Portal Help Card

Index

A. Getting Started

1. Logging in/out

1) Click on Portal Icon.
2) Computer enters your login and password. Call (360) 518-7812 for help.
3) To log out, click **Log Out.**

2. Finding a Patient

1. By Patient List

Click on patient name. If not a physician of record click **OK** to continue.

2. By Census

1) At top under tab that says Patient List, click **Station Census**.
2) In center of screen click **Station** and search by unit. Click **Get Census**.

3. By Patient Name

1) At top of page, click tab that says **Find Patient**.
2) Type patient’s name into box. Click name to open patient information.

3. Adding patients to work list

1) At top of page, click **Find Patient** and click **Active** (not MPI). Type patient’s name in box.
2) To left of patient’s name, click the box.
3) Above the patient’s name, click **Add to Worklist**.

4. Changing your password

1) In upper right corner click arrow next to **Site Controls: <select>**.
2) From drop down menu, select **Change Password,** type in current password, the new password and repeat.

5. Editing preferences

On each page there is a blue bar. On the far left side of the blue bar, click **Edit** to make any changes you prefer, then click **Save**.

6. Questions

- On each page there is a blue bar. On blue bar click the **?** button.
- Call (360) 518-7812.

B. Chart Completion

1. To complete one or all charts:

1) Select **Deficiency Worklist** then select either **Process All** or **Process.**
2) Enter your PIN, click **OK** to activate electronic signature.
3) **Process All** displays charts without returning to Deficiency Worklist screen.
4) **Process** allows you to work on one or more entries, but not all. Check box to left of entries you want, then click **Process**.
5) Declining a deficiency removes it from your worklist. Enter a reason.
6) To view other documents while in a deficiency, click on **Documents** tab. To return to deficiency list, click **Deficiency** tab.
7) To change size of buttons in the deficiency and chart view screens, go to **File, Preferences, Toolbars** and select large buttons or small buttons.

2. Signing Documents

1) Select deficiencies to work on
2) Scroll through report and click **sign**, **skip** or **decline** buttons at top of screen to act on report.
3) Complete any text edits before signing. Documents cannot be edited once signed.

3. Dictation Deficiencies – required documentation missing when chart analyzed after discharge.

1) After report dictated, click **Complete** to remove deficiency from worklist.
2) Click **Decline** if deficiency is not yours.

Portal Help Card

Index

A. Getting Started
1. Logging in/out
2. Find patient or patient visit
3. Adding a patient to your list
4. Changing password
5. Editing preferences

B. Chart Completion
1. Completing chart deficiencies
2. Signing documents
3. Dictation deficiencies

C. “Old Charts”

D. Finding Clinical Information
1. Vitals, Intake & Output, Weights
2. Medication
3. Emergency Visits

A. Getting Started

1. Logging in/out

1) Click on Portal Icon.
2) Computer enters your login and password. Call (360) 518-7812 for help.
3) To log out, click **Log Out.**

2. Finding a Patient

1. By Patient List

Click on patient name. If not a physician of record click **OK** to continue.

2. By Census

1) At top under tab that says Patient List, click **Station Census**.
2) In center of screen click **Station** and search by unit. Click **Get Census**.

3. By Patient Name

1) At top of page, click tab that says **Find Patient**.
2) Type patient’s name into box. Click name to open patient information.

3. Adding patients to work list

1) At top of page, click **Find Patient** and click **Active** (not MPI). Type patient’s name in box.
2) To left of patient’s name, click the box.
3) Above the patient’s name, click **Add to Worklist**.

4. Changing your password

1) In upper right corner click arrow next to **Site Controls: <select>**.
2) From drop down menu, select **Change Password,** type in current password, the new password and repeat.

5. Editing preferences

On each page there is a blue bar. On the far left side of the blue bar, click **Edit** to make any changes you prefer, then click **Save**.

6. Questions

- On each page there is a blue bar. On blue bar click the **?** button.
- Call (360) 518-7812.

B. Chart Completion

1. To complete one or all charts:

1) Select **Deficiency Worklist** then select either **Process All** or **Process.**
2) Enter your PIN, click **OK** to activate electronic signature.
3) **Process All** displays charts without returning to Deficiency Worklist screen.
4) **Process** allows you to work on one or more entries, but not all. Check box to left of entries you want, then click **Process**.
5) Declining a deficiency removes it from your worklist. Enter a reason.
6) To view other documents while in a deficiency, click on **Documents** tab. To return to deficiency list, click **Deficiency** tab.
7) To change size of buttons in the deficiency and chart view screens, go to **File, Preferences, Toolbars** and select large buttons or small buttons.

2. Signing Documents

1) Select deficiencies to work on
2) Scroll through report and click **sign**, **skip** or **decline** buttons at top of screen to act on report.
3) Complete any text edits before signing. Documents cannot be edited once signed.

