SEARCHING FOR A SINGLE PATIENT RECORD

QUICK REFERENCE GUIDE

Applies to:	Anyone who accesses the electronic health record (EHR).
Purpose:	To open a single patient's record within the EHR.

Whenever possible, access patient records from a patient list application, such as:

- Ambulatory Organizer
- Care Compass
- Case Selection
- FirstNet Tracking List
- Patient List
- Perinatal OB Tracking Shell

This reduces the risk of accessing the incorrect patient's record or the incorrect encounter.

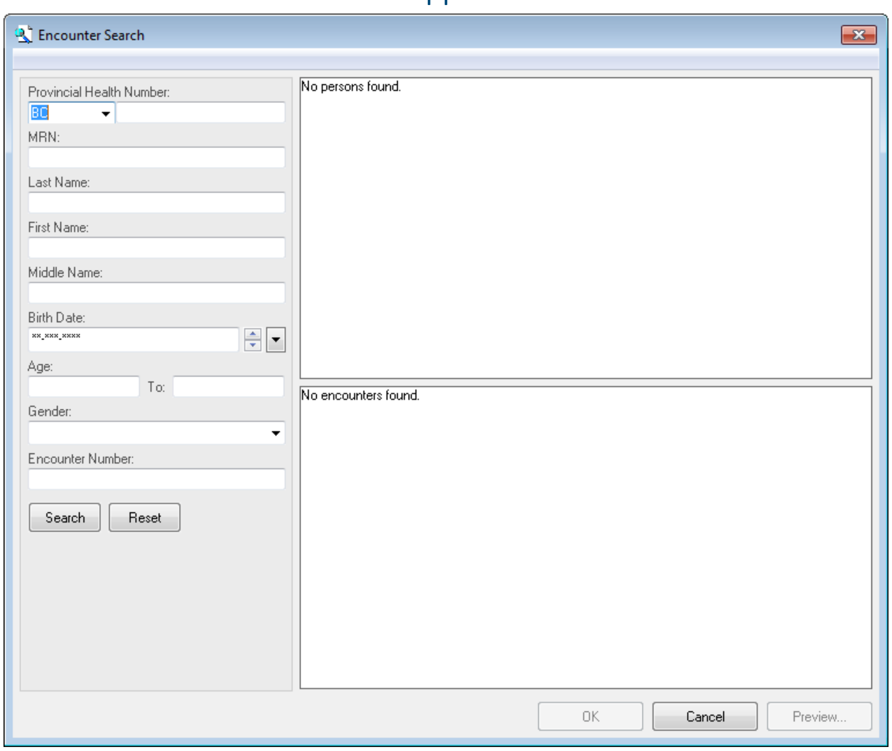
Refer to the following policies and procedures related to patient search:

- *Positive Patient/Client Identification (PPID) at Point of Registration*
- *Positive Patient/Client Identification (PPID) at Point of Care*
- *Positive Patient/Client Encounter Selection*

Opening the Correct Patient Record and Encounter Using Search

1. In the PowerChart toolbar, click the **magnifying glass icon**.

- The **Encounter Search** window appears.

