PATIENT SEARCH RECENT PATIENTS AND WORKLISTS CONTEXT NAVIGATION TOOLS



Amadeus				*	🗘 0 🛔 Apr	II SALISBURY-3 🔻 LOGOU
* PATIENTS	Patient Search					
Recent Patients	Identifier		Name	Last Name	First Name(s)	
Patient Search	This searc	h performs an EXACT match only.			similar sounding names e.g atch any text e.g. Sa% mat	
PORTAL MESSAGING	Organization OPTU	M	Date of Birth]	
			Sex	Male Fema	le All	
	Search Reset					
	Enter search criteria abo	we and hit 'Search'				

The start of every entry into a patient's record in the SYNCRONYS HIE is the patient search. A user must search to find the patient to view patient summary information.

All access levels have access to conduct a patient search, with the exception of End User Administrators, who may search for users instead of patients.

PATIENT SEARCH METHODS	
* Orion Health Amadeus	April SALISBURY-3 V LOGOUT
PATIENTS Recent Patients Patient Search Identifier This search performs on EXECT match only. WORKLISTS PORTAL MESSAGING Organization OPTUM Search Reset Enter search criteria above and hit 'Search'	Name Last Name First Name(s) 2 This search will match similar sounding names e.g. Mick will match Michael and Mickey. Use % to match any text e.g. Safk matches Sam and Sarah. Date of Birth Sex Male Female All
 Either by identifier number with associate Using demographic information, i.e, Name 	

There are two ways to find a patient's record.

- 1. Either by identifier number with associated organization, <u>or</u>
- 2. Using demographic information, i.e., Name, DOB, and Gender

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•	identifier number with associated in an exact match with one patie	•	1 March 1	VNCRONYS EXTER DATA BETTER HEATTH

If you know a patient's medical record from a system that sends data to the HIE, you can enter that Identifier and the organization name it came from. These two search criteria will result in an exact patient match.

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≪ ▼ PATIENTS	Patient	Search		_				
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WORKLISTS PORTAL MESSAGING	Organ	This search performs an ization Christus St Vince	n EXACT match only. ent Regional Med Ctr) Date of Birth	This search will match s and Mickey. Use % to m	atch any text e.	0	
				Sex	Male Fema	le All		
	Sea	arch Reset						
		Identifier	Name	Date of Birth (Age)		Sex	Phone	Address
		AAR-41945-5	TEST, TEST	Jan-01-1901 (120 years)		Male		
								NCRONYS RE DATA BETTER REALTH.

However, be aware that there may be additional records that did not have enough information to merge into a single record, e.g., a reference laboratory result, or a record that had an error in a date of birth or social security number.

PATIEN	IT SEARCH METHO	DS
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✓ PATIENTS	Patient Search	
Recent Patients	Identifier	Name Last Name First Name(s)
Patient Search	This search performs an EXACT match only.	This search will match similar sounding names e.g. Mick will match Michael
WORKLISTS PORTAL MESSAGING	Organization OPTUM	Date of Birth
		Sex Male Female All
	Search Reset	
	Enter search criteria above and hit 'Search'	
Using demo	ographic information, i.e., Nar	me, DOB, Gender

Most searches are done with demographic information. For this search, only use the criterial fields on the right of the screen, including Name, Date of Birth, and Gender. If you also know the person's middle name, you can add it to the first names box.

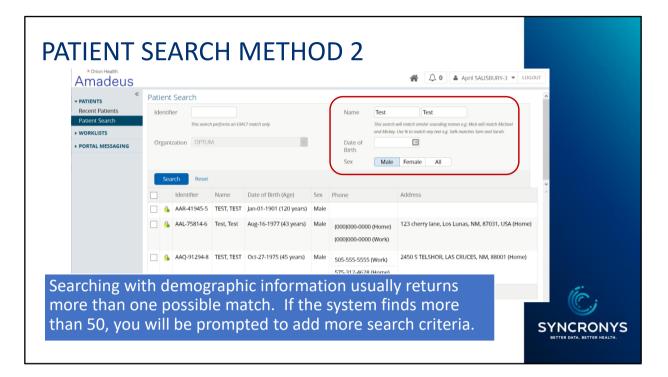
PATIENT SEARCH METHOD 2

Demographics Search –

- Last name and:
 - Date of Birth (DOB) First Name(s) Gender
- Wildcard character "%" may be used in Name fields
 - Example: "John%" to return "John", "Johnson", "Johnston", etc.
- Search will return close matches
 - Example: Search for Peterson will return matches for Petersen, Patterson, Pederson
 - May produce unexpected results, maiden to married names, or people with same DOB and similar name

A wildcard character of a percent sign may be used if you are uncertain about the spelling of the first or last name. The master patient index can return close matches and even recognize some nicknames. If you use a date of birth in your search, it will offer up possible matches for people who have the same first name and date of birth, but a different last name, helping you find patients who may have had a change to their last name.

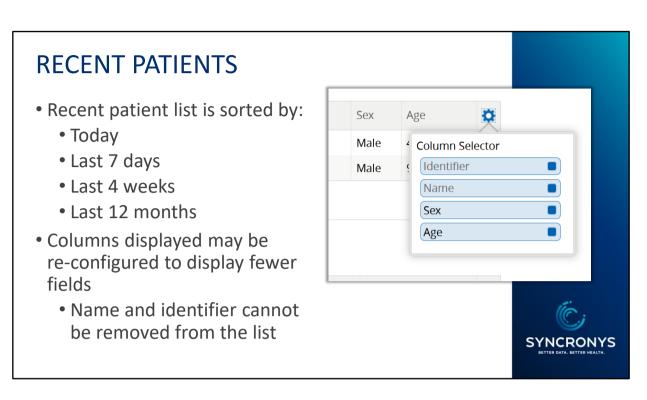
SYNCRONYS



The demographic search can result in up to 50 possible matches before it asks you to add more criteria.

