

This guide will help you abstract a paper chart into the EHR prior to a patient's first appointment in the EHR.

*Note:* Make sure the patient is already entered in the system on the EPM side.

*Note:* Make sure you have completed the steps in *EHR How-to Guides 1 & 2* prior to performing a chart abstraction.

## I. Create the Encounter

### A. Open the Patient's chart.

Follow the steps in the *EHR How-to Guide 2* on how to search for a patient.

### B. Perform the 6-Point Check See *EHR How-to Guide 2*

### C. New Patient in EHR

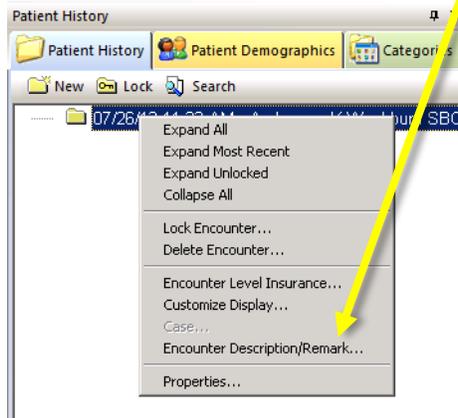
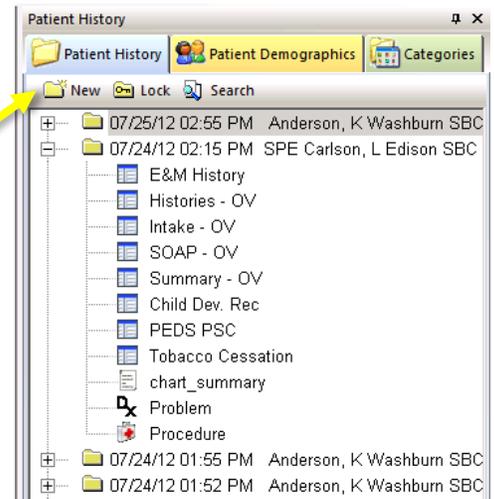
1. If the patient has not yet had an appointment in the EPM, the EHR will ask you to create the patient's chart for the first time. Go ahead and follow these steps.
2. When the EHR asks you to create an encounter for the patient's chart, select **Yes**.

### D. Existing Patient in EHR

1. If the patient already has encounters in his/her chart, click on *New* in the *Patient History* window.

### E. Create Remark

1. Right-click on the encounter you just created and select *Encounter Description/Remark*
2. Type **ABST** for Chart Abstraction



## II. Abstracting the Paper Chart: Clinical

Follow this procedure if abstracting a clinical chart.

The following items are the *only* elements you need to enter for a chart abstraction. You will not need to enter any other additional information.

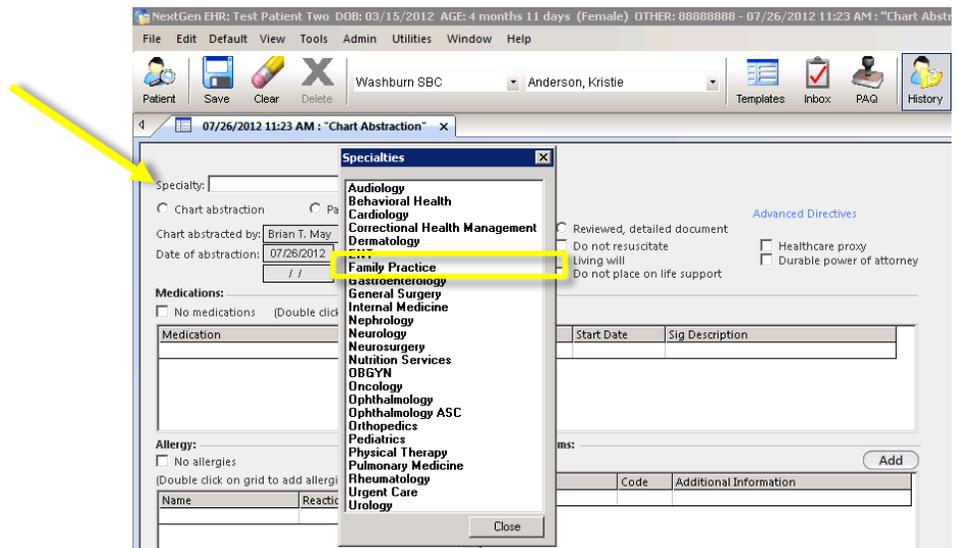
### A. Open Chart Abstraction Template

1. Click on the *Template*  button either at the bottom of the *Patient History* window or on the EHR toolbar.
2. Choose *Chart Abstraction* from the *Select Template* window