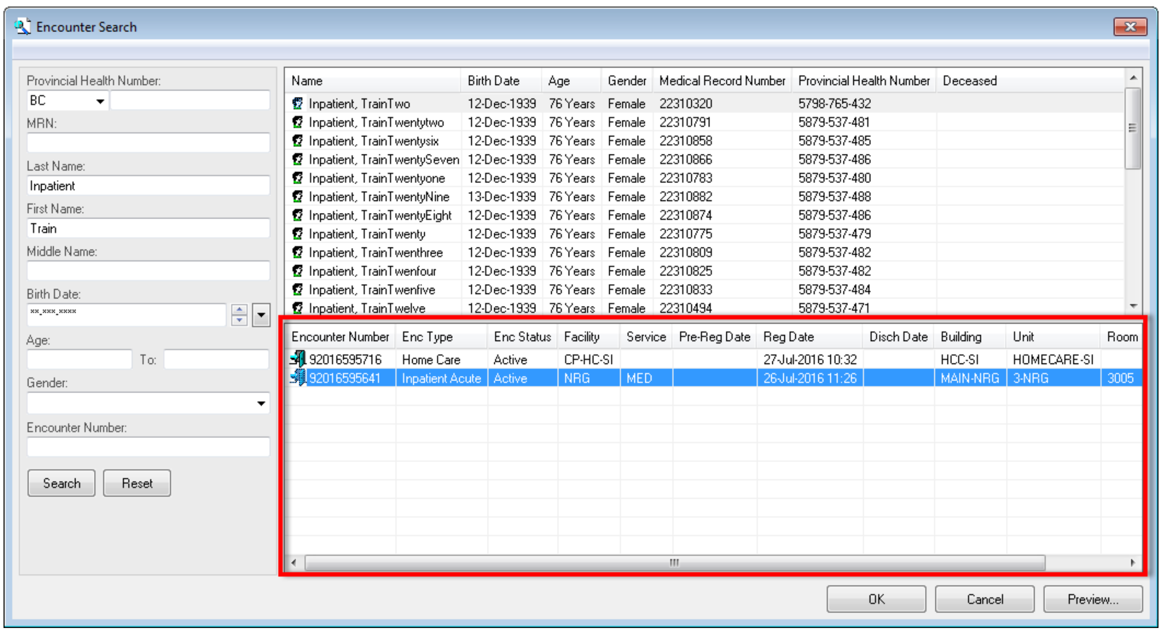


2. Complete the appropriate fields.

3. Click **Search**, or press **Enter** on your keyboard.
   - All search criteria matches are displayed in top pane to the right of the fields (the "person pane").
4. Identify and select the correct patient by confirming a match of at least 3 identifiers (Name, DOB, MRN, PHN, etc.).

Note: If there is more than one positive match, select a patient and click **Preview** to review more patient demographics to confirm correct selection.

- All of the patient's encounters, both active and discharged, display in the bottom-right pane (the "encounter pane").



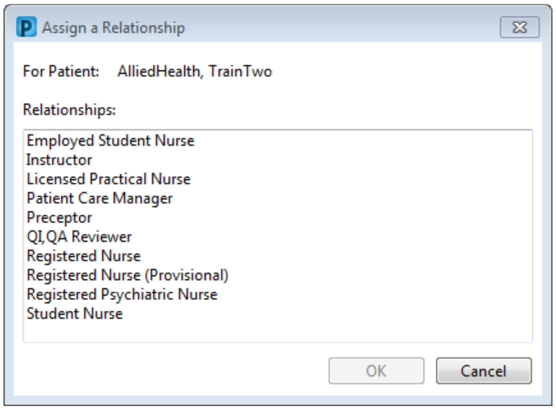
5. Select the encounter that you need to access.

Note: To ensure you are **selecting** the correct encounter, review the encounter details, such as **Encounter Number**, **Location**, **Registration Date**, **Encounter Type**, **Service**, etc.

- The active or most recent encounter may not be displayed first.

Note: Information recorded in a patient encounter may not display across all encounter records. Orders are encounter-specific, so it is crucial to confirm that they are entered in the correct encounter.

6. Click **OK**.
   - If this is the first time you are accessing the record, the **Assign a Relationship** dialog box appears.

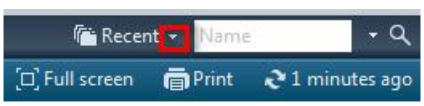


7. Select the **Relationship** that aligns with your reason for accessing the record, then click **OK.**
   - The patient record opens for the selected encounter.
   - Your electronic signature is added to the patient record in the **Lifetime** or **Visit Relationships** list.

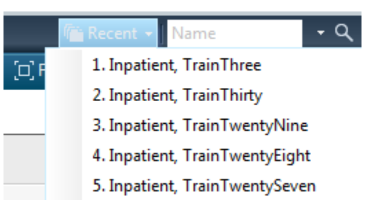
Opening a Recently-Viewed Patient Record and Encounter

The last five patient records that you accessed can be quickly re-opened.

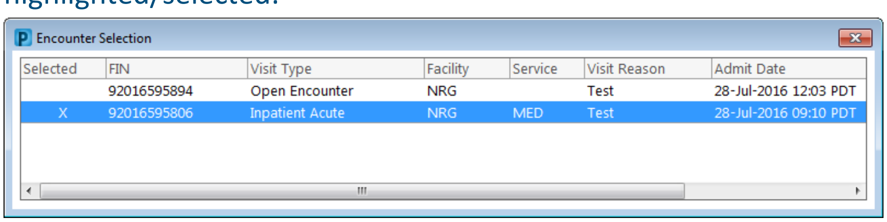
1. On the PowerChart toolbar, click the **Recent** drop-down arrow.



   - The last five patient records that were accessed appear.



2. Select the patient name for the record you want to open.
   - The **Encounter Selection** dialog box appears; the last encounter that was viewed is highlighted/selected.



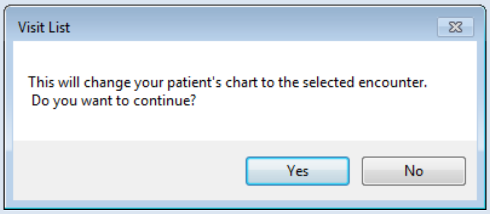
Selected	FIN	Visit Type	Facility	Service	Visit Reason	Admit Date
	92016595894	Open Encounter	NRG		Test	28-Jul-2016 12:03 PDT
X	92016595806	Inpatient Acute	NRG	MED	Test	28-Jul-2016 09:10 PDT

3. Click the **X icon** in the upper-right corner of the dialog box to view the highlighted/selected encounter.
   - The patient record opens to the selected encounter.

Viewing an encounter that is not highlighted/selected

If you need to view an encounter other than the one that is highlighted/selected:

i. In the **Encounter Selection** dialog box, double-click the encounter you want to view.
   - A warning message appears.



ii. Click **Yes**.
   - The patient record opens to the selected encounter.