



Resident ORCA Pocket Guide June 2011

IT Services Help Desk:

206-543-7012 or
mcsos@u.washington.edu

Clinical Applications Education:

<https://emr-edu.uwmedicine.org>

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Section I – Reference Information

How to Get Help

Help Desk: 206 543-7012
mcsos@u.washington.edu

Use the Help Desk to report a problem or request assistance with using clinical applications. Staff triage issues and questions and page the appropriate resource to contact you. If you do not require an immediate response, send email.

Important Websites

Multiple applications are used to manage clinical and non-clinical tasks. Those with a * below can be accessed via Links and Reports in ORCA. The most used sites are:

ORCA PowerChart Web Access

<http://orca.medical.washington.edu>

Amion (Am I On)

<http://amion.com/cgi-bin/ocs?Login=uwmed>

Use to find current on-call schedules

Clinical Toolkit*

<http://www.medical.washington.edu/clinkit>

Icon is available on all medical center desktops at HMC, UWMC and SCCA. Use it for quick links to

- Clinical applications
- Patient Safety Net
- Reference materials
- Other helpful websites for managing employee and student information.

① *Place the Clinical Toolkit as a shortcut on your home computer for use when you are on call.*

Communications Toolkit*

<http://depts.washington.edu/comtools/>

MINDscape Web Access*

<http://mindscape.mcis.washington.edu>

My UW*

<http://myuw.washington.edu>

Use to access student and employee services including

- Manage Logins and Passwords
- Manage benefits
- Email vacation settings
- Links to UW and community services, news, weather, etc.

① *Login and password used are the same as email (UWNetID).*

Email (Web): <http://alpine.washington.edu>

UW Residents*

<http://uwresidents.com>

UW House Staff Association site for UW Residents and Fellows

VA CPRS*

<https://vhav20csecure.v20.med.va.gov/citrix/metaframeXP/>

Electronic medical record used at Seattle Veterans Administration Medical Center

Patient Safety Net

<https://psn.medical.washington.edu>

Icon is available on all Medical Center desktops. PSN can be used to report safety slips, gaps, errors and suggestions for improvement.

Section II – Clinical Applications

ORCA PowerChart

- ① *When using web access, click the text “ORCA PowerChart users can bypass this login...” in the red box to avoid multiple logins.*
- ORCA (Online Record of Clinical Activity) is the primary charting system at HMC, UWMC and SCCA for inpatient and many outpatient services.
- All disciplines document in ORCA and it is the primary site for viewing clinical data of all kinds.
- Order Entry remains on paper.

Section III of this booklet provides detailed instructions on how to find and enter data in ORCA. Further information and training is also available online at: <https://emr-edu.uwmedicine.org>

EpicCare

- Some outpatient clinics at UWMC and HMC use EpicCare as their EMR.
- If you rotate to an EpicCare clinic, you will require additional training to activate your charting privileges. Contact your residency coordinator to schedule.

FirstNet

FirstNet is used in the ED at HMC and UWMC for:

- Patient Tracking (location and tasks).
- Triage.
- Depart Process.
- Electronic Prescription Writing .

It is made by the same vendor as ORCA PowerChart (Cerner) and allows direct access to the patient's ORCA chart.

EasyScript

EasyScript is a function within ORCA used for writing and printing prescriptions in the outpatient setting.

For further information/education regarding FirstNet or EasyScript go to the Clinical Applications Education website.

<https://emr-edu.uwmedicine.org>

MINDscape

MINDscape is primarily a read only application which imports data from other systems (primarily ORCA and EpicCare) and uniquely organizes the information. It has patient information from HMC, UWMC and SCCA.

Use MINDscape for:

Echocardiogram & ECG (EKG) results

1. Search patient.
 2. Click **Cardiology**.
 3. Click **Echocardiography** or **EKG**.
- ① *The report will be scanned into ORCA – usually within 24 hours and can be found in Clinical Notes under Diagnostics-All Other.*

Vascular lab reports

1. Search patient.
 2. At HMC: Click **Vascular**.
 3. At UWMC: Click **Radiology** and look for “US Ext ART” or “US Ext DPLR”.
- ① *The report will be scanned into ORCA – usually within 24 hours and can be found in Clinical Notes under Diagnostics-All Other.*

PACS

PACS workstations display higher resolution radiology images and support more user functionality than the web versions below .

