Health*e*Vet Desktop / Care Management Project

Health*e*Vet Desktop
Clinician Dashboard
Nurse Dashboard
Sign List
Query Tool

User Manual

February 2004

Department of Veterans Affairs
V*ist*A System Design & Development

Revision History

Date	Patch	Page(s)	Change(s)

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Health*e*Vet Desktop

HEALTHe*e*VET DESKTOP

Introduction

The Health*e*Vet Desktop is the application framework that hosts the Veterans Administration's (VA's) new generation of clinical applications. The Care Management project is the first project to run inside the Health*e*Vet Desktop. Eventually, most of the clinical applications used at the VA will be hosted within the Health*e*Vet Desktop.

This distribution of the Health*e*Vet Desktop includes the four Care Management perspectives (perspectives are similar to applications). The perspectives included are:

- **Clinician Dashboard**
  The Clinician Dashboard provides clinicians with an easy-to-read table that lists patients who have items that need attention. The table allows clinicians to quickly and easily view healthcare information. For example, you can use the Clinician Dashboard to quickly determine which patients have order results that should be reviewed or acknowledged, or documents that need to be signed.

- **Nurse Dashboard**
  The Nurse Dashboard provides nurses with an easy-to-read table that lists patients who have items that require a nurse's attention. For example, you can use the Nurse Dashboard to quickly determine which patients have orders that need to be verified. The Nurse dashboard also displays patients' vitals.

- **Query Tool**
  The Query Tool allows you to create reports based on patient data. You can use the five predefined reports (Abnormal Results, Consult Status, Incomplete Orders, Recent Activity, Scheduled/Due Activity) or you can create a custom report.

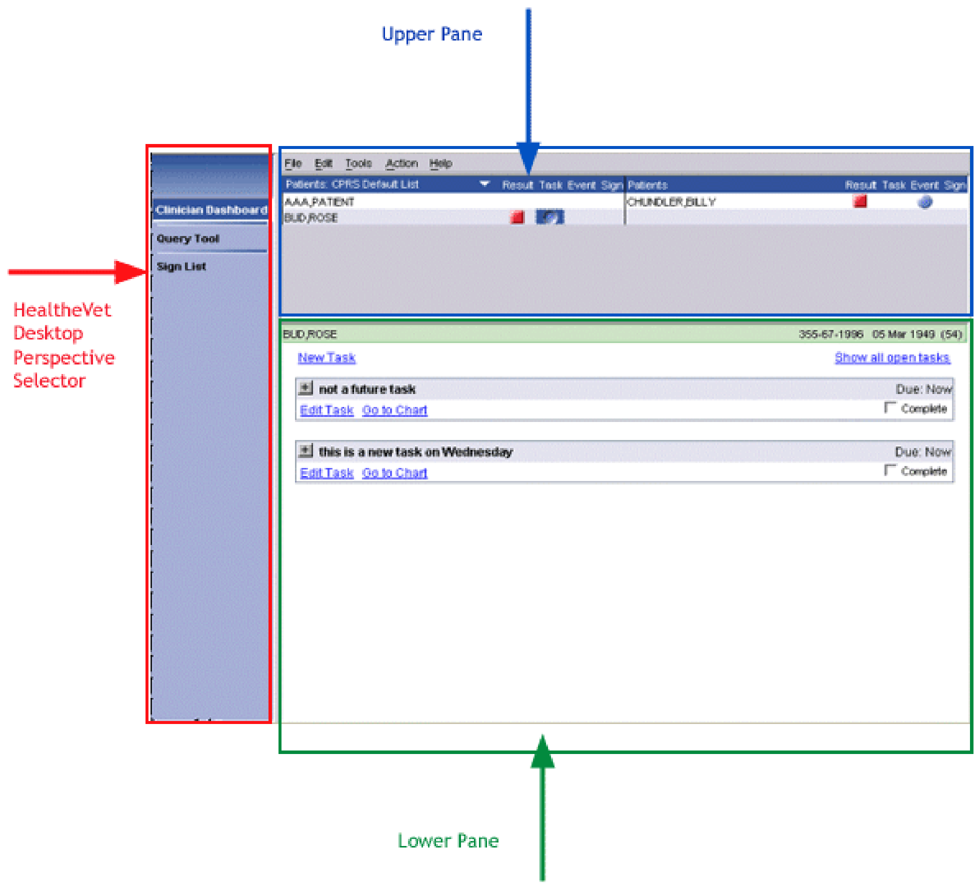
- **Sign List**
  The Sign List allows you to sign multiple items for multiple patients. For example, using the Sign List you could sign a discharge summary for John Smith and notes for Jane Smith simultaneously. The types of items that appear on your Sign List depend on which dashboard you are using. Items that appear on the Sign List for the Clinician Dashboard include unsigned and uncosigned clinical documents. Items that appear on the Sign List for the Nurse Dashboard include unverified orders and completed text orders.

  *Note: The Clinical Application Coordinator (CAC) at your site assigns access to Health*e*Vet Desktop perspectives. You may not have access to all of the perspectives listed above.*

This distribution of Health*e*Vet Desktop also includes a Task Editor, which allows you to create patient-related tasks. The tasks you can create are based on items listed in the Clinician and Nurse Dashboards. For example, using the Task Editor, you could create a task to call a patient based on a lab result indicating an abnormal white bloodcell count. Any user can view and act on tasks created in the Task Editor.

Links to different perspectives are located in the perspective selector on the left side of the Health*e*Vet Desktop. To display a new perspective, simply click the appropriate link. For example, to display the Sign List perspective, click **Sign List** on the Health*e*Vet Desktop perspective selector.

The output from the current perspective is displayed in the output (right) pane. The output pane is further divided into an upper pane and a lower pane. The upper pane contains general information, while the lower pane contains detailed information about the items you select in the upper pane.



Workstation System Requirements

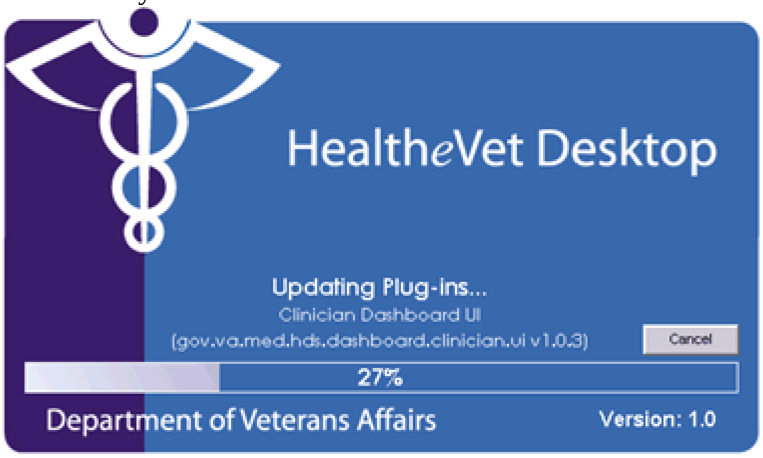
- Windows 2000 Workstation or Windows 2000 Server with Terminal Services
- Workstation hardware should comply with VA Desktop Minimum Acceptable Configurations (http://vaww.vairm.vaco.va.gov/VADesktop)

- Java 2 Platform Standard Edition version 1.4.1 or 1.4.2 (J2SE 1.4.1 or 1.4.2) Java Runtime Environment (JRE); the JRE is available from http://java.sun.com
  Note: You must install J2SE 1.4.1 or 1.4.2 in the default directory.

Logging on

To log on to Healthe*e*Vet Desktop, follow these steps:

1. Double-click the *HealtheVetDesktop.exe* shortcut icon.
2. The Health*e*Vet splash screen appears. If necessary, new plug-ins and modules are automatically downloaded from the Health*e*Vet server.



If necessary, new plug-ins and modules are automatically downloaded from the Health*e*Vet server.

*Note: Click **Cancel** to stop downloading new plug-ins and modules.*

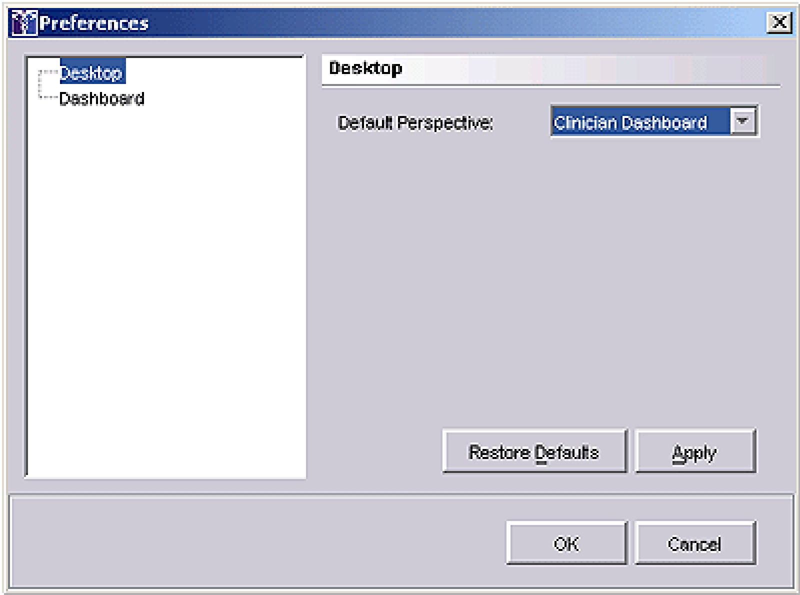
3. When the *VistA Sign On* dialog box appears, enter your access code.
4. Enter your verify code.
5. Click **OK**.
   The Health*e*Vet Desktop appears.

Selecting a Default Perspective

The default perspective is displayed everytime you start Health*e*Vet Desktop.
Your site's CAC may have already assigned a default perspective for you. If not, you should select a default perspective after you log in for the first time. You may also want to change your current default perspective. For example, you may want to change your default perspective from the Clinician or Nurse Dashboard to the Sign List. You can change your default perspective at any time.

To select (or change) a default perspective, follow these steps:

1. Select **Tools** | **Options**.
   The *Preferences* dialog box appears.



The *Preferences* dialog box.

2. Select **Desktop** from the pane on the left side of the screen.
3. Select a default perspective from the *Default Perspective* pull-down list.

   Note: If you are not authorized to access a particular perspective, you will not be able to set this perspective as your default perspective

4. Click **OK**.
   The selected perspective is now the default perspective.

   Note: If a defaut perspective is not set, the first perspective in the perspective list will be the default perspective.

The Relationship Between Notifications in CPRS and Care Management

The Relationship Between Notifications in CPRS and Care Management

Notifications that are active in CPRS are displayed on the Clinician Dashboard. However, actions taken on items in either the Clinician or Nurse Dashboard can affect notifications in CPRS. In general, if you can act on an item in Care Management, your action clears the result notification in CPRS.

Following is a summary of the relationship between notifications in CPRS and Care Management.

Notification Name	Dashboard Action	Required CPRS Action	CPRS Outcome	Notification Outcome
Events				
Admission	View Event	None	None	Cleared
Discharge	View Event	None	None	Cleared
Deceased Patient	View Event	None	None	Cleared
Unscheduled Visit	View Event	None	None	Cleared
Transfer from Psychiatry	View Event	None	None	Cleared
Results				
Abnormal Lab Results (Action)	Acknowledge	None	None	Cleared
Abnormal Lab Results (Info)	Acknowledge.	None	None	Cleared
Abnormal Imaging Results	Acknowledge	None	None	Cleared
Consult/Request Resolution	Acknowledge	None	None	Cleared
Critical Lab Result (Info)	Acknowledge	None	None	Cleared
Critical Lab Results (Action)	Acknowledge	None	None	Cleared
Imaging Results Amended	Acknowledge	None	None	Cleared
Imaging Patient Examined	Acknowledge	None	None	Cleared
Imaging Results	Acknowledge	None	None	Cleared
Lab Results	Acknowledge	None	None	Cleared
Actions				
Unsigned Document	Document Signed	None	Document Signed	Cleared
Unverified Order	Verify Order	None	Order Verified	Cleared
Unverified Med	Verify Med	None	Med Order	Cleared

Notification Name	Dashboard Action	Required CPRS Action	CPRS Outcome	Notification Outcome
Order	Order		Verified	

Note: Additional notifications are accessible only via CPRS.

Clinician Dashboard

CLINICIAN DASHBOARD

Introduction

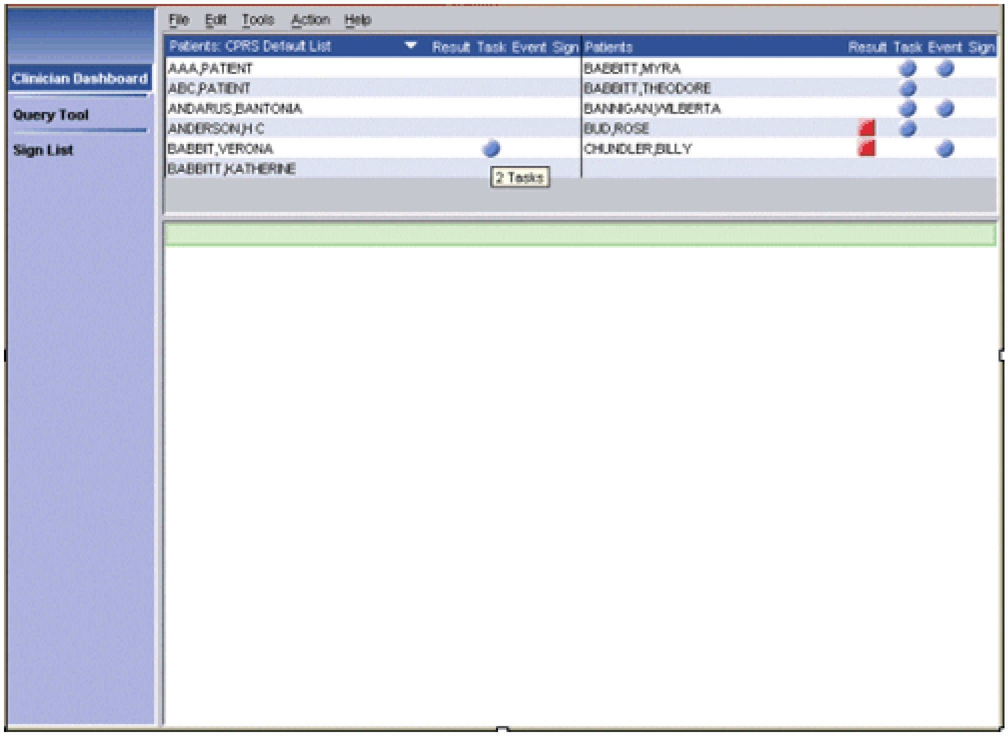
The Clinician Dashboard provides clinicians with an easy-to-read table that lists patients who have items that need attention. The table is displayed in the upper pane and contains the following columns:

- Result column (p. 18)
- Task column (p. 20)
- Event column (p. 23)
- Sign column (p. 23)

If a patient has items that need attention, one of the following icons appears in a column:

- The icon indicates a new, due or outstanding item that contains normal results or a low- or medium-priority task.
- The icon indicates that the item contains abnormal results, significant findings, or high priority tasks.
- The icon indicates that you have acted on all of the items with which this icon is associated. In most cases, refreshing or exiting Care Management removes this icon.

If you hold the pointer over an icon, a hover hint appears indicating the number of items that are associated with the icon. For example, in the graphic below, the hover hint indicates that Verona Babbit has two tasks.



The hover hint shows that Verona Babbit has two tasks.

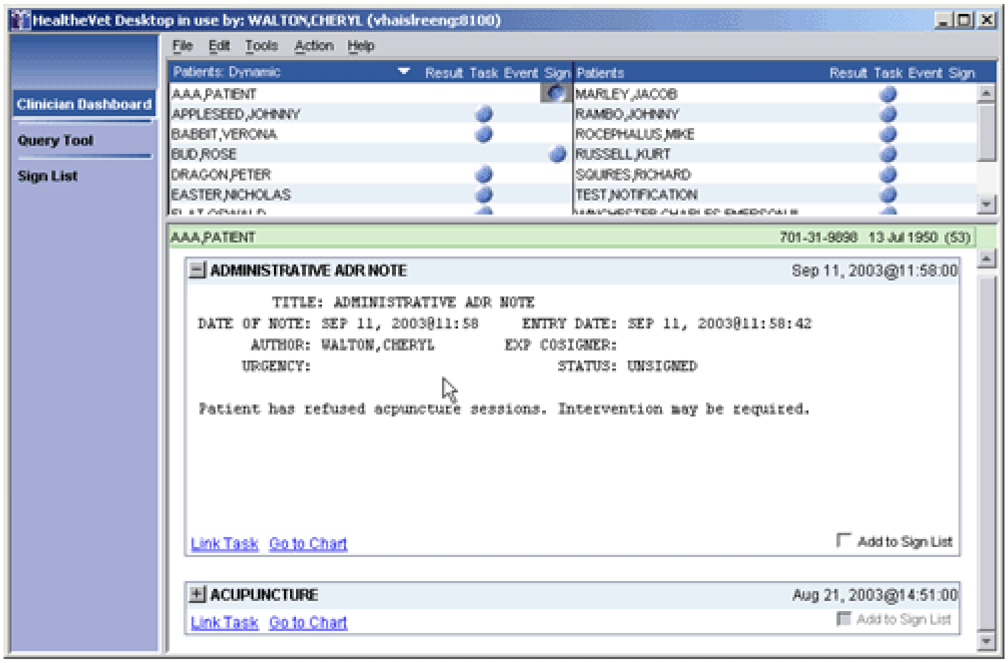
Viewing Details of an Item on the Clinician Dashboard

To view details of an item on the Clinician Dashboard, follow these steps:

1. Click an icon in the *Result*, *Task*, *Event*, or *Sign* column.
   Items that have not been acknowledged, completed, viewed, or signed appear in individual boxes in the lower pane.

