

**Level 1** – Level one of *Nursing Documentation Using Electronic Health Records* includes chapters 1, 2, 3, and 4. These early chapters deal with the history and development of the EHR and trace the impact of standards development, certification, and the government's involvement with the EHR in the healthcare community. The theory, purpose, and types of nursing documentation are discussed with a focus on the MAR and the relevance of NIC and NOC. In Level one students are introduced to SpringCharts™ and learn essential documentation on an industry standard EHR program. They are introduced to the Nurse Note and are given hands-on practice in documenting chief complaints, vitals, and physical assessment on ten different disease case studies.

## Chapter 3 – Essential Documentaion

Chapter 3 begins the hands-on training in nursing documentation on the industry standard SpringCharts EHR program. The individual program must be either downloaded from the McGraw-Hill Online Learning Center or the networked program must be installed by the IT department before students start this chapter. Students learn to set up their user preferences and create 10 patients with different disease processes from which they document findings for the remainder of the course. Chapter 3 also introduces the students to the electronic chart, specifically learning about the Face sheet and the Care Tree.

## Learning Outcomes

*After completing Chapter 3, the students will be able to:*

- 3.1** Describe the basic features of SpringCharts EHR.
- 3.2** Describe the history of SpringCharts EHR.
- 3.3** Apply user preferences.
- 3.4** Carry out setting up and editing patients.
- 3.5** Use pop-up text.
- 3.6** Explain the concept of an electronic chart.
- 3.7** Use the electronic chart's face sheet.
- 3.8** Use the SpringCharts EHR care tree.

## Key Terms & Definitions

*Terms and abbreviations encountered in Chapter 3:*

**Care Tree:** List of categories in the EHR that includes encounters (progress notes), tests, excuse notes, letters, reports, and other current records.

**Category Preferences:** Table on the SpringCharts server that enables the clinic administrator to create customized predetermined lists of healthcare data that are displayed in SpringCharts on each computer to enable rapid selection of items to build the face sheet.

**Chart Alert:** Text that appears in red above the Encounters category on the EHR's care tree to notify the user of important patient information.

**Encounters:** A tab in the SpringCharts Care Tree that stores many documents created from encounters with the patient.

**Face Sheet:** Portion of the EHR that contains more constant patient information such as allergies, problem list, past health history (PMHX), etc.

**FMHX:** Family Medical History. SpringCharts category for recording family health history in the patient's Face Sheet.

**Graphic User Interface:** Software program screen that can display icons, sub-windows, text fields, and menus designed to standardize and simplify the use of the computer program by typing in fields and by using a mouse to manipulate text and images.

**Imperial Units:** Having to do with weights and measures that conform to standards legally established in Great Britain and widely used in the United States.

**Metric Units:** Having to do with weights and measures relating to the metric system, also known as the International System of Units. Commonly used in healthcare measurement.

**OV:** Office Visit. Used in SpringCharts to designate the graphic user interface window in which the encounter note is created.

**PMHX Past Medical History:** SpringCharts category for recording past health history in the patient's face sheet.

**PMS:** Practice Management Software. (PMS) A software program that manages financial transactions, billing of insurance claims, patient statements, etc.

**User Preferences:** Setup window in SpringCharts that enables each user to preset the default practice name, provider name, schedule, and various other features that are displayed when the user logs into the program.

## Presentation Outline

### Lo 3.1 SpringCharts Features

Power Point Slides: 1, 2, 3, 4.

### Lo 3.2 A Brief History

Power Point Slides: 5, 6

### Concept Checkup 3.1

- A. List three features of SpringCharts EHR that promote its use as the instructional software for this textbook.

**Answer:**

1. Ease of use
2. Richness in features
3. Customizable for multiple healthcare specialties

**Rationale:** The CCHIT-certified SpringCharts EHR™ software has been chosen as the training tool for this textbook because of its ease of use, richness in features, and its ability to be customized to suit a wide range of healthcare specialties. SpringCharts is an international program and is used by over 1,500 physicians and thousands of nurses, medical assistants (MA), nursing assistants (NA) and other healthcare personnel

- B. List three areas in which SpringCharts EHR qualified for ONC certification.