Radiology images are also viewable from:

1. The ORCA PowerChart Toolbar

1. Click HMC or UWMC Radiology Images icon .

2. MINDscape:

1. Click Radiology.
2. Click Centricity .

① *No second login needed*

3. Clinical Toolkit

1. Click HMC or UWMC GE PACS.
2. Enter login and password.

24 Hour PACS Workstation and Account Support:

IT Services Help Desk: 206 543-7012 or
mcsos@u.washington.edu

PACS Help Webpage:
<http://depts.washington.edu/pacshelp>

PACS HMC:
<https://hmcradweb30.medical.washington.edu/ami/html>

PACS UWMC:
<https://uwradweb.medical.washington.edu/ami/html>

Clinical Assignment Sites - non ORCA

Children's Hospital and Regional Medical Center

- Uses Cerner PowerChart (called CIS) for documentation and order entry. Not linked to UWMC and HMC ORCA PowerChart.
- Education staff at Children's provides training.

Seattle Veterans Administration Medical Center

- Uses CPRS, the VA electronic medical record.
- Access from outside VA using the web site.

Section III – The ORCA Organizer

Using the Organizer in ORCA (Log In Page)

There are a number of tools in the Organizer page. Some are the Message Center, Patient List, View Scheduling, Surgery Schedule, Rounding (CORES), and Links and Reports.

The Toolbar

- The Toolbars can be Customized to rearrange icons.
 - Click on the little grey vertical dots and drag the toolbar to make items visible.
 - Click the down arrow to see more menu selections.
- ① *ORCA must be closed via the **EXIT** door icon in order for Toolbar changes to stick.*

Message Center

Complete Saved Notes

1. Double click to open note.
2. Right click on document and select **Modify**.
3. Complete or edit note.
4. Add names for review/signature as needed .
5. Click **Submit** (Add document) or the **Sign/Submit** icon (PowerNotes).
6. Close note pane.

Sign or Review Documents Without Editing

1. Double click documents to sign or review.
2. Click **OK** or **OK and Next** to add your electronic signature.

Refuse Notes or Results from Message Center

1. Double click document/result.
2. In the Action Pane at the bottom, select **Refuse**.
3. Select a reason for refusal from the drop down menu.
4. Click **OK**.

Results to Endorse

- Lab results associated with your name will display in your Message Center under Results.
- Once you have viewed the result, click **OK** or **OK and Next**.

Patient Lists

Patient Lists can be created based on Service (e.g. Cardiology) or Location (e.g. 4E, 4SE). These lists are particularly useful for inpatient providers.

A Custom List can also be created. Patients must be manually added or removed from Custom Lists.

Users can add up to 30 lists, 10 of which can be Custom Lists.

Create a Medical Service List

1. Click on **Patient List** in the Toolbar.
2. Click **List Maintenance** icon (wrench).
3. Click **New** in the Modify Patient List window.
4. Select **Medical Service** as the Patient List Type and click **Next**.
5. Select desired service.
6. Click **Next**.
7. Set the desired filters.
8. To include Pre-Admits select None and None.
8. Click **Finish**.
9. Select the new list in the **Available List** Pane.
10. Click the blue arrow to place it in **Active Lists**.
11. Click **OK**.

Create a Location List

1. Click on **Patient List** in the Toolbar.
2. Click **List Maintenance** icon (wrench).
3. Click **New** in the Modify Patient List window.
4. Select **Location** as the Patient List Type.
5. Double click the desired institution.
6. Double click the desired building.
7. Select the desired unit.
8. Click **Next**.
9. Set the filters to **Not Discharged** and **Donor, Inpatient, Limited Stay and Observation**.
10. Click **Finish**.
11. Select the new list in the **Available List** Pane.
12. Click the blue arrow to place it in **Active Lists**.
13. Click **OK**.

Change Filters on Lists

1. Click on desired list tab.
2. Click on the **Properties** icon (hand and paper) next to the wrench.
3. Change desired filters.
4. Click **OK**.

Create a Custom List

Custom lists are created and maintained by the person who sets up the list. Patients must be manually added and deleted from Custom Lists. They are viewable only by the creator of the list unless the list is set up as a Proxy list.

1. Click on **Patient List** in the Toolbar.
2. Click **List Maintenance** icon (wrench).
3. Click **New**.
4. Select **Custom List** and click **Next**.
5. Name the list and click **Next**.
6. Set the desired filters (usually None and None).
7. Click **Finish**.
8. Select the new list in the Available List Pane.
9. Click the blue arrow to place it in Active Lists.
10. Click **OK**.