   Note: You can also click on a patient's name. The patient's demographic information is then displayed in the lower pane.

2. Click the plus (+) or minus (−) icon to expand or collapse a box.



The details of an item displayed on the Clinician Dashboard

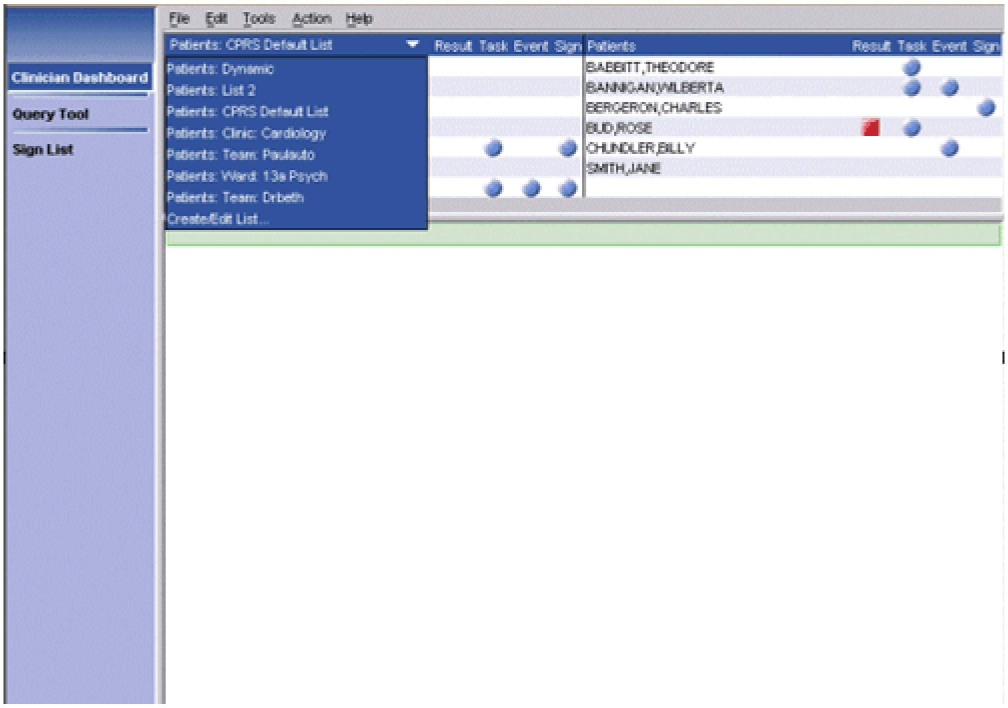
Criteria Used to Determine if a Patient is Listed on Your Clinician Dashboard

Care Management includes three types of patient lists:

- The Dynamic patient list
- The CPRS Default List
- Custom patient lists

Dynamic Patient List

The Clinician Dashboard includes a drop-down menu from which you can select a patient list.



The Clinician Dashboard includes a drop-down menu from which you can select a patient list.

Included in this selection is a dynamically generated patient list—called the Dynamic patient list—that incorporates patients from all of the individual patient lists in CPRS. Patients who appear in this list meet one or more of the following criteria:

- The patient has order results that have not been acknowledged (see Acknowledging a Result, p.19) and you are the ordering provider.
- The patient has documents that need to be signed and you are the designated signer or cosigner.
- You have an outstanding notification for the patient's ADT movements or unscheduled visits.

  Note: Outstanding ADT movements and unscheduled visit notifications are the ONLY outstanding notifications that ***cause*** *a patient to appear on the Clinician Dashboard. However, for patients who do appear, the dashboard also displays other types of notifications.*

- The patient has incomplete tasks that are due and you meet one or more of the following three criteria:
  - You created the task
  - You are the patient's attending or primary provider
  - You are linked to the patient through a team or personal patient list

All patients who appear on the dashboard as a result of selecting the Dynamic patient list have associated icons.

CPRS Default Patient List

The Clinician Dashboard also includes the CPRS Default patient list, which, as its name suggests, is based on—and synchronized with—your default patient list in CPRS.

When you select this list, Care Management displays all of the patients who are included in your default patient list in CPRS.

If you select this list but have not selected a default patient list in CPRS, no patients appear on your Clinician Dashboard.

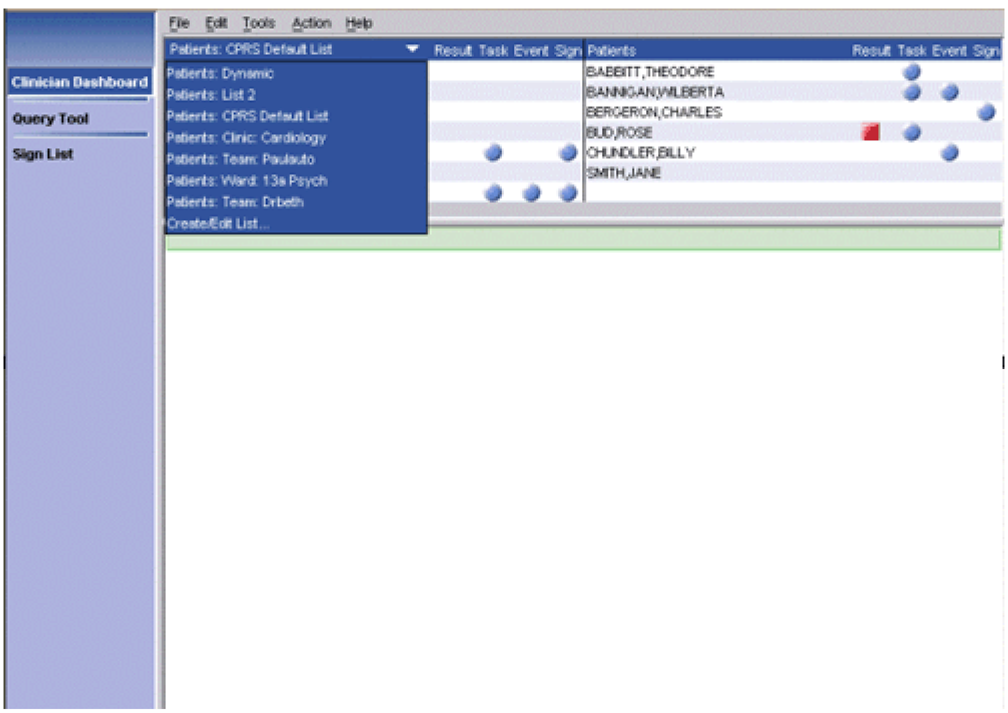
Note: To avoid potential confusion, you should select a default patient list in CPRS before selecting the CPRS Default List in Care Management. For more information, see "Setting a Default Patient List" in the CPRS user guide or access this topic from the CPRS GUI ***Help*** *menu.*

Creating a Custom Patient List

You can specify which patients appear on your Clinician Dashboard by creating a custom patient list.

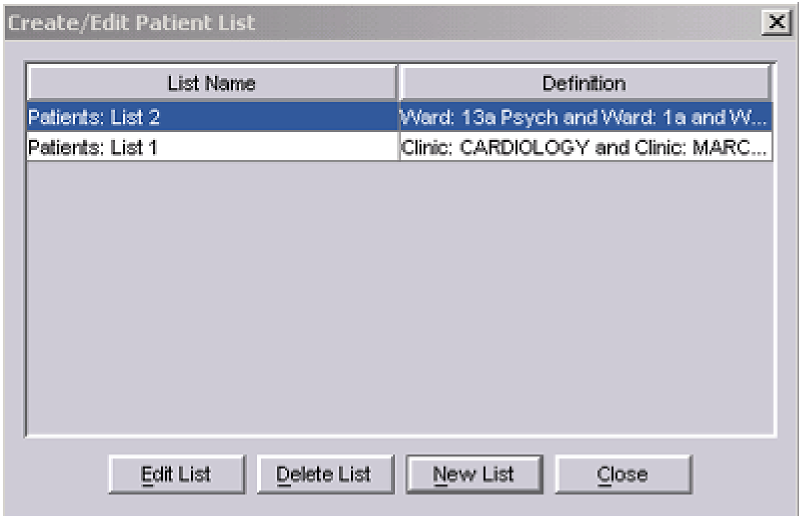
To create a custom patient list, follow these steps:

1. Click **Clinician Dashboard** on the Health*e*Vet Desktop perspective selector.
2. Select **Create/Edit List** from the *Patients* drop-down menu.



To create a patient list for the Clinician Dashboard, select **Create/Edit List** from the *Patients* drop-down menu.

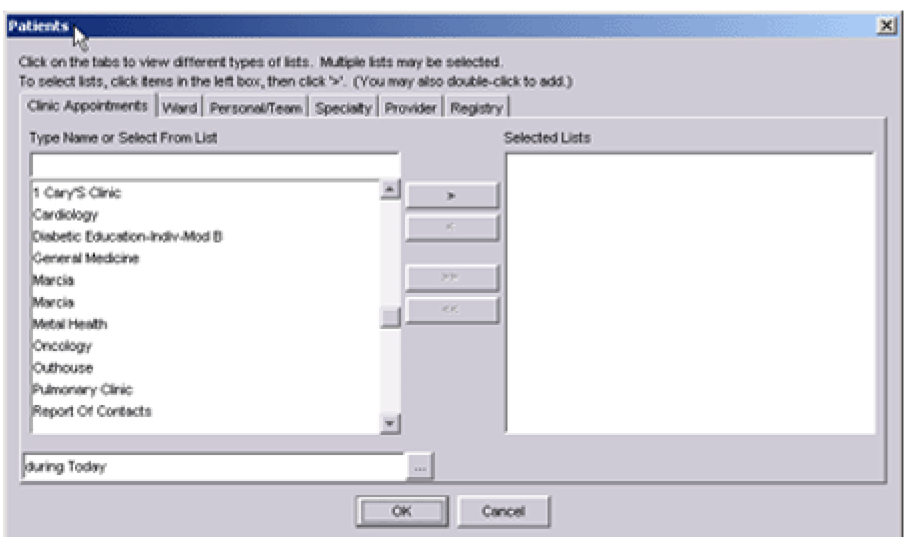
The *Create/Edit Patient List* dialog box appears.



The *Create/Edit Patient List* dialog box.

3. Select **New List** from the *Create/Edit Patient List* window.
   The *Patients* dialog box appears. The tabs across the top of the dialog box (Clinic Appointments, Ward, Personal/Team, Specialty, Provider, Registry) correspond to different patient lists.
4. Select the tab for the patient list(s) you want to add.

   Note: you can use any or all of these patient lists. However, your results are likely to be more coherent if you carefully consider your list selections.

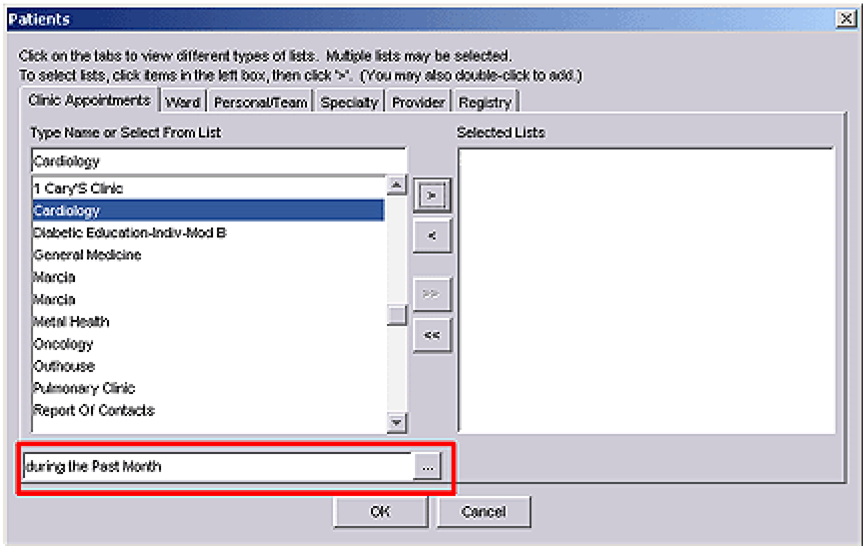


The *Patients* dialog box

5. Select a clinic, ward, personal/team, specialty, provider, or registry list from the *Type Name or Select From List* pane.

   Note: If you select a clinic from the Clinic Appointments tab, you must also specify a date range. To do this, click the ellipse  *button (at the bottom of the dialog box) and select a date range. The date range you specify tells the Clinician*

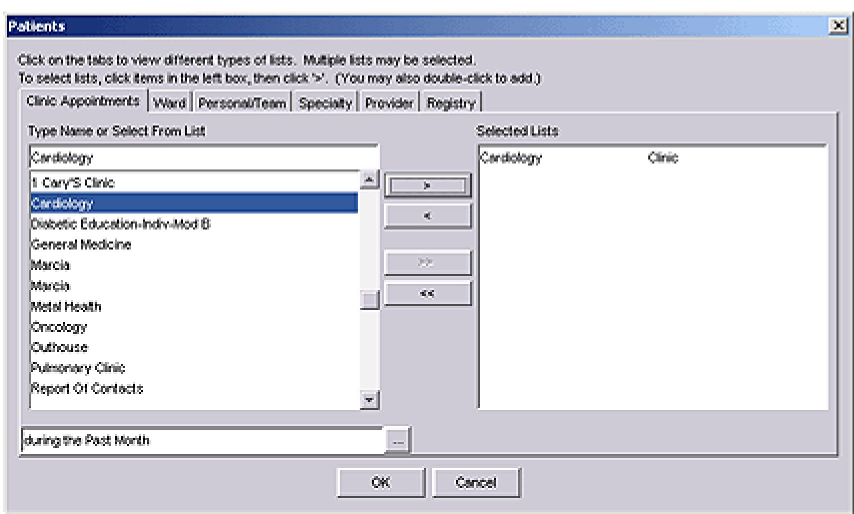
Dashboard to display patients who have, or have had, appointments in the clinic within the specified date range. In the example below, patients who had appointments in the Cardiology clinic in the past month will be displayed on the Clinician Dashboard.



In this example, patients who had appointments in the Cardiology clinic in the past month will be added to the patient list.

6. Click the right arrow .
   The item moves to the *Selected Lists* pane.

   Note: Alternately, you can double-click an item to move it to the Selected Lists *pane. If it is available, you can also click the double arrow*  *to move all of the items in the* Type Name or Select From List *pane to the* Selected List *pane. (The double arrow is available for the Ward, Personal/Team, Specialty, and Registry Tabs.)*

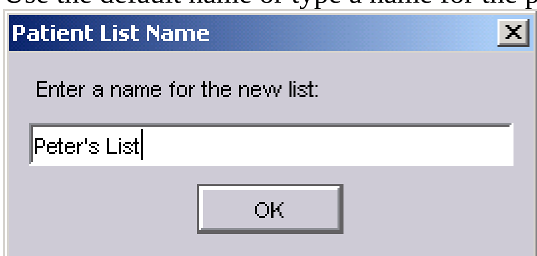


The Cardiology clinic is displayed on the *Selected Lists* pane.

7. Repeat Steps 4-6 if you want to add additional patient lists.
8. Click **OK**.
   The *Patient List Name* dialog box appears.

The *Patient List Name* dialog box.