**Answer:**

1. Functionality
2. Interoperability
3. Security

**Rationales:**

Version 10 of SpringCharts EHR was certified with ARRA in 2010 to qualify for financial rebates to physicians under the HITECH ACT for Ambulatory EHRs. That means that SpringCharts EHR has met a comprehensive set of criteria for:

- Functionality—setting features and functions to meet a basic set of requirements.
- Interoperability—establishing basic functionality enabling standards-based data exchange with other sources of healthcare information in future versions of the product.
- Security—ensuring data privacy and robustness to prevent data loss.

### LO 3.3 User Preferences

Power Point Slides: 7, 8, 9.

### Concept Checkup 3.2

- A. What two default options may be selected for reports and letters?

**Answer:** primary provider, practice name

**Rationale:** In the Set User Preferences window, each user sets:

1) The primary provider's name that appears as the default for the user on reports and letters. The list of providers is based upon those set up in the administration panel of the SpringCharts server. 2) The practice name or healthcare facility that defaults for letterheads. Although the provider's and the practice's name are chosen here as "default," they can be changed within the program at the time of creating various letters and reports. A clinic may have several practices set up in various locations but use the same database

for SpringCharts across the Internet. This enables the complete patient health record to be viewed by any of the practices.

- B. When is the Tracker Group option used?

**Answer:** When a facility has multiple locations

**Rationale:** The Tracker Group displays the list of patients in the Patient Tracker window of the Practice View screen. Clinics that have several locations and work from the same patient database over the Internet are able to track patients separately for each location. The various tracker groups are set up in the administrative panel of the SpringCharts server. *Show All* displays all patients in the Patient Tracker window from all locations. If the healthcare facility has only one location, the Tracker Group field is left blank.

- C. When is the Rx Print Attending option used in SpringCharts?

**Answer:** If there are Nurse Practitioners or other support providers at the healthcare facility prescribing medications.

**Rationale:** The selection of a practitioner in the Rx Print Attending field prints this name as the attending provider on the pharmacy prescription forms. Based on state laws, nurse practitioners and other support providers may be required to indicate the attending physician when creating prescriptions.

### Exercise 3.1

#### Setting Your User Preferences

**Note:** If you have not downloaded the SpringCharts program to your computer, please review the front matter of this text for downloading instructions before commencing the following exercise.

1. Double-click on the SpringCharts icon on your desktop.

**Note:** This is the only time you double-click while using SpringCharts. Once the program is opened all functions are activated by a single click of the mouse.

2. SpringCharts is designed to allow each user to select default functions. These preferences adjust when the user logs on. Select the *File* menu on the main window and choose *Preferences > User Preferences*. Set up your preferences based on the items selected in the *Set User Preferences* window (shown in Figure 3.1).
3. Click the [Save] button to save your material.

Set User Preferences

User Name: demo

Preferences 1 | Preferences 2 | Password | Signature

Your Provider: John O. Smith, R.N.

Your Practice: Suburban Medical Group, 101 Elm Street

Appt Schedule:

Auto Log Off (min): never

Tracker Group

OV Form View: ☒ Large Screen  
☐ Classic

Search Mode: ☐ Rapid Select  
☒ Standard Select

PopUp Text Insert: ☐ Insert at End  
☒ Insert at Cursor

Measurements ☐ Use Metric (kg,cm)  
☒ Use Imperial (lbs,in)

Time ☒ Use 12 Hour Time  
☐ Use 24 Hour Time

Font ☒ Large Font  
☐ Small Font

Rx Print Attending None

Save Cancel Help

## LO 3.4 Setting Up and Editing Patients

Power Point Slides: 10, 11

### Exercise 3.2

#### Adding a New Patient

1. In the New Patient window of the New menu on the main screen enter yourself as a patient. Note the first name is filled out first. Fill out as much information as you can. The PMS ID field can be left blank. This field automatically populates when patient data are transmitted from a practice management system program. Save the information.

**Note:** Steps 2 and 3 guide you in adding 10 additional patients into SpringCharts for use in the exercises in this text.

2. Once again, open a New Patient window and record the patient's first name as *Diabetes*. **Record your date of birth.** Click the [Copy Patient] button and type your last name (or a portion of it) in the Choose Patient window. Click on the binocular to search. Click on your name. Note the family information that is copied from an existing patient. The new patient should have your last name, address, and home

phone number. You do not need to complete any more information. The program uses the home phone number to link patients together from the same household. Save the information.