Add Patient to the Custom List

1. Click on the desired Custom List.
 2. Click **Add Person** icon (person with yellow star.)
 3. Search by MRN or name (clicking the down arrow gives the option to search by name) and select correct patient and correct encounter.
 4. Click **OK**.
- ① *Encounters are not updated on Custom Lists. The chart will always open to this same encounter when opened from a custom list.*

Or

1. Select the patient from another list (e.g. service, location).
 2. Right click and select **Add to a Patient List**.
 3. Select the Custom List where patient name will display.
 4. **Refresh** screen if patient does not display on list.
- ① *Multiple patients can be selected by holding down the Control Key on the Keyboard. They can then be added to the Custom List all at once.*

Remove Patients from the Custom List

1. Select the patient.
2. Click **Remove Patient** icon (person with red star).

View Scheduling

View Scheduling is useful for those working in outpatient clinics.

View the Clinic or Provider Schedule

1. In Resource box, enter the provider or clinic name. Always type HMC or UW before a clinic name, but not before a provider name (e.g. HMC Adult Medicine).
 2. Press **Enter** or click binoculars.
 3. Select the desired resource and click **OK**.
- ① *If your name is not found when attempting to look up your schedule, call the Help Desk and ask to have your schedule added.*

Set a Default Resource

1. Click **Schedule** from the top menu row.
 2. Select **Preferences**.
 3. Select the **Generic** tab.
 4. In the **Default Resource** search for provider or clinic name as above.
 5. Select desired resource and click **OK**.
- ① *Default settings will not be effective until you have logged out of ORCA and logged back in.*

View Weekly or Monthly Schedule

1. Click **Schedule** from the top menu row.
 2. Select **View** and choose day, week or month view.
- ① *Multi day views of large clinics can be very slow to load.*

Other Useful Tools in View Scheduling

- Click on the down arrow after Date to view a different date.
- Click Recent to select previously viewed schedules.
- When opening a patient chart through View Scheduling, the encounter associated with that visit is automatically selected. This ensures that all documentation is connected to the correct encounter.

Rounding (CORES)

Rounding (CORES) is a patient hand-off, rounding, and sign-out tool.

- ① *Patients must be manually added and deleted from lists.*
- 1. Click **Rounding (CORES)**.
- 2. Select the Facility, Service, and Team.
- 3. Click **Go To Patient List**.
- ① *Once the Patient List loads, it will be the Default. The Default can be changed by repeating the steps above.*
- 4. If necessary, use the drop-down filters at the top of the columns to filter the list further.
- 5. Use **Sign Out** (to update **Primary Contact**) and **Update Attending**.
- 6. Update patient information by clicking on the **MRN** from the Rounding patient list.
- ① *A Patient Chart can be opened by clicking the ORCA icon or the words Open Chart.*
- 7. Select **Manage Contacts** from the **More** menu to update team contact information.

- ① *Detailed instruction for using Rounding (CORES) are available by clicking the help icon within the program.*

8. Select **My Preferences** from the **More** menu to set list preferences and enter pager information.
 9. Select **Team Preferences** from the **More** menu to set up team text paging.
 10. Click **Sign Out** to record handoff.
- ① *Help icons are located throughout Rounding to provide information about how to use features in Rounding.*

Update Long Term Problems

Long-term problems entered in Rounding (CORES) will display in ORCA.

1. Click on the **MRN** on the Rounding patient list.
2. In the Long-Term Problems section, enter a problem in the search field.
3. Select desired result and select **This Visit, Ongoing**, or **Both**.
4. Long Term Problems can be added in Rounding (CORES) but can only be modified by clicking on the **Diagnoses & Problems** menu item in the patient chart.
5. Click **Save and Exit**.

Enable Text Paging

Rounding (CORES) allows the user to enter a pager that can receive text pages. This is then published in the Chart Summary of ORCA and on the Rounding (CORES) patient list so that other staff can send the primary contact a text page.

