

## 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.

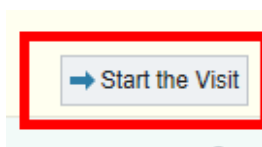
**Schedule**

Chart Print AYS Sign Encounter Open Slots Change Prov Events

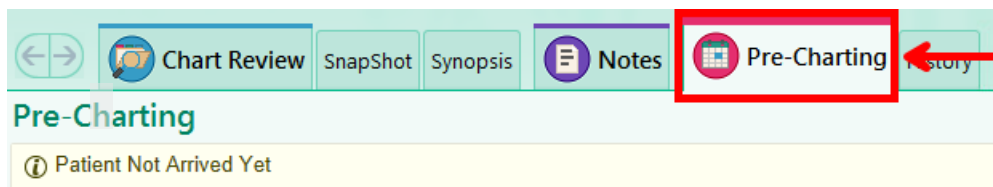
ACHILLES, FINN-IM Jan 26, 2023 Filter by Status Total: 5

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



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

**Pre-Charting**  
 Patient Not Arrived Yet  
 This screen includes tools that are helpful before the patient arrives. If the patient arrives while you are documenting here, click Start the Visit.  
 The patient review screen, all notes, communications, and assigned orders are disabled by the system 30 days after the appointment. You can copy the notes forward to a new scheduled visit below 30 days past.  
 Any orders that you sign are carried out regardless of whether the patient arrives for the scheduled appointment. You need to manually cancel any orders that should not remain active.

**Medication Management**  
 Patient Reports  
 1. Placing a new order?  
 Use the Visit Toolbar at the bottom of your screen to add, edit, and sign orders at any point during a visit.  
 No active orders.  
 Last Reviewed by Montano Ritz, RN on 1/23/2023 at 9:22 PM  
 % Click here to select a pharmacy  
 % Accepting Signed Orders | % Problem Estimates | % Renewal | % Current Interactions

**Problem List**  
 Visit Diagnoses  
 Search for new diagnosis  
 No active problems.  
 Last Reviewed by Ritz, RN on 1/23/2023 at 2:17 PM

**Visit Diagnoses**  
 Search for new diagnosis  
 No visit diagnoses

5. Utilize the Storyboard for pre-charting.

**Christy-IM Achilles**  
 Legal: Christy-IM Achilles  
 Female, 23 y.o., 11/13/1999  
 MRN: 30106362  
 Cur Location: Fam Exam Room A  
 Code: Assume Full (no ACP docs)  
 Visitor Restrictions: None  
 Patient Contacts: None

Search

PDMP Risk Score: None

COVID-19 Vaccine: Unknown  
 COVID-19: Unknown

Isolation: None

Care Team: No PCP  
 Coverage: None

Allergies: Not on File

Care Team: No PCP  
 Coverage: None  
 Preferred Lab: None

2:00 PM OFFICE VISIT  
 No vital signs recorded for this encounter.

LAST 3YR  
 No visits  
 No results

PROBLEM LIST (0)

Opioid Use Disorder/Overdose Risk: N/A  
 ASCVD Risk (%), General Risk: N/A, N/A  
 Current Programs: None

- 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 pre-charted 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 pre-charted 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