**New Patient**

**First Name\*:** Diabetes

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☒ Male ☐ Female

**Marital Status:**

**Employer:**

**Email:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details** **Add**

Name	Role	Edit	Del
------	------	------	-----

**\* Required**  
**+ Required for eRx**

**Previous Updates** **Exempt** **Save** **Cancel** **Copy Patient**

- Repeat step 2 and set up nine more patients. Use the following list of diseases and assign a disease as the patient's first name. For each patient add the first name (disease process), your date of birth, and then copy your own information into the record by accessing the [Copy Patient] button. Patients' First Names: **CHF, Pneumonia, COPD, Fractured Hip, Colon Cancer, Stroke, Cellulitis, Chest Pain, and Bipolar Affective Disorder.**

**New Patient**

**First Name\*:** CHF

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☒ Male ☐ Female

**Marital Status:**

**Employer:**

**Email:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details** **Add**

Name	Role	Edit	Del
------	------	------	-----

**\* Required**  
**+ Required for eRx**


**Previous Updates** **Exempt** **Save** **Cancel** **Copy Patient**

**New Patient**

**First Name\*:** Pneumonia

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949 

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☒ Male ☐ Female

**Marital Status:**

**Employer:**

**E-Mail:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details** Add

Name	Role	Edit	Del

**\* Required**  
**+ Required for eRx**


Previous Updates Exempt Save Cancel Copy Patient

**New Patient**

**First Name\*:** COPD

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949 

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☒ Male ☐ Female

**Marital Status:**

**Employer:**

**E-Mail:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details** Add

Name	Role	Edit	Del

**\* Required**  
**+ Required for eRx**

Previous Updates Exempt Save Cancel Copy Patient



New Patient

**First Name\*:** Fractured Hip

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☐ Male ☐ Female

**Marital Status:**

**Employer:**

**Email:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details**

Name	Role	Edit	Del

\* Required  
+ Required for eRx

New Patient

**First Name\*:** Colon Cancer

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☐ Male ☐ Female

**Marital Status:**

**Employer:**

**Email:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details**

Name	Role	Edit	Del

\* Required  
+ Required for eRx



New Patient

**First Name\*:** Stroke

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☐ Male ☐ Female

**Marital Status:**

**Employer:**

**E-Mail:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details** Add

Name	Role	Edit	Del
------	------	------	-----

**\* Required**  
**+ Required for eRx**

Previous Updates Exempt Save Cancel Copy Patient

New Patient

**First Name\*:** Cellulitis

**MI:**

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☐ Male ☐ Female

**Marital Status:**

**Employer:**

**E-Mail:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details** Add

Name	Role	Edit	Del
------	------	------	-----

**\* Required**  
**+ Required for eRx**

Previous Updates Exempt Save Cancel Copy Patient

**New Patient**

**First Name\*:** Chest Pain

**MI:** ☐

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☐ Male ☐ Female

**Marital Status:**

**Employer:**

**Email:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details**

Name	Role	Edit	Del

**\* Required**  
**\* Required for eRx**

**New Patient**

**First Name\*:** Bipolar Affective Disorde

**MI:** ☐

**Last Name\*:** Moore

**Date of Birth\*:** 04/15/1949

**Address:** 8301 North Main

**City:** Sherman

**State:** TX

**Zip\*:** 77521

**Sex\*:** ☐ Male ☐ Female

**Marital Status:**

**Employer:**

**Email:**

**SS#:**

**Category:**

**Home Phone:** (214) 543-4567

**Home Fax:**

**Work Phone:**

**Work Fax:**

**Pager:**

**Mobile Phone:**

**PMS ID:**

**Patient ID:**

**Mother's Last Name:** Fischer

**Attending Provider ID:**

**Attending Provider:**

**Other Provider Details**

Name	Role	Edit	Del

**\* Required**  
**\* Required for eRx**


**Note:** If SpringCharts is used for simulation activities in the lab setting, the simulation name may be inserted as the first name. Using your last name identifies the patient chart as your work.

4. Open your own chart by clicking on the *open a chart* icon on the tool bar. (see margin illustration.) Type in your last name and click the binocular icon to search. . Select your name from the list. (If there is another student in the same network who has the same name as you, the date of birth can be used to identify your chart.)
5. In your patient's chart, click on the *File* menu and select the *Household List* submenu. The ten patients that you added to SpringCharts are listed. The home phone number connects the patients together.