1. When prompted with a 'Pager Number Required' message, click **Fix Now**. May also access **My Preferences** under the **More** menu.
 2. The My Preferences page opens.
 3. Enter a 10 digit pager number (no dashes) into the Pager Number field.
 4. Select the appropriate carrier (look on the pager).
 5. Check **Enable Text Paging**.
 6. Click **Save**.
 7. Click **OK** to the verification message.
 8. When the page goes off, enter the 5 digit code into the Verification Number field.
 9. Click **Verify**.
 10. Click **Save**.
- ① *Your contact information will now include a pager icon that will allow other users to send you a text page.*

Links and Reports

There are two Links and Reports pages in ORCA.

1. On the Toolbar.
 2. Within a patient chart on the Menu.
- ① *#1 above is a general page and is not patient specific. #2 above has options specific to the patient chart that is open.*
- Links and Reports offers links to other commonly used applications.
 - Custom Links can be added.
 - Saved PowerNotes are listed on this page.

Medication Reconciliation

1. Open the patient chart.
 2. Click on **Links and Reports** from the Menu.
 3. Locate the Med Recon Reports heading.
 4. Choose the Medication Form that is appropriate.
- ① *Information about the Medication Reconciliation process can be found on the Clinical Applications Education Website and through Pharmacy.*

Section IV - The Patient Chart in ORCA

Opening a Patient Chart

- Patient charts can be opened from a Patient List, Schedule, Message Center or by Patient Search.
- Right click on the patient name to display a menu with options for opening to a specific point in the chart.
- You can have up to 4 patient charts open at the same time.

Search for Patient

1. Enter MRN in the white search box in the upper right corner of the window. Press **Enter** or click the **binoculars** (clicking the down arrow gives the option to search by name).
 2. Select the correct patient in top half of window and correct patient encounter in bottom half of window.
 3. Click **OK** and chart opens.
- ① *Be sure to select the Encounter in which you provided service to the patient. Documentation associated with the correct encounter results in correct billing.*

View Recent Charts

- Click **Recent** to access the 5 most recently viewed charts.

Chart Menu

- The Menu lists all of the sections of the patient chart.
- The Menu can be collapsed or “pinned” open by use of the pushpin icon.

Alerts

Pop ups are set to alert providers about:

- Patient Care Plans (CPLN).
- Workplace Violence Issues/Care Plans (SAFE).
- Transfusion/Blood Product Issues (TRXN).
- Clinical Trial Participants (STUDY).
- MRSA status (MRSA).
- Deceased Alert (DIED).

① *Details about the Alerts can be located by clicking on Alerts/Adv Dir/Code from the menu.*

Clinical Notes

- Clinical Notes contains notes, some scanned documents, and reports.
- “Add” Documents can be written from this location.
- The most recent 250 documents are initially displayed. View more documents by clicking the right facing arrow on the right side of the horizontal, blue bar.


Document Sort

- Use radio buttons on bottom left of screen to sort by Type, Date or Performed by, etc.
- Move quickly from note to note using the green arrows below the sort types.

ORCA/EpicCare Notes

- EpicCare and ORCA notes are visible.
- Click on the Header of a column to sort.

Document Viewer

- PowerNotes can be written from this location.
- Viewing filters can be set by clicking the Ellipsis .
- Single click to view a document from the list.
- Double click to open the note to make corrections or modifications to the note.

IVIEW & PowerNote

- Recommended location for writing PowerNotes.
- MD Review band shows recently charted information and some lab results.
- Checkmarks on the MD Review Navigator pane indicate recent results or charting.
- Items highlighted in the Navigation pane can be viewed automatically on the Flowsheet pane.
- Items that are NOT highlighted in the Navigation pane must be clicked to view.

① *IVIEW was developed for RN charting. Results Review is the best place to view RN charting.*

Epic Web

Some ambulatory clinics use an electronic medical record called **EpicCare**. To view information entered into EpicCare, use **Epic Web** from the ORCA Menu.


1. Click **Epic Web** from the menu.
2. The **Patient SnapShot** opens.
3. View **Allergies, Medications and Immunizations**.

① *Allergies, medications and immunizations entered into EpicCare do not display in the allergies, medications and immunizations sections of ORCA. Always check Epic Web to ensure that complete allergy, medication and Immunization information is entered into ORCA. If there is a discrepancy, contact Pharmacy.*

Results Review, Lab, I&O Results

- Information entered/charts in ORCA flows to these tabs for easy viewing.
- Right click in the blue Search Criteria Bar to change search range.
- Load 500 more results by clicking the right arrow on blue bar.
- The MORE button may light up requiring that you click on it to load more results.
- All Results can take time to load because so much information is displayed.
- Information can be arranged in different ways by clicking the radio buttons above the blue bar. The default is the Table view. Use Group view to see trends, or List view to read longer pieces of information.