9. Use the default name or type a name for the patient list.



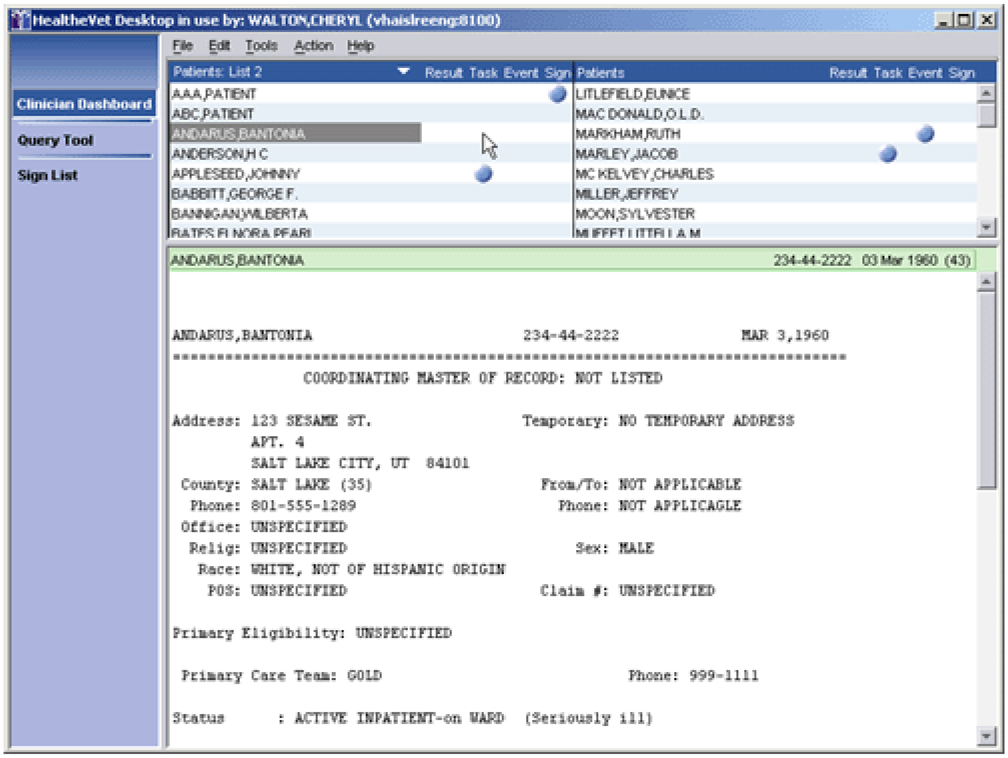
This list will be called Peter’s List.

10. Click **OK**.
    The patients from the new list appear in the upper pane. Dashboard lights (or icons) appear for patients who have items that need attention. The name of the new list also appears in the *Patients* drop-down menu.

Viewing Patient Demographic Information

Click a patient’s name to view his or her demographic information. The demographic information appears in the lower pane and may include the patient’s:

- Address
- Eligibility
- Health insurance information
- Ward status
- Provider
- Attending physician
- Admission status
- Future appointments
- Religion
- Sex

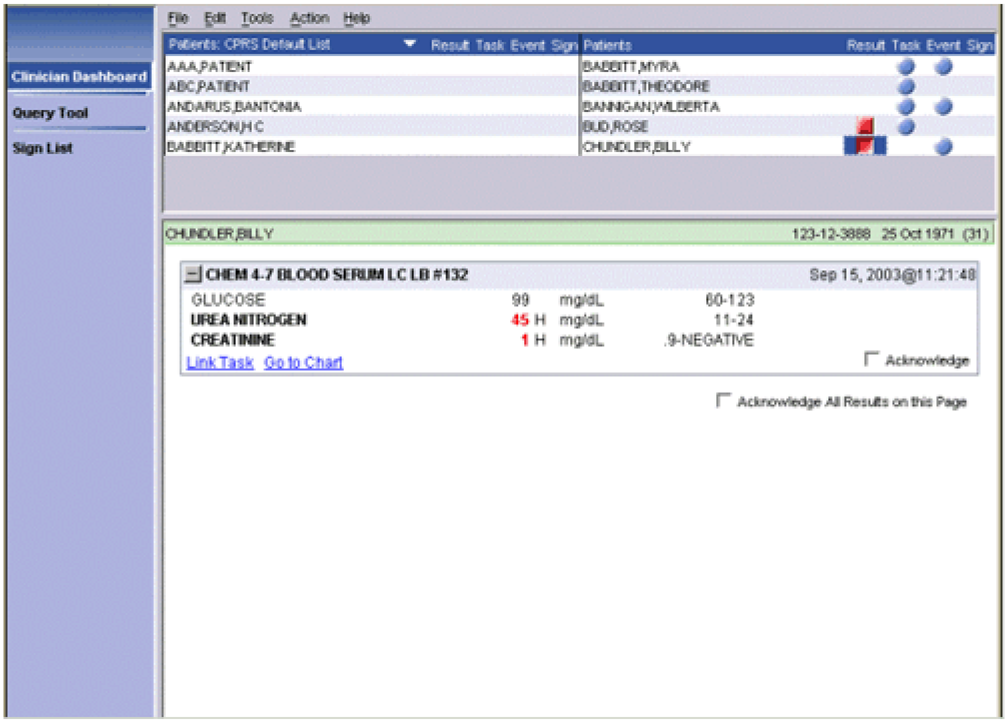


Demographic information for Andarus, Bantonia displayed on the Clinician Dashboard.

Result Column

Introduction

An icon in the result column indicates that a patient has lab, consult, procedure, or radiology results that the user has not acknowledged. Icons appear in the result column of the Clinician Dashboard only if the user is the ordering provider. The user can view/acknowledge these results from the Clinician Dashboard.



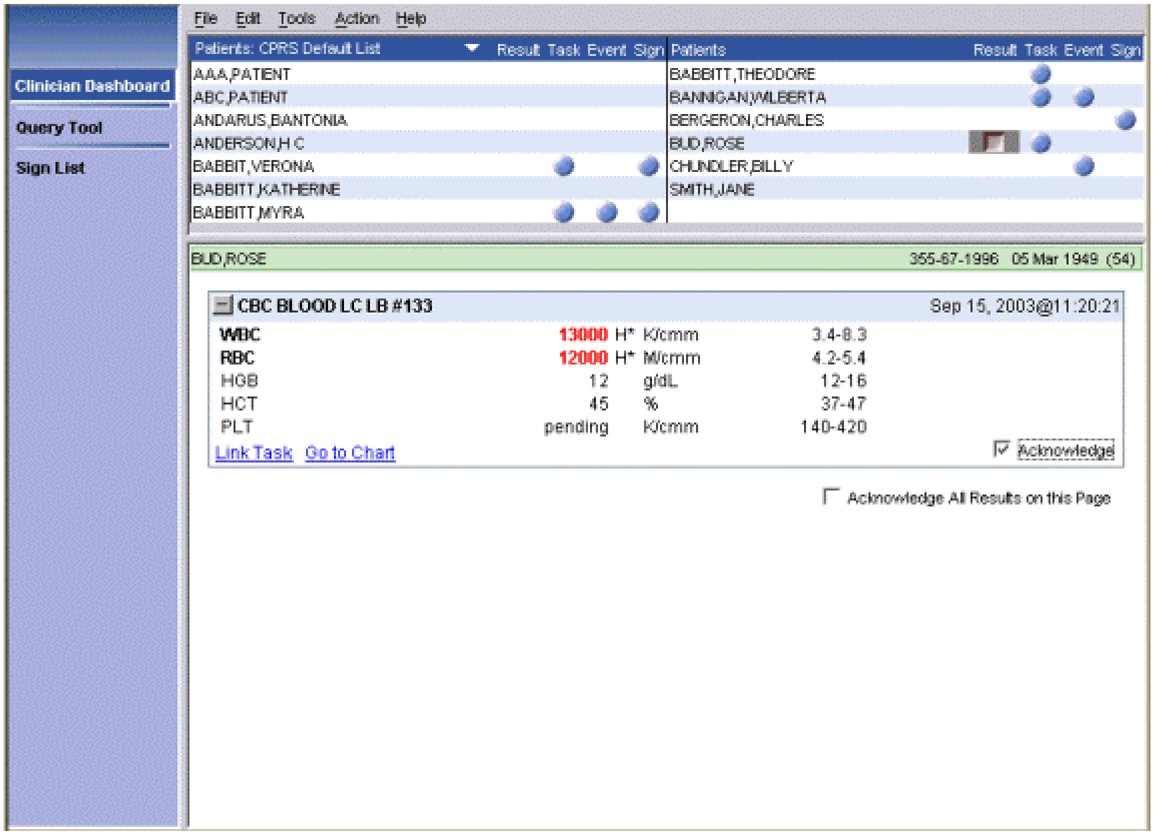
An icon in the results column indicates that a patient has results that have not been acknowledged.

Acknowledging a Result

Acknowledging a result removes the result from the Clinician Dashboard. (Ordering providers are required to acknowledge results in Care Management regardless of the notification or deletion parameters set up in CPRS.)

To acknowledge a result, follow these steps:

1. Click an icon in the *Result* column.
   Results that have not been acknowledged appear in individual results boxes in the lower pane.
2. Click the plus ( ) or minus ( ) icon to expand or collapse a results box.
3. Check the appropriate *Acknowledge* check box.
4. The result is now acknowledged. Select **Action** | **Refresh Dashboard** to refresh the screen.



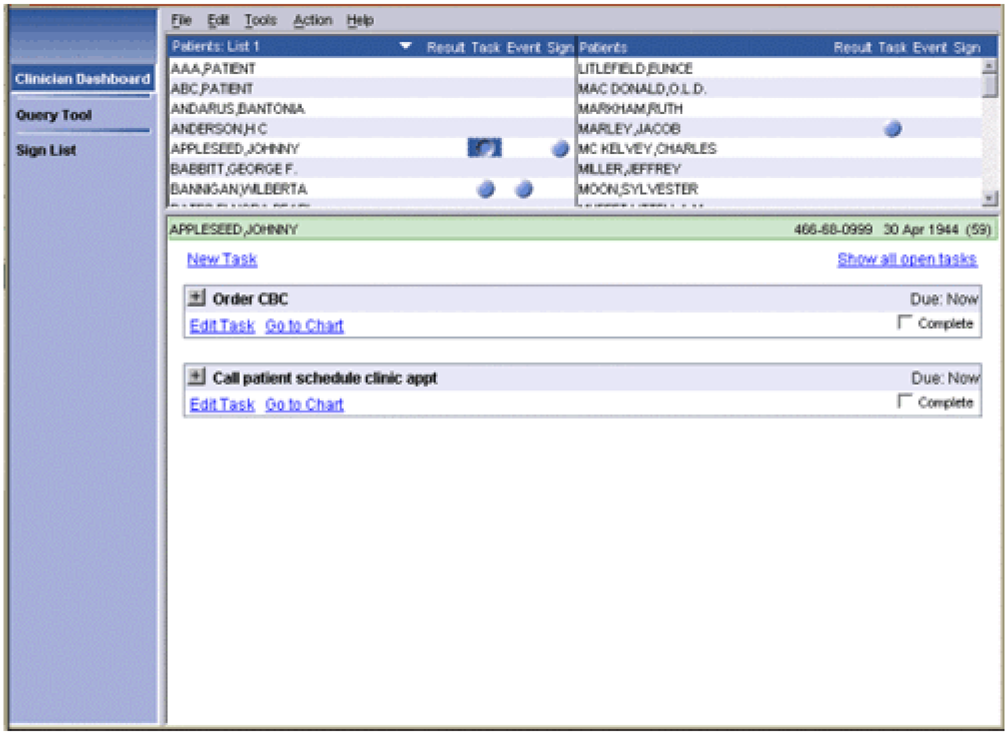
You can acknowledge a result to remove it from the Clinician Dashboard.

Note: You can also acknowledge all the results on a page by clicking the Acknowledge All Results on this Page check box.

Task Column

Introduction

An icon in the *Task* column indicates that a patient has uncompleted tasks in the Task Editor module. For more information, see the Task Editor (p. 47).



Tasks for patient Johnny Appleseed are displayed on the Clinician Dashboard.

Criteria for Displaying Tasks on the Clinician Dashboard

Tasks appear on your Clinician Dashboard only if they are uncompleted, due, and meet one or more of the following criteria:

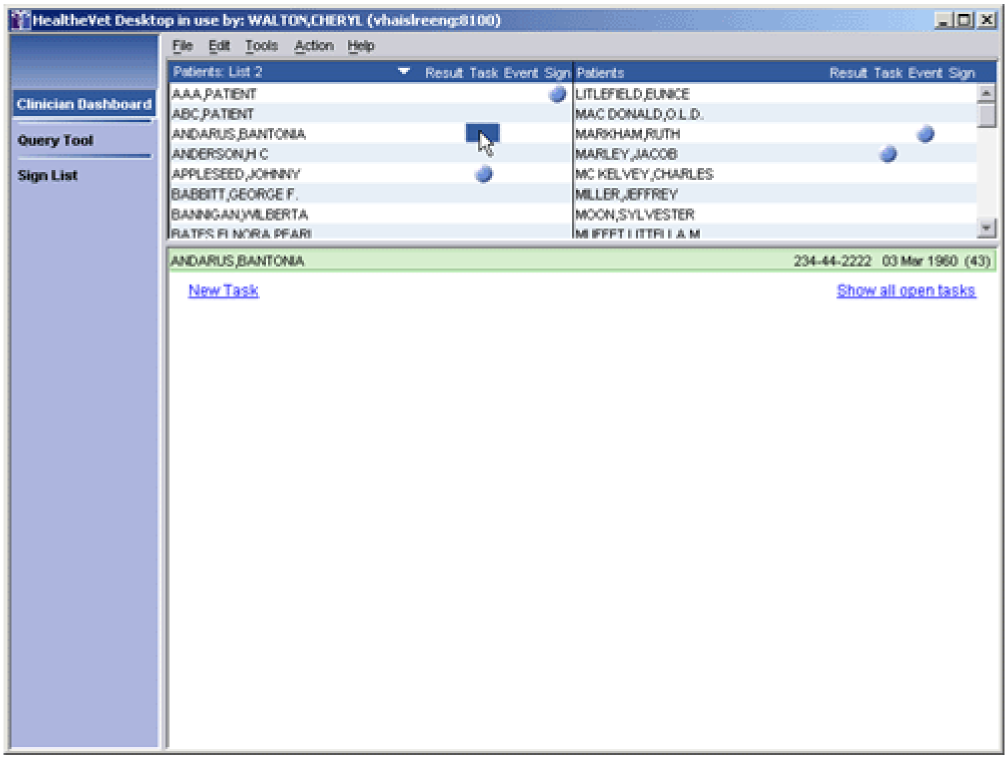
- You created the task
- You are associated with the patient in one or more of the following ways:
  - You are an inpatient's primary or attending provider (as defined in the DG BED CONTROL menu)
  - You are assigned to an auto-link list on which the patient is included
  - The patient is associated with you through a personal or team list (OE/RR list file #100.21)

Note: All providers attached to a team list see tasks for all of the patients included on this list.

Viewing Future Tasks on the Clinician Dashboard

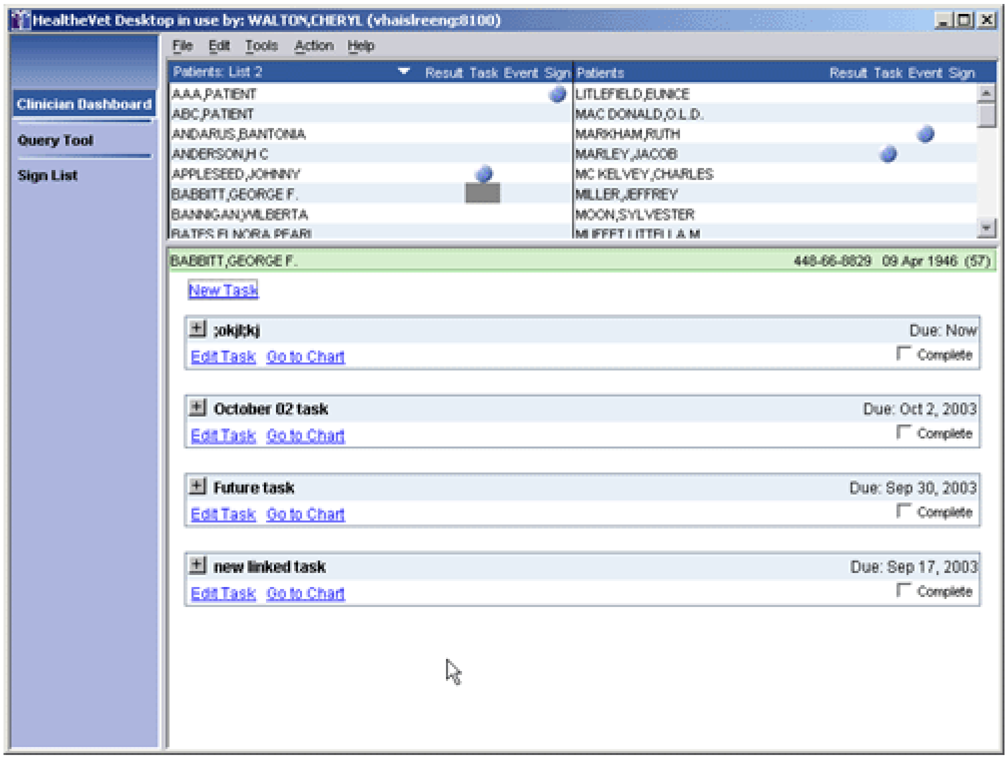
Although icons appear in the *Task* column only for tasks that are uncompleted and due, you can view a patient's future tasks by following these steps:

1. Click to select an icon in the *Task* column or, if no icon is present, click the area under the *Task* column where an icon associated with tasks would appear.



