



**ST. MARY'S**  
**Advanced Care Hospital**

**Horizon Patient Folder**

**User's Guide**

## Overview

St. Mary's Medical Center is embarking on a new way to view the medical record for patients on-line. This information will guide you through the Horizon Patient Folder.

## Horizon Patient Folder Definition (HPF)

HPF is an electronic patient medical record (EMR). Since the chart is scanned into the computer using Document Imaging, the patient's chart is accessible *anytime* from *anywhere*. The entire chart, including physician's orders and progress notes, assessments, vital signs, and signed consents can be viewed in HPF.

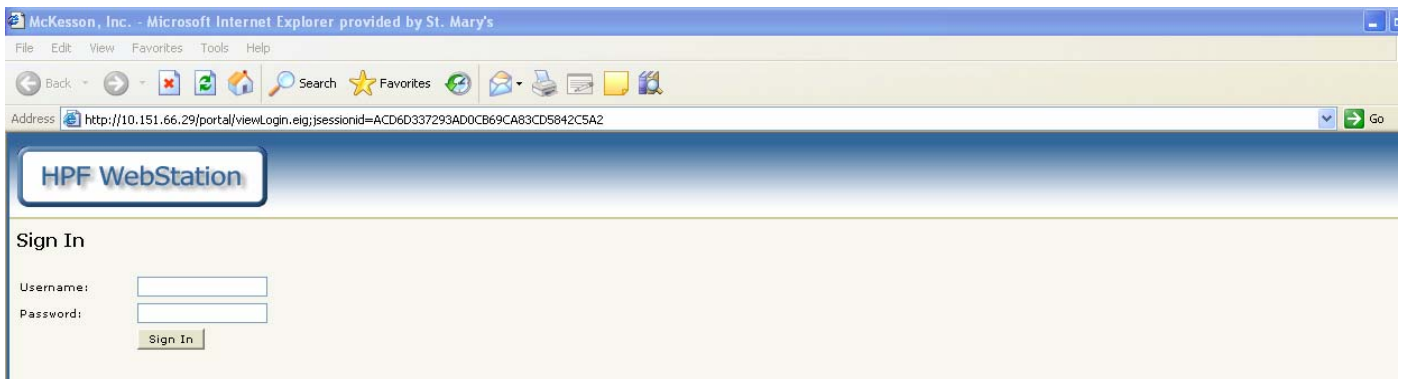
## Objectives

Upon completion of this education, the user will be able to:

- Access HPF
- Search for a patient
- Navigate the document viewer
- Access and work the Deficiency List (Physician function)
- Log out of the system

## 1. Accessing HPF

HPF is accessible through Stoneware. Please refer to the Stoneware User Guide if you are a new user. After you have set-up your user name and password in the Password Management field, you can select EMR – Horizon Patient Folder from the list of applications in the top right corner without duplicating these steps. The first screen of HPF looks like this:



## 2. Patient Search

The Patient Search tab is used to find a patient record. Enter all search criteria which might help you filter your search. You must enter a minimum of three characters. The Encounter field indicates a specific account number. After you enter your chosen criteria and press search, the following screen appears.

HPF WebStation Last Refresh: 07/13/2006 11:07 AM  
Change Password Sign Out

Assignment Worklist **Patient Search** Options Help

Facility:

Encounter:  Last Name:

MRN:  First Name:  DOB:  (mm/dd/yyyy)

GPI:  Admitted:  (mm/dd/yyyy) +/-  days Age:  years +/-  years

SSN:  Discharged:  (mm/dd/yyyy) +/-  days Sex:

**Search Results**

Encounter	Patient	MRN	Facility	Pt Type	Service	Admitted	Discharged	Age
<u>80009216</u>	<u>ZZZZ, ARUP1</u>	421698	A70 - ST. MARY'S MEDICAL CENTER	P - PRIVATE	201 - MED, 14 - 64	06/08/2006 08:17 AM	06/08/2006 08:22 AM	58

You will note that the encounter number and the patient name are underlined and in blue. To view the record, click on the patient name for complete information or the encounter number for specific information.

