

CARE4 Tip Sheet

Chart Filtering

Overview

This document provides instructions on how to apply filters for better organization and easier viewing of documents when using the Web Acute Module.

Changing Views within Chart Tabs

- Within a patient's Chart, folder tabs such as Activity, Diagnostics, Provider Notes, Nurse/Allied Health, and Medications will have various view options for different organization of patient data.
- When under one of these tabs, the top left grey box will show which option you are viewing. Selecting the Grey box will show all viewing options. Example below shows the Activity folder, viewing All Activity and other options once selected.

The screenshot shows the 'Activity' tab selected in the patient chart. A dropdown menu is open, showing options: Activity Log, All Activity, Visits, Archive, Continuity of Care Documents, Migrated Progress Notes/Scans, and Record Scans. The main table displays activity entries:

DATE	DESCRIPTION	LOCATION	VISIT PROBLEM	STATUS
17/01/2022	CC Document			Open
11/09/2021	Inpatient	RVH - Cardiac Renal	MH Crisis	
ACTIVITY DATE	DESCRIPTION			STATUS
02/02/2022 09:37	Consult Request			Open
01/02/2022 08:28	HumuLIN R ; NovoLIN ge Toronto 100 unit In NaCl 0.9% 99 mL @ Per Protocol IV .Q0M SCH		2 mls/hr	

- Below is another example for Provider Notes and the ability to change view from Activity Log to other options.

The screenshot shows the 'Provider Notes' tab selected. A dropdown menu is open, showing options: Activity Log, All Visits - Most Recent, Date, Specialty, Subcategory, and Archive. The main table displays provider notes:

ACTIVITY DATE	DOCUMENT	PROBLEM	STATUS	BY
19/01/2022 11:04	Operative Report	MH Crisis	Cancelled	Crawford, Gordon
17/01/2022 17:13	Internal Medicine Consultation	MH Crisis	Signed	Ma, Maria (+)
04/01/2022 15:15	Hospitalist Progress Note	MH Crisis	Cancelled	Jeffreys, Michael

Utilizing Filters with Chart Tabs

- Within the chart tabs, such as Activity, Diagnostics, Provider Notes, Nurse/Allied Health, and Medications will have various filter options for filtering of patient data.
- Once inside the specific chart tab, select either the Filter tab or the current filters on the left-hand side.

The screenshot shows a navigation menu with tabs for Diagnostics, Provider Notes, Nurse/Allied Health (highlighted in red), and Medications. Below these are sub-tabs for History & Problems, Administrative, Other Clinical, and Health Mgmt. Under the Nurse/Allied Health tab, there are further sub-tabs: Summary, Activity, Flowsheets, and Health Mgmt. A filter bar is visible with the text "Nurse/Allied Health" and a "Clinical Specialty" dropdown. Below the filter bar, a breadcrumb trail reads "All Activity : All Time : All Clinician Specialties : All Subcategories". A "Filter" button is highlighted in red.

- Once selected, the Filter window will appear and you can filter the data such as Care Settings, Timeframe, Specialty, or Subcategory.

The screenshot shows the "Filter Nurse/Allied Health" window. It has a blue header with "Filter Nurse/Allied Health" and "Cancel" and "Apply" buttons. The window is divided into four columns: CARE SETTINGS, TIMEFRAME, SPECIALTY, and SUBCATEGORY. Each column has a "Select All" option and several specific options with checkboxes.

CARE SETTINGS	TIMEFRAME	SPECIALTY	SUBCATEGORY
<input checked="" type="checkbox"/> Select All	<input checked="" type="radio"/> All Time	<input checked="" type="checkbox"/> Select All	<input checked="" type="checkbox"/> Select All
<input checked="" type="checkbox"/> Ambulatory	<input type="radio"/> 1 Year	<input checked="" type="checkbox"/> Interventions	<input checked="" type="checkbox"/> Assessments
<input checked="" type="checkbox"/> Emergency	<input type="radio"/> 3 Years	<input checked="" type="checkbox"/> MAR Documentation	<input checked="" type="checkbox"/> Interventions
<input checked="" type="checkbox"/> Inpatient	<input type="radio"/> 5 Years	<input checked="" type="checkbox"/> Nursing	<input checked="" type="checkbox"/> Notes
<input checked="" type="checkbox"/> Hosp Outpatient	<input type="radio"/> Go to Date		

- Utilizing the filter option will help organize the data for easier access to view necessary documentation