### LO 3.5 Customizing Pop-Up Text

Power Point Slides: 12, 13

### Concept Checkup 3.3

- A.  What is the purpose of this icon?
- Answer:** To access the Edit PopUp Text window so that a user can add or modify PopUp Text.
- Rationale:** SpringCharts pop-up text can be edited from multiple locations. In any dialogue box within SpringCharts that displays pop-up text, the edit icon gives access to the Edit PopUp Text window where text can be added, deleted, or modified.
- B. What does the following mean: the pop-up text is stored in SpringCharts “**by user**”?
- Answer:** It means that each user has a personal set of pop-up text that can be modified without affecting any other user’s pop-up text.
- Rationale:** Pop-up text is stored in the SpringCharts database by the user login name; therefore, each user has a personal set of pop-up text that can be modified without affecting any other user’s pop-up text.

### Exercise 3.3

#### Adding Pop-Up Text

1. Let's add some pop-up text that facilitates documentation of your patient's recent admission to the hospital for elective knee surgery. Click on the File menu in the Practice View screen and select Preferences>PopUp Text.

Message Body	↑	↓	Message Body
S Panel	↑	↓	
Letter Body	↑	↓	Pt called requesting med _
O(Normals)	↑	↓	Patient called requesting refill.
O (Abnormals)	↑	↓	Pt called with question about med.
OtherTx Panel	↑	↓	Medication not working.
f/u Panel	↑	↓	Please call.
Notes Panel	↑	↓	Returned call to number.
Procedure Text	↑	↓	Left message on answering machine/voice mail.
Report-Prbs	↑	↓	Discussed Pt's concerns.
Report-Recs	↑	↓	Advised to come in today.
ROS-Normals	↑	↓	Advised Pt to go to ER
ROS-General	↑	↓	Ok to refill. Please call Pt when Rx called in.
ROS-HEENT	↑	↓	Call today and schedule an appt ASAP.
ROS-Resp	↑	↓	
ROS-CV	↑	↓	Called in the meds below.
ROS-GI	↑	↓	Called patient and arranged an appt with Dr. Finchman for _
ROS-GU	↑	↓	
ROS-Neuro	↑	↓	Nurse called from hospital.
ROS-Musc/Skel	↑	↓	
Excuse Text	↑	↓	
Orders	↑	↓	
Diagnosis	↑	↓	
Problem List	↑	↓	
Social Hx	↑	↓	
Chart Note	↑	↓	
Allergy Notes	↑	↓	
File Cabinet	↑	↓	
Routine Meds	↑	↓	
Vitals	↑	↓	

- Choose the *S Panel* and scroll down until you find an empty line. Type: *Knee Surgery*. Using the arrows to the left, move the text up until it is alphabetized.

Message Body	↑	↓	Message Body
ToDo-Reminders	↑	↓	Falls,
Urgent Messages	↑	↓	Flu/Virus,
Chart Alert	↑	↓	Headache,
Drug Stopped	↑	↓	Heartburn,
Test Note	↑	↓	Hemorrhoids,
Nursing Outcomes Classification	↑	↓	Hypertension,
Nursing Interventions Classification	↑	↓	Hyperthyroid,
Evaluation	↑	↓	Hypothyroid,
Reassessment	↑	↓	Itching,
PE-General	↑	↓	Itchy eyes,
PE-Eyes	↑	↓	Knee Surgery
PE-ENT	↑	↓	Lethargy,
PE-Neck/Chest	↑	↓	Loss of consciousness,
PE-CV	↑	↓	Memory loss,
PE-Pulm	↑	↓	Nausea,
PE-Abd	↑	↓	Numbness,
PE-Female	↑	↓	Overdose,
PE-Male	↑	↓	Pain,
PE-Extremities	↑	↓	Palpitations,
PE-Neuro	↑	↓	Pregnancy/labor,
MSE	↑	↓	
Milestones	↑	↓	
My List 13	↑	↓	
My List 14	↑	↓	
My List 15	↑	↓	
My List 16	↑	↓	
My List 17	↑	↓	
Chief Complaints	↑	↓	
MiniTemplates	↑	↓	

- We want to also make sure we have appropriate text in the *Nursing Outcomes Classification* panel. Locate this category. Scroll down in this panel and find an empty line at the bottom. Type: *Wound Healing: Primary Intention: Extent of regeneration of cells and tissue following intentional closure*. On the next line type: *Wound healing: Secondary Intention: Extent of regeneration of cells and tissue in an open wound*. Using the arrows to the left, move the text up and position it above **PRIORITY OUTCOME:**. Click on the [Done] button.