Graph Values in Labs or Results Review

1. Select item(s) you wish to graph.
2. Click the graph icon. 

Flowsheets

- Each tab will default to MD Review Sheet or All Results.
- Click the down arrow to select additional Flowsheets, i.e. Pain/Chronic Pain Assessment Sheet.

Search for a Specific Piece of Information:

1. Select **Results Search** from the menu.
2. Type the name of the desired item (it must be called by the "ORCA" name to be searchable, i.e. Peripheral Nerve Catheter).
3. Press **Enter** on keyboard.
4. Most recent results display with link to older results.

I & O Results

- Daily intake, output, net and daily weight.
 - 24 hour, 10 day, 30 day, and length of stay totals.
 - Weight and Height for Medication Calculation, Dubois BSA and Predicted Body Weight.
- ① *IO Review tab is not a reliable tool for tracking medications. Only fluid volumes are displayed, not dose history.*

Summary Pages

Summary Menu items import and organize recent information entered in other areas of the patient chart. Clicking on one of the Summary items is a quick way to find information.

Chart Summary:

Chart Summary has several views available based on clinician setting/workflow. More views may be added over time. Some items that display in Chart Summary are Vitals (last 24 hrs), Labs, Allergies, Active meds, Alerts, Precautions and other recent charting.

- The first time Chart Summary is selected from the Menu a “Set Default” page displays.
- Once selected, the Default page will display first.
- Other views are available for viewing using the underlined links at the top of the summary page.
- Default page can be changed at any time by clicking on **Set Current View as Default** at the top right.

Status Summary

- Reason for admission, Past Medical & Surgical History.
- Legal Next of Kin (always determined by Social Work).
- Precautions, Diet.
- Psych alerts.

Plan Summary

- Discharge planning info from Rehab Therapies, Social Work, Nutrition, Spiritual Care, Nursing and Others.

Alerts/Adv Dir/Code

- Care Plans and Privacy Alerts.
- Precautions.
- Advanced Directive information.
- MRSA status.
- Bed Placement Alerts.


Med Profile

- Current medications are listed for admitted patients.
 - A folder can be opened by clicking on it.
 - Home medications may be listed here.
- ① *Many HMC Clinics use EasyScript as a way to write and print prescriptions. EasyScript training can be found on the Clinical Applications Education Web Site as a Web Based Training Module.*
- ① *Check Epic Web for other home medications.*

Med Admin Sum...

- Review the dosing history of the medications given for a time period.
- Time period can be changed by right clicking the blue banner.
- Medications that were given list dose and time.
- Medications that are overdue are in Red.
- Medications that are due are in Blue.
- Time View is the Default.

To review medications by Therapeutic Class:

1. Click the **blue arrow**  to the left of the Search Criteria Bar .
2. Click the **Therapeutic Class View Band**.

Section V – Writing Notes in ORCA

- There are two ways to write notes in ORCA: **Clinical Note** and **PowerNote**.
- For billing purposes notes must be linked to the correct encounter.
- The correct document **Type** must be selected so that the note is filed in the correct folder in Clinical Notes.

Selecting the Correct Encounter

Opening a patient chart and writing a note for the correct date/time **DOES NOT** automatically select the correct Encounter (visit).

- Always confirm that chart is opened to correct encounter.
- If opening a patient chart by MRN or Name search, single click on the correct Encounter date/location from the bottom 1/2 of the window before opening the chart.
- Check the selected encounter in the colored Demographic Banner to assure chart is opened to desired visit date/location in which service was provided.
- If the Encounter needs to be changed, click **Selected Encounter**, double click the desired encounter, click Yes, and OK.

Selecting the Correct Document Type


When signing either a Clinical Note or PowerNote you will need to choose the correct document type (folder) that displays in Clinical Notes. The correct document type is not automatically selected.

Clinical Notes

Customizing the Document Type List

- The position list of document types is the system default.
 - A customized list can be created to shorten the options and make selection easier.
1. Open patient chart.
 2. Select **Clinical Notes** from the Menu.
 3. From the drop down menu, select **Documents**.
 4. Select **Options** from the drop down list.
 5. Default document type should be **<none>**.
 6. Click (select) the desired type from the Custom Type List and click on the **SINGLE** arrow to move it over to Personal Document Type List.
 7. Click **OK**.
 8. Close the patient chart and reopen it to “set” the changes.

