

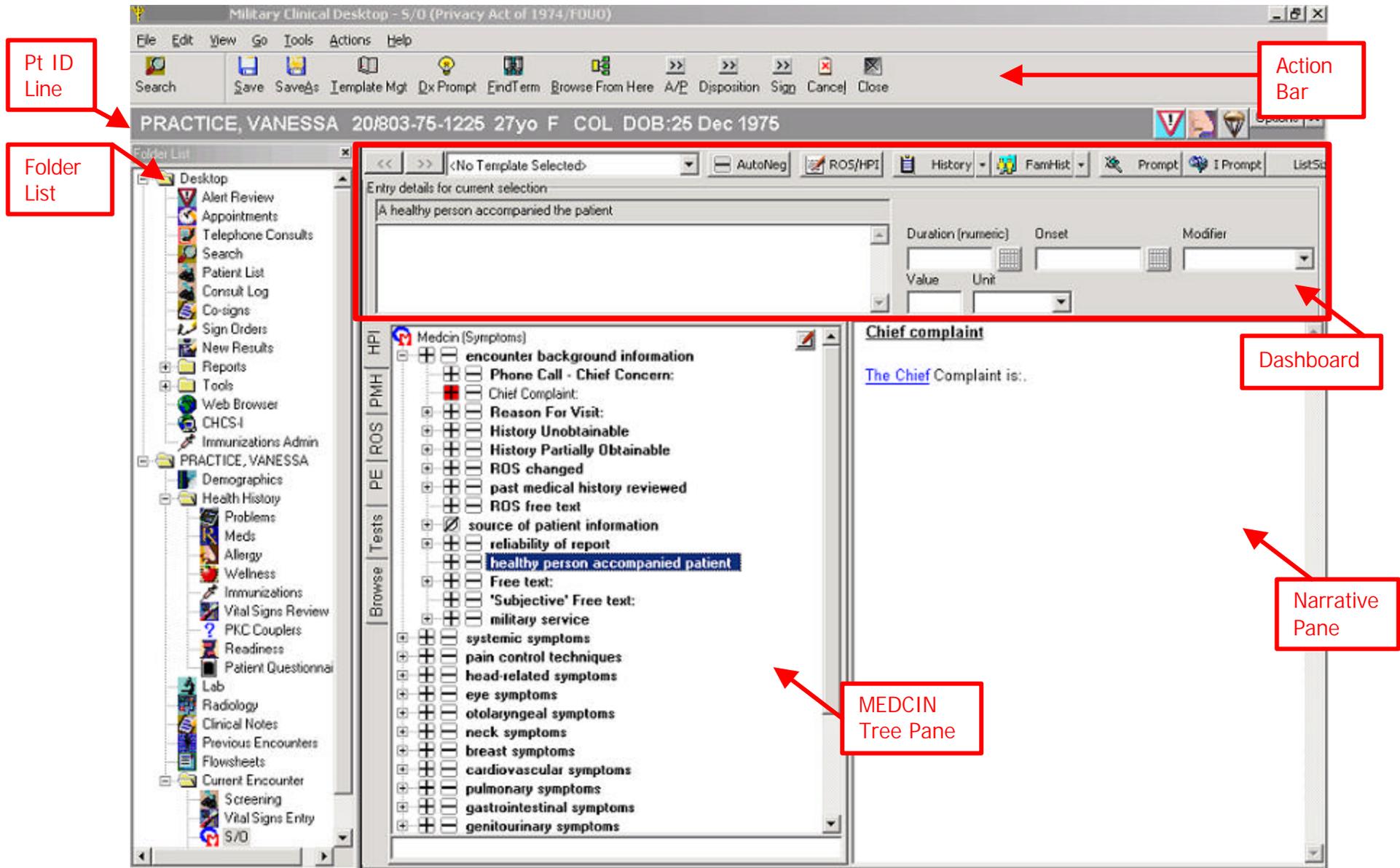
CHCS II Quick Reference Guide

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***The purpose of this document is to provide quick direction for frequent CHCS II tasks. Additional help can be obtained by using the HELP menu in CHCS II or by referencing the Quick Start Cards and Student Manual.



