

## HOW TO DOCUMENT IN AN EHR TUTOR CHART

Use this guide to gain an understanding of how an EHR Tutor chart is organized, as well as how to use the chart's functionality to add new documentation.

- [Chart Organization](#)
- [How to Document Within Chart Tabs](#)
  - [Patient Summary](#)
  - [Patient Information](#)
  - [Notes](#)
  - [Flowsheets](#)
  - [Care Plan](#)
  - [Orders](#)

### Chart Organization

The screenshot shows the EHR Tutor interface. At the top left is the 'EHR Tutor' logo and 'zATI University'. The top right has a 'Logout' button. The main header is 'Patient Summary' with a sub-header 'Primary Concern: Multiple fractures'. Below this is a table of vital signs. The left sidebar has a 'Patient Summary' tab selected, along with other tabs like 'Patient Information', 'Results', 'Provider', 'Allergies & Home Medications', 'Immunization Record', 'Notes', 'Flowsheets', and 'Screenings'. A red box highlights the patient header information: 'Ben Ivanovs', 'Male, 09/01/1998 (24 years old), 70 in, 167', 'MRN: 65157', 'Attending: William Smith, MD', 'Code Status: Full Code', 'Allergies: NKDA', and 'Comments: none'. A yellow arrow points to the 'Comments: none' text. A yellow arrow also points to the 'Patient Summary' tab in the sidebar. A callout box in the bottom left says: 'Use the **left navigation menu** to move through the chart's documentation tabs. For more information about what is contained within each tab, see [Quick Guide to Documentation Tabs](#).'

The **Patient Header** is always available at the top of the page and displays important patient information. Use the arrow next to the patient name to collapse the bottom half of the header.

The **center of the page** is your main work area where you will view and enter patient data. The content of this area changes depending on which documentation tab you click.

### How to Document Within Chart Tabs

Now let's look at the functionality within the documentation tabs.

## Patient Summary

The **Patient Summary** provides an overview of important patient information, including the patient's primary concern, allergies, vital signs, orders, and lab results.

It is the first page you see when opening a chart. **The Patient Summary is read only!** Data entered in other tabs automatically displays in this tab.

## Patient Information

Go to **Patient Information** to see the patient's name, sex, gender identity, pronouns, date of birth, provider, and code status. If you need to display newborn or pediatric documentation tabs, make sure that the patient age is correct. Depending on how your charting activity has been set up, you might not be able to edit this tab in the chart.

## Notes

To see the text of an existing note, click the **Blue Plus icon** that appears to the left of the note.

Click **New Note** to enter your own note.

Select your **Professional Role** and the **Note Type**. Enter the text of your note and then click **Sign** to save your note. After signing, the note is added, with your name, to the list of notes.

**Important:** If you don't click sign, your note will be lost.

[Go back to the top](#)

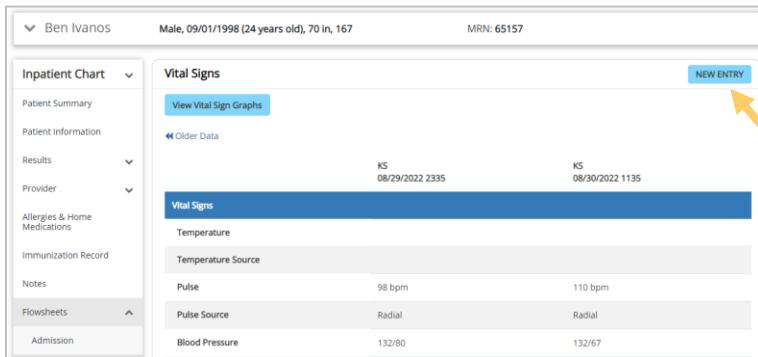
## Flowsheets

The flowsheets section of the chart contains documentation tabs that feature different types of entry fields used throughout the chart:

- [Text Entry](#)
- [Single Select](#)
- [Multi-Select](#)
- [Add Criteria](#)

### Text Entry

Enter text or numerical values into a field.

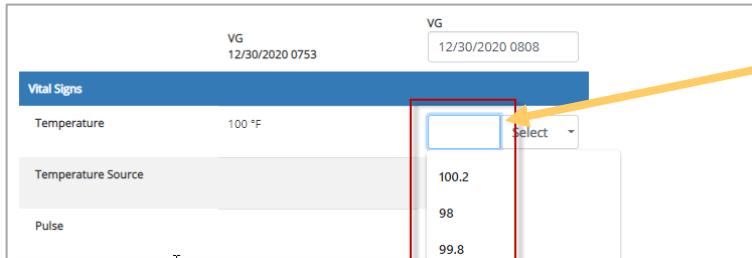


A screenshot of the EHR interface showing the 'Vital Signs' flowsheet. The top bar displays patient information: Ben Ivanovs, Male, 09/01/1998 (24 years old), 70 in, 167, and MRN: 65157. The left sidebar shows the 'Flowsheets' tab is selected. The main area displays vital sign data for KS on 08/29/2022 at 2335 and KS on 08/30/2022 at 1135. A blue 'Vital Signs' header bar contains a 'NEW ENTRY' button. An orange arrow points from the text 'Click on Flowsheets and then Vital Signs.' to this button.