If Bantonia, Andarus has future tasks, you can display them by first clicking in the space under the *Task* column, then selecting the *Show all open tasks* link, which appears on the right side of the bottom pane.

2. Click the *Show all open tasks* link, which appears on the right side of the bottom pane. The *Show all open tasks* link then disappears and Care Management displays all uncompleted tasks for the selected patient.



Care Management displays all uncompleted tasks for the selected patient (Babbitt, George F).

Note: The Show all open tasks *link displays tasks for all patients who appear on your Clinician Dashboard, including patients who do not meet the criteria described in the "Criteria for Displaying Tasks on the Clinician Dashboard" section above.*

Event Column

Introduction

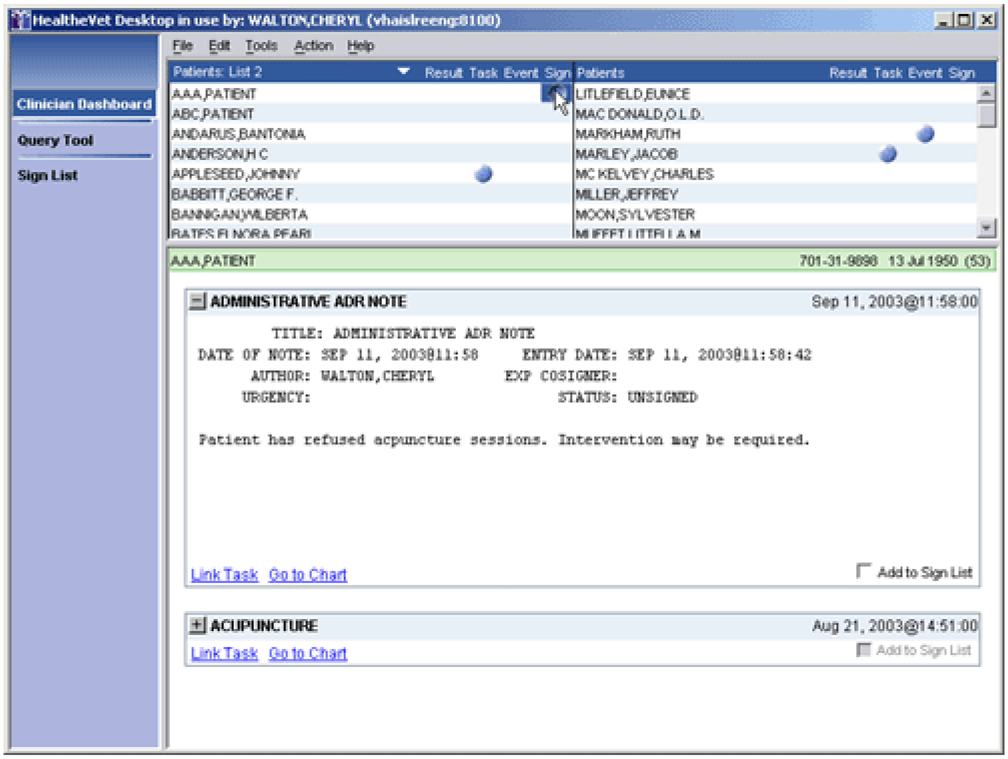
An icon in the *Event* column indicates that an admission, discharge (including death), transfer, or unscheduled clinic visit has occurred. Once you have fully expanded and viewed an item in the *Event* column, the icon turns gray and remains gray for the remainder of the session or until you refresh the dashboard. When you refresh the dashboard or end the session and begin a new session, Care Management removes the icon from the Clinician Dashboard.

Note: The notification for a particular event must be turned on in CPRS for an icon to appear in the Event *column. (To turn on notifications, select* **Tools|Options|Notifications** *from the main menu in CPRS).*

Sign Column

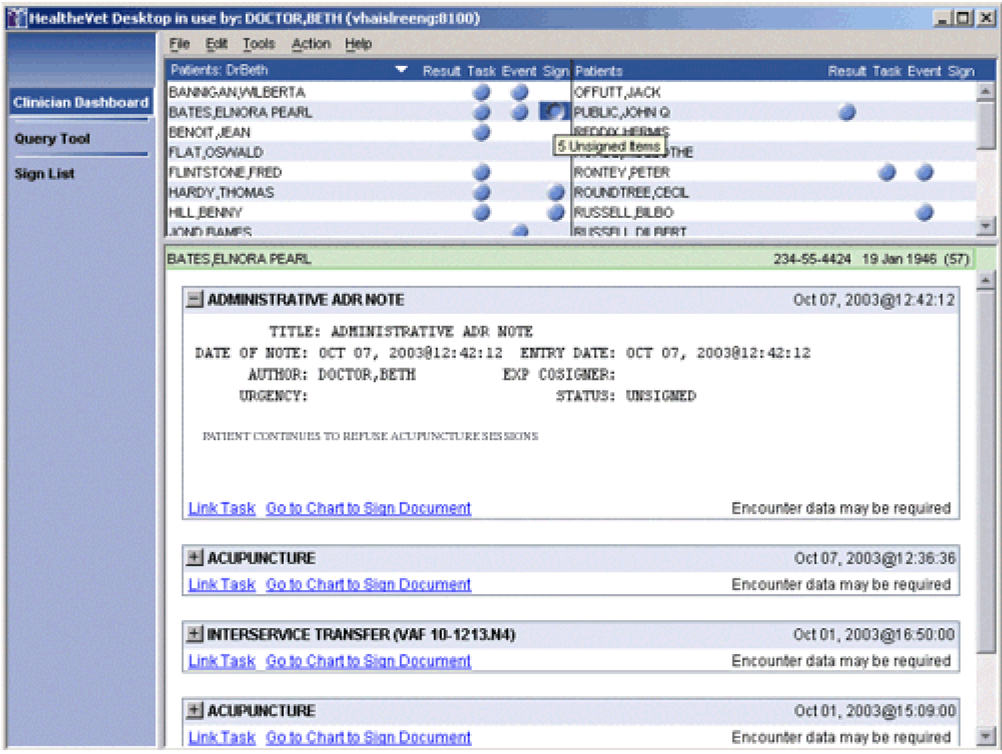
Introduction

An icon in the *Sign* column indicates that a patient has documents that require your signature or co-signature.



The icon in the *Sign* column indicates that Patient AAA has documents that need to be signed

Note: Remember, you cannot sign a document until you have entered all required encounter data. If a document requires encounter data, Care Management does not display the Sign *checkbox. Instead, it notifies you that encounter data may be required. In this case, click the* Go to Chart to Sign Document *link, which takes you to the patient's chart in CPRS. If CPRS requires encounter data, you can then enter it in CPRS. For information about how CPRS determines the need for encounter data, see the "Encounter Parameters" section of the* Computerized Patient Record System (CPRS) Technical Manual.



If CPRS requires encounter data, Care Management does not display the *Sign* check box.

Adding an Item to Your Signature List

To add an item to your signature list, follow these steps:

1. Click an icon in the *Sign* column.
   The items that require your signature appear in individual boxes.
2. Click the plus (⊞) or minus (⊟) icon to expand or collapse a signature box.
   You must expand the note once to activate the electronic signature functionality.
3. Click the *Add to Sign List* check box for any items you want to add to your signature list.

Care Management then adds the items to your signature list.

Signing Items on your Signature List

See Sign List (p.45)

Working With Tasks

Tasks are created in the Task Editor. For further information, see the Task Editor (p. 47).

Opening the CPRS Patient Chart from the Clinician Dashboard

You can open the CPRS patient chart from the Clinician and Nurse Dashboards by clicking the *Go to Chart* hyperlink. This hyperlink appears in boxes that display items associated with the *Result*, *Task*, *Event*, and *Sign* columns. When you click this hyperlink, CPRS opens to your default tab using the patient that you have selected on your Clinician Dashboard.

Note: This feature requires that:

- OR*3.0*173 (CPRS v. 22) is installed at your site
- A Sentillion Vault is installed at your site
- The Sentillion Desktop Components are installed on your workstation

Refreshing the Clinician Dashboard

After you have performed an action (such as acknowledging/verifying an order) you can refresh the Clinician Dashboard display by selecting **Action** | **Refresh Dashboard** or pressing the F5 key.

Nurse Dashboard

NURSE DASHBOARD

Introduction

The Nurse Dashboard provides nurses with an easy-to-read table that lists the names of patients from a selected patient list. Dashboard lights (icons) appear for patients who have items that need attention.

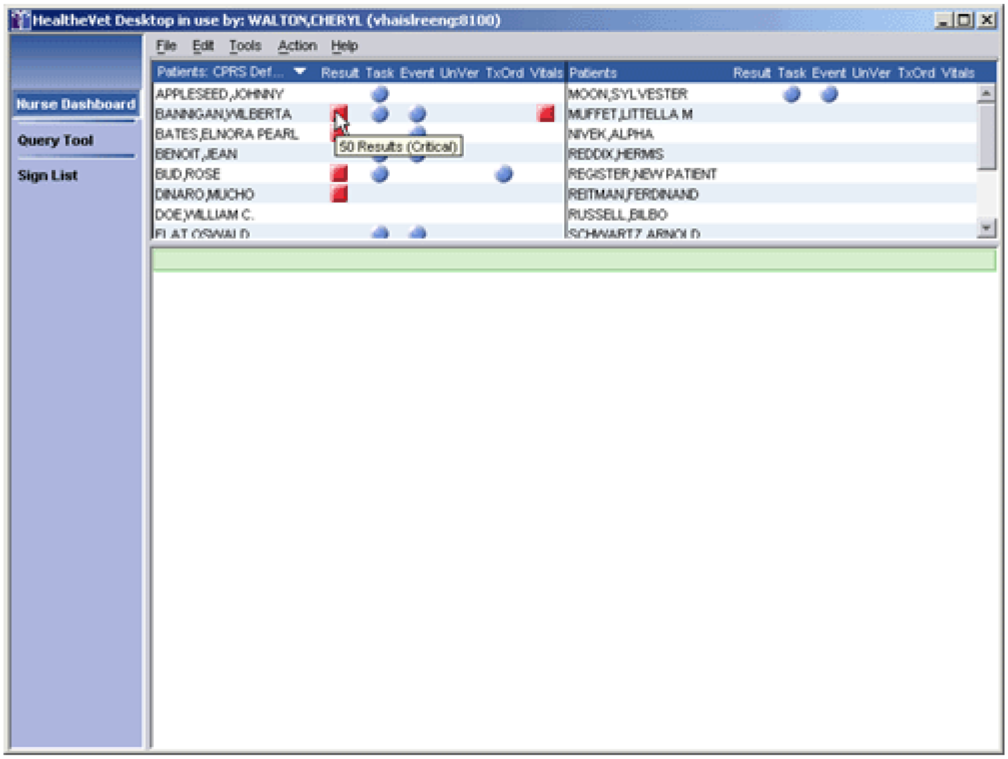
The table is displayed in the upper pane and contains the following columns:

- Results column (p. 37)
- Task column (p. 38)
- Event column (p. 39)
- Unverified Orders (UnVer) column (p. 40)
- Text Orders (TxOrd) column (p. 41)
- Vitals column (p. 42)

If a patient has items that need attention, one of these icons appears in a column:

- The icon indicates a new, due, or outstanding item that contains normal results or a low- or medium-priority task.
- The icon indicates that an item contains abnormal results, significant findings, critical vitals, or high priority tasks.
- The icon indicates that you have acted on all of the items with which this icon is associated. In most cases, refreshing or exiting Care Management removes this icon. However, for text orders, the gray icon remains on the dashboard for the period specified in the CPRS ORPF ACTIVE CONTEXT HRS parameter, which determines the number of hours that completed text orders remain on the active list.

If you hold the pointer over an icon, a hover hint appears indicating how many items are associated with the icon.



Hover hints indicate the number of items that are associated with each icon.

Displaying the Nurse Dashboard

To display the Nurse Dashboard, follow these steps:

1. Click **Nurse Dashboard** on the HealtheVet Desktop perspective selector.
   The Nurse Dashboard appears. If this is your first time using the Nurse Dashboard, see Creating a Patient List, (p. 32).
2. The patients from your patient list appear in the upper pane.

Criteria Used to Determine if an Icon Appears for a Patient Listed on Your Nurse Dashboard

Icons appear on the Nurse Dashboard for patients who meet the following criteria:

- The patient is on your patient list
  and
- The patient has any of the following items that fall within the specified date range (see Setting the Nurse Dashboard Date Ranges, p.29):
  - Unacknowledged results (regardless of who wrote the order)
  - Uncompleted tasks that are due (regardless of who authored the tasks)
  - Appointments
  - Unverified orders
  - Uncompleted text orders
  - Vitals/Measurements

Setting the Nurse Dashboard Date Ranges

The Nurse Dashboard displays items based on default or user-specified date ranges. If you want to change the dashboard's default date ranges, you can easily do so through the *Preferences* dialog box. However, keep in mind that the date ranges you specify can affect system response times. If you experience long response times, decrease the start date for dashboard items. On the other hand, if the Nurse Dashboard is not displaying all of the items you want to see, increase the start date for these items.

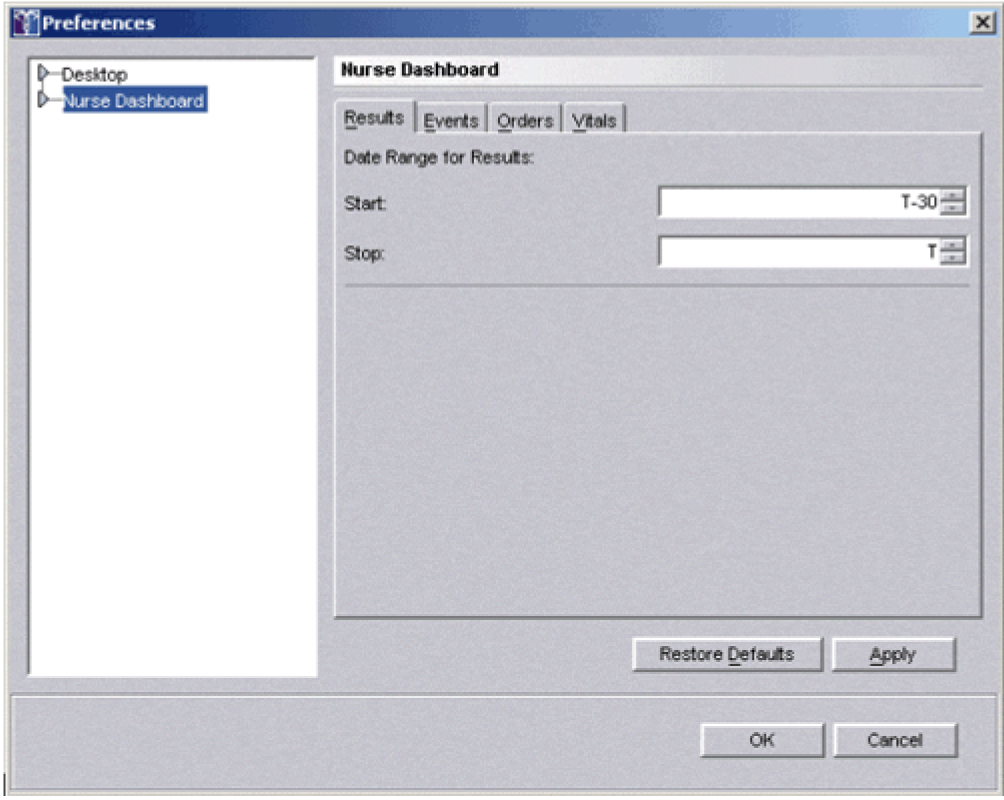
Note: The following table lists the maximum and minimum values users can assign through the Preferences *dialog box. These limitations do not exist when you specify date ranges by accessing the parameters directly.*

Minimum and Maximum Date Ranges

	Desktop Minimum	Desktop Maximum
Events Stop	T-30	T+30
Events Start	T-180	T
Results Stop	T-30	T+30
Results Start	T-180	T
Text Order Stop	T-30	T+180
Text Order Start	T-365	T
Unverified Order Stop	T-30	T+30
Unverified Order Start	T-180	T
Vitals Stop	T-30	T
Vitals Start	T-180	T

To change the default date ranges for items that appear on the Nurse Dashboard, follow these steps:

1. Select **Tools | Options**.
   The *Preferences* dialog box appears.



The *Preferences* dialog box.

