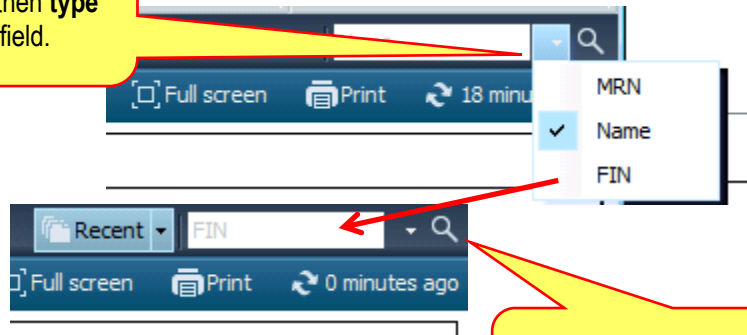


## Using Patient Search

When opening a patient's chart, it is **best practice** to select a patient from either a **Patient List** or from the **Ambulatory Organizer**. When selecting a patient from either of these locations, you will open to the correct *Visit, Encounter, or FIN number* for documentation. However, when you must search for a patient, follow these steps below to ensure you open the chart to a correct encounter (visit #, or FIN #) for documentation.

Click the small **drop-down arrow** to change this to *FIN*; then **type the FIN#** into this field.



**OR** click the **magnifying glass** to open the *Patient Search* window

The screenshot shows the 'Patient Search [Patient Results: 1]' window. The 'Recent Persons' section is active, and the search criteria are set to 'FIN NBR'. The search results table shows one patient: NSPBLUE, NATALIE, with MRN 77-00-10-01-4, Female, Birth Date 10/25/1960, and Age 55 Years. Below the patient information, a table lists encounters for this patient:

FIN NBR	Enc Status	Enc Type	Med Service	Facility	Est Arriv
70011014	Active	UH OUTPATIENT	General Medicine	UP-SP FAM MED BLUE	

The search criteria on the left are: FIN NBR: 70011014, MRN: (empty), Last Name: (empty), First Name: (empty), Birth Date: (empty), Phone Number: (empty). The 'Search' button is highlighted. A 'Search Quality' bar is visible at the bottom left, and 'Assume Wildcards' is checked. The 'OK' button is highlighted at the bottom right.

Searching by **FIN NBR** (encounter or visit #), limits the results to a specific visit for a specific patient

Since there is only 1 encounter (visit/FIN) listed for this patient, click **OK** to open to this visit

## Searching by name

1) Typing the **Last Name** and **First Name** (or partial first name) will strengthen the search results

Then click the **Search** button, or press the **Enter** key on the keyboard

Recent Persons

Last Name: ztest  
First Name:  
FIN NBR:  
MRN:  
Birth Date:  
Phone Number:

No persons found.

Search Quality

Search strength is low. Use additional filters to improve the search strength. Click Yes to continue or No to refine your search.

Yes No

No encounters found.

Search Quality

Assume Wildcards

Typing only the *last name* (or partial last name) of the patient may return a **No persons found** result. Or you might get this *Search Quality* message.

If you clicked *Yes* to the *Search Quality* message above, you may get this type of search results – multiple patients with the same last name

2) Select the **patient's name** in the top window. All of visits for that highlighted patient will display in the lower window

3) Then select the correct **FIN/Encounter** in the bottom window

Recent Persons

Name	SSN	MRN	Gender	DOB
ZTESTBURKENHOLDER-JACKSON, BOY		01-47-72-07-3		03/07/2015
ZTEST3, OPENSCHTHREE		02-90-15-49-0	Male	01/01/1999
ZTEST, ZEBRA	XXX-XX-0020	99-99-99-98-2; C1052331; 00-87-87-87-8	Female	05/03/1984
ZTEST, WCHED		02-90-07-14-4	Female	05/22/1988
ZTEST, WBN	XXX-XX-3122	01-40-02-88-0	Female	07/13/2012
ZTEST, UNICORN	XXX-XX-1199	01-34-23-39-3; S074125896	Male	09/19/2008
ZTEST, TWOSTEWART		02-90-00-03-4	Female	
ZTEST, TURTLE	XXX-XX-9874	01-33-36-64-4; S065478932	Female	02/19/2007
ZTEST, TRAUMA		01-51-43-86-0	Unknown	
ZTEST, TRANSPORT B		01-40-02-86-3	Male	11/11/2012
ZTEST, TINA	XXX-XX-2589	99-99-99-98-5; S072664	Female	05/23/1992
ZTEST, TIGER		88-88-88-88-8	Male	04/23/2001
ZTEST, TEST		01-42-60-07-2	Male	01/01/2014