Write a Clinical Note

1. Choose **Clinical Notes** from the Menu.
 2. Click on the **Add** icon. A small square icon with a document symbol and a plus sign, representing the 'Add' function.
 3. Select the correct **Document Type** using down arrow (the folder this note should be filed under in Clinical Notes).
 4. Add a Subject Line (brief description of the note).
 5. Click **Modify** to add names for Sign (co-signature) or CC/Review.
 6. If needed, click on the **Template (Rubber Stamp)** icon to add a template and choose Insert or Replace.
 7. Complete the note, deleting unneeded text.
 8. **Submit** or **Save**.
- ① *Saved Clinical Notes will display in the Message Center Saved Documents folder. They are not visible to anyone except the author and are not part of the medical record until completed and Signed/ Submitted.*
- Smart Templates are preceded by a * and import information from other areas of ORCA.
 - Free text notes can be written in Add Document.
 - More than one template selection can be added to a note (place the cursor where the template should be inserted).

- Choosing Submit means Signing the document.
- The F3 key on the Keyboard can be used to move through the underscores on the Template.

Modify Clinical Notes

- Once submitted, a note can be only be edited while it is in preliminary status. Once it has been cosigned by an attending, modifications will be limited to addendums and strike-through.
 - Notes that are Preliminary (not Final) can be fully modified.
 - Notes with the header *Final Report* can only have an addendum added.
1. Open the note in Clinical Notes.
 2. Right click anywhere inside the note and select **Modify** from the drop down list.
 3. If the note is preliminary: change note as needed.
 4. If the note is final: highlight incorrect text and click the **Strike Through Selected Text icon** (strike through will show in final document). Write an addendum at the end of note (an addendum must be added before signing).
 5. Additional providers can be added to receive the note by selecting the **Modify** button.
 6. **Submit** or **Save**.

PowerNote

PowerNote is a note with a template that guides documentation.

Customizing the Document Type List

- When signing a PowerNote the complete list of Document Types is available.
- A customized list can be created to shorten the options to make selection easier.
- Signed PowerNotes are found in Clinical Notes.
 1. Open patient chart.
 2. Select **IVIEW & PowerNote** from the Menu.
 3. Click the **yellow folder icon**.
 4. Click **Encounter Pathway**.
 5. Click the **binoculars** icon.
 6. Double click on any note in the list.
 7. On the Toolbar at the top of the screen, select **View**.
 8. Select **Customize** from the drop down list.
 9. Select the **Document Types** tab.
 7. Uncheck Display last document type used as default.
 8. Default Note Type should be **<None>**.

9. Default List Type should be **Personal Note Type List**.
10. Click on the name of the desired note from the Custom Type list and click on the **SINGLE** arrow to move it over to Personal Document Type List.
11. Click **OK**.

Close the Current PowerNote

1. From the top Toolbar, select **Documentation**.
2. Select **Close Note** from the drop down list.

PowerNote Catalog

Use the Catalog to Locate Templates designed for specific Services.

1. Open patient chart.
2. Select **IVIEW & PowerNote** from the Menu.
3. Click the **yellow folder icon** (Open Note).
4. Choose the **Catalog** tab.
5. Click the Down Arrow in the search box after Catalog.
6. Select the desired Service.
7. Select the desired PowerNote.
8. Select **OK**.

① *Frequently used notes can be added to favorites.*


Write a PowerNote

1. Choose **IVIEW & PowerNote** from the Menu.
2. Open a PowerNote by clicking the **yellow folder** icon (Open Note).
3. In the **Encounter Pathway tab**, search for the desired note template.
4. Double click on the desired note template to open.
 - To see all notes leave **Search**: blank and click binoculars.
 - To add the template to the Favorites tab, single click on the note and click Add to Favorites. Note template is then stored in the Favorites tab.
 - All signed or saved PowerNotes can be found in the Existing tab.
 - Saved PowerNotes notes show as Active and can be corrected or completed from this location.
 - A list of Saved PowerNotes can be found in the Links and Reports page or the Message Center.


