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

Patient Chart	0	Patient Summary	
Patient Summary			
Demographics		∧ Problems 1	∧ Medications 1
Appointments		Prediabetes	Metformin 500 mg tablet Unknown
Clinical Dashboard		Go to Problem List	Go to Medication List
Documents			
Tasks	0	∧ Allergies 1	 Locked Notes
Problem List	1	Peanuts	New Patient Visit
Medication List	1	Anaphylaxis Non-Drug Moderate to Severe	Appt. 04/14/2025 by: Provider
Send eRx		Go to Allergy List	1-1 of 1 records Go to Documents
Allergy List	1		
During Judgens states a			

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 \uparrow \checkmark .
- Select Go to Medication List to open the Medication List section of the patient chart.

^	Medications 1
Met	formin 500 mg tablet Unknown
	Go to Medication List

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.

	5	
Peanuts		
Anaphylaxis		
Non-Drug	Moderate to Severe]
		Co to Alleray List

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** o 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 \uparrow \checkmark .
- Select **Go to Documents** to open the **Documents** section of the patient chart.

 Loc 	ked Notes		
New Patie	nt Visit	Matthew	Ø
Appt. 04/14	/2025 by:	Provider	