FIN NBR	Enc Status	Enc Type	Med Service	Facility	Attending Physician	Reg Date
26722773	Active	UH INPATIENT	Family Medical Care	UNIVERSITY HOSP	Ztest, Physician	08/11/...
26417372	Cancelled	UH EMERGENCY	ER Services	UNIVERSITY HOSP	Yanos MD, John	05/27/...
26353482	Cancelled	UH OUTPATIENT	Child Health	UP-SP GEN PEDS	Rajagopalan MD, Anurad...	05/11/...
26337759	Cancelled	UH EMERGENCY	ER Services	UNIVERSITY HOSP	Yanos MD, John	05/06/...
26327919	Cancelled	UH EMERGENCY	ER Services	UNIVERSITY HOSP	Yanos MD, John	
26314690	Discharged	UH EMERGENCY	ER Services	UNIVERSITY HOSP	Yanos MD, John	
26265746	Cancelled	UH EMERGENCY	ER Services	UNIVERSITY HOSP	Yanos MD, John	
26213146	Cancelled	UH INPATIENT	Family Medical Care	UNIVERSITY HOSP	Ztest, Physician	
26206333	Cancelled	UH OUTPATIENT	Dermatology	UP-DERM CL	Zurowski MD, John	
26090257	Discharged	UH INPATIENT	Family Medical Care	UNIVERSITY HOSP	Ztest, Physician	
25736118	Cancelled	MOI OUTPATIENT	Orthopaedic - Surg...	UP-MOI	Stankovic MD, John	
25709491	Cancelled	UH OUTPATIENT	Student Health Svc	Student Health	Outpatient	
25709370	Cancelled	UH OUTPATIENT	Student Health Svc	Student Health	Outpatient	

Search Quality

Assume Wildcards

OK Cancel Preview...

4) Once you have selected **both** the **patient** and the **visit**, click **OK**

## Changing to a different FIN/Visit/Encounter inside the patient's chart

1) Click the **location** link on the blue banner bar to view all of this patient's visits

The X indicates the current FIN that is open

2) Double-click on the new FIN/Visit/Encounter you want to open; Or **highlight** it and click **OK**

Selected	FIN	Visit Type	Est Arrive Date	Admit Date	Discharge Date	Location
X	26754926	MOI TRAUMA		08/19/2015 08:36:19		MOI DAY OF SURG 1050 01
	26754901	UH TRAUMA		08/19/2015 08:33:07		UH DO NOT USE UDN 1 01
	26722773	UH INPATIENT		08/11/2015 11:48:05		UH DO NOT USE UDN 1 02
	26417372	UH EMERGENCY		05/27/2015 08:53:04		EMER CTR C UH TR
	26353482	UH OUTPATIENT	05/11/2015 08:00	05/11/2015 05:56:00	05/27/2015 03:18	SPMB GEN PEDS
	26337759	UH EMERGENCY		05/06/2015 08:56:20		EMER CTR C UH TR
	26327919	UH EMERGENCY	05/04/2015 12:32	05/04/2015 13:01:43		EMER CTR C UH TR
	26314690	UH EMERGENCY		04/30/2015 13:09:16	05/01/2015 09:20	EMER CTR C UH TR
	26265746	UH EMERGENCY		04/20/2015 09:18:27		EMER CTR C UH TR
	26213146	UH INPATIENT		04/07/2015 09:47:56		UH TR
	26206333	UH OUTPATIENT	04/06/2015 14:40	04/06/2015 09:43:03		UH TR
	26090257	UH INPATIENT		03/09/2015 09:20:35	03/18/2015 12:16	UH TR
	25736118	MOI OUTPATIENT	12/09/2014 13:00	12/09/2014 10:31:42	12/16/2014 15:44:29	
	25709491	UH OUTPATIENT	12/02/2014 11:20	12/02/2014 15:56:05		
	25709370	UH OUTPATIENT	12/02/2014 11:20	12/02/2014 15:44:29		

