-Out**

1. Login as Receptionist
2. Open the Chart from Alert Page
3. Take all the printouts (statements, referrals, etc.,)
   - Current Visit Leafs/All Old leafs, documents & Lab results
4. Fax the prescription to Pharmacy & Fax the other leafs
5. Schedule appointments for the follow-up
6. Clicking **Book Appt** displays the Scheduler.
   - Select Doctor
   - Select Time and Patient
   - Edit appointment Details
7. Enter the patient payment information.
8. Checkout the patient.
9. Logout

**Follow-up**

1. Login as Receptionist
2. Select the patient from chart center and open Patient Chart
3. Add New Messages encounter
   Enter the Message and response details
4. Add New External Communication
   Enter the Message and response details
5. Forward the chart to doctor
6. Logout

**Doctor’s final review**

1. Login as Doctor
2. Select the patients under Waiting for Phone message / chart waiting for review
3. Review the Patient chart
4. Change the status of the encounter to Closed using the Edit Encounter tab on top of the Patient chart.
5. Logout.
A TYPICAL PATIENT FLOW

RECEPTIONIST TASK → REGISTER A NEW PATIENT → ADD OLD SERVICE RECORDS

FORWARD TO NURSE/TECH → ADD NEW ENCOUNTER → ATTACH SCAN PAPER/LAB RECORDS

NURSE TASK → CLINICAL FORMS → ADD NURSE NOTES → ADD PRE-VISIT INVESTIGATIONS

FORWARD TO DOCTOR → ADD OLD SERVICES → ADD CURRENT MEDICATIONS

DOCTOR TASK → OPEN HMR → REVIEW PAST ENCOUNTERS → REVIEW SCAN PAPER/LAB RECORDS

OPEN PROGRESS NOTES → ADD NEW CLINICAL FORMS → VITALS ALLEGIES CURRENT MEDICATIONS

SUBJECTIVE → HISTORY → ROS → PHYSICAL EXAM

PRESCRIPTION → INVESTIGATION → PLAN → ASSESSMENT

USE DRUG SEARCH OR SHORT CUTS → ORDER LABS/ADD REFERRALS → AFTER CARE INSTRUCTIONS

USE Dx CODE PICKER

LAB FLOW → FORWARD TO NURSE/TECH

PEDIATRIC PATIENTS → VACCINATION CHART → GROWTH CHART

ADD SUPERBILL → CHECK-OUT
LABS FLOW

- Nurse Task
  - Get Labs/Test Performed & Attach Results
  - Forward to Doctor
- Doctor Task
  - Review the Labs/Test
  - Add/Change the Progress Notes
  - Add/Modify Medications
  - Add/Modify Assessment and Plan
  - Change the Lab Status to Completed

Check-Out
CHECK-OUT

RECEPTIONIST TASK

TAKE ALL PRINTOUTS

STATEMENTS
REFERRALS
CURRENT VISIT LEAFS
ALL OLD LEAFS
SCANS
LAB RESULTS

FAX

PREScriptions TO PHARMACY

OTHER LEAFs

SCHEDULE APPOINTMENTS

SELECT DOCTOR

SELECT TIME

EDIT APPOINTMENT DETAILS

ENTER PAYMENT INFORMATION

CHECK-OUT

LOG OUT

FOLLOW-UP

ADD NEW MESSAGES ENCOUNTER

ENTER MESSAGE AND RESPONSE DETAILS

ADD NEW EXTERNAL COMMUNICATION

FORWARD TO DOCTOR

LOG OUT