The following screen appears:

http://10.151.66.29 - Medical Record Viewer - Microsoft Internet Explorer provided by St. Mary's

**ZZZZ, ARUP1** MRN: 421698 Encounter: 80009216 Admitted: 06/08/2006 08:17 AM  
 DOB: 08/04/1947 Facility: A70 Discharged: 06/08/2006 08:22 AM

File Pages Document Edit View Assignments Deficiencies Help

Content    
 My View  Physician  
 ZZZZ, ARUP1  
 No global documents for this view

# 4245982 L 06/15/2006  
 # 80022085 R 06/12/2006  
 # 80009380 H 06/08/2006  
 # 80009348 H 06/08/2006  
 # 80009216 P 06/08/2006  
 CARE MANAGER  
 Adm Clin Hx Rpt (admin\_hx) Page 1  
 Adm Hx Peds(admped\_hxmr) Page 1  
 assess\_eas Page 1  
 # 80009208 R 06/08/2006

ZZZZ, ARUP1  
 St. Mary's Medical Center  
 Adm Hx Peds(admped\_hxmr)  
 FROM: 06/08/06 08:07 TO: 06/08/06 09:22  
 FROM: ZZZZ-04 ADM: 06/08/06 08:07  
 AGE: 58Y SEX: M MD: NOT ON S  
 DOB: 08/04/1947 ID: 0080009216 MR: 00421698  
 REQUESTED: 06/08/06 16:22  
 Page 1

**Allergy History**

Allergy	Primary Reaction	Severity	Onset Dt	Comment	Confirm Dt/By
NKA	NR				

**Medication History**

Medication	Status	Start Dt	Stop Dt	Dose	Route	Freq	Comment	Confirm Dt/By
Not documented.								

FLWSHEET

This is called the Document Viewer. We will discuss parts of the screen that you will need in the next section.

### 3. Document Viewer

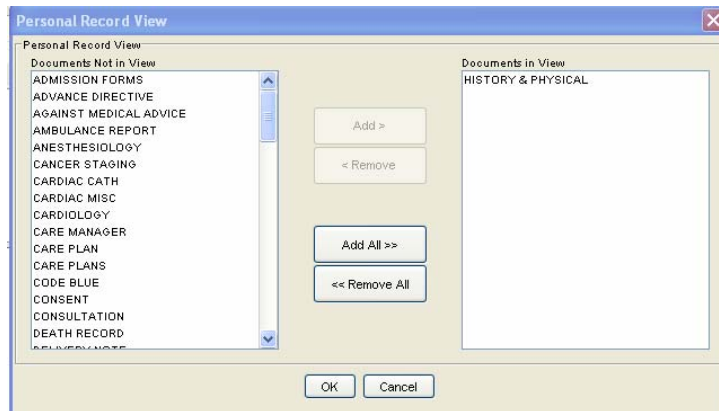
There are three main sections to the document viewer.

**A. Content Window-** The content window is on the left side of the screen and is like a table of contents. There are four tabs at the top of this window: Documents, Bookmarks, Patient, and Encounter.

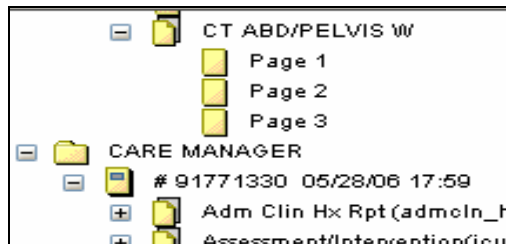
1. **Documents** - The upper section of the screen has the patient name. The lower section lists all documents available for viewing in folders.

**Record Views:** May show one or more tabs that are configured to show all documents for that record type.

**My View** – May not show any documents until it is personally configured. To configure My View, click on File, Preferences, and Personal Record View. Choose document types to add individually or Add All.



Here is an example of the Document Tree in the Content Window:



As you click on the expand icon (+), you can see the number of pages in each folder. To go to the next page, click on the page in the content window.

2. **Bookmark**-if you bookmark a page of interest, you can find it easily by clicking on this tab. Bookmarks are lost once you log out of your current viewing session.