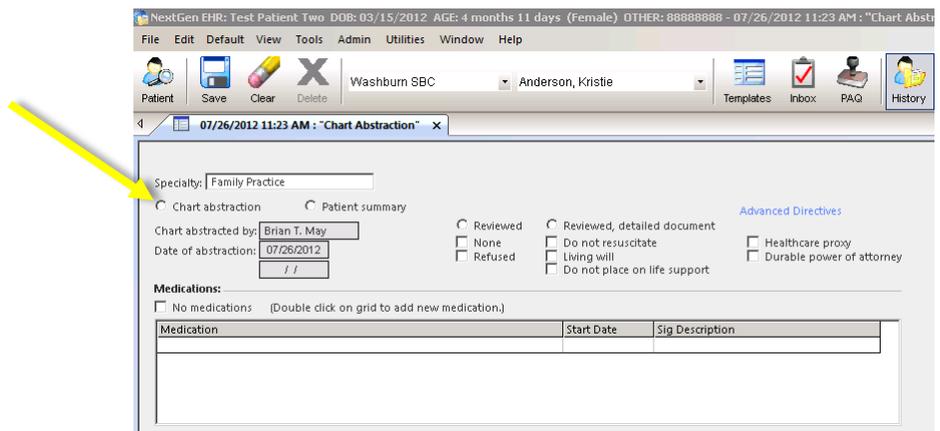
**B. Specialty**

Click in the white field and select *Family Practice*:



**C. Chart Abstraction**

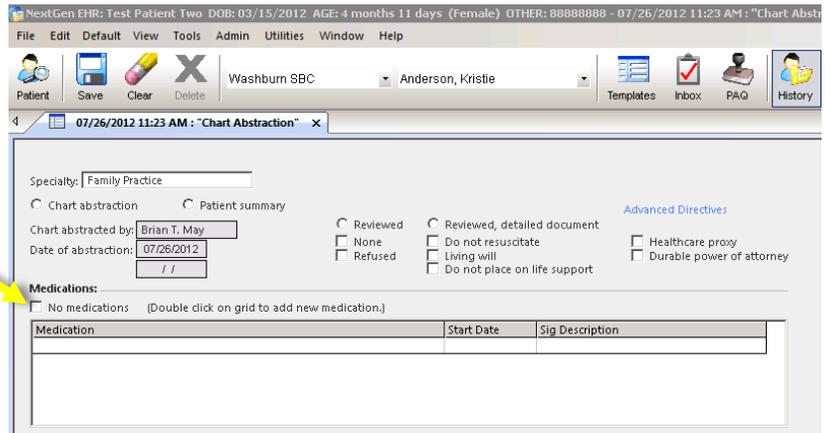
Click on the radio button.



**D. Medications**

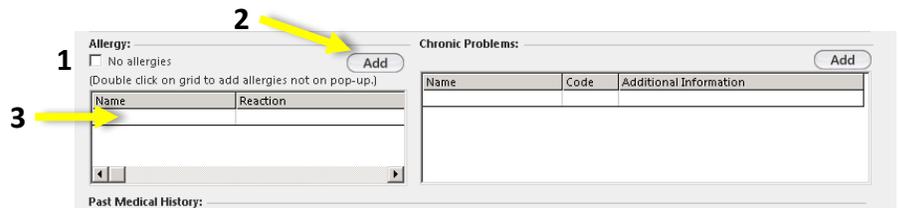
You will **only enter current medications** being taken by the patient – not past prescriptions.

1. If the patient is not currently taking medications, click the *No medications* box
2. If the patient is currently taking meds, then double click in the white field. You will be taken to the Medication Module. *See How-to Guide 4: Medication Module*



**E. Allergy**

1. If the patient does not have any known allergies in the paper chart, click the *No allergies* box
2. If the patient does have allergies, then click on the *Add* button.
3. If you can't find the allergy, then double click in the white field. You will be taken to the Allergy Module.