Click on **Flowsheets** and then **Vital Signs**.

If there have been previous entries, they display in columns with the creation information (initials, date, time) at the top of the column.

Click **NEW ENTRY** to chart data in a new column with a current date and time stamp.

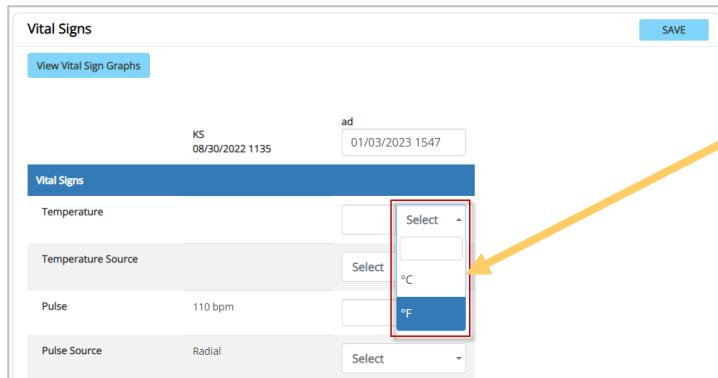


A screenshot of the EHR interface showing the 'Vital Signs' flowsheet. The top bar displays initials VG and date 12/30/2020 0753. The main area shows vital sign data for VG on 12/30/2020 at 0808. A dropdown menu is open over the 'Temperature' field, showing values 100.2, 98, and 99.8. An orange arrow points from the text 'Click into the open field for Temperature and enter a value. Note that any values previously entered in this field will display in a list from which you can select.' to this dropdown menu.

Click into the open field for Temperature and enter a value. Note that any values previously entered in this field will display in a list from which you can select.

### Single Select

Select a single option from a dropdown list.



A screenshot of the EHR interface showing the 'Vital Signs' flowsheet. The top bar displays initials ad and date 01/03/2023 1547. The main area shows vital sign data for KS on 08/30/2022 at 1135. A dropdown menu is open over the 'Temperature Source' field, showing options 'Select', '°C', and '°F'. An orange arrow points from the text 'Single select fields, such as the on the Temperature row, are designated with an arrow to the right of the field. Click on it to open the dropdown list and select a value.' to this dropdown menu.

Single select fields, such as the on the Temperature row, are designated with an arrow to the right of the field. Click on it to open the dropdown list and select a value.

Vital Signs

View Vital Sign Graphs

ad  
08/30/2022 1135

Vital Signs

Temperature

Temperature Source

SAVE

The list closes and your selection displays. To remove your selection, click the X.

## Multi-Select

Select multiple options from a dropdown list.

Eyes, Ears, Nose, Throat

Eyes Symmetrical, No drainage, Denies pain

Eyes Comments

Ears Symmetrical placement, No drainage, Hearing intact

Click on **Flowsheets** and then **Assessment**.

Multi-select fields look like the single select field, but they do not have an arrow at the right.

Scroll down to the Eyes, Ears, Nose, Throat section and find the *Eyes* field.

Eyes, Ears, Nose, Throat

Eyes Symmetrical, No drainage, Denies pain

Eyes Comments

Ears Symmetrical placement, No drainage, Hearing intact

Click inside the field. The multi-select list expands. Select all items in the list that apply.

You can remove a selection by clicking the associated X.

## Add Criteria

Another method of charting on the flowsheets is Adding Criteria. The Add Criteria functionality allows you to add criteria to the left hand side of a flowsheet and then document actions performed related to that specific criteria in a time and date stamped column to the right. Examples of this can be found in Allergies & Home Medications, Immunization Record, and certain sections the Admission flowsheet.

Let's look at an example.

Allergies

Add Allergen

Allergen Name:

Date allergy noted:

Reaction:

Select Actions from the list below that were performed at this time

Reviewed

Allergen added

Remove

Click on **Flowsheets** and then **Admission**.

Click on **NEW ENTRY** and scroll down to the Allergies section.

Click **Add Allergen**.

Allergies

Add Allergen

Allergen Name: Egg

Date allergy noted: 1/3/2023

Reaction: Hives

Select Actions from the list below that were performed at this time

Allergen added/edited

Reviewed

Remove

Remove

Two columns of options display.

The options on the left define the criteria. In this case it is a specific allergy that we are documenting.

The options on the right enable you to indicate what *actions* you took regarding this particular allergy.