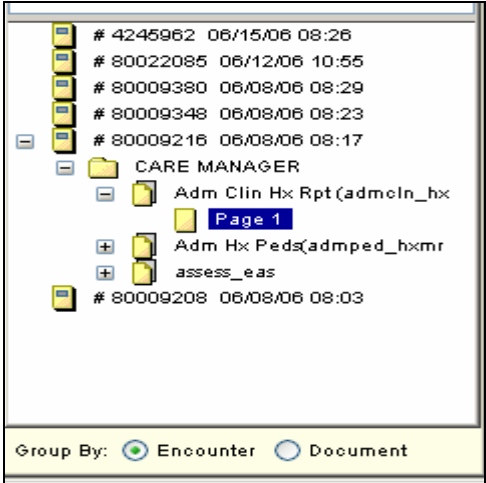
3. **Patient**-gives you more detailed patient information.

Documents	Bookmarks	<b>Patient</b>	Encounter
<b>Patient Information</b>			
Patient:	ZZZZ, ARUP1		
MRN:	421698		
SSN:	000-00-0000		
DOB:	08/04/1947		
Age:	58 years		
Sex:	M		
Birthplace:			
<b>Security Information</b>			
Locked:	No		
<b>Contact Information</b>			
Address:	111 TEST		
Address2:			
Address3:			
City:	EVANSVILLE		
State:	IN		
Zip:	47712		
Contact:			
Phone (H):	(812)000-0000		
Phone (W):			

4. **Encounter**-gives you more detail about this patient encounter.





Documents	Bookmarks	Patient	<b>Encounter</b>
<b>Patient Information</b>			
Patient:	ZZZZ, ARUP1		
MRN:	421698		
Age at Encounter:	58 years		
<b>Encounter Information</b>			
Encounter:	80009216		
Admitted:	06/08/06 08:17		
Discharged:	06/08/06 08:22		
Facility:	A70 - ST. MARY'S MEDICAL CENTER		
Clinic:	ZZZZ		
Service:	201 - MED, 14 - 64		
Pt Type:	P - PRIVATE		
Disposition:	AHR		
Source:			
<b>Encounter Security</b>			
Locked:	No		
Privacy Requested:	No		
Opt out of Census:	No		

Note at the bottom of the content window the **Group by:** bullets. The default is by **Document**. The other option is by **Encounter**. If you change to **Group by: Encounter**, the screen changes to look like this:

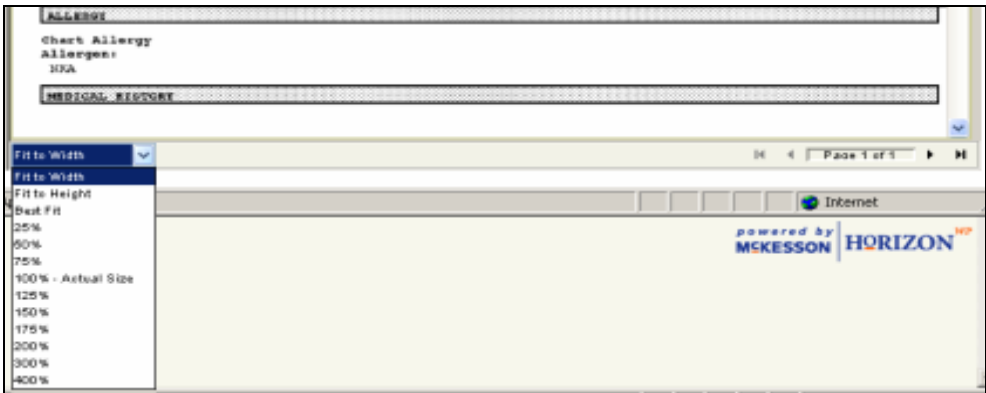


You can then select a different encounter (account number) to view.

**B. Document Window**












The document window is a view of the actual document as it appears in the chart. Use the vertical and horizontal arrows to view the document. The  and the  are used to navigate quickly from one folder to the next. The  and the  allow you to move from page to page.

At the bottom left of this window is a drop down menu to allow you to select how you want to view the document.



