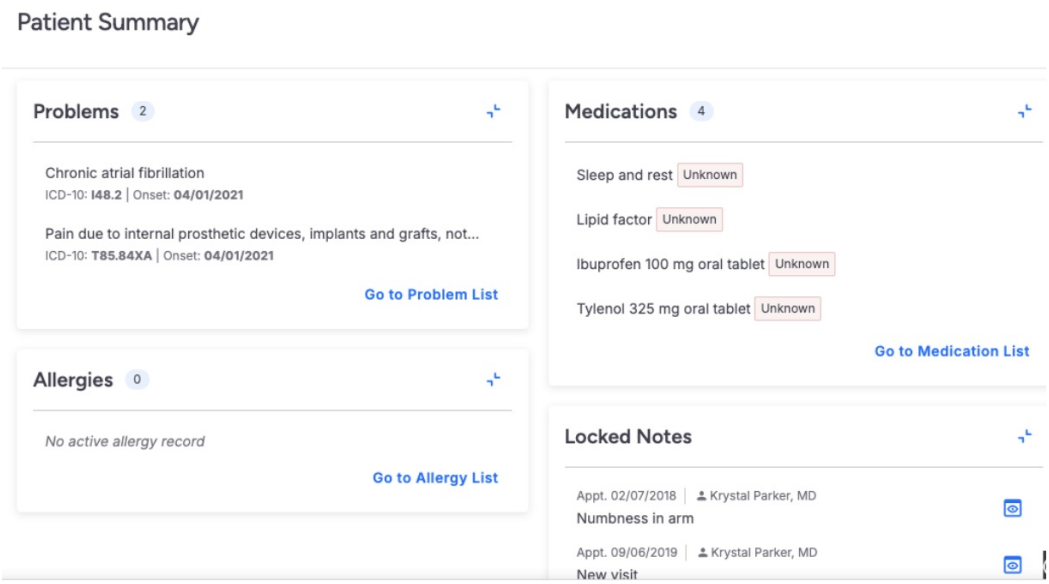
Patient Chart Summary

Last modified on 03/31/2025 11:04 am EDT

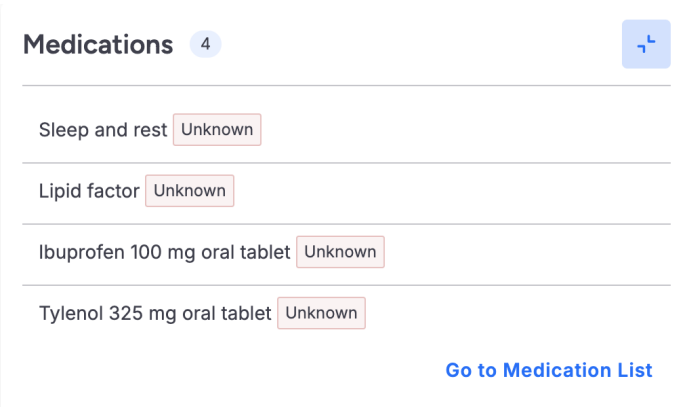
The patient summary view provides both providers and ancillary medical staff with a brief overview of the patient before their visit. This feature facilitates quick access to essential information, streamlining the preparation process and enhancing the quality of care delivered during the patient's appointment.

The summary screen consists of four widgets, each serving a specific purpose:

- Medications - displays a list of the patient's active medications.
- Allergies - displays a list of the patient's active allergies.
- Problems - displays a list of the patient's active problem list.
- Locked Clinical Notes- displays a list of the patient's most recent locked clinical notes.



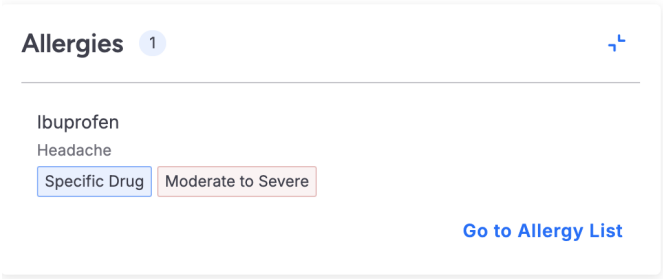
Medication Widget



- Displays the number of active medications beside the header name.
- Active medications are sorted by order date.
- Each medication displays the following: medication order type, medication name, SIG, and eRx (if a medication was sent electronically).

