Best Practices – ChartLink®

The following are Evident's "Best Practice" recommendations for ChartLink. Listed below each topic is the hospital staff that should review each section. Changes made for Version 19 appear in **boldface and are italicized**.

Physician Setup
IT Director
- Give each Physician access to Updated ChartLink
- Give each Physician access to Confidential Patients and View Demographic info All patients
- Access to All Physician's Patients (if applicable)
- If using ChartLink, set each device to be used by the Providers direct link to ChartLink sign-on
- If using Updated ChartLink, download Updated ChartLink to each device to be used by Providers
- Be sure each physician has a UBL designated as a Physician
- ***Set up the Physician Group via Identity Management with Application Access of ChartLink, Home Screen, Electronic Signature, E-Forms, and ImageLink.***

ChartLink Tab Setup
ChartLink Liaison
- In Nursing Chart Master Selection, be sure the Multi-disciplinary Categories have a number in the Tab # column. Each Code may only be used once. For ChartLink tabs use:
    - 1 for the documentation to pull to the Cardio-Pulmonary (Respiratory)
    - 2 for the documentation to pull Rehab Services (this is usually Phys. Therapy)
    - 3 for the documentation to pull to Dietary.
- All other Multi-disciplinary documentation will pull under the Multi-D Tab
- If associated Scanned Images to orders, be sure Image titles are set-up for these orders (ie. Outsourced Labs, Medical Records sent from the office/clinic, etc.)
- If EMR Viewer has been purchased, in Nursing Administration, pull ChartLink Review to any Virtual Chart Tab. This will only open the patient nursing is on in Thrive.

ChartLink
Providers
- When the physician signs into ChartLink, the Whiteboard will display
    - Patients will default to My In-Patients
    - Have the physician access Maint. to set Preferences
    - Set number of days post discharge to keep patients on Whiteboard
    - Choose Whiteboard default to display IP, OP, Practice Patient or Last Viewed
    - Choose preference for Rounds Report option
    - If not attached to a group code enter Physicians who the Provider may round to be included on the Whiteboard
- Have each Provider set up a Passphrase in E-Sign to electronically sign Medical Record documents.
- Physicians may reset their Login Password via Maint. Options.
- Patients with Icons will display first on the Whiteboard
- Patients without icons will display after patients with icons in alphabetical order
- Patients may be manually added to the Whiteboard by using Search Options

Virtual Chart
Providers
- Tabs are located at the top of the chart
- Physician logged in will display in the Physician area.
- If documented by Nursing, Demographic data will include Age, Sex, Wt, Ht, BMI, and Allergies.
- Room number and Medical Records number will pull from Patient Profile
- Pictures may be loaded via jpeg file to ChartLink Photo and will display on Virtual Chart

- Hyperlinks provide quick access to resulted tests or scanned images
- Nursing, Medical Records, Ancillary documentation (resulted tests) are located under each tab

Updated ChartLink
Providers
- Click on Evident icon and select Thrive Patient Care Portal to open application
- Will default to Charts icon. All patients where the Provider is the Physician of Record or meets preferences will display
- Patient may be Searched by White Board List, Name, Number, Nursing, Provider via Icon
- ***The White Board List is a customized patient list based on specific filters created per UBL, Role, or Facility. Filters are created using database codes pulling from patient profile information based on the visit type, associated physicians, and patient location.***
- When patient is selected, Demographics will display in the blue bar at the top of the chart
- ***Alerts are determined by the user and can provide information for Clinical Decision Support. The user can define Alerts via the Home Screen.***
- ***More Information will open Micromedex for the item that the user is reviewing***
- Summary screen may be viewed by selecting Radio buttons for: Lab, Meds or vitals
- Allergy, Immunizations icons display data and can be used to enter additional data
- Attach will display any data that has been documented via disciplines (these are the CL tabs) and any attachments (such as scanned documents) to the chart. In addition, the Patient Summary as seen by the patient after discharge via Patient Portal.
- ***History provides the user the ability to access Family Health History***
- Providers may use the E-Sign icon to access E-Sign
- If clinics have been associated with the Provider the Clinic Icon may be used to view Clinic data.

EMR Viewer
HIM, Nursing
- Medical Records may access ChartLink Virtual Chart from the EMR Viewer button located in Medical Records
- Nursing may access ChartLink Virtual Chart via the ChartLink Review link located under a tab on the Patient Documentation Virtual Chart

Support
IT Director, ChartLink Liaison
- Use ICMS (Internet Call Management System) to enter and monitor situations
  - Allows you to enter situations without having to talk to the operator.
  - Users are able to review Evident actions in the situations as well as enter their own actions.
  - Able to review current situations as well as old situations that have already been closed.
  - If Evident is waiting for input from you, ICMS allows you to see the 'Awaiting Response' status of your situation. Likewise, if Evident does not need any more input, you can see that the situations is at "Investigating'
- Make sure you have the proper information before opening situation:
  - Description of Problem
  - Example account number
  - Department problem occurred in
  - Hospital Employee who experienced the issue
  - Path employee took to see problem
  - If you have multiple examples please provide or if it only occurred once, let us know that the problem only happened one time.
  - Let the Evident Representative know your preferred method of communication

- Attend Evident Conferences:
    - Best Practice Conferences (held annually in the Fall)
    - Evident National Conference (held annually in the Spring)
- Provide user feedback on enhancements and new projects via the NACC website at https://usergroup.cpsi.com.
  NOTE: *Access to the website is for user group members only.*
- Load patches and releases in a timely manner. We encourage loading and testing these on your Test Server prior to loading on your Production Server when possible.