Using the PowerNote Template

- The Navigator pane on the left shows the note sections.
 - The View pane on the right is where the note is written.
 - When <Hide Structure> or <Show Structure> is available in a section of the note, template items are available.
 - When <Hide Structure> or <Show Structure> is not available in a section of the note, free text can be entered.
 - Clicking on text will select it and **BOLD** the words. Bolded words will show in the note.
 - If bold text is clicked again it unbolds and is removed.
- ① *In some cases a 2nd click puts a line through a symptom. Final note will then read “denies symptom.” 3rd click clears the text.*
- Clicking on Free Text or Other opens a free text box.
 - Free Text/Other boxes can be enlarged by dragging a corner. This new size will be the new default for that box.
 - If an item or text is accidentally erased, click on the Undo icon to get the text back.
 - To preview the note, click the Contributor View icon on the right upper corner of the note screen.
 - To continue charting, click the icon again.

Save a PowerNote

- Click the **Save** icon  to save note for later completion.
- ① *Saved PowerNotes are visible only to the author and are not part of the medical record until completed and signed.*


Sign a PowerNote

1. Click the **Sign** icon  to sign a PowerNote .
2. Choose the correct Document Type (folder in Clinical Notes).
3. Check **Request Endorsement** to forward the note for Signature or Review.
4. Click under the word **Endorser** to search names.
5. Click under the word **Type** to select Sign or Review.
6. Click **OK** to sign the note.

Find a Saved PowerNote

- Saved PowerNotes can be found in the Message Center.
- In IVIEW, saved PowerNotes can be found in the Existing tab and show as Active.

Complete a Saved PowerNote

1. Click on **VIEW & PowerNote** from the Menu.
2. Click the **yellow folder** icon (Open Note) .
3. Click **Existing** tab.
4. Limit viewable notes by clicking **Unsigned notes only** or **My notes only** (Unsigned notes will have Active status).
5. Choose the **All Encounters** button if the note is not visible.
6. Double click note to open the note for completion.
7. Complete or edit note using the template.
8. Click the **sign** icon. 
9. Add names for review/signature as needed.
10. Click **OK**.

Complete a Saved PowerNote from the Message Center

1. Click on the **Message Center** button.
2. Double click on the saved note.
3. Right click on document and select **Modify**.
4. Complete or edit note using the template.
5. Sign/add endorser as above.
6. Close note pane.


Correct a Signed PowerNote

1. Open the patient chart.
2. Click on **IVIEW & PowerNote** from the Menu.
3. Click the **yellow folder** icon (Open Note).
4. Click **Existing tab**.
5. Limit viewable notes by clicking **My notes only**.
- ① *Choose the All Encounters button if the note is not visible.*
6. Click the **Make Correction** button.
7. **Sign**.
- ① *Signed notes can also be Corrected from Clinical Notes. Right click in the note and choose Correct. Selecting Modify will allow only an addendum to be added.*
- ① *Once co-signed by an attending, notes can no longer be corrected, only a*

Results Letter—Mail to Patient

- Use PowerNote or Clinical Note to create a letter to the patient.
- Labs can be easily inserted into a PowerNote.
- When the document type *Letter - Mail to Patient* is used, the letter will be automatically mailed to the patient by Health Information Management on letterhead.

PowerNote

1. Open PowerNote and search for the **Patient. Results Letter** template in the **Encounter Pathway tab**.
2. An outline will display with a template.
3. Click on each section of the outline to add specific information.
4. Change document type to:
Letter – Mail to Patient.
5. Click on **Sign**  icon.

Clinical Note

1. Begin a Clinical Note.
2. Choose **Letter Mail to Patient** as the Type
3. Write the letter or use AutoText to insert a template for the note.
- Click on the Rubber Stamp (template) icon to view other options.

Auto Text


Auto Text allows the user to easily add commonly used text of any length into a Clinical Note or a PowerNote.

- ① *Auto Text can be added to a Clinical Note or to a PowerNote wherever free text can be added to the note.*

Create an Auto Text—Method 1

1. Open patient chart.
 2. Select **Clinical Notes** from the menu.
 3. Begin a new document.
 4. Enter desired text.
 5. Highlight text, then right click and select **Save As Auto Text**.
 6. In the Abbreviation field, start every Auto Text with a "." (period) and then add a short phrase for identification of the template.
 7. In the Description field, enter a more complete description of your Auto Text.
- ① *Before clicking Save, make sure that the Auto Text is complete and that you have added all of the information that you need.*
8. Click **Save**.