PATIENT	Identifier Name Test Test This search performs an EXACT match only.
SEARCH	Organization OPTUM Date of Birth
RESULTS	Sex Male Female All Search Reset
	Identifier Name Date of Birth (Age) Sex Phone Address
	AAR-41945-5 TEST, TEST Jan-01-1901 (120 years) Male AAL-75814-6 Test, Test Aug-16-1977 (43 years) Male AAL-75814-6 Test, Test Aug-16-1977 (43 years) AAL-75814-6 Test, Test Aug-16-1977 (43 years)
	Other Identifiers AAQ-91294-8 TEST, TEST Oct-27-1975 (45 Other Identifiers AAL-75814-6 (ORION) AAS CRUCES, NM, 88001 (Home)
	Add checked results to worklist V Replace worklist
 15 patients per Next and Previ there are more 	screen ous links to navigate if than will fit on one screen; 50 maximum possible

Hovering over the Orion Identifier will give you a pop-up with additional identifiers, giving you a clue to where the information in this record comes from.



In addition to the ability to search for patients, there are some features that will help you find a patient record again.

For example, if you've conducted a patient search and had to exit the patient summary or log out, there is an easy way to find the patient again without conducting the entire search Use the Recent Patients list in the Patients>Recent Patients entry point or the Recent Patients windowlet on the homepage.

WORKLISTS

- Worklists allow users to quickly access and manage patients
- Six worklists available user may rename
 - Red, Blue, Yellow, Green, Orange, Purple
 - Edit columns that appear on worklist
- A user may wish to rename a worklist to follow a specific group of patients, e.g.:
 - Follow-up
 - By Care Team
 - By Condition



Another way to quickly find patients that you have looked up before is to assign them to one of your six worklists.

You can name your lists any way you like, and there are a couple of ways you can assign patients to the list you choose.

WORKLISTS		Patient Search	
 Add from Patient Search Add one at a time or 	1	This search performs an EXACT match only. Organization	
in a groupUser specific100 patients per worklis	Search Reset Identifier Name AAR-03810-9 Consent1, Test AAR-02993-2 Consent2, Test		
This worklist is full. To add to this worklist please		AAR-03400-6 Consent3, Test	ults 🗸
 Choose which list(s) to display on your home screen 	My Worklist Red Rename Identifier		NYS NEALTH.

In your patient search result list, you can click on the open box next to the identifier and choose the worklist from the dropdown menu below.

Each worklist can hold up to 100 names, and you will see a notification if you need to make room for more.

The first, or Red, worklist appears on the clinician's home screen by default, but users can choose which list to present on the home screen by visiting the user preferences screen.

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+	*	External Record								
		traphics			Allergie	25				
_ +	FLAUB	ERT, Gustave			Details	Reac	tions Overa Sever		Туре	Source
		Ctr)			Allergy Peanut		hylaxis <mark>Seve</mark> r	e On Date 15 Jan-2012	- Food	CSV_HOSP_NM
 Laboratory (5 Chemistry 	Red (N									
Aug-16-2 Aug-16-2	Blue -	FLAUBERT , Gusta	ve	1						
Nov-20-2 Nov-20-2	Dide -		_							
Nov-20-2 Nov-20-2	Yellow	Red (My Sample Patients	;)			Visit Type	Specialty	Facility	Clinician	Attenders
Mar-23-2 Tematolog Aug-16-2	Green	Blue - NM PDMP		llitus (icc	10cm)	Inpatient	Medical Service	Red Regional Hospital	Dr Joe MARTIN	Joe Martin
Aug-16-2		N/ 11	-]		Inpatient	Medical Service	Red Regional Hospital	Dr Joe MARTIN	Joe Martin
	Orange	Yellow	J Date		n (finding) (1 of	Inpatient	Medical Service	Red Regional Hospital	Dr Joe MARTIN	Joe Martin
	Purple –	Green	Jac							
	Labora			_						25 December
	Labora	Orange			Route	Action Date	Actioned By	Event Type	Sourc	35 Results
		Purple)	daily •	oral	01 Dec 2020	Jack Bolger	Dispense	Main Pharr Syste	
		-					Joe Bloggs			

If you decide after you have entered a record, you have a second chance to add a patient to a worklist, by clicking into the icon at the top left side of the patient summary screen. You will see a drop-down menu of your six worklists there, and you can assign the patient to more than one list if you like.

CONTEXT NAVIGATION



The Context is the list from which you selected a patient:

- Patient Search Result
- Recent Patients
- Worklist

★ < 🚍 > 🕷 🌲 1 🔺	Demo Jack
AGUILAR Jon 1000006002 (M 71 years)	^
APPLESEED Michael M 1000000004 (M 32 years)	
AUXIER-COFFEE ENZIO ENZO 1000007011 (M 39 years)	
CARDINAL John Q 1000000000 (M 71 years)	
CARDWELL John 1000006003 (M 71 years)	
CHDRZZZTESTPATIENT CHDRONE 1000005000 (M 60 years)	
CHDRZZZTESTPATIENT CHDRTWO 1000007000 (F 59 years)	
DUCK Daisy 100000001 (F 94 years)	
HENDERSON Harry 100000002 (M 23 years)	
IPOAASEN LUCIA A 1000007007 (F 68 years)	

Context navigation can be helpful for working through patients on a worklist or recent patients list.

Once in a patient record, you will see the list of patients that surrounded the one you selected from that list, whether from a patient search result list, a recent patients list, or one of your six worklists. Use the forward and back arrows or click into the three horizonal lines (called the hamburger) to see a popup of that list.

We hope you will find your patient information quickly with these search and retrieval tools.