The S/O screen is displayed below. Use this page as a reference when following the steps outlined in this document.



The buttons described below can be found on the Action Bar or on the S/O Dashboard.

A. For HPI and ROS tabs use:

- Find Term- to find a specific term in the MEDCIN tree.
 1. Click HPI tab
 2. Click FIND TERM button on Action Bar.
 3. Type term in search field.
 4. Click the OK button.
- Prompt- to find related terms.
 1. Highlight term for which you wish to find related terms.
 2. Click PROMPT button on dashboard. Example: If fever is highlighted, clicking the PROMPT button will return related terms such as chills and headache.
- DX Prompt- to find terms related to a diagnosis. This will also populate other tabs with related terms.
 1. Click the DX PROMPT button on Action Bar
 2. Type diagnosis
- ROS/HPI- to 'flip' HPI terms to ROS and visa versa.

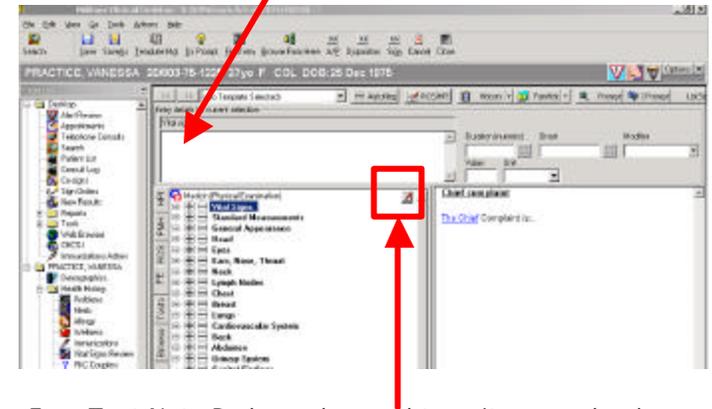
B. For PMH tab use:

- Medical, Social, Surgical and Family History anchors- used when the exact PMH term is not in template. Example: If a pt reports history of appendectomy and the term is not built into the template, the surgical 'anchor' can be used, with appendectomy typed into the free text. To add anchors to a note or to template:
 1. Click the PMH tab
 2. Select Family Medical History term
 3. Select Social History term
 4. Expand Past Medical History and select medical term.
 5. Then, select surgical/procedural term.
- History button and FamHist button- used to toggle terms from pt history to family history as needed.
 1. Select a term on PMH tab
 2. Click the FAMHIST button on dashboard to switch to family history or HISTORY button to switch to pt history.

Note: Drop down arrows beside each button can also be used to specify type of pt history or family history.

C. For PE tab use:

- Browse From Here- Can be used when you need to find a PE term that is not on your template.
 1. Select term on PE tab that is closest (in anatomy) to the term you wish to add.
 2. Click the BROWSE FROM HERE button on Action Bar.
Example: If nasal discharge is on your template but tympanic membrane is not, select nasal discharge, and then click BROWSE FROM HERE. This opens up the anatomy in the MEDCIN tree where you can expand the ear and find tympanic membrane.
- Free Text – There are two types of free text.
 - Free Text on Dashboard- can be used to add text to selected term.
 1. After selecting any term in MEDCIN tree, click inside the free text term on the dashboard.
 2. After typing needed text, press the ENTER key on your keyboard.