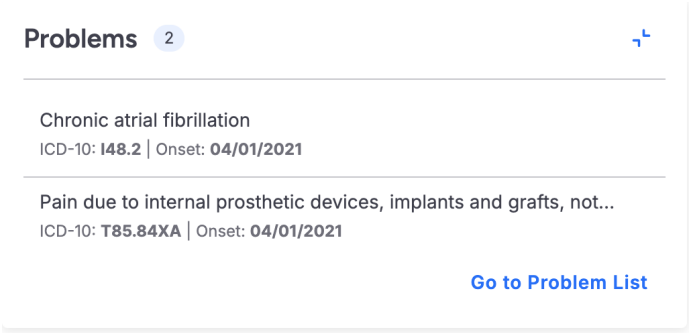
- Ability to expand or collapse widget, using the icon in the upper right corner.
- "Go to medication list" hyperlink that navigates to the medication list section of the patient chart.

Allergies Widget



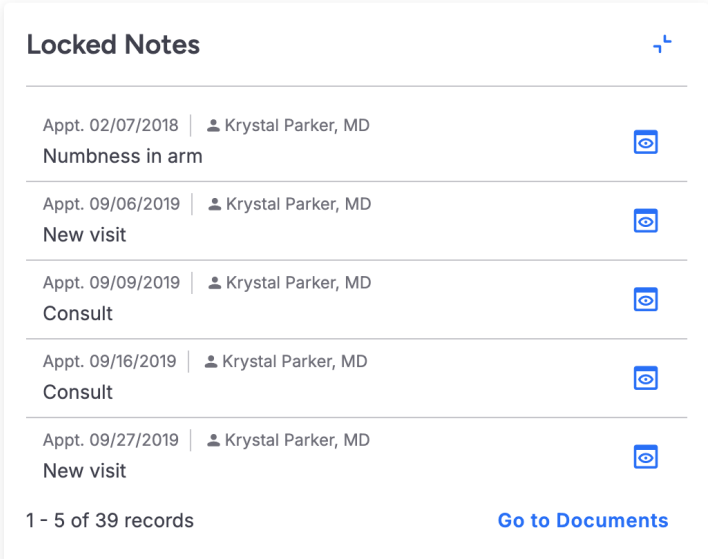
- Displays the number of active allergies beside the header name.
- Allergies are auto-sorted by type, starting with drug allergies, followed by non-drug allergies, and further organized by severity.
- Each allergy displays the following: allergy, reaction, type, and severity.
- Ability to expand or collapse widget, using the icon in the upper right corner
- "Go to allergy list" hyperlink that navigates to the allergy list section of the patient chart.

Problems Widget



- Displays the number of active problems beside the header name.
- Active problems appear in the order that they are sorted in the patient's chart.
- Each problem displays the following: problem, ICD-10, or DSM-5 code (if no ICD-10 or DSM-5 code, the SNOMED CT code will display) and onset date.
- Ability to expand or collapse widget, using the icon in the upper right corner.
- "Go to problems list" hyperlink that navigates to the problems list section of the patient chart.

Locked Notes Widget



- Displays the (5) most recently locked clinical notes.
- Displays the total number of recorded locked clinical notes.
- Ability to filter locked clinical notes by selecting a provider from the drop-down.
- Ability to click on the icon to preview locked clinical notes.
- Each problem displays the following: appointment date, appointment provider, and chief complaint.
- Ability to expand or collapse widget, using the icon in the upper right corner.
- "Go to documents" hyperlink that navigates to the locked clinical notes tab in the document section of the patient chart.

Click the help center articles below to learn more.

Patient Chart Sidebar Navigation	Patient Header
How to Customize the Patient Chart Header	Patient Summary Tutorial Video