2. Select *Nurse Dashboard* in the left-hand pane.
3. Select the Default tab to set a default date range for all dashboard items
   or
   select the tab for each item (Results, Events, Orders, or Vitals) to set a date range for these individual items (individual date ranges override the date range set through the Default tab)
   or
   set a date range in the Default tab and adjust this date range for one or more individual items as needed.
4. Enter the appropriate dates in the *Start* and *Stop* fields. This screen accepts only relative dates (T+1, for example).
5. Click **OK**

Restoring Default Date Ranges

To restore default date ranges, click **Restore Defaults.** The following table lists the default date ranges that ship with Care Management:

	Start	**Stop**
Events	T	T+7
Results	T-2	T
Text Orders	T-365	T

	Start	Stop
Unverified Orders	T-2	T
Vitals	T-7	T

Note: Your site's CAC can specify site-specific date ranges. Consequently, the values in this table may not reflect the default date ranges that apply to your site.

The CPRS Default List

The Nurse Dashboard includes a CPRS Default patient list, which, as its names suggests, is your default patient list in CPRS. When you select the CPRS Default list, the Nurse Dashboard uses the criteria delineated in the "Criteria Used to Determine if an Icon Appears for a Patient Listed on Your Nurse Dashboard" section above. Icons appear for patients who meet one or more of these criteria.

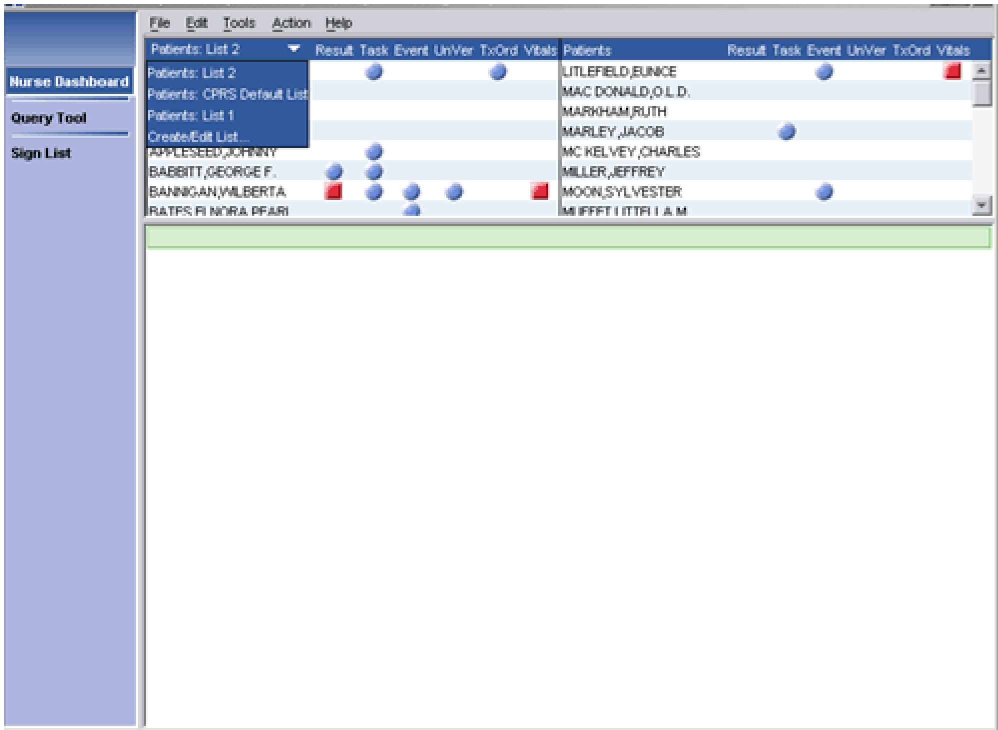
The CPRS Default patient list is synchronized with the default patient list in CPRS. For example, suppose you change your default patient list selection in CPRS. When you subsequently select—or refresh—the CPRS Default patient list on the Nurse Dashboard, the dashboard displays a CPRS Default patient list that is based on the new default patient list in CPRS.

Note: To avoid potential confusion, you should select a default patient list in CPRS before selecting the CPRS Default List in Care Management. For more information, see "Setting a Default Patient List" in the CPRS user guide or access this topic from the CPRS GUI ***Help*** *menu.*

Creating a Custom Patient List

To create a custom patient list, follow these steps:

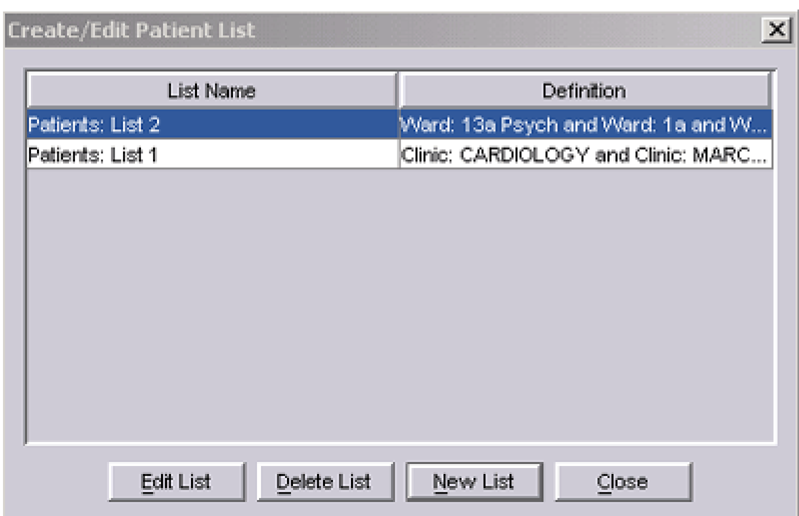
1. Click Nurse Dashboard on the Health*e*Vet Desktop perspective selector.
2. Select **Create/Edit List** from the *Patients* drop-down list.



To create a patient list for the Nurse Dashboard, select **Create/Edit List** from the *Patients* drop-down list.

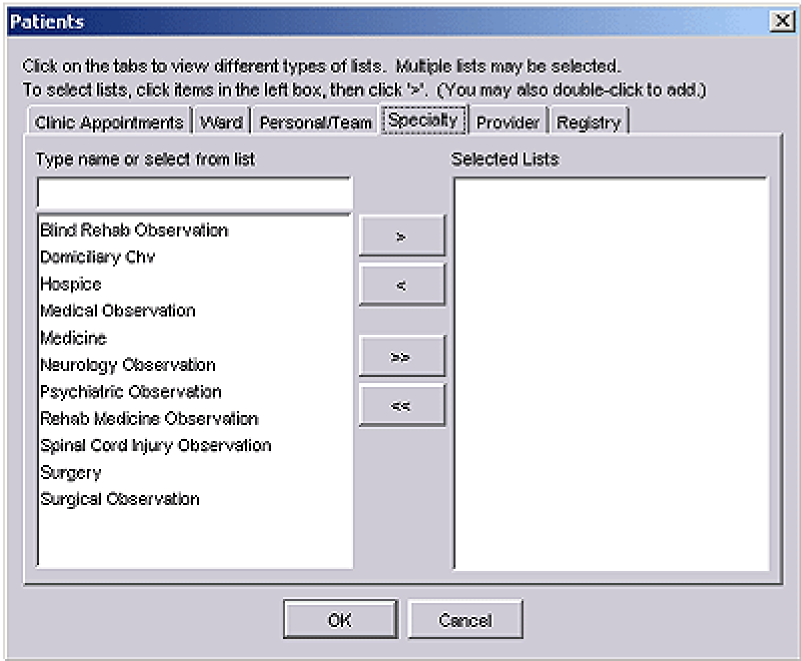
The *Create/Edit List* dialog box appears.

3. Select **New List** in the *Create/Edit List* window.



The *Create/Edit Patient List* window.

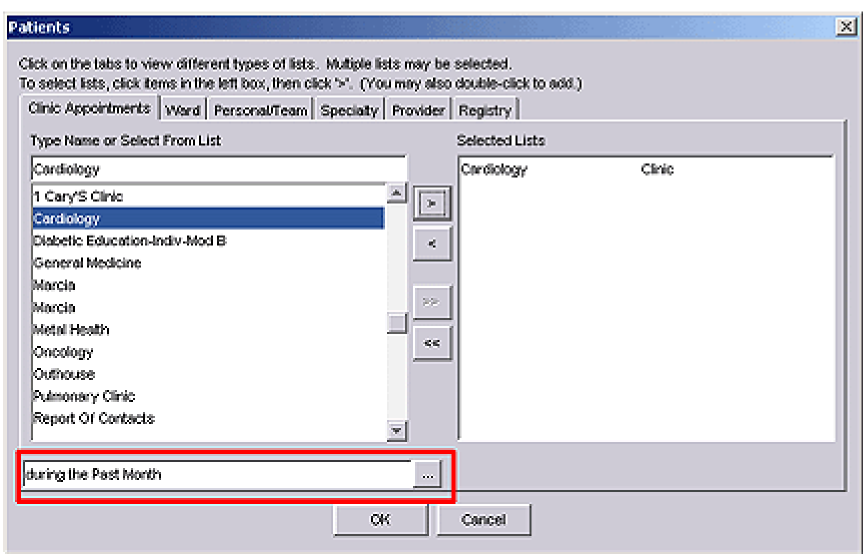
The *Patients* dialog box appears. The tabs across the top of the dialog box (Clinic Appointments, Ward, Personal/Team, Specialty, Provider, Registry) correspond to different patient lists.



The *Patients* dialog box

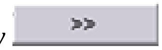
4. Select the tab for the patient list you want to add.
5. Select a clinic, ward, personal/team, specialty, provider, or registry list from the *Type name or select from list* pane.

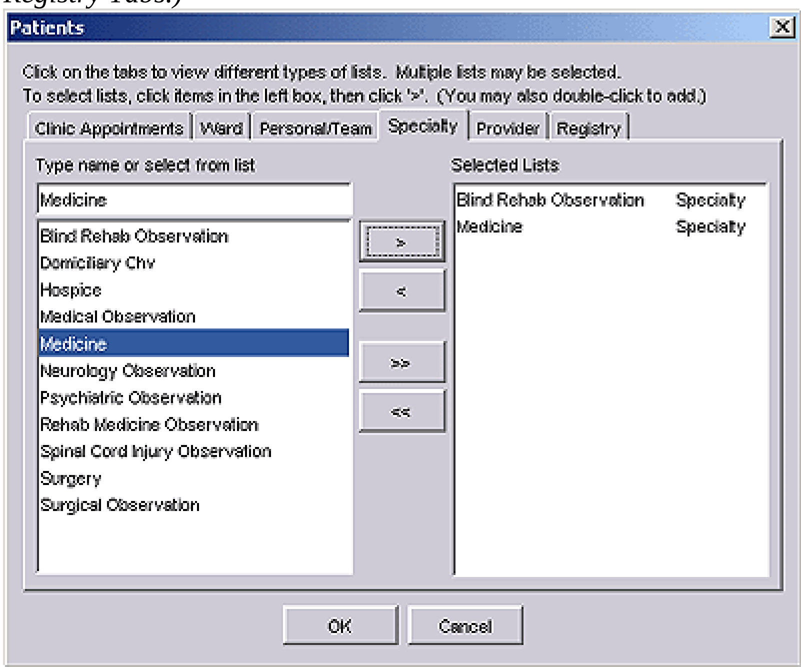
   Note: If you select a clinic from the Clinic Appointments tab, you must also specify a date range. To do this, click the  *button (at the bottom of the dialog box) and select a date range. The date range you specify tells the Nurse Dashboard to display patients who have, or have had, appointments in the clinic within the specified date range. In the example below, patients who had, appointments in the Cardiology clinic in the past month will be displayed on the Nurse Dashboard.*



In this example, patients who had appointments in the Cardiology clinic in the past month will be added to the patient list.

6. Click the right arrow .
   The item moves to the *Selected Lists* pane.

   Note: Alternately, you may double-click an item to move it to the Selected Lists *pane. If it is available, you can also click the double arrow*  *to move all of the items in the* Type name or select from list *pane to the* Selected List *pane. (The double arrow is available for the Ward, Personal/Team, Specialty, and Registry Tabs.)*



Clicking the right arrow adds the Blind Rehab Observation specialty list and the Medicine specialty list to the *Selected Lists* pane.

7. Repeat Steps 4-6 if you want to add additional patient lists.
8. Click **OK**.

   The *Patient List Name* dialog box appears.

The *Patient List Name* dialog box.

9. Type a name for the patient list or accept the default name.

This list will be called Peter's List.

10. Click **OK**.
    The patients from the new list appear in the upper pane. Dashboard lights (icons) appear for patients who have items that need attention. The name of the new list also appears in the *Patients* drop-down list.

Viewing Details of an Item on the Nurse Dashboard

To view details of an item on the Nurse Dashboard, follow these steps:

1. Click an icon in the *Result, Task, Event, Unverified Orders (UnVer), Text Orders (TxOrd), or Vitals* column.
   Items that have not been acknowledged, signed, or verified appear in individual boxes in the lower pane.

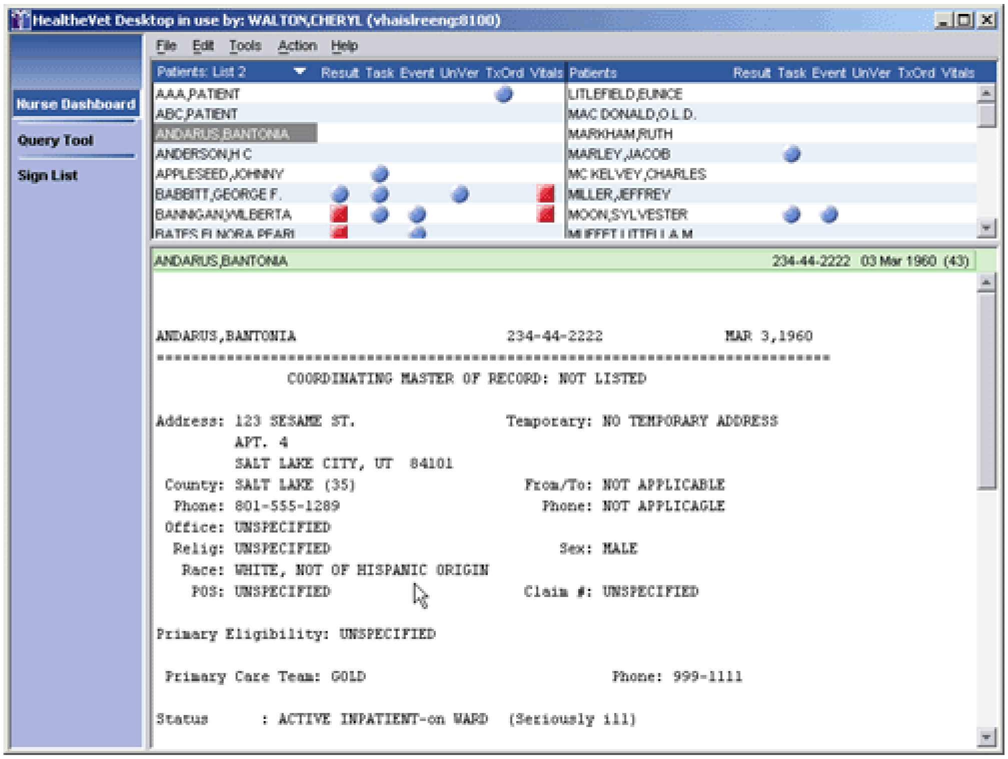
   Note: You can also click on a patient's name. When you do so, Care Management displays the patient's demographic information in the lower pane.

2. Click the plus () or minus () icon to expand or collapse a box.

Viewing Patient Demographic Information

Click a patient's name to view his or her demographic information. The demographic information appears in the lower pane and may include the patient's:

- Address
- Eligibility
- Health insurance information
- Ward status
- Provider
- Attending physician
- Admission status
- Future appointments
- Religion
- Sex



Patient demographic information appears in the lower pane.

Result Column

Introduction

An icon in the *Result* column indicates that a patient has unacknowledged (by you, specifically) lab, consult, procedure, or radiology results within the date range specified for results. (See Setting the Nurse Dashboard Date Ranges, p. 29.)