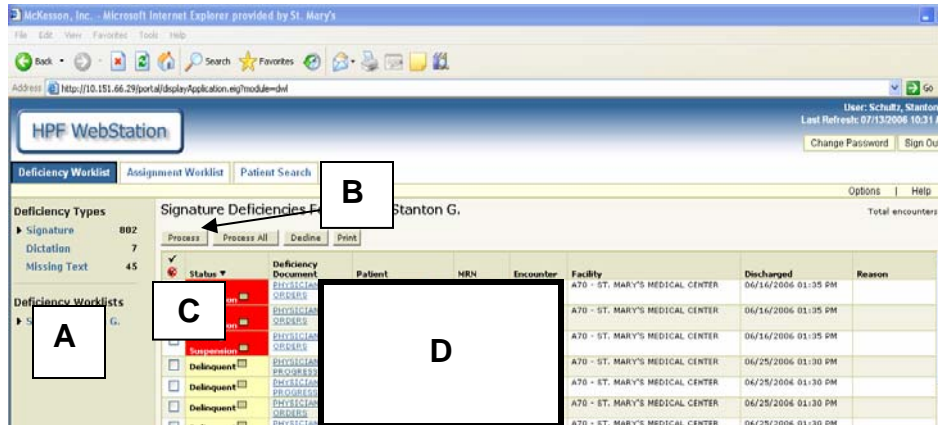
### C. Toolbar

The following table includes the items on the Toolbar used to review documents.

Icon	Description
	<b>Content:</b> Toggles between showing Content Window on the screen or only showing Document Window.
	<b>Bookmark:</b> Click this to bookmark a page. Note: you must be in a patient folder to bookmark.
	<b>Book View:</b> Allows you to view two pages in the Document Window at a time.
	<b>Zoom In</b>
	<b>Zoom Out</b>
	<b>Zoom:</b> Left click & drag to draw rectangle over area to be enlarged. Note: You must be on a single page view.
	<b>Grab Scroll:</b> Click Zoom, draw rectangle, and then click Grab Scroll to move the document.
	<b>Rotate Left</b> (if document is scanned upside down or sideways)
	<b>Rotate Right</b> (if document is scanned upside down or sideways)
	<b>Help</b>
	<b>Exit:</b> Note: Always exit out the red door.

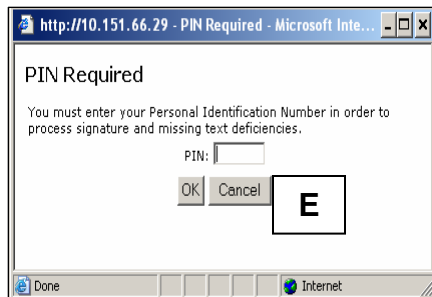
## 4. Deficiency Worklist

The Deficiency Worklist allows you to view the chart deficiencies and correct them on-line. Click on the Deficiency Worklist tab to bring up the main screen.



There are four main sections to the Deficiencies Worklist screen.

- The Content Window allows you to view the three deficiency types: Signature, Dictation and Missing Text.
- The tool bar allows you to:
  - Process one deficiency at a time
  - Process all deficiencies
  - Decline a specific deficiency
  - Print the list
- The Status column shows the level of the deficiency: Incomplete, Delinquent, Warning, Pending Suspension.
- The Main Window displays the document type and the patient information. The document, patient name and encounter are linked to the document viewer.
- By clicking on the document in blue, the link takes you to that specific document. A screen appears for you to enter your PIN. This allows you to view and correct the deficiency.




Clicking on the blue patient or encounter links takes you to the main Document Viewer window. This does not show you what the deficiencies are, it just allows you to view the chart.

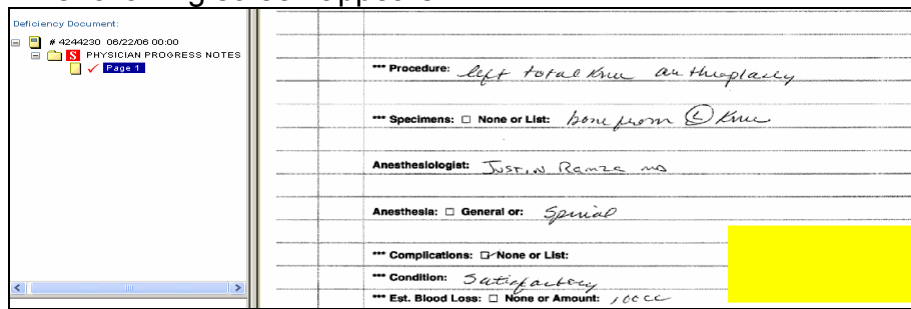


## A. Signature Deficiencies

To work Signature Deficiencies, click on “Signature” in the Content Window under deficiency types. The Main Window then lists all of the signature deficiencies listed for you. The number behind the deficiency name is the number of those kinds of deficiencies you have.