## LO 3.6 Understanding The Electronic Chart

Power Point Slides: 14, 15, 16, 17.

## Concept Checkup 3.4

- A. What is stored in the electronic chart?

**Answer:** Patient health data

**Rationale:** The electronic chart is the repository for patient health data created through computer automation in the healthcare setting. Similar to the traditional paper chart, it holds such static information as the patient's demographics, allergies, health history, and health problems as well as the dynamic information including encounter notes, nurse notes, tests, letters, and reports concerning the patient.

- B. What charts are included in the *Recent Charts* menu?

**Answer:** Charts opened during the current logon session

**Rationale:** The Recent Charts menu provides a drop-down window that allows the user to access charts that have been opened during the current logon session.

- C. How many users can open a patient's chart simultaneously?

**Answer:** Multiple users can open a patient's chart at the same time. **Rationale:** A patient's chart can be opened by multiple users in SpringCharts at the same time.

- D. How many users can edit a patient's chart simultaneously?

**Answer:** Multiple users can edit a patient's chart at the same time.

**Rationale:** All users can be editing the same chart at the same time. However, because of data protection, the same specific area of the chart cannot be edited simultaneously by

different users. Many different patient electronic charts can be opened simultaneously by the same user.

### LO 3.7 The Face Sheet

Power Point Slides: 18, 19, 20.

### Concept Checkup 3.5

- A. Where is information to complete the patient's past health history, routine medications, and current health problems in the electronic face sheet obtained?

**Answer:** From paper intake forms that the patient completes or from interviewing the patient

**Rationale:** Information to complete the electronic face sheet is taken from the paper intake forms that the patient completes containing information such as past health history, routine medications, and current health problems. These intake forms are typically completed by patients in the waiting room while they wait to be seen or admitted. The paper intake forms may be designed to cover the same categories and data flow that appear in the SpringCharts Face Sheet.

- B. What section of the Face Sheet is not printed out on the face sheet form?

**Answer:** The Chart Alert section

**Rationale:** A newly completed Face Sheet can be printed for new patients. This allows patients an opportunity to confirm the accuracy of their health information.. All information in the Edit Face Sheet window is printed except the Chart Alert, preventing the Chart Alert information from being seen by the patient.

- C. Where are the preference lists for the social history, past health history, and family health history sections of the Face Sheet set up?

**Answer:** Category preferences table on the SpringCharts server

**Rationale:** The social history, past medical, and family medical history sections contain health history items that are set up in the category preferences table on the SpringCharts server. The category preferences table enables the administrator to create predetermined customized lists of healthcare data. The lists are displayed in SpringCharts on each computer and enable rapid selection of items from these checklists to build the Face Sheet.

### LO 3.8 The Care Tree

Power Point Slides: 21, 22

## Concept Checkup 3.6

- A. Can preset categories in SpringChart's Care Tree be changed?

**Answer:** Preset categories cannot be altered or edited

**Rationale:** There are preset categories in the care tree that cannot be altered or edited. When certain documents and tests are saved, they are automatically positioned in these appropriate care tree categories. The preset list includes all categories from Encounters through Recycle Bin.

- B. How many custom categories can be added to the patient's care tree?

**Answer:** 30 categories

**Rationale:** An additional 30 categories can be added to the care tree list. This provides all users the opportunity to store created documents and imported files under these added categories.

## Chapter 3 Review Key

### Using Terminology

1. H
2. G
3. J
4. L
5. K
6. I
7. F
8. D
9. B
10. C
11. A
12. E

#### Rationales:

1. The dynamic Care Tree on the right side lists encounters (progress notes), tests, and other current records and documents.
2. The social history, past medical, and family medical history sections contain health history items that are set up in the category preferences table on the SpringCharts server. The category preferences table enables the administrator to create predetermined



customized lists of healthcare data.