Acknowledging a Result

After you acknowledge all of a patient's results, Care Management grays the icon in the *Results* column of the Nurse Dashboard. When you subsequently refresh the dashboard or exit Care Management, it removes the results from the dashboard. When you acknowledge a result, Care Management removes it from your dashboard. The dashboards of other users are not affected by your acknowledgement.

To acknowledge a result, follow these steps:

1. Click the icon in the *Result* column.
   Results that have not been acknowledged appear chronologically in individual results boxes in the lower pane.
2. Click the plus (±) or minus (▭) icon to expand or collapse a results box.
3. Select the appropriate *Acknowledge* check box.
   The result is now acknowledged. Select **Action** | **Refresh Dashboard** to refresh the screen.

   Note: You can also acknowledge all the results on a page by clicking the Acknowledge All Results on this Page *check box.*

Task Column

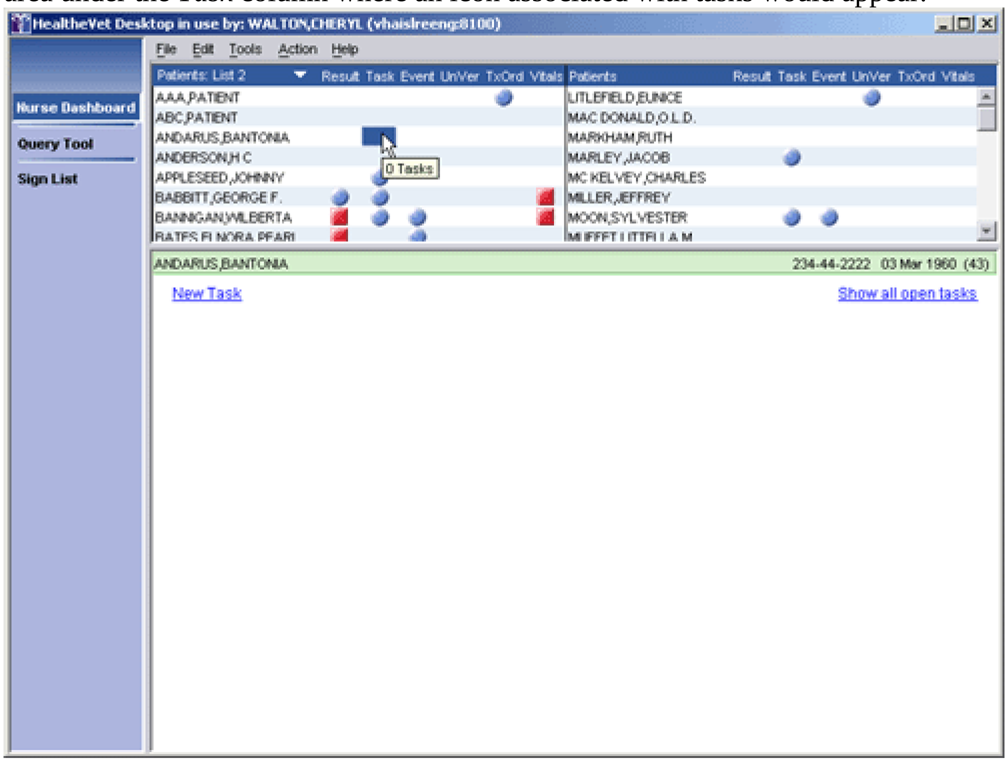
Introduction

An icon in the *Task* column indicates that a patient has tasks in the Task Editor that have not been completed. All uncompleted patient tasks that are due now appear in the Nurse Dashboard. For more information, see the "Task Editor" section of this manual.

Viewing Future Tasks on the Nurse Dashboard

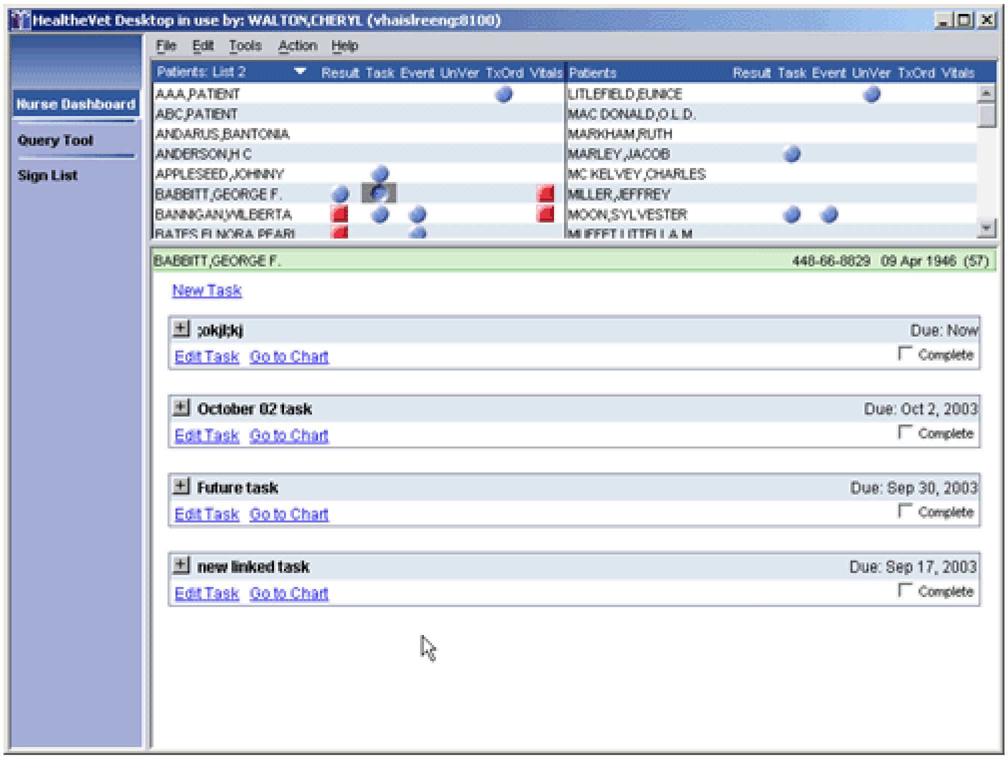
Although icons appear in the *Task* column only for uncompleted tasks that are due, you can view a patient's future tasks by following these steps:

1. Click to either select an icon in the *Task* column or, if no icon is present, click the area under the *Task* column where an icon associated with tasks would appear.



If Bantonia, Andarus has future tasks, you can display them by first clicking in the space under the *Task* column, then selecting the *Show all open tasks* link, which appears on the right side of the bottom pane.

2. Select the *Show all open tasks* link, which appears on the right side of the bottom pane. The *Show all open tasks* link then disappears and Care Management displays all uncompleted tasks for the selected patient.

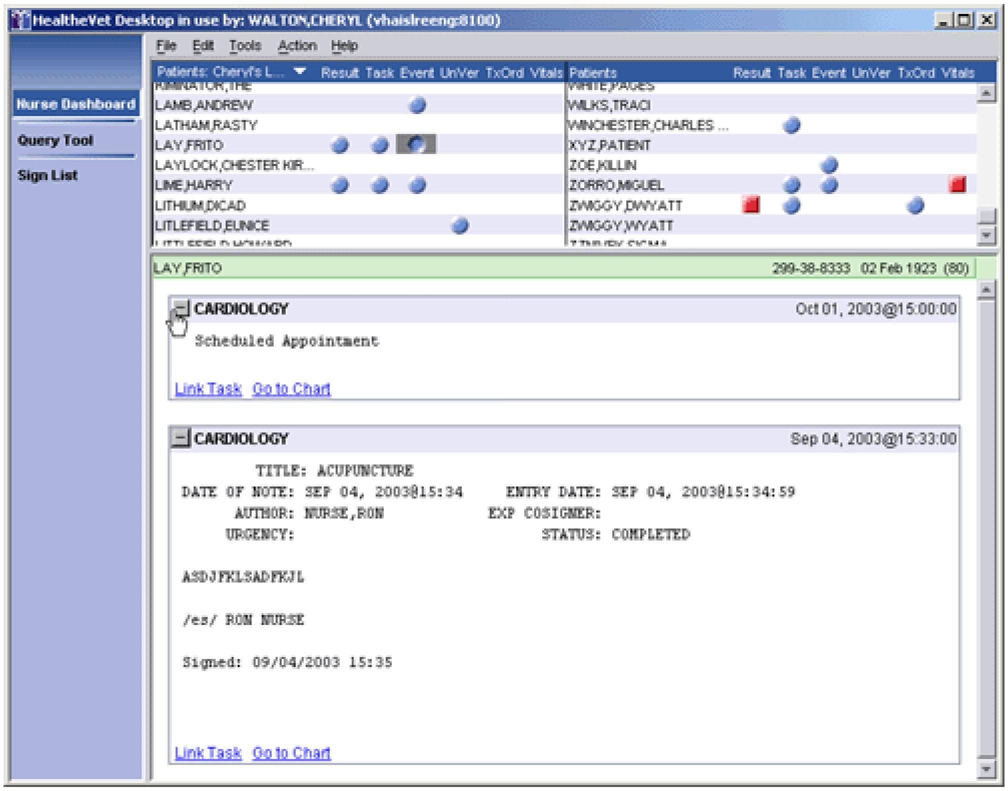


Care Management displays all uncompleted tasks for the selected patient (Babbitt, George F).

Event Column

An icon in the *Event* column indicates that a patient has an appointment within the date range specified for events (see Setting the Nurse Dashboard Date Ranges, p. 29.) This icon is not removed from the dashboard after you view the event. Instead, it remains on the dashboard until the **Stop** date specified in the **Events** date range occurs.

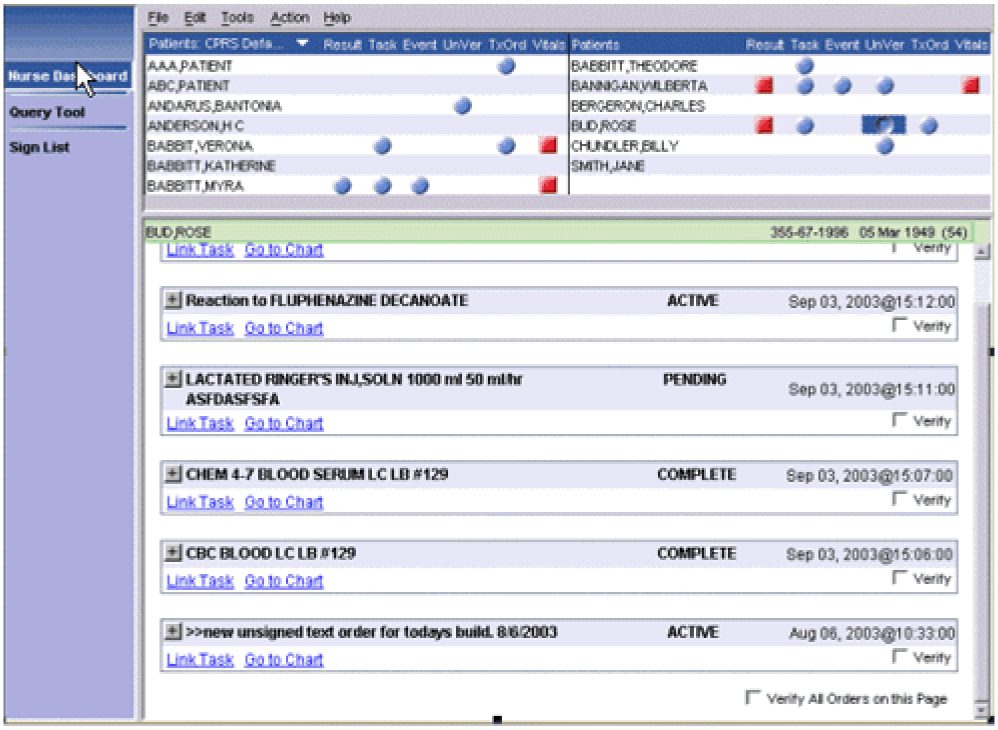
Progress notes that are attached to past appointments appear in the boxes that display these appointments



Progress notes that are attached to past appointments appear in the boxes that display these appointments.

Unverified Orders (UnVer) Column

Icons that appear in the unverified orders (*UnVer)* column are based on the date range you specify for unverified orders. These icons indicate that an inpatient has orders within this date range that have not been verified by nursing. (See Setting the Nurse Dashboard Date Ranges, p. 29.)



An icon in the *UnVer* (Unverified Orders) column indicates that an inpatient has unverified orders within the date range specified in the Nurse Dashboard *Preferences* dialog box.

To verify orders, follow these steps:

1. Click an icon in the unverified orders (*UnVer*) column.
   Orders that have not been verified appear chronologically in individual boxes in the lower pane.
2. Click the plus (⊞) or minus (⊟) icon to expand or collapse a box.
3. Select the appropriate *Verify* check boxes.
   You can also verify all of the orders on a page by clicking the *Verify All Orders on this Page* check box.

   The checked orders now appear on your Sign List. After you sign the orders, they are verified. See Sign List (p. 45) for more information.

   Note: The Verify checkbox is active only for ORELSE key holders.

Text Orders Column (TxOrd)

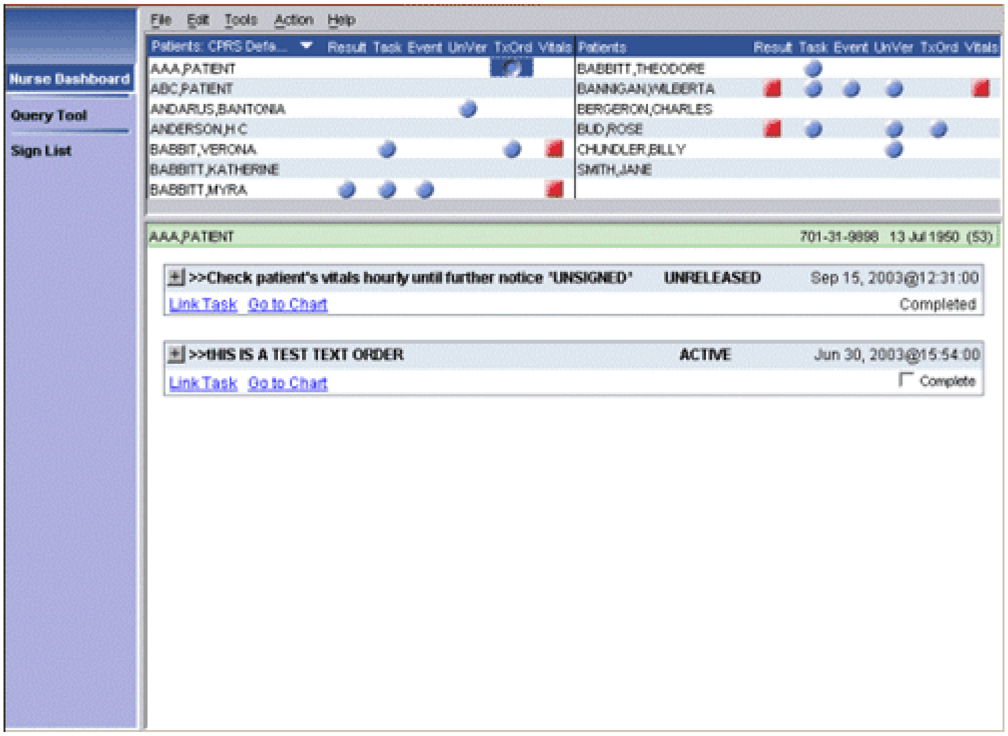
Icons that appear in the text orders *(TxOrd)* column indicate that:

- A patient has uncompleted text orders that fall within the date range specified in the Nurse Dashboard Preferences dialog box (p.30)
  or
- a patient has orders that have been completed, but have been completed for fewer hours than specified in the ORPF ACTIVE ORDERS CONTEXT HRS parameter.

Completing Text Orders

To complete orders in the text orders column, follow these steps:

1. Click an icon in the text orders *(TxOrd)* column.



When you select an icon in the *TxOrd* column, text orders appear in the lower pane. The *Complete* checkbox is active for uncompleted orders.

2. Click the plus (⊞) or minus (⊟) icon to expand or collapse a box.
3. Select the appropriate *Complete* check boxes.
   The selected items are now added to your signature list. After you sign the orders, they will be complete. See Sign List (p.45) for more information.

Vitals Column

An icon in the vitals column indicates that the patient has vital signs (from the vital signs package) that fall within the date range specified in the Nurse Dashboard Preferences dialog box (p.30). The Nurse Dashboard can display the following vitals:

- Blood Pressure
- Temperature
- Respiration
- Pulse
- Height
- Weight
- Central Venous Pressure
- Circumference/Girth
- Pulse Oximetry
- Pain

Note: The Nurse Dashboard can display up to 100 vitals within a given date range.

