

Ambulatory: Pre-Charting

This tip sheet covers the workflow and benefits of Pre-Charting. Steps and options to review and prepare patients for the day or even tomorrow.

STEPS/OPTIONS FOR PRE-CHARTING



1. **Open** up a chart by double clicking on an appointment.

Schedule

Chart Print AVS Sign Encounter Open Slots Change Prov Events

ACHILLES, FINN-IM ▾ Jan 26, 2023 Filter by Status Total: 5

	Time	Status	Patient	Visit Type	Notes
	8:00 AM	Visit in Progress Checked in: 8:14 AM	Achilles, Franklin-IM 68 y.o. / M	Office Visit	Rash
	9:00 AM	Scheduled Checked in: 8:42 AM	Achilles, Fred-IM 68 y.o. / M	Office Visit	annual exam
	10:00 AM	Rooming in Progress Checked in: 8:23 AM	Achilles, Fatima-IM 36 y.o. / F	Procedure	arthrocentesis
	11:00 AM	Scheduled Checked in: 8:43 AM	Achilles, Fillipe-IM 46 y.o. / M	Office Visit	hypertension
	2:00 PM	Scheduled	Achilles, Christy-IM 23 y.o. / F	Office Visit	new patient

2. DO **NOT SELECT** "START THE VISIT"

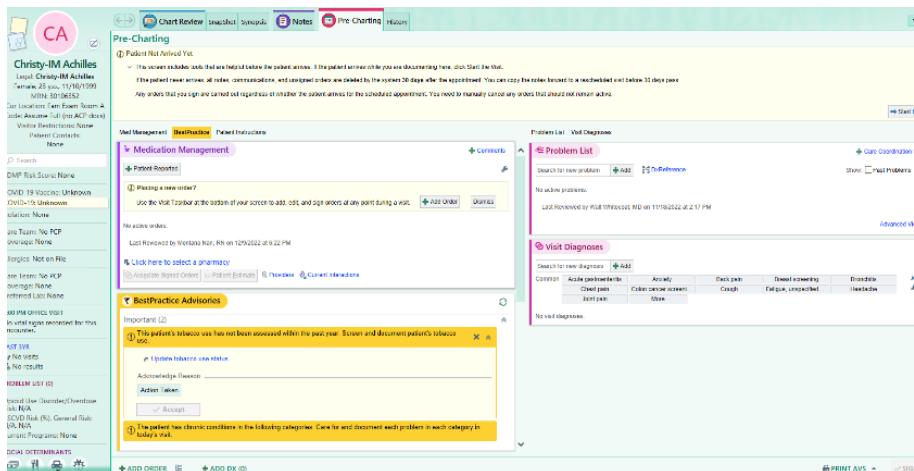


3. **Select** and **Open** Pre-Charting Tab on the Activity Tool bar

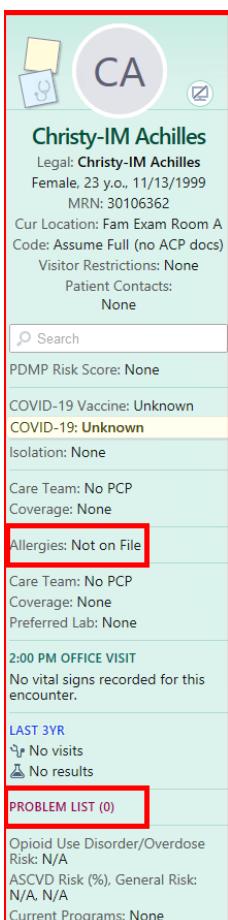
Activity Tool bar

- Pre-Charting
- Chart Review
- SnapShot
- Synopsis
- Notes
- Pre-Charting
- History

Patient Not Arrived Yet

4. Update the problem list, enter visit diagnoses, pend orders (just as it were an active encounter)

5. Utilize the Storyboard for pre-charting.



- Problems can be added to the visit diagnosis list
- Address patient care gap and place orders
- Review allergies, medications, history and problems

6. **Use** Yellow Sticky note from Storyboard.

- Great place to add personal notes about a patient
- Sticky notes are personal and only visible to you
- Use .sticky SmartLink to pull the sticky note into a note
- RWJBH POLICY prevents us from using Blue Sticky Note
- **DO NOT USE BLUE STICKY**

Reviewing

Pre-Charting helps review and prepare your patients ahead of time.



- Queue orders
- Review, allergies, medications, history
- Notes started
- Saves time

Remember



1. If the patient does not show up, your precharted notes are deleted in **30 days**.
 - Pended orders are also deleted from the visit
 - Signed orders will remain
2. If the visit is rescheduled for later that same day, you can copy forward your note to the future encounter.
3. If the visit is rescheduled for 6 weeks later, you must copy the precharted note forward within 30 days or the note will be deleted.

Version #	Purpose of Change	Author	Date of Change
1.0	Initial Creation	J. Federico	1/23/23
		Klaudia Wadolowska	1/26/23