3. The Chart Alert allows the inclusion of important text that appears in red above the Encounters category on the charts' care tree. The text can be typed in the Chart Alert window or selected from predefined text in the Chart Alert pop-up text list.
4. The electronic chart is the repository for patient health data created through computer automation in the healthcare setting. Similar to the traditional paper chart, it holds such static information as the patient's demographics, allergies, health history, and health problems as well as the dynamic information including encounter notes, nurse notes, tests, letters, and reports concerning the patient.
5. Encounters is a tab in the electronic Care Tree that stores many of the documents that are created from encounters with the patient.
6. Practice Management Software (PMS) is a software program that manages financial transactions, including charges, payments, insurance billing, and patient statements.
7. The patient chart is composed of a series of panels on the left for displaying and editing the comprehensive Face Sheet. The Face Sheet contains more constant patient information such as allergies, problem list, and past health history (PMHX) and is used in both inpatient and outpatient settings.
8. Family Medical History (FMHX) is the category for recording family health history in the patient's face sheet.
9. Imperial Units are weights and measures that conform to the standards legally established in Great Britain. This measurement system is still widely used in the United States.
10. The User Preferences Setup window in SpringCharts enables each user to preset the default practice name, provider name, schedule, and various other features that are displayed when the user logs into the program.
11. Past Medical History (PMHX) is the category for recording past health history in the patient's face sheet.
12. Metric Units are weights and measures relating to the metric system, which is mandatory in a large number of countries; also known as the International System of Units. Commonly used in healthcare measurement.

## Checking Your Understanding

13. T
14. F
15. F
16. T
17. F
18. T

### Rationales:

1. SpringCharts EHR provides practitioners a unique view of the entire chart at a glance. It resembles having a paper chart open in front of you. The user does not have to navigate to other areas of the program to view various elements of the chart.
2. The first twelve categories in the Care Tree are preset and cannot be modified. In addition

to the twelve preset categories 30 categories can be added to the Care Tree from the server.

3. SpringCharts can store up to one million patient ID numbers.
4. The Edit PopUp Text window allows for 60 line items to be added to any pop-up text category. These text lines can be individual words, sentences, or complete paragraphs. In addition to the 34 preset category headings that come with the installed program (and therefore cannot be altered), 20 customizable categories are in the side menu.
5. The social history, past medical, and family medical history sections contain health history items that are set up in the category preferences table on the SpringCharts server. The category preferences table enables the administrator to create predetermined customized lists of healthcare data.
6. The patient chart is composed of a series of panels on the left for displaying and editing the comprehensive Face Sheet. The Face Sheet contains more constant patient information such as allergies, problem list, and past health history (PMHX) and is used in both inpatient and outpatient settings. Information to complete the Face Sheet may be taken from intake forms that the patient completes.

19. A, B, C

**Rationale:**

The first twelve categories in the Care Tree are preset and cannot be modified. In addition to the twelve preset categories, 30 categories can be added or edited from the server.

20. A

**Rationale:**

The CCHIT-certified SpringCharts EHR™ software has been chosen as the training tool for this textbook because of its ease of use, richness in features, and its ability to be customized to suit a wide range of healthcare specialties. SpringCharts is an international program and is used by over 1,500 physicians and thousands of nurses, medical assistants (MA), nursing assistants (NA) and other healthcare personnel.

21. B

**Rationale:**

The User Preferences Setup window in SpringCharts enables each user to preset the default practice name, provider name, schedule, pop-up text insert, default measurement units, font size, create a new password, and various other features that are displayed when the user logs into the program.

22. C

**Rationale:**

When creating a new patient chart fields marked in red are required fields for the patient record to be saved and a chart created.

23. B

**Rationale:**

SpringCharts pop-up text can be edited from multiple locations. In any dialogue box within SpringCharts that displays pop-up text, the edit icon gives access to the Edit PopUp Text window where text can be added, deleted, or modified. Pop-up text is stored in the SpringCharts database by user login name; therefore, each user has a personal set of pop-up texts that can be modified without affecting any other user's pop-up text.

24. A

**Rationale:**

The patient chart is composed of a series of panels on the left for displaying and editing the comprehensive Face Sheet. The Face Sheet contains more constant patient information such as allergies, problem list, family health history (FMHX), social history, routine medications and past health history (PMHX) and is used in both inpatient and outpatient settings.

25. C

**Rationale:**

A document saved under a category in the Care Tree can be moved to another category by selecting the [Change Tab] button within that document.