Allergies

Add Allergen

Allergen Name: Egg

Date allergy noted: 1/3/2023

Reaction: Hives

Please select actions within the tab before saving

Select Actions from the list below that were performed at this time

Reviewed

Allergen added

Remove

You can add another allergy by clicking **Add Allergy** again.

► **Important:** You must make edits to BOTH columns before saving. If you do not select actions in the right column, you will see an error message.

## Care Plan

Ben Ivanos Male, 09/01/1998 (24 years old), 70 in, 167 MRN: 65157

Inpatient Chart Care Plan NEW PROBLEM/NEED

Show 10 entries

Last Updated	Diagnosis / Problem	Status
01/03/2023 1632	test	ongoing

Showing 1 to 1 of 1 entries

To create a Care Plan or to view or edit an existing Care Plan, click the **Care Plan** tab in the left menu.

Click **New Problem/Need**.

Ben Ivanos Male, 09/01/1998 (24 years old), 70 in, 167 MRN: 65157

Inpatient Chart Care Plan SAVE

Last Updated: 01/03/2023 1633

Assessment

Open Sans

A form opens in which you can enter Care Plan information in text fields: Assessment, Diagnosis, Outcomes/Planning, Interventions, Evaluation, and Additional Information. Designate whether the issue is ongoing or resolved.

When finished, click **SAVE**. Like the Notes tab, saved Care Plans will appear in a table. To view an existing plan, click the blue plus (+) icon.

## Orders

EHR Tutor has an orders list that contains medications and orders you can add to charts.

Orders

Select an Order: Search for an order

Order Type: Written order

Approving Provider: William Smith, MD

All orders to be cosigned by the provider. Orders not signed will not be saved.

Click the **Orders** tab in the left menu and then the **New Order** button.

To select a specific order, click inside the field and enter at least three letters of the name of a medication, activity, or procedure. If you don't find the order you want, try different words that could be used for the order. Although EHR Tutor does not contain every order that you would find in a clinical EHR used in hospital systems, it does have over 2,000 of the most common medications and clinical orders available. **If you find that an order is not available, search for the word "other." Select the appropriate generic order.**

Be sure to also select the **Order Type**:

- Written – Provider gave written orders.
- Verbal – Provider gave orders face to face.
- Telephone – Provider gave order by phone.

And the **Approving Provider**. (Note that in a real nursing situation, the provider would receive a message to cosign the order that was entered.)

Remove Order

Select Order

Imaging: X-Ray: Abdominal

Frequency: select a frequency

For How Long:  select a unit

Schedule:

Start Date: 01/03/2023 1635

End Date:

Admin Instructions / Comments:

Student Notes:

The order form for a procedure contains the following fields:

- **Select Order** – Checked by default. If you have entered multiple orders, you can uncheck any that no longer apply before saving.
- **Frequency** – How often to perform the procedure.
- **For How Long** – Indicate duration
- **Schedule** – Select scheduled time, or times, for the procedure if there is one. (Note that PRN has no schedule.)
- **Start Date** – Pre-populated with the current date and time. The date/ time to begin the procedure.
- **End Date** – The date/time to end the procedure.
- **Admin Instructions/Comments, Student Notes** – Free-form text fields to enter additional notes.

Medication: ATORVASTATIN  
TABLET; ORAL 10MG

Dose:  select a unit

Rate:  select a unit

Route: select a route

Frequency: select a frequency

For How Long: Number  select a unit

Schedule:

Start Date: 01/03/2023 1635

End Date:

Admin Instructions / Comments:

A slightly different order form opens if you are entering a medication. The following fields are specific to entering a medication order:

- **Dose** – The first field is for the number. The second field is for the unit from the list to the right.
- **Rate (for IVs)** – The first field is for the number. The second field is for the unit/time.

Click **Sign** to enter the order. Note by signing the order you are not authorizing it, as you do not have the legal authority. In a real situation, the provider must cosign the order.

Orders

Type of order to view: All

Show: 10 entries

Start Date: 12/30/2020 1541 Order: ATORVASTATIN Details: Discontinue Add/Edit Student Notes Status: All

12/30/2020 1603 Order: Ice Pack Details: Discontinue Complete Add/Edit Student Notes Status: Active

After signing an order, the Orders page opens, displaying all orders entered. The Status column indicates the following:

- **Active** – The order is current.
- **Completed** – The order has been performed.
- **Discontinued** – The order has been cancelled without being performed.
- **Past End** – The order was active for a period of time; the end date has passed, and the order expired.

You have several options for signed orders:

- **Discontinue** – You cannot delete an order after it is signed. Click **Discontinue** to stop the order.
- **Complete** – This option is available if the order has been scheduled. Click **Complete** to mark an order as having been performed and finished.
- **Add/Edit Student Notes** – Add or change information attached to the order.

[Go back to the top](#)