- **Process one at a time** - click on the check box at the beginning of the row and click the “Process” button.
- **Process all of one type** –there are two ways to process them all. Click on the “Process All” button and the system will place a checkmark in front of all of the rows or click on the √ to select all and click “Process”. If you want to deselect the select all option, click .

1. Click on the Blue Deficiency Document Link.
2. Enter your PIN and click OK.
3. The following screen appears:



Note that the Content Window shows that it is a Signature Deficiency by showing a red “S” symbol. The area where the signature is to be entered appears on the screen in yellow.

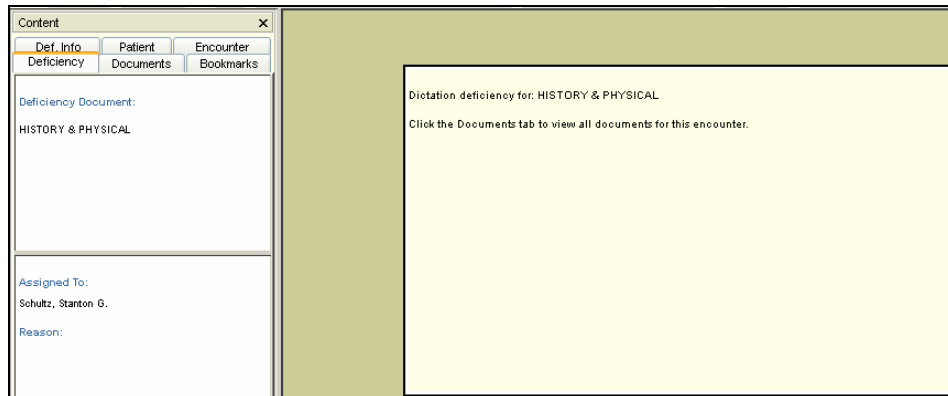
4. There are a number of things you can do with this deficiency as noted by the following table:

Icon	Description
	<b>Auto Sign Mode:</b> Allows you to sign all you have selected, one record at a time.
	<b>Stop Autosign:</b> To stop Auto Sign click on the red Stop Sign.
	<b>Continue Autosign:</b> To resume Auto Sign click on the green arrow.
	<b>Sign Deficiency:</b> signs one at a time.
	<b>Skip Deficiency:</b> To go to the next one.
	<b>Decline Deficiency:</b> If you decline, you must give a reason why.

5. Once you have addressed the deficiencies you have selected, the system returns to the Main Window. The deficiencies selected will be removed from the list and subtracted from the total.

## B. Dictation Deficiencies

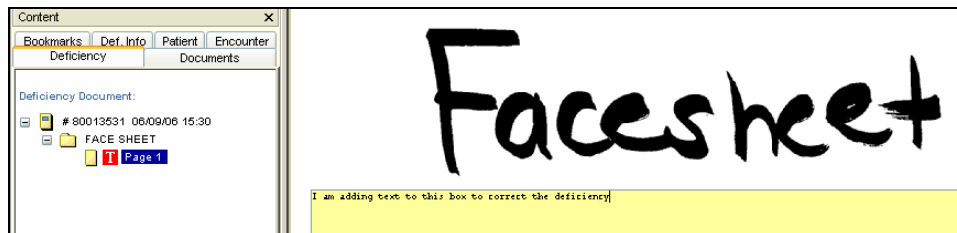
Clicking on the Dictation deficiencies brings up the following screen:



This gives you a list of the dictation deficiencies you have but you still must do the dictation as you do currently. Once you know you have done the dictation, you can process all of your deficiencies and click “Complete” on the tool bar.

## C. Missing Text Deficiencies

When text is missing, this screen appears with the cursor blinking in a yellow box. Type the missing text here. Note that the Content Window identifies this as a Missing Text deficiency, showing a red “T” symbol. The Missing Text deficiencies have a reason listed on the Main Window to make it easier to find what needs to be completed.



Then click the “Complete Deficiency” button .

## 5. Logging out

Click on **Sign Out** to log out of the application.