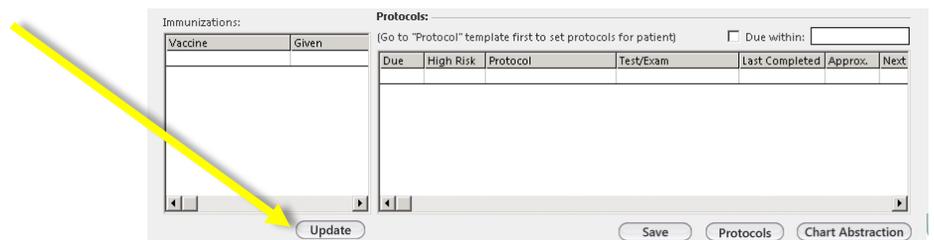


**F. Immunizations**

Skip over all of the history fields and scroll down to *Immunizations*.

*Note:* If there isn't an immunization record for the patient, skip this section and go to the ICS to scan the *No Immunization Record Available* document. *See EHR How-to Guide 7: Scanning Documents in the ICS.*

1. Click on the *Update* button below the *Immunizations* field. You will be taken to the Immunization Module



2. You will **only be entering incomplete series vaccinations** – not all past vaccinations received.

- a. If the patient **does not** have any incomplete series vaccinations:
  - i. Check the *Childhood immunizations given* box.
  - ii. Click the *Reviewed, no changes* radio button.
  - iii. Then click *Save* at the bottom of the screen.

The screenshot shows the 'Immunization - Previous' window. The 'Childhood immunizations given' checkbox is checked. The 'Reviewed, no changes' radio button is selected. There are three 'Save' buttons at the bottom of the form.

- b. If the patient **does** have incomplete series vaccinations:
  - i. Check the *Childhood immunizations given* box.
  - ii. Click the *Reviewed, updated* radio button.

The screenshot shows the 'Immunization - Previous' window. The 'Childhood immunizations given' checkbox is checked. The 'Reviewed, updated' radio button is selected. There are three 'Save' buttons at the bottom of the form.

- iii. Now find the first vaccination that is not complete and click on the white field.  
*DTaP is being used just as an example.*

The screenshot shows a dropdown menu for 'DTaP'. The menu is open, showing a list of vaccine types: DT (pediatric), DT Pedi, DTaP, DTaPHib, DTP, DTP-Hib, Infanrix, Kinrix 1, Pediarix, and Pentacel. A yellow arrow points to the 'DTaP' option.

- iv. Select the type of vaccine given
- v. Enter the sequence/series number
- vi. Enter the date given
- vii. Enter the source.

If you are getting the data from MIIC, select *other registry*.  
If you are getting the data from Discovery, select *school record*

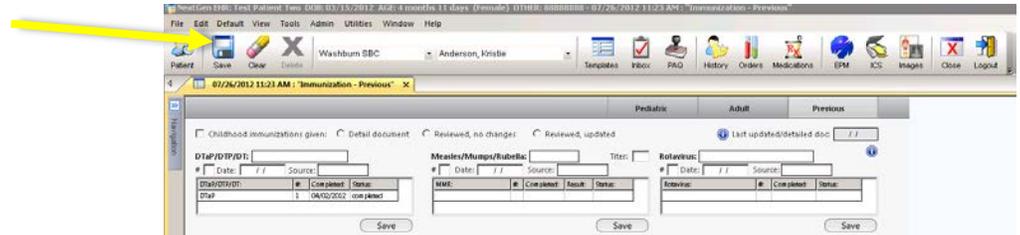
The screenshot shows the 'Ngkbn Dbp Imm Source' dialog box. It contains a list of source options: birth certificate, other registry, parent's recall, parent's written record, previously given, school record, and source unspecified. The 'other registry' and 'school record' options are highlighted with yellow boxes.