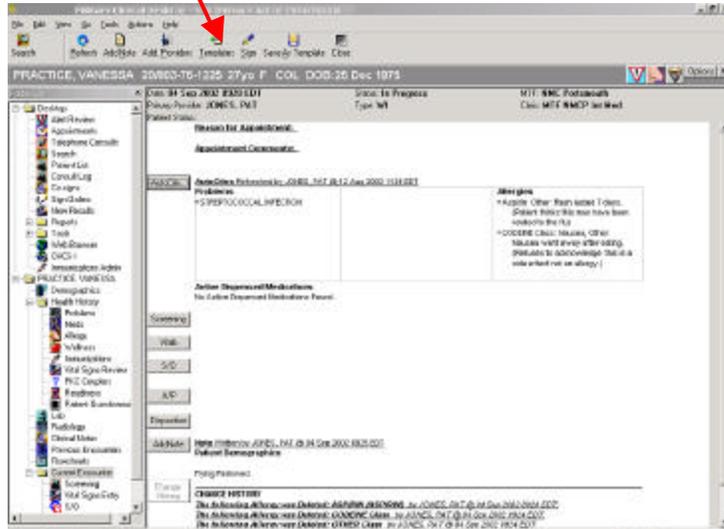


- Free Text Note Pad- can be used to write procedural, educational, counsel or consent text to note.
 1. Click notepad icon  to top right of MEDCIN pane.
 2. After typing needed text, click the SAVE AND CLOSE button.

Access an Encounter Template

Encounter templates house both S/O and A/P information.

1. Start from the **Encounter Note** screen.
2. Click the **TEMPLATES** button on the Action Bar.



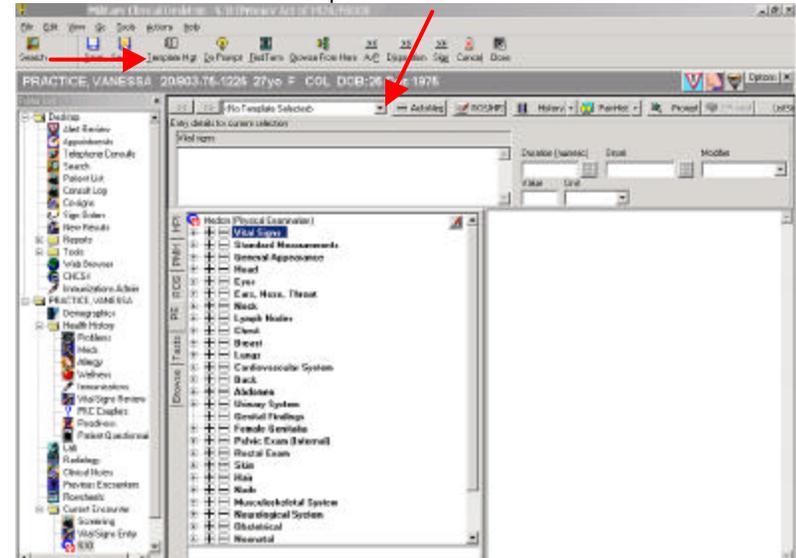
3. If desired template is not displayed, search for the template using the 'Name Search' field.
4. Select the template.
5. Click the **LOAD** button on the Action Bar.

Template is loaded and ready for use in the S/O and A/P modules.

- Encounter templates can house both S/O and A/P information.
- Encounter templates can be created by using a test patient and documenting an encounter that includes the most frequent terms, diagnoses and orders for a specific type of visit. When finished documenting the encounter, return to the encounter screen and click the **SAVE AS TEMPLATE** button. Be sure to save both the S/O (first save prompt) and the Encounter (second save screen).

Access an S/O template or a Procedure Template

1. Start from the **S/O** screen by clicking the S/O button on the encounter.
2. Click the **TEMPLATE MANAGEMENT** button on the Action Bar or use the **TEMPLATE** drop down arrow.



3. If the desired template is not displayed, search for the template using the 'Name Contains' field.
4. Select the template.
5. Click the **LOAD** button on the Action Bar.

Template is loaded and ready for use.

- S/O templates house only the S/O information, including HPI, ROS, PMH and PE.
- Procedure templates can house Consent, Procedure, Educational or Counsel notes typically written repeatedly. For example, a procedural note for removal of sutures is typically the same for each pt. Once the procedural template for removal of sutures is written, it can be accessed by following the steps above.