3) Then click **Yes**

Selected	FIN	Visit Type	Est Arrive Date	Admit Date	Discharge Date
X	26754926	MOI TRAUMA		08/19/2015 08:36:19	
	26754901	UH TRAUMA		08/19/2015 08:33:07	
	26722773	UH INPATIENT		08/11/2015 11:48:05	
	26417372	UH EMERGENCY		05/27/2015 08:53:04	
	26353482	UH OUTPATIENT	05/11/2015 08:00	05/11/2015 05:56:00	05/27/2015 03:18
	26337759	UH EMERGENCY		05/06/2015 08:56:20	
	26327919	UH EMERGENCY	05/04/2015 12:32	05/04/2015 13:01:43	
	26314690	UH EMERGENCY		04/30/2015 13:09:16	05/01/2015 09:20
	26265746	UH EMERGENCY		04/20/2015 09:18:27	
	26213146	UH INPATIENT		04/07/2015 09:47:56	
	26206333	UH OUTPATIENT	04/06/2015 14:40	04/06/2015 09:43:03	
	26090257	UH INPATIENT		03/09/2015 09:20:35	03/18/2015 12:16
	25736118	MOI OUTPATIENT	12/09/2014 13:00	12/09/2014 10:31:42	12/16/2014 15:44:29
	25709491	UH OUTPATIENT	12/02/2014 11:20	12/02/2014 15:56:05	
	25709370	UH OUTPATIENT	12/02/2014 11:20	12/02/2014 15:44:29	

4) You may need to declare a **relationship** to the new FIN/Visit/Encounter and click **OK**

For Patient: ZTEST, TURTLE

Relationships:

- Care Delivery
- Clinical Instruction
- Data Systems Support
- IRB Research
- Quality Assurance
- Specialty Care Provider (Lifetime)

ZTEST, TUR... x

ZTEST, TURTLE      DOB:02/19/2007      Age:7 years      Gender:Female      MRN:01-33-36-64-4      Loc:UH DO NOT USE; UD...

Allergies: morphine, Percocet 7.5/325, Titanium, Vi...      FIN: 26722773      UH INPATIENT      ADMIT: 08/11/2015 11:48      DISCH: <No - Discharge date>      Ad Hoc Results:Not Subs...

Code Status: FULL CODE      Ordered: 02/05/2016      MU Health:Active      Account Advance Directive: No Electronic Advance Directive      Clinical Research:On Study

Menu - All      < >      Home      Family Med View      Full screen      Print      0 minutes ago

The new FIN # selected should now be displayed along with the new location

ZTEST, TUR... x

ZTEST, TURTLE      DOB:02/19/2007      Age:7 ye      Gender:Female      MRN:01-33-36-64-4      Loc:UH DO NOT USE; UD...

Allergies: morphine, Percocet 7.5/325, Titanium, Vi...      FIN: 26722773      UH INPATIENT      ADMIT: 08/11/2015 11:48      DISCH: <No - Discharge date>      Ad Hoc Results:Not Subs...

Code Status: FULL CODE      Ordered: 02/05/2016      MU Health:Active      Account Advance Directive: No Electronic Advance Directive      Clinical Research:On Study

Menu - All      < >      Home      Patient Information      Full screen      Print      0 minutes ago

IView / I & O

Postoperative Summary

Problems and Diagnoses

Health Maintenance

Immunization Schedule

Appointments

Histories

Goal Editor

**Patient Information**

Advanced Growth Chart

Community View

Newborn Summary

ACS Calculator

Prenatal / Newborn Summary Views

Demographics      Allergies      **Visit List**      PPR Summary      System Information

Selected	FIN	Visit Type	Est Arrive Date	Admit Date	Discharge Date
X	26722773	UH INPATIENT		08/11/2015 11:48:05	
	26417372	UH EMERGENCY		05/27/2015 08:53:04	
	26353482	UH OUTPATIENT	05/11/2015 08:00:00	05/11/2015 05:56:00	05/27/2015 08:53:04
	26337759	UH EMERGENCY		05/06/2015 08:56:20	
	26327919	UH EMERGENCY	05/04/2015 12:32:02	05/04/2015 13:01:43	
	26314690	UH EMERGENCY		04/30/2015 13:09:16	05/01/2015 09:00:00
	26265746	UH EMERGENCY		04/20/2015 09:18:27	
	26213146	UH INPATIENT		04/07/2015 09:47:56	
	26206333	UH OUTPATIENT	04/06/2015 14:40:00	04/06/2015 09:43:03	
	26090257	UH INPATIENT		03/09/2015 09:20:35	03/18/2015 21:00:00
	25736118	MOI OUTPATIENT	12/09/2014 13:00:00	12/09/2014 10:31:42	12/16/2014 08:00:00
	25709491	UH OUTPATIENT	12/02/2014 11:20:02	12/02/2014 15:56:05	
	25709370	UH OUTPATIENT	12/02/2014 11:20:01	12/02/2014 15:44:00	

Patient Name : ZTEST, TURTLE      Admitting : Yanos MD, John

Changing to a different FIN/Visit/Encounter can also be done from the Patient Information / Visit List tab by following the same process