- viii. Click *OK*

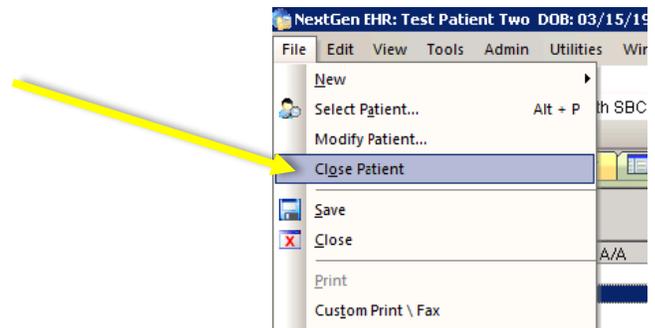
3. In the Immunization Module, click on the *Save* button. You will now see the series you just entered.
4. Repeat these steps for the next sequence/series for this vaccination or move onto the next incomplete vaccination.

*Note:* You will need to go into the ICS to scan the MIIC or Discovery immunization document. See *EHR How-to Guide 7: Scanning Documents in the ICS*.

G. When finished, click on the *Save button* on the EHR toolbar.



H. Click on *File* and select *Close Patient*



- I. Initiate the “Stop Light” paper chart archiving procedure by placing a green dot on the file with a “C” for clinical on it. See *Procedure C-7 in the SBC Policy & Procedure Handbook*.

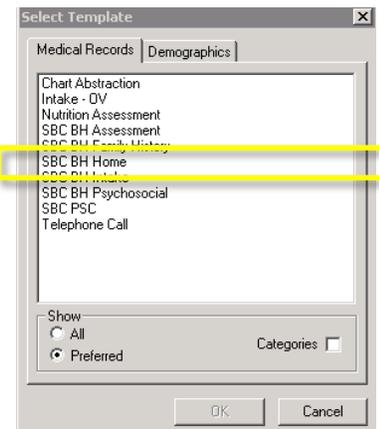
### III. Abstracting the Paper Chart: Mental Health

Follow this procedure if abstracting a clinical chart.

The following items are the *only* elements you need to enter for a chart abstraction. You will not need to enter any other additional information.

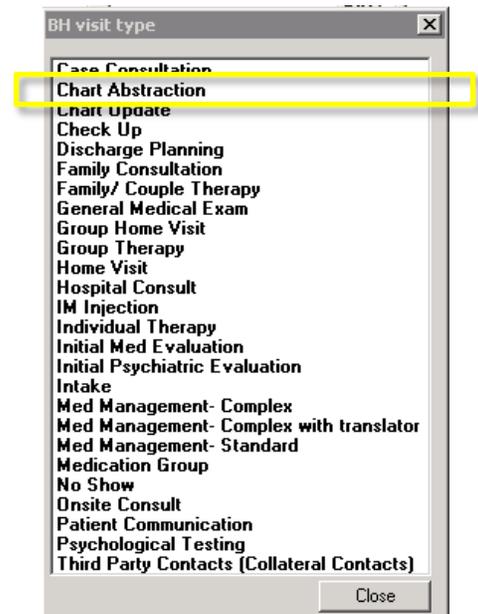
#### A. Open SBC BH Home Screen

1. Click on the *Template*  button either at the bottom of the *Patient History* window or on the EHR toolbar.
2. Choose *SBC BH Home* from the *Select Template* window



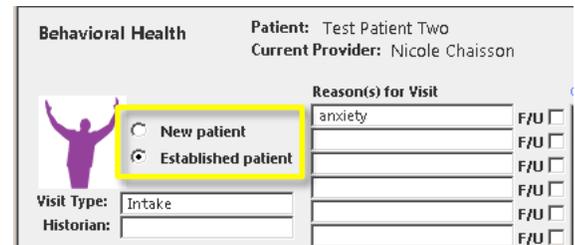
**B. Visit Type**

Select *Chart Abstraction* from the pick list.



**C. Patient Type**

Select *New* or *Established Patient*.



**D. Complete Abstraction**

Complete Sections II – V and VII of the *EHR How-to Guide 3: Charting – Mental Health Visit* with the necessary information from the paper chart.

E. Initiate the “Stop Light” paper chart archiving procedure by placing a green dot on the file with a “MH” for mental health on it. *See Procedure C-7 in the SBC Policy & Procedure Handbook.*

**Congrats! You are now done with this How-to Guide.**