Use these steps when you wish to:

- Edit a Starter template and make it your own
- Edit someone else's template and make it your own
- Edit your own template

Edit an S/O template

1. Create an appointment for a test pt. REMEMBER TO CHANGE CLINIC TO PMT CLINIC (or test clinic).
2. Select test pt's appt line in Appointments module.
3. Click S/O (under Current Encounter Folder in Folders List). The S/O screen appears.
4. Click TEMPLATES on the Action Bar.
5. If template is not already displayed in list, search for the template, using the 'Name Contains' field, then click FIND NOW.
6. Select the template you wish to edit.
7. Click the EDIT button on the Action Bar. The MEDCIN tree displays on the left side of the screen. The contents of the template display on the right side of the screen.
8. To remove a term from the template:
 - a. Select the term. The term then displays on the left, in the MEDCIN tree pane.
 - b. Click the abnormal or normal box beside the term. (Click whichever box is red or blue to make it white.)
 - c. Look to the right side of your screen at the template contents to ensure the term has been removed.
9. To add a term to the template:
 - a. Use Find Term, Prompt, DX Prompt or Browse from Here (for PE) to find the terms you wish to add.
 - b. Look to the right side of your screen at the template contents to ensure the term has been added.
10. To Save the changes:
 - a. Use the SAVE button if you do not wish to save this template as a separate version.
 - b. Use the SAVE AS button if you wish to keep the original template as a separate version. MAKE SURE YOU USE **SAVE AS** IF YOU ARE EDITING SOMEONE ELSE'S TEMPLATE TO MAKE YOUR OWN.
 - c. Name your template appropriately in the File Name field.

Edit an Encounter Template

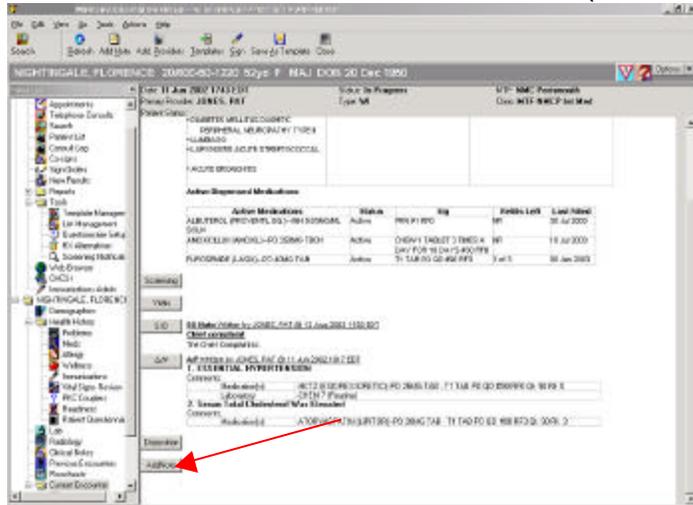
1. Click Template Management (in the Tools Folder).
2. Click the SEARCH button on the Action Bar.
3. Search for the template you wish to edit by using the Template Name field.
4. Select the template you wish to edit.
5. Click the VIEW/EDIT button on the Action Bar.
6. Add or remove elements from each category as needed. For example, to add a procedure:
 - a. Click the ADD button in the Procedure section.
 - b. Search for the procedure you wish to add.
 - c. Select the procedure and click ADD ITEMS button.
 - d. When finished, click the DONE button.
 To remove a procedure:
 - a. Select the procedure you wish to remove.
 - b. Click the REMOVE button.
7. Save or Save As (see step 10 to left) as needed.

*****For details on building a template from scratch, please see Student Manual.**

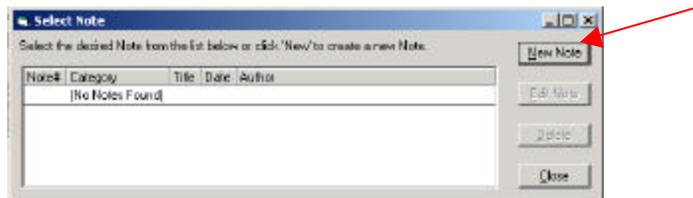
How to Import an Image to an Encounter Note

The following steps can be used after the image has been saved to bitmap file. (The encounter note file does not support jpeg files. However, jpegs can be converted to bitmap files, which are supported by the encounter note. See Edit Image Size for quick instruction.)

