Patient Chart Summary

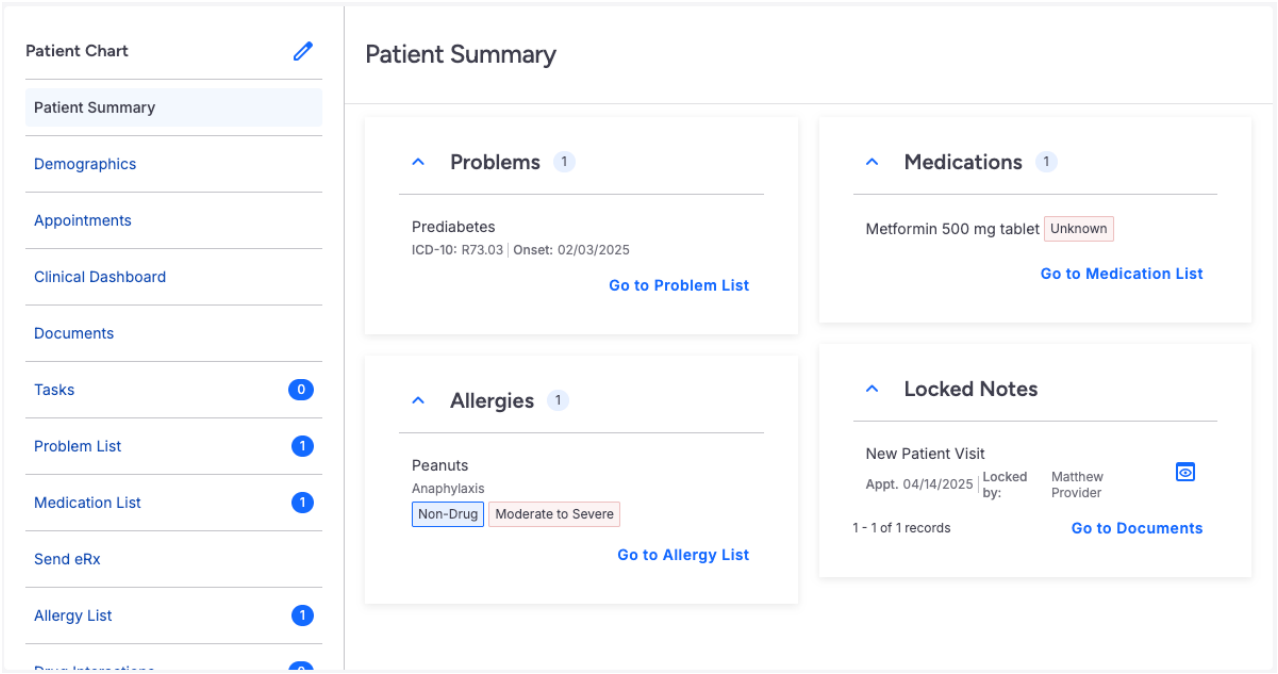
Last modified on 04/17/2025 9:44 pm EDT

Select this link to watch a video with step-by-step instructions.

The **Patient Summary** provides providers and medical staff with a brief overview of the patient before the visit. This feature facilitates quick access to essential information, streamlining the preparation process and enhancing the quality of care delivered during the patient's appointment.

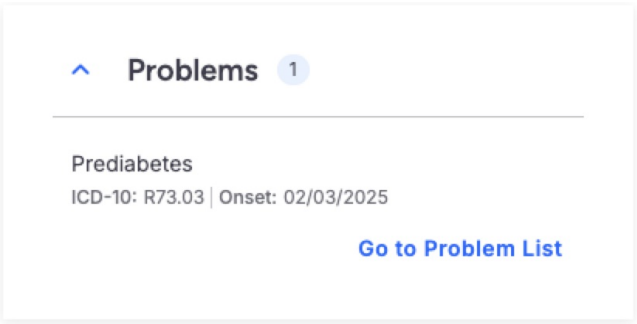
The **Patient Summary** contains four widgets:

- Problems
- Medications
- Allergies
- Locked Notes



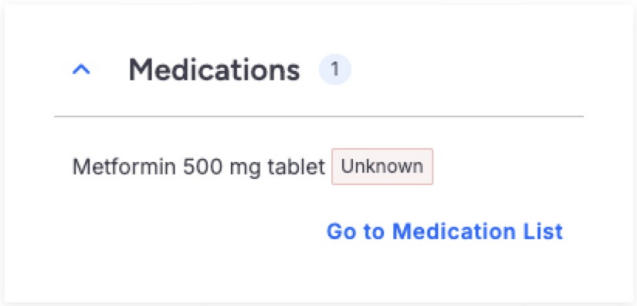
Problems widget

- Shows the number of active problems next to the **Problems** header.
- Active problems appear in the order that they are sorted in the patient's chart.
- Each problem shows the following:
  - Problem
  - ICD-10 or DSM-5 code (if no ICD-10 or DSM-5 code, the SNOMED CT code shows)
  - Onset date (if entered)
- Collapse or expand the widget by selecting the up or down chevron icons .
- Select **Go to Problems List** to open the **Problems List** section of the patient chart.



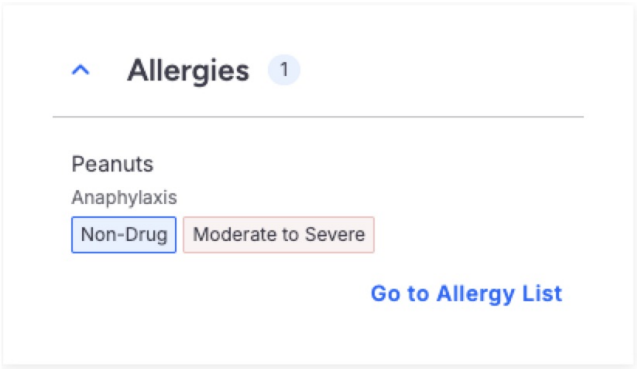
Medications widget

- Shows the number of active medications next to the **Medications** header.
- Active medications are sorted by order date.
- Each medication shows the following:
  - Medication order type
  - Medication name
  - Sig
  - eRx (if a medication was sent electronically)
- Collapse or expand the widget by selecting the up or down chevron icons .
- Select **Go to Medication List** to open the **Medication List** section of the patient chart.



Allergies widget

- Shows the number of active allergies next to the **Allergies** header.
- Allergies are auto-sorted by type, starting with drug allergies, followed by non-drug allergies, and further organized by severity.
- Each allergy displays the following:
  - Allergy
  - Reaction
  - Type
  - Severity
- Collapse or expand the widget by selecting the up or down chevron icons .
- Select **Go to Allergy List** to open the **Allergy List** section of the patient chart.



Locked Notes widget

- Shows the five most recently locked clinical notes.
- Shows the total number of recorded locked clinical notes.
- Filter locked clinical notes by selecting a provider from the dropdown.
- Select **Preview note** to open a preview of the locked clinical note.
- Each problem shows the following:
  - Appointment date
  - Appointment provider
  - Chief complaint
- Collapse or expand the widget by selecting the up or down chevron icons .
- Select **Go to Documents** to open the **Documents** section of the patient chart.