3. Dictation Deficiencies – required documentation missing when chart analyzed after discharge.

1) After report dictated, click **Complete** to remove deficiency from worklist.
2) Click **Decline** if deficiency is not yours.

C. "Old Charts" *--viewing historical patient documents. (If you need information prior to 9-06 click the Historical Results Tab then Historical Results.)*

- For Personal Record views select **File**, **Preference**, **Personal View**. Use **Add** and **Remove** buttons to add and remove.
- Global documents are all visits such as Advance Directives .
- The Document Tree lists all the documents for a patient. Can view by encounter or type.
- Click **Patient Folder** tab.
- Enter physician type.

1. To display a document, double click on a document or page in document tree.

- To page through all documents, click document name.
- To see only one page, select specific page.

2. To bookmark pages.

1) Click on page in document tree. Click **Bookmark**.
2) Repeat for each page you want to mark.
3) To see list of bookmarked pages, go to **Bookmark** tab. Sort or delete bookmarked pages.

D. Finding Clinical Information

1. Vitals, Intake & Output, Weights

1) Click **OK** if you see a screen that says *"you are not the clinician of record for this patient….."*

- Values in red denote abnormal values.
- Click on yellow box to view comments or notes added by nurse.
- Click on pen/paper to see modification history of a result.
- Use the "more" arrows to navigate forward or backward.

a. Summary Viewer results for 24, 48 or 72 hours.

1) On upper left, select hours.
2) On right side, Click **Refresh.**

b. Flow Sheet Viewer

1) Click **Flowsheet** tab.
2) In upper left corner, select report type.
3) Select time interval.
4) Click "specific encounter" or by "start date."
5) Click **Refresh** on right side.

2. Medication

- Click **OK** if you see a screen that says *"you are not the clinician of record"*

1. Results tab

1) Select Summary Viewer Tab
2) Click box that says **Medication IV Orders**, then **Refresh**
3. Click medication name, dose, frequency or date given to review.

2. Flowsheet Viewer Tab

1) In upper left corner where it says Report, select **Meds/IV/VS/ I&O** then **Refresh**.
2) Click on magnifying glass for medication delivery time.

3. Med Tab

1) Click on medication name, dose, frequency or date given to review .
2) Click magnifying glass for delivery time.

3. Finding Clinical Information for Emergency Visits

1. Click **OK** if you see a screen that says "You are not the clinician of record"
2. To right of Summary Viewer, click **Emergency** tab. Select **Encounter date**. On left side you will see all categories for the ED visit. Click on the ones you want to view.

C. "Old Charts" *--viewing historical patient documents. (If you need information prior to 9-06 click the Historical Results Tab then Historical Results.)*

- For Personal Record views select **File**, **Preference**, **Personal View**. Use **Add** and **Remove** buttons to add and remove.
- Global documents are all visits such as Advance Directives .
- The Document Tree lists all the documents for a patient. Can view by encounter or type.
- Click **Patient Folder** tab.
- Enter physician type.

1. To display a document, double click on a document or page in document tree.

- To page through all documents, click document name.
- To see only one page, select specific page.

2. To bookmark pages.

1) Click on page in document tree. Click **Bookmark**.
2) Repeat for each page you want to mark.
3) To see list of bookmarked pages, go to **Bookmark** tab. Sort or delete bookmarked pages.

D. Finding Clinical Information

1. Vitals, Intake & Output, Weights

1) Click **OK** if you see a screen that says *"you are not the clinician of record for this patient….."*

- Values in red denote abnormal values.
- Click on yellow box to view comments or notes added by nurse.
- Click on pen/paper to see modification history of a result.
- Use the "more" arrows to navigate forward or backward.

a. Summary Viewer results for 24, 48 or 72 hours.

1) On upper left, select hours.
2) On right side, Click **Refresh.**

b. Flow Sheet Viewer

1) Click **Flowsheet** tab.
2) In upper left corner, select report type.
3) Select time interval.
4) Click "specific encounter" or by "start date."
5) Click **Refresh** on right side.

2. Medication

- Click **OK** if you see a screen that says *"you are not the clinician of record"*

1. Results tab

1) Select Summary Viewer Tab
2) Click box that says **Medication IV Orders**, then **Refresh**
3. Click medication name, dose, frequency or date given to review.

2. Flowsheet Viewer Tab

1) In upper left corner where it says Report, select **Meds/IV/VS/ I&O** then **Refresh**.
2) Click on magnifying glass for medication delivery time.

3. Med Tab

1) Click on medication name, dose, frequency or date given to review .
2) Click magnifying glass for delivery time.

3. Finding Clinical Information for Emergency Visits

1. Click **OK** if you see a screen that says "You are not the clinician of record"
2. To right of Summary Viewer, click **Emergency** tab. Select **Encounter date**. On left side you will see all categories for the ED visit. Click on the ones you want to view.