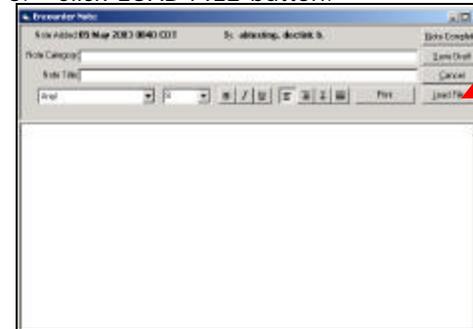
1. Click ADD NOTE button on Encounter screen (see below).



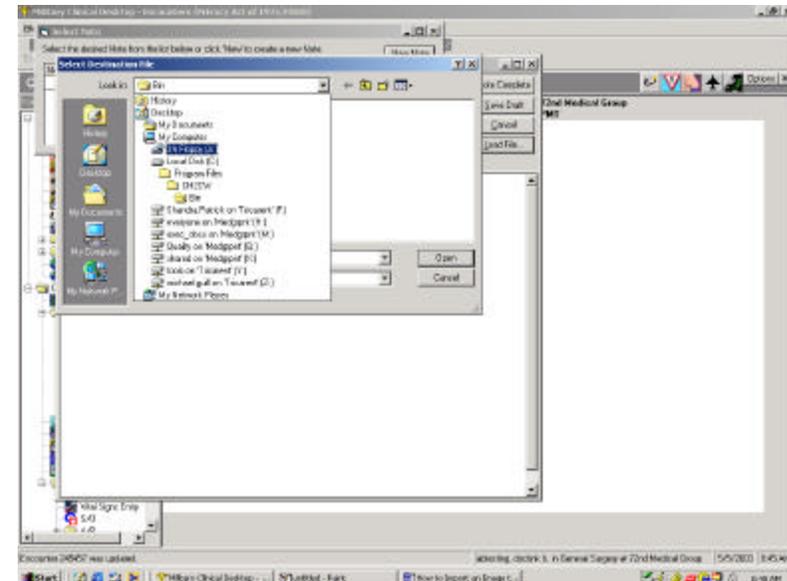
2. Click NEW NOTE button.



3. Click LOAD FILE button.



4. Select file from the location it was saved.

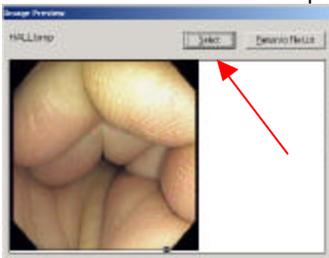


Note: Select Bitmap in Files of Type field.

5. Click the OPEN button.

(Continued on next page)

- Click SELECT button after previewing image.



- Click NOTE COMPLETE button. Image will load to Encounter screen.
 - If your image is larger than you prefer when transferred to note, see next topic.

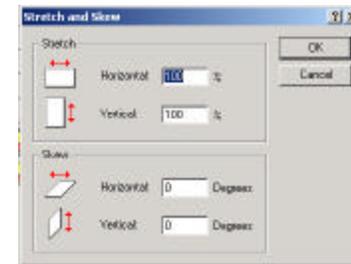
Edit Image Size

To edit the size of an image on the encounter note, you must edit the image size BEFORE importing to the note.

- Open bitmap file (outside CHCS II) in the application, PAINT.
- Click the IMAGE menu on the Menu Bar.

