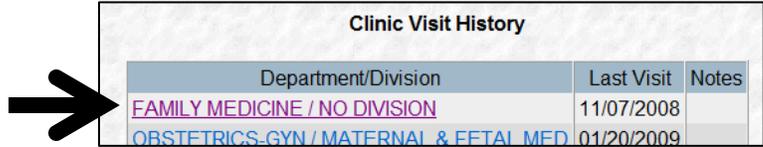


## Patient Clinical Summary – Primary Workflow

A Patient Clinical Summary (PCS) is required for clinic office visits. It must be released to the patient within three business days of the appointment via email, mail, or at time of visit.

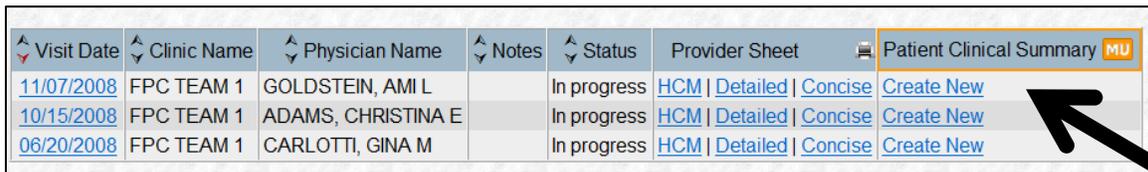
I. Navigate to your patient’s record in WebCIS (usually through “Schedule.”)

II. Click the “Visits” Tab. Choose your visit here:



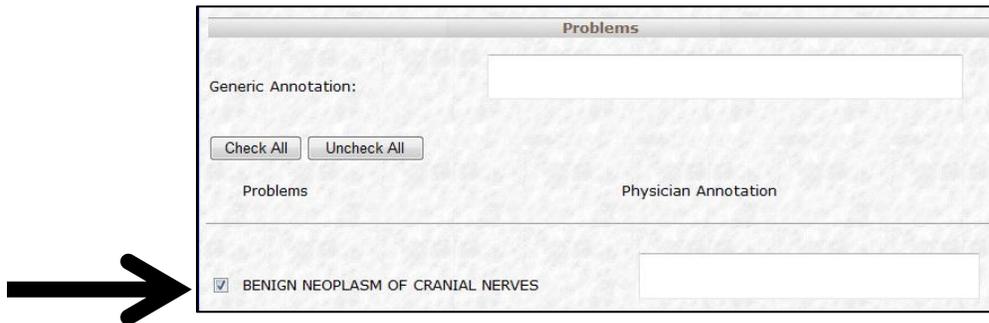
Clinic Visit History		
Department/Division	Last Visit	Notes
FAMILY MEDICINE / NO DIVISION	11/07/2008	
OBSTETRICS_GYN / MATERNAL & FETAL MED	01/20/2009	

III. Choose “Create New” on line containing today’s visit:



Visit Date	Clinic Name	Physician Name	Notes	Status	Provider Sheet	Patient Clinical Summary <span style="background-color: #FFD700;">MU</span>
11/07/2008	FPC TEAM 1	GOLDSTEIN, AMI L		In progress	<a href="#">HCM</a>   <a href="#">Detailed</a>   <a href="#">Concise</a>	<a href="#">Create New</a>
10/15/2008	FPC TEAM 1	ADAMS, CHRISTINA E		In progress	<a href="#">HCM</a>   <a href="#">Detailed</a>   <a href="#">Concise</a>	<a href="#">Create New</a>
06/20/2008	FPC TEAM 1	CARLOTTI, GINA M		In progress	<a href="#">HCM</a>   <a href="#">Detailed</a>   <a href="#">Concise</a>	<a href="#">Create New</a>

IV. Active Problems, Meds, and Allergies in WebCIS flow into a Patient Clinical Summary. Use checkboxes to indicate which meds, problems, and allergies you wish to include on the patient’s PCS. Annotate or provide patient education on clinical summary if desired.



**Problems**

Generic Annotation:

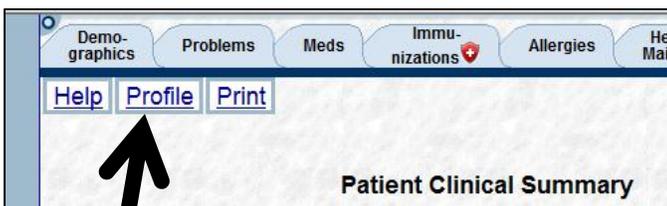
Problems	Physician Annotation
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BENIGN NEOPLASM OF CRANIAL NERVES

Notes:

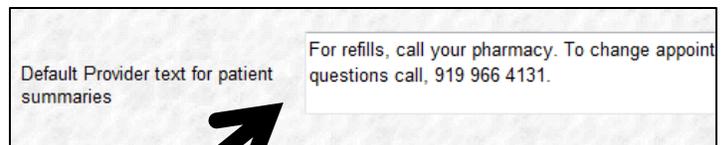
1. You can bring labs into your Patient Clinical Summary by choosing the proper date range under “labs” on the Patient Clinical Summary, then click refresh.
2. If you leave the PCS to update another part of this patient’s record, you can get back to your Patient Clinical Summary by clicking on the “Create Notes” tab. If you want to log off WebCIS or want to leave this patient record altogether, first click “Save.” This will save a draft version of the PCS to your “WIP Notes” tab in your Activity List. Other users will not be able to view/edit your PCS until it has been finalized to the patient record.
3. By clicking “Profile” at the top-left of the PCS, you can determine default text to appear on any PCS you create.



Demo-graphics
Problems
Meds
Immu-nizations ▼
Allergies
He Mail

Help
Profile
Print

**Patient Clinical Summary**



Default Provider text for patient summaries

For refills, call your pharmacy. To change appointment questions call, 919 966 4131.

(over)

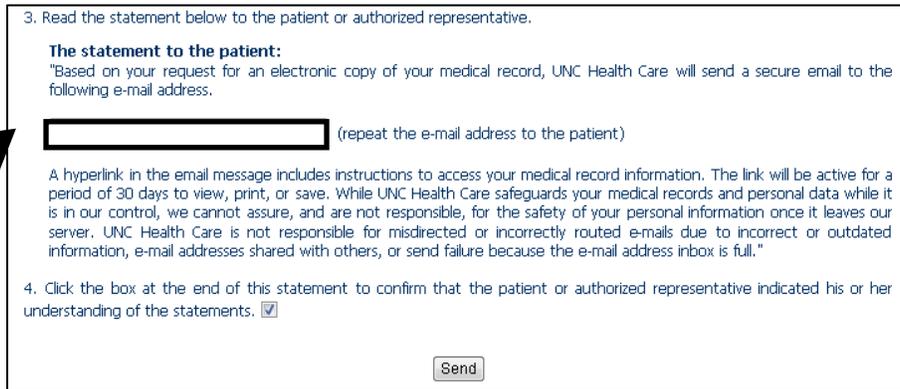
V. When you have completed your patient clinical summary, it can be provided to the patient in any of three ways.

A. Email to Patient.



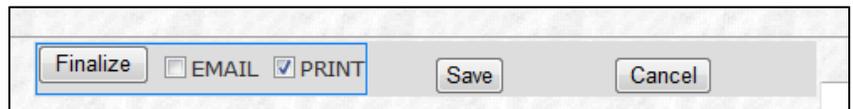
1. Check "EMAIL" box, then click finalize.

2. A disclaimer appears. If the patient has an email address recorded in GE, it will appear in the box below. Confirm the email address with the patient. If there is not a recorded email, you can enter it at this time.



3. Alert patient that this is protected health information and that one should only provide an email address if the patient would like to receive this health information via (secure) e-mail. Check the box and click "Send."

B. Print for Patient.



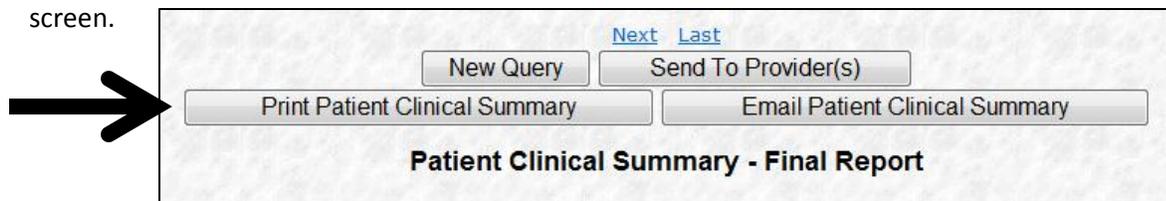
1. Check "PRINT" and click "Finalize."

2. A pdf will be generated which you must then print and hand or mail to the patient.

C. Finalize to record and print or email later.

1. Click "Finalize."

2. The Patient Clinical Summary will be finalized and stored on the "Reports" Tab. From Reports any user can open a previously finalized clinical summary and either print or email for patient using buttons at the top of the screen.



**Important Note:** You must follow workflow A, B, or C to receive credit.

If you click "Finalize" but do not first check "EMAIL" or "PRINT," and then do not later print or email a clinical summary using workflow C within 3 business days, then you will not receive credit.

If you click the blue hyperlink "Print" in the top left corner of WebCIS or use "File-Print" in the browser dialog without using workflow outlined above, you will not receive credit.

If you click "Save" but do not complete workflow A, B, or C above, you will not receive credit. You must follow steps outlined above in A, B, or C to receive credit.