Opening the CPRS Patient Chart from the Nurse Dashboard

You can open the CPRS patient chart from the Clinician and Nurse Dashboards by clicking the *Go to Chart* hyperlink. This hyperlink appears in boxes that display items associated with the *Result*, *Task*, *Event*, and *Sign* columns. When you select this hyperlink, CPRS opens to your default tab using the patient that you have selected on your Clinician or Nurse Dashboard.

Note: This feature requires that:

- OR*3.0*173 (CPRS v. 22) is installed at your site
- A Sentillion Vault is installed at your site
- The Sentillion Desktop Components are installed on your workstation

Refreshing the Nurse Dashboard

After you have performed an action (such as acknowledging or verifying an order) you can refresh the Nurse Dashboard display by selecting **Action** | **Refresh Dashboard** or pressing the F5 key.

Sign List

Sign List

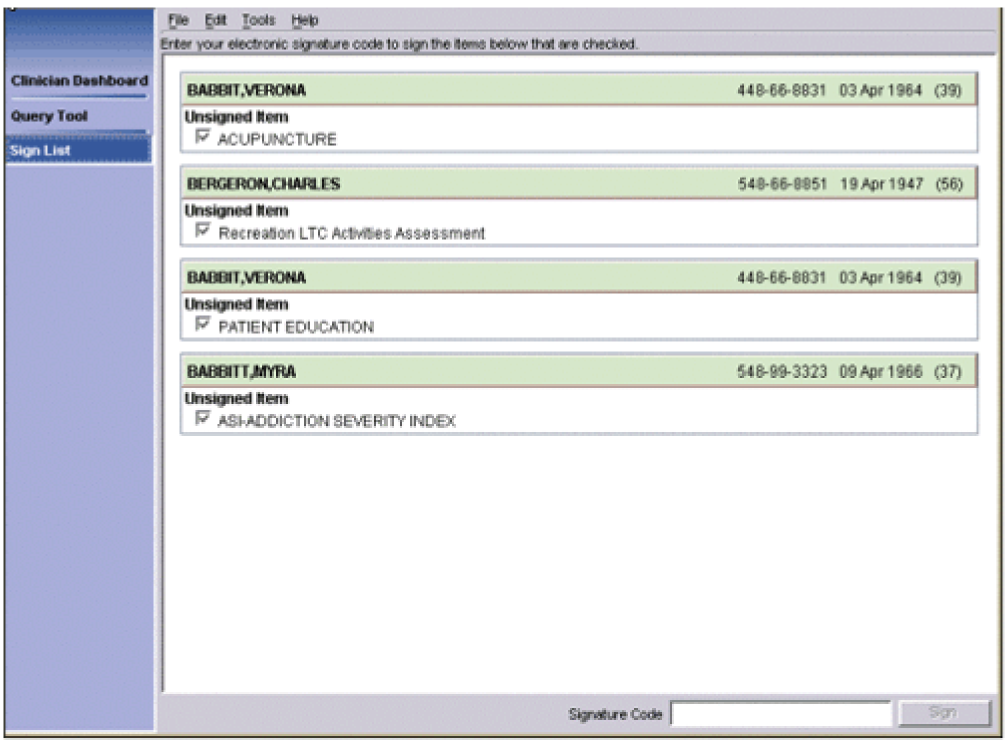
Introduction

The Sign List allows you to sign multiple items for multiple patients at the same time.

Signing Items on your Signature List

To sign the items on your signature list, follow these steps:

1. Click the *Sign List* link in the Healthe*e*Vet Desktop perspective selector.
   The items on your signature list appear in patient signature boxes. A check appears next to the items that will be signed. You can clear an item by clicking on the checkbox. Unselected item(s) remain unsigned after you apply your electronic signature code.



The HealtheVet Desktop sign list

2. Enter your signature code in the *Signature Code* field at the bottom of the dialog box.
3. Click **Sign**.
   The selected items are then signed and removed from your signature list.

Task Editor

Task Editor

Introduction

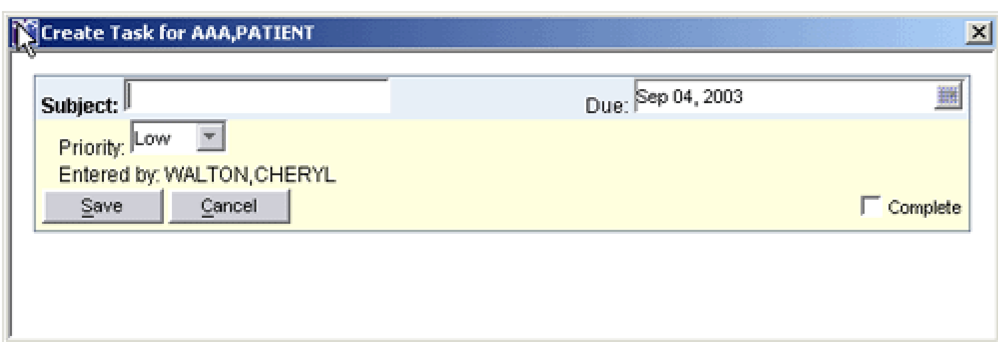
The Task Editor allows health care providers to create a list of tasks to perform for a patient. These tasks must be linked to a patient on the Clinician or Nurse Dashboard. You may also link tasks to one or more items that appear on the same dashboard as the patient.

For example, using the Task Editor you could create a task to call a patient based on a lab result that indicates an abnormal white bloodcell count.

Creating a New Task

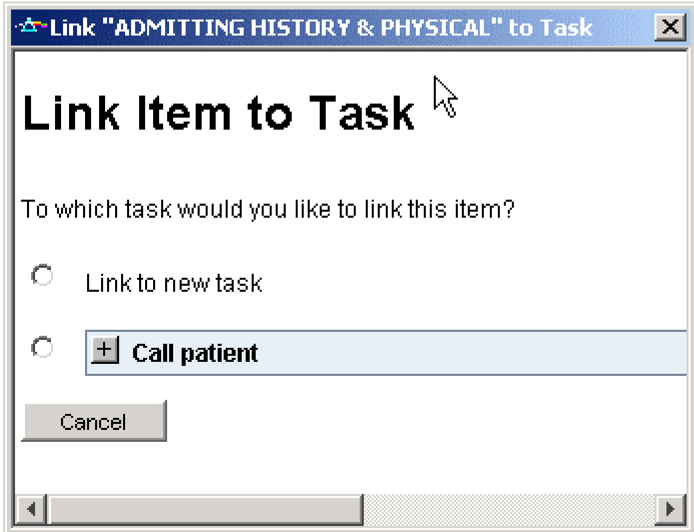
1. Click the Clinician Dashboard perspective or the Nurse Dashboard perspective on the Health*e*Vet Desktop perspective selector.
2. Click the name of the patient for whom you want to create a task and select **Action** | **Create Task**.
   or
   click an icon adjacent to the patient's name on the Clinician or Nurse Dashboard and then click the *Link Task* link at the bottom of the screen.
   or
   click an icon adjacent to the patient's name in the *Task* column (or a blank area where a Task icon would appear) and click the *New Task* link.

   The *Create Task* dialog box appears.



The *Create Task* dialog box

Note: If the Link [item] to Task *dialog box appears, select the task to which you want to link the item or select* Link to new task.



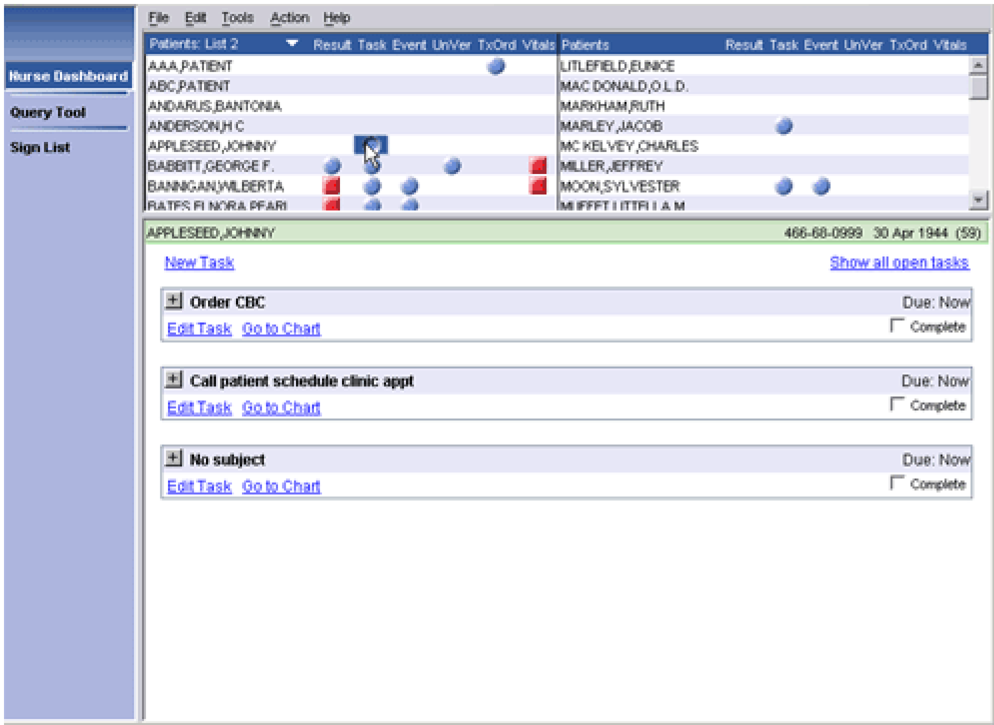
The *Link [item] to Task* dialog box allows you to choose whether to link the item to an existing task or create a new task.

3. In the *Subject* field, enter the subject of the new task. .
4. Enter a due date for the task in the *Due* field (the default is today).
   Note: This field does not support relative date notation (T-20, for example).
5. Enter a priority for the task (the default is low).
6. Select **Save**.
   The task is created.
   Note: Icons do not appear on the dashboard until the task is due.

Completing a Task

When you have completed a task, follow these steps to remove the task from the Clinician or Nurse Dashboard:

1. Click the icon in the *Task* column.
   The associated tasks appear in the lower pane.
2. Click the *Complete* check box for the task you want to complete.
   The task is now marked complete.
3. Select **Action** | **Refresh Dashboard** to refresh the Clinician or Nurse Dashboard.
   If all of the tasks for a patient have been completed, Care Management removes the icon in the *Task* column. (Care Management also removes the icon if you exit the program.)

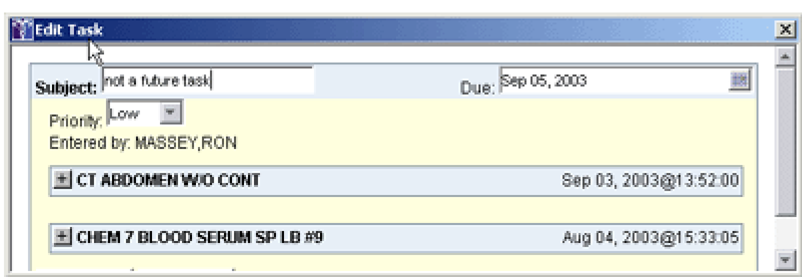


When you have completed a task, select the *Complete* check box to remove the task from the dashboard.

Editing a Task

To edit a task from the Clinician or Nurse Dashboard, follow these steps:

1. Click an icon in the *Task* column.
   Tasks that are currently due appear in individual task boxes in the lower pane. To show tasks with a due date in the future, click the *Show All Tasks* link.
2. Click the *Edit Task* link.
   The *Edit Task* dialog box appears. The titles of items associated with the task appear in the middle of the dialog box. Click the plus (±) to expand or collapse an item.



The *Edit Task* dialog box

3. Make the appropriate changes.
4. Click **Save**.

*Note: You can also delete a task that you have created by clicking **Edit Task** and then clicking **Delete**.*

Query Tool

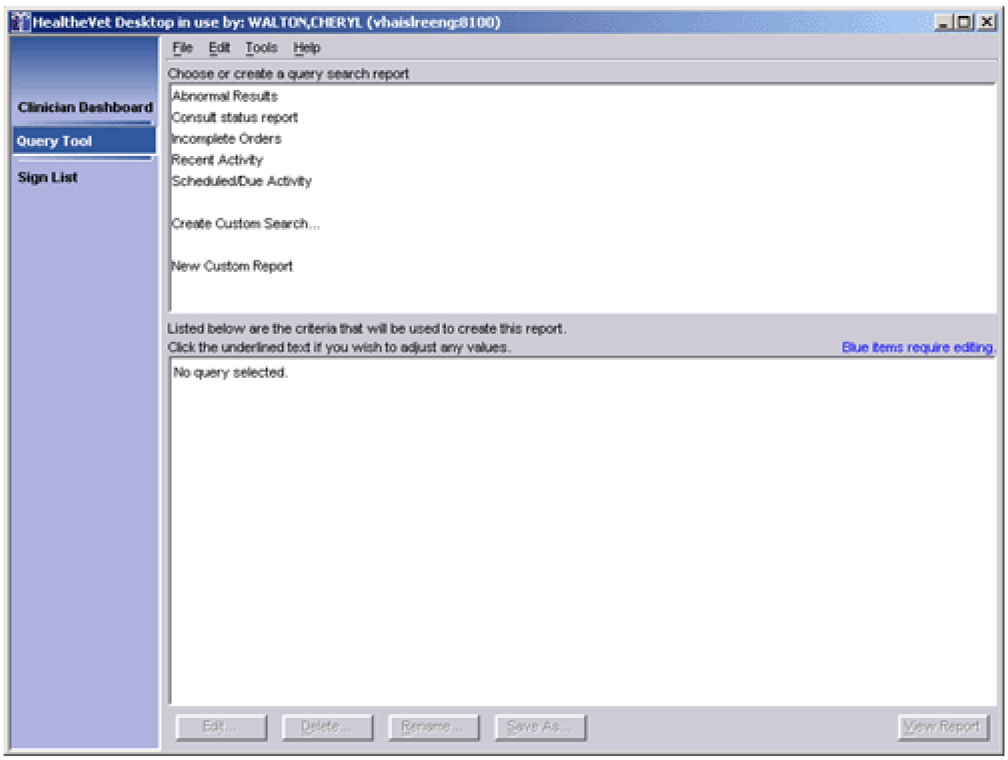
QUERY TOOL

Introduction

The Query Tool allows you to create reports for a group of patients based on criteria you specify. There are five predefined reports available in the upper pane as well as a *Create Custom Search* option that allows you to create a custom report.

Criteria for the selected report are displayed in the lower pane. Criteria displayed in blue font must be defined before the report can be displayed. To define these criteria, click on the blue hyperlink. Criteria in maroon font have already been defined (but can be changed).

Note: Large reports may cause a significant strain on network resources.



The CPRS Query Tool

Types of Reports

The six types of reports are described below:

- **Abnormal Results Report**
  The Abnormal Results report lists patients with abnormal results that fall into the specified date range.

*Note: The Abnormal Results report returns only results that were entered after your site installed the Hepatitis C patches (OR*3*153). These patches should have been installed on or about April 9, 2003.*

- **Consult Status Report**
  The Consult Status report lists patients for whom consults were ordered from specified services within a specified date range.

- **Incomplete Orders Report**
  The Incomplete Orders report lists patients with orders in a specified date range that have a partial or pending status. (You can also select other types of statuses—such as active or cancelled—for the Incomplete Orders report.)

- **Recent Activity Report**
  By default, the Recent Activity report returns orders and documents created within the past 24 hours. However, you can select specific document classes and other time ranges for this report.

- **Scheduled/Due Activity Report**
  The Scheduled/Due Activity report lists patients with orders or consults that are pending or scheduled. (You can also select a date range, patient list, and order/consult status for this report.)