Create an Auto Text—Method 2

1. Open patient chart.
2. Begin a new document.
3. Click the **Manage Auto Text** icon. 
- ① *The Manage Auto Text icon can be found in an Add Document or in a Free Text or Other box in PowerNote.*
4. Click the **New phrase** icon in the Manage Auto Text pop up box.
5. In the Abbreviation field, start every Auto Text with a “.” (period) and then add a short phrase for identification.
6. In the Description field, enter a more complete description of your Auto Text.
7. Click the **Add text** icon or **Add Template** icon.
8. In the text box that opens, enter the template/text you would like to insert into your notes. You can make the Auto Text as long as you want.
9. Click **Save**.
10. **Close**.

Insert a Template into an Auto Text Template

A template can be inserted into an Auto Text to add current information from the patient's chart. Templates display under the Rubber Stamp icon.

1. After creating Auto Text, click the **Add Template** icon .
2. Select a template from the list .
3. Click **OK**.
- ① *Use the Up and Down arrows to arrange the text phrases and templates.*
4. Click **Save**.

Insert an Auto Text into a Note

1. Open patient chart.
2. Begin a new note.
- ① *Auto Text can be added to a Clinical Note or to a PowerNote wherever free text can be added to the note.*
3. Press the period key on your keyboard.
4. Double-click on the name of the desired Auto Text.
5. Your selected Auto Text will be entered into the note.

Modify or Delete Auto Text

Information about modifying or deleting Auto Text can be found on the Clinical Applications Education Web Site at <https://emr-edu.uwmedicine.org>

Section VI - Documentation Guidelines

Dictation

There is an institution wide mandate to decrease dictation costs. Please follow these guidelines:

- OK to dictate Complex Discharge Summaries and Operative Reports.
 - Use ORCA PowerChart note entry for all notes on non-complicated patients.
 - Check with the Attending or Chief Resident for Dictation standards for your Service.
 - Clear, concise dictation is appreciated.
 - Minimize background noise.
- ① *Loud noises such as coughing can be painful to the person transcribing.*

Note Writing Guidelines

Co-signature Requirements

- Requirements may differ from service to service – check with the Attending or Chief Resident for your Service.

Discharge Summaries – 5 Critical C's

1. Correct Encounter and Service Date – the chart is not complete if the discharge summary is not attached to the specific encounter.
2. Correct Document Type – always use Discharge Summary.
3. Co-Signature – Add the appropriate Attending as a co-signer on the document .
4. CC Recipients – Called Reviewers in ORCA. Always add the referring physician as a Reviewer.
5. Complete – Discharge summaries as soon as possible. Unsigned discharge summaries cannot be viewed by other providers. Discharge summary should be available *in the chart* within 48 hours.

Consequences If Not Followed:

- Attending will receive Anticipated Document notices in Message Center stating that he/she has incomplete patient records.
- Billing and release of information may be delayed.
- Resident and attending will be contacted by Health Information Management (HIM). If not promptly corrected, medical director will be notified and privileges may be suspended.

Required Elements of the Discharge Summary

1. Date of admission.
 2. Date of discharge.
 3. Service.
 4. Admission diagnosis (no abbreviations).
 5. Final & secondary diagnoses (no abbreviations).
 6. List consults requested.
 7. Operation/surgeries or procedures.
 8. Reason for admission and brief history.
 9. Allergies.
 10. Physical exam at discharge.
 11. Labs at discharge.
 12. Radiology studies.
 13. Hospital course by problem.
 14. Disposition and/or follow-up required.
 15. Medications at discharge.
 16. Action Plan.
 17. Copies to referring providers.
- ① *Interim Summaries must be copied and pasted into a Discharge Summary note and updated.*

Errors in Notes

Report the following critical note errors to

IT Services Help Desk:

Phone: 543-7012

E-mail: mcsos@u.washington.edu

- Note created for incorrect patient.
- Note created using incorrect encounter.
- Note contains incorrect service date.
- Incorrect document type was used.

Provide detailed information (e.g. patient name, MRN, date of service, specific nature of problem)

Health Information Management (HIM) staff will do one of the following:

- Correct the existing note (for simple notes).
- In-error the note and re-enter it correctly. In-errored notes are marked in ORCA with an IN ERROR status, and are not removed/deleted from the chart but may not be visible depending on user settings.
- Contact and work with the user if necessary.