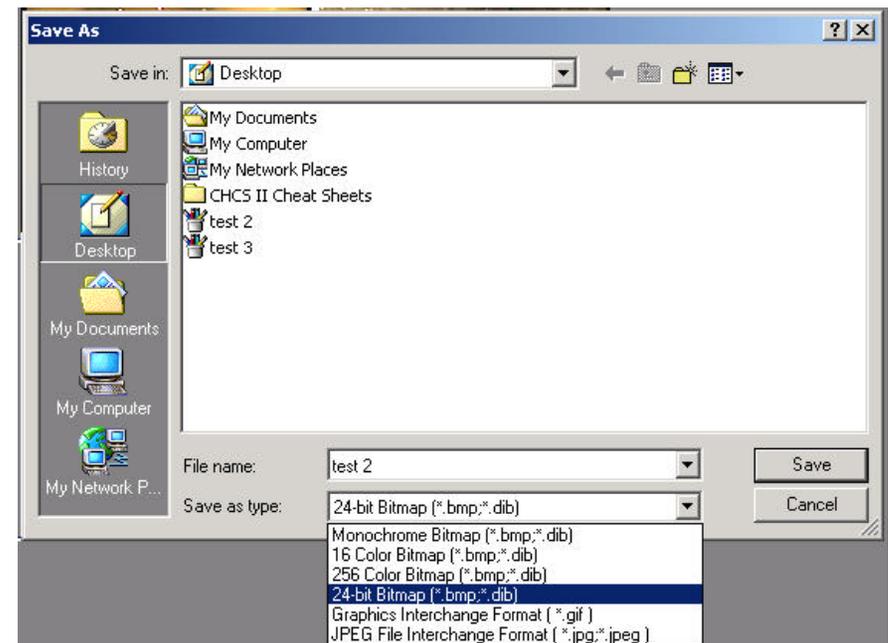


- Select STRETCH/SKEW.
- In the STRETCH section of the window, adjust the size lower than 100%. For example, if the image needs to be half the original size, enter 50 in the HORIZONTAL field and 50 in the VERTICAL field.



- Click the OK button.
- Save the image.

***Note: If this is a jpeg file, you can convert to a bitmap when you save the image by choosing bitmap as the file type on the SAVE window.



Merge Encounter Templates

Templates can be combined to create a completely new template. To merge Encounter Templates:

BEFORE YOU MERGE- view the templates you wish to merge and REMOVE any visit types that are in the template.

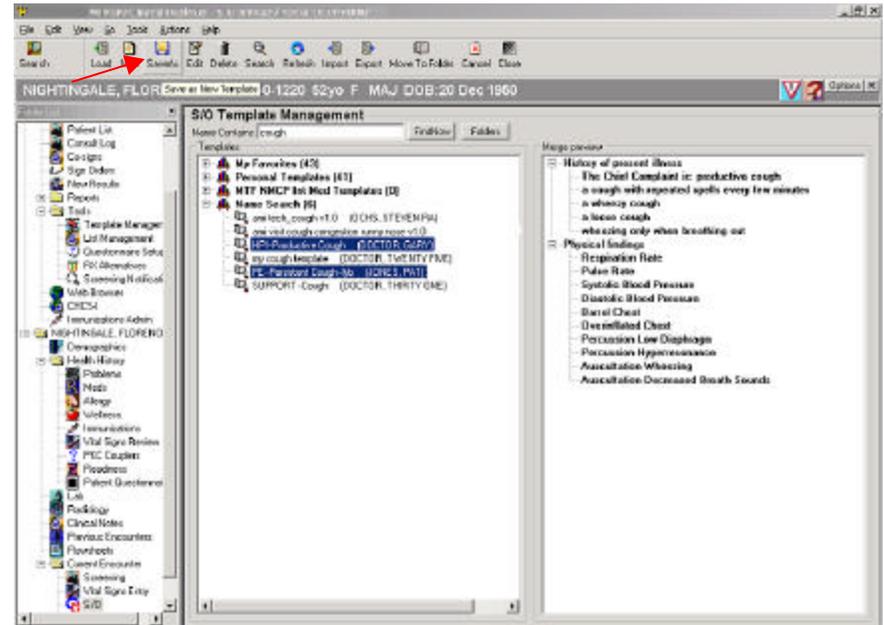
1. Click Template Management (in Tools folder).
2. Search for the templates you wish to merge. The templates display in the Search/Browse tab.
3. Select the templates by pressing the Ctrl key on your keyboard and clicking on each template you want to merge.
4. Click the MERGE button on the Action Bar. The Template Details tab displays the details from the selected templates.
5. Edit the template if necessary.
6. Click SAVE AS on the Action Bar. The Save Encounter Template window opens.
7. Select a template type from the Save in drop-down list.
8. Enter the template name in the Template Name field.
9. Select a Specialty from the drop-down list.
10. Click the checkbox to denote whether the template should be added to the Favorites List or shared with other Clinical Team members.
11. Click SAVE to save the template.

Merge S/O Templates

S/O templates can also be merged. You will need to start with a test patient appointment.

1. Click the S/O module in the Folders list. (The S/O screen appears.)
2. Click the TEMPLATE button on the Action Bar.

3. Select the templates you wish to merge. (Click one template, then hold down CTRL key and select another.) The contents of your new template display on the right side of the screen.



4. Click SAVE AS button on Action Bar.
5. Name the template.
6. Note Save to Favorites and Share checkboxes.
7. Click SAVE button.

The template should now appear in your FAVORITES list if you opted to save to your Favorites folder.

*If you wish to delete or add some terms to the merged template, see *How to Edit a Template*.

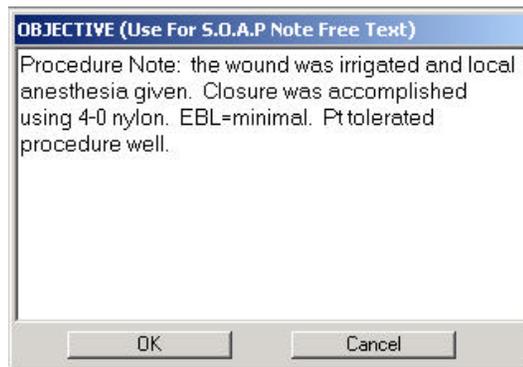
How to Create a Procedure Template

A procedure template can be used for routine **procedure**, **education**, **counsel** and informed **consent** notes. This helps reduce repetitive typing. (This template is sometimes referred to as a free text template.)

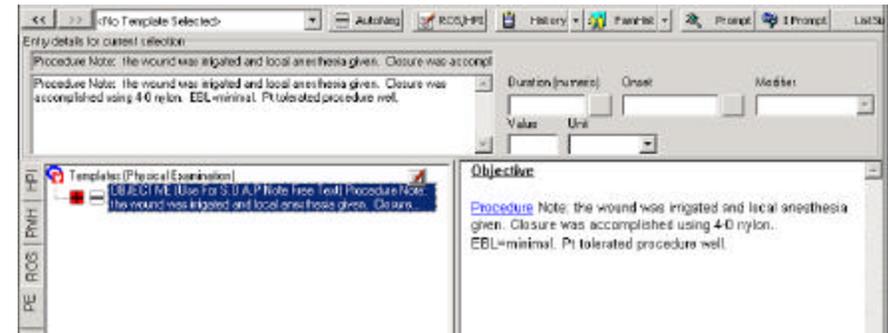
6. Test the use of this template by loading it into an encounter. Remember to look on the PE tab for the procedure note.

To build a Procedure template, **start at the S/O screen:**

1. Click the PE tab and click the Notepad icon to open the free-text window.
2. Enter the first words of the note the category of the template (e.g., Procedure Note: or Education Note:)

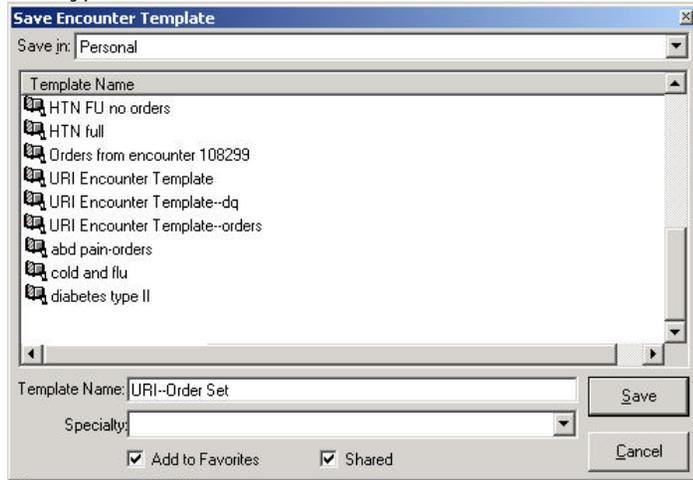
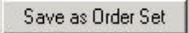


3. Enter the rest of the free-text.
4. Click OK.
The note is added to the Narrative window.
5. Click SAVE AS on the Action Bar and name the template PROC--[name] or EDU--[name] as appropriate. For example: PROC--Laceration--Dr Smith



Create an Order Set

1. Click the A/P button on the Encounter screen.
2. Order any LABS, RADS or MEDS you wish to include in the order set, using SAVE TO QUEUE.
3. Click the ORDER SET tab.
4. Click the CHECKBOX beside each order you wish to include in the template.
5. Click the SAVE AS ORDER SET button.
6. Type a name for the order set in the TEMPLATE NAME field.

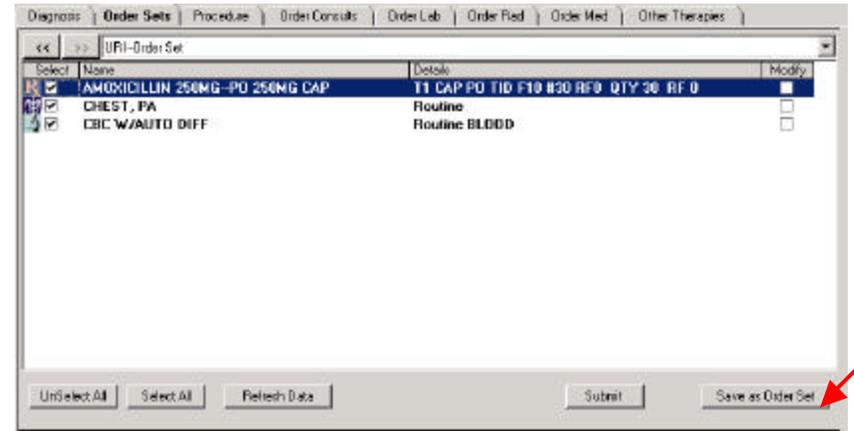


Edit an Order Set

Order set editing works a bit differently than editing normal templates. You must edit your order set from an encounter.

1. Create an appointment for a test pt. REMEMBER TO CHANGE CLINIC TO PMT CLINIC (test clinic).
2. Double-click the pt's appointment line to display the Encounter screen.
3. Click the TEMPLATES button on the Action Bar.
4. If Order Set template you wish to edit is not displayed, use the Name Search field to search for the template.
5. Select template from displayed template list.
6. Click the ADD button.

7. Click the OK button.
8. Click the A/P button on the Encounter screen.
9. Order any LABS, RADS or MEDS you wish to add to the existing order set and click the SAVE TO QUEUE button.
10. Click the ORDER SET tab.
11. Click the CHECKBOX beside each order you wish to include in the edited template.
12. Click the SAVE AS ORDER SET button.



13. Save the template as the same name if you simply wish to edit the template. (You will receive a message confirming that you wish to replace the old version.)
 - If you wish to retain the old version and save as a new order set, rename.
 - If you previously merged the order set with an encounter template, step through the process of merging the templates again to incorporate the changes. (See *How to Merge Templates*)

Note: This is a Microsoft Windows Function and is accessed outside CHCS II.

To print on both sides:

1. Click the START menu.
2. Select SETTINGS>PRINTERS.
3. Right-click on desired printer.
4. Select PRINTER PREFERENCES from the pop up menu.
5. Select PRINT ON BOTH SIDES.
 - If you wish to print Encounter Note on both sides for medical charts, select FLIP PAGES UP.

Print Encounter on Both Sides