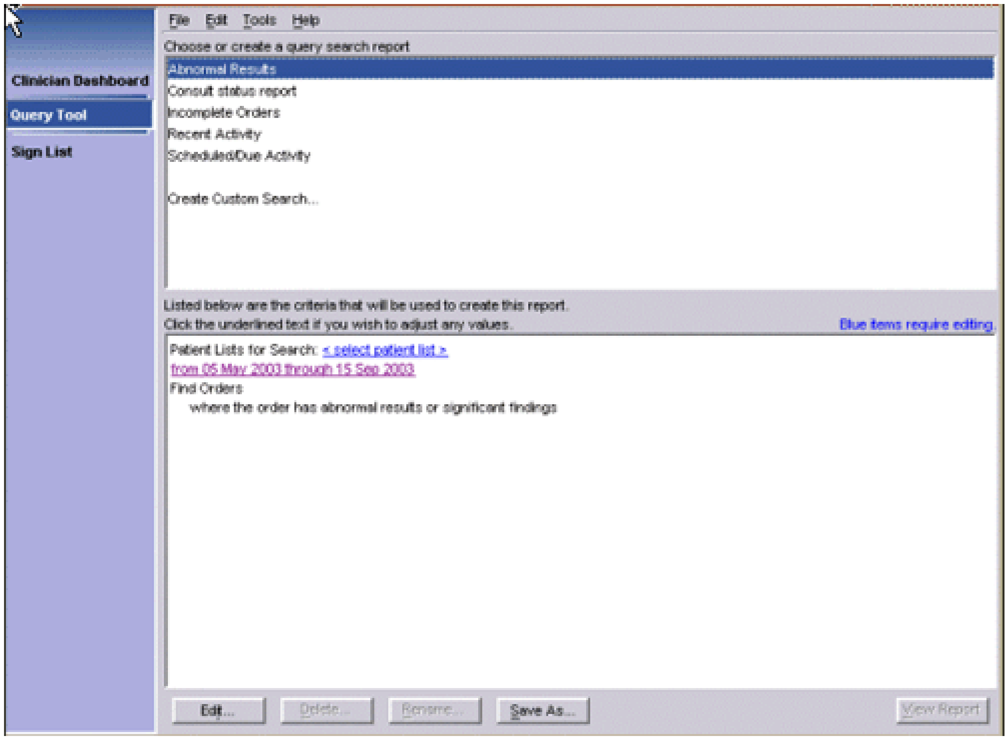
- **Custom Report**
  The custom report feature allows you to create reports that are more detailed and more complex than are any of the predefined reports. With a custom report, you can specify exactly which information is displayed.

  For example, you could create a custom report that returns all of the orders placed on March 13, 2003 for patients who had appointments in the Cardiology clinic in the past month and for whom the primary outpatient provider was Doctor Lee.

Selecting a Report

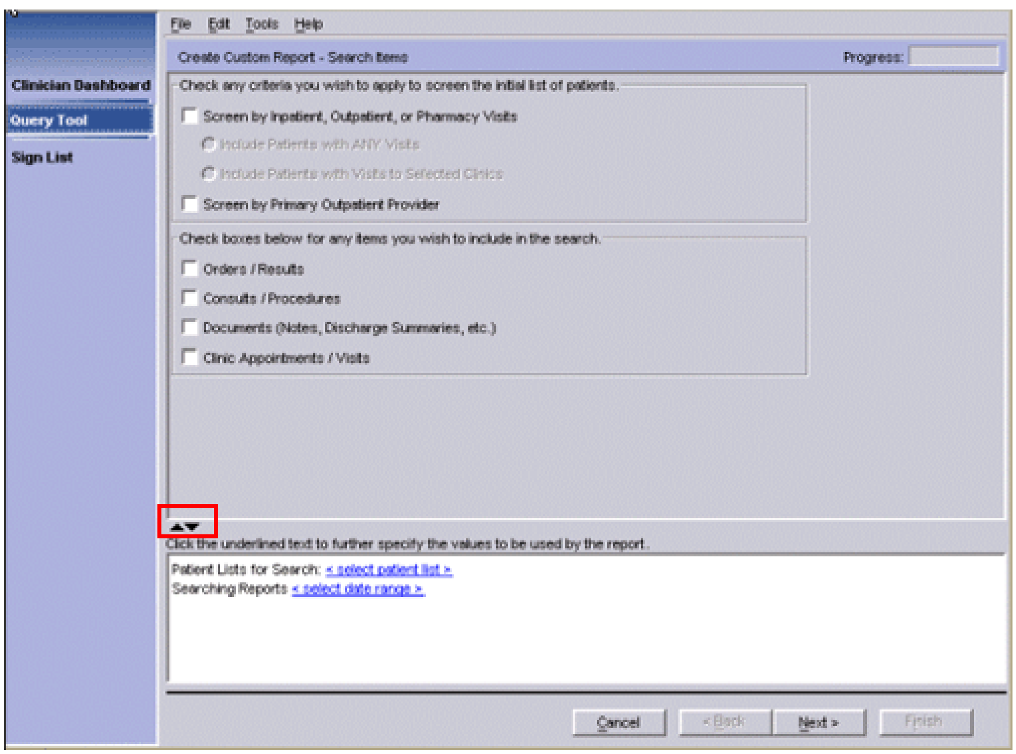
To select a report, follow these steps:

1. Click **Query Tool** on the Health*e*Vet Desktop perspective selector.
   The Query Tool appears.
2. Select either **Abnormal Results, Consult status report, Incomplete Orders, Recent Activity, Scheduled/Due Activity** or **Create Custom Search…**from the upper pane. The criteria for the selected report appear on the lower pane.



Criteria for the Abnormal Results report displayed on the lower pane.

*Note: If you select **Create Custom Search…**, the screen shown below appears. If the lower pane is not visible, click the down arrow (▼).*



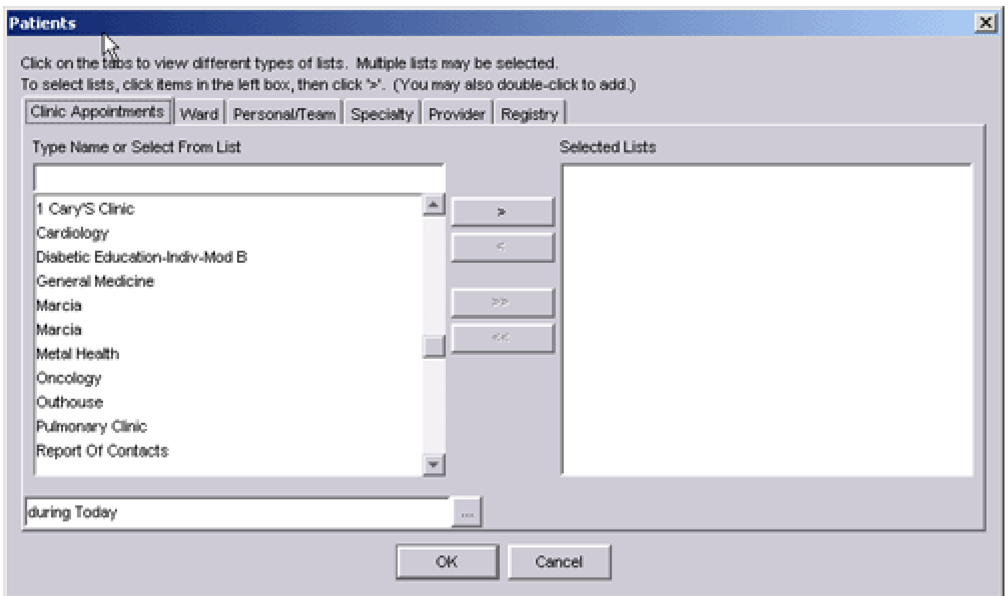
If you select **Create Custom Search**, this screen will appear. If the lower pane is not visible, click the down arrow (▼).

Defining the Patient Lists to Search

After you select a report, you must select the patient lists that will be searched.

To define the list of patients that will be searched, follow these steps:

1. Click the <select patient list> link in the lower pane.
   The *Patients* dialog box appears. The tabs across the top of the dialog box (*Clinic Appointments*, *Ward*, *Personal/Team*, *Specialty*, *Provider*, *Registry*) correspond to different patient lists.



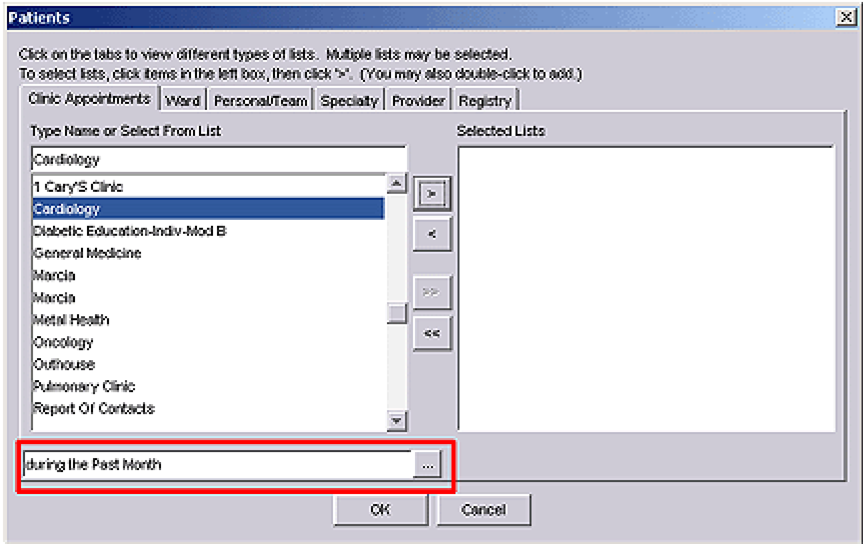
The *Patients* dialog box.

2. Select the tab for the patient list you want to add.

   Note: Depending on your access rights, you may not see all of the tabs on the Patients *dialog box. Specifically, if you don't have the RORVA HEPC USER key, Care Management does not display the* Registry *tab.*

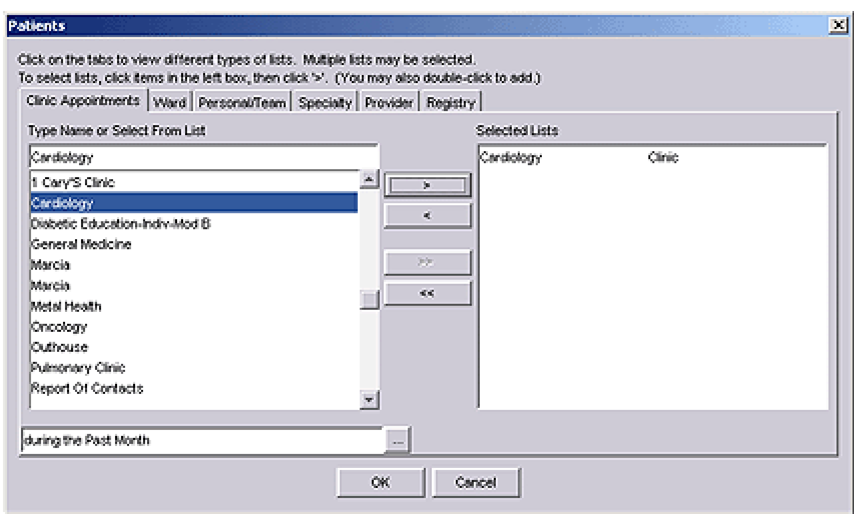
3. Select a clinic, ward, personal/team, specialty, provider, or registry list from the *Type Name or Select From List* pane.

   Note: If you select a clinic from the Clinic Appointments tab, you must also specify a date range. To do this, click the  *button (at the bottom of the dialog box) and select a date range. The date range you specify tells the Query Tool to search for patients who have/had appointments in the clinic within the specified date range. In the example below, the Query Tool will search for patients who had appointments in the Cardiology clinic in the past month.*



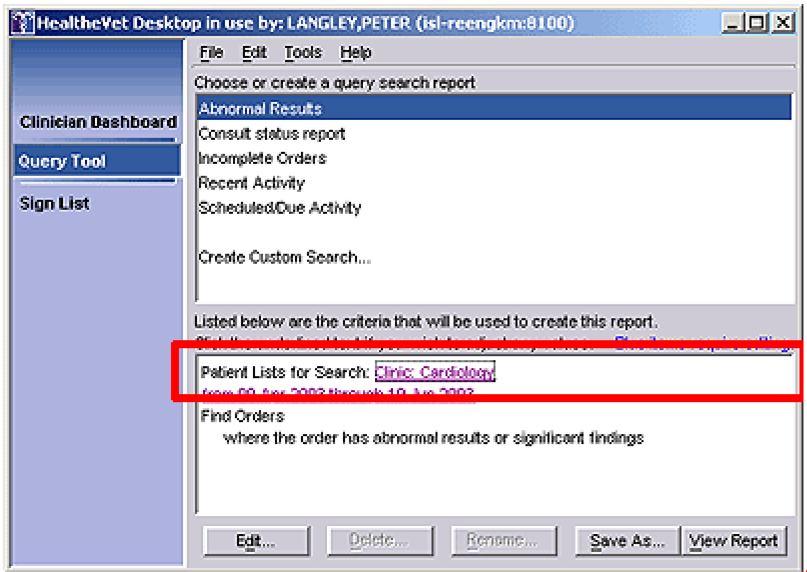
In this example, patients who had appointments in the Cardiology clinic in the past month will be added to the patient list.

4. Click the right arrow .
   The item moves to the *Selected Lists* pane.
   Note: You may also double-click an item to move it to the Selected Lists *pane. For patient lists in the* Personal/Team, Specialty, *and* Registry *tabs, you can also click the double arrow*  *to move all of the items in the* Type Name or Select From List *pane to the* Selected List *pane.*



Click the right arrow to add the Cardiology list to the *Selected Lists* pane.

5. Repeat Steps 2-4 if you want to add additional patients.
   Click **OK**.
   The selected lists appear in the lower pane.



A

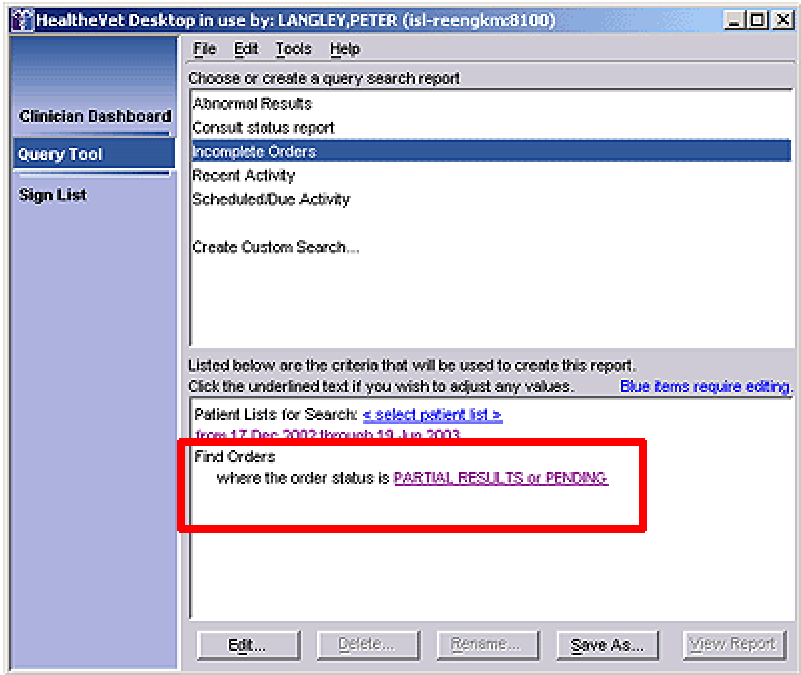
The cardiology clinic appears on the lower pane.

If you selected a predefined report and do not want to alter its default criteria, skip to **Displaying the Report** (p. 67). If you selected the Create Custom Search option, you need to follow the **Additional Steps for Custom Reports** (p. 56).

Editing the Criteria in a Predefined Report

You can change the default criteria (displayed in maroon font) for any predefined report. To change a criterion, simply click on the appropriate link. After you change a criterion, the new criterion is displayed in the lower pane.

For example, to change the date range on the Abnormal Results report, click the *From [date] Through [date]* hyperlink. To change the order status on the Incomplete Orders Report, click the hyperlink displayed after the following words: *where the order status is*.



Click the *Partial Results or Pending* hyperlink to change the order status.

Note: When you follow these steps to edit a predefined or custom report, Care Management does not save your edits. That is, when you close this application, edited criteria return to their original state. If you want to save your edits, select a report and then click the ***Edit*** *bar in the lower pane. After you have edited the criteria for this report, you can save your edits by clicking the* ***Save As…*** *bar. This creates a new report that uses your edited criteria as its default criteria.*

The following table lists the default criteria you can change for each predefined report:

Report	Predefined Criteria	To change, click…(in the lower pane)
Abnormal Results Report	Date Range	The *from [date] through [date]* hyperlink
Consult Status Report	Date Range	The *from [date] through [date]* hyperlink
	Consulting Service	The hyperlink displayed after these words: *where the consulting service is*
Incomplete Orders	Date Range	The *from [date] through [date]* hyperlink
	Order Status	The hyperlink displayed after these words: *where the order status is*
Recent Activity	Date Range	The hyperlink displayed after these words: *Searching Reports*
	Document Class	The hyperlink displayed after these words: *where the document class is…*
Scheduled/Due Activity	Date Range	The hyperlink displayed after these words: *Searching Reports*
	Service Category (display group)	The hyperlink displayed after these words: *where the service category (display group) is*
	Order Status	The hyperlink displayed after these words: *where the order status is*
	Consult Status	The hyperlink displayed after these words: *where the consult status is*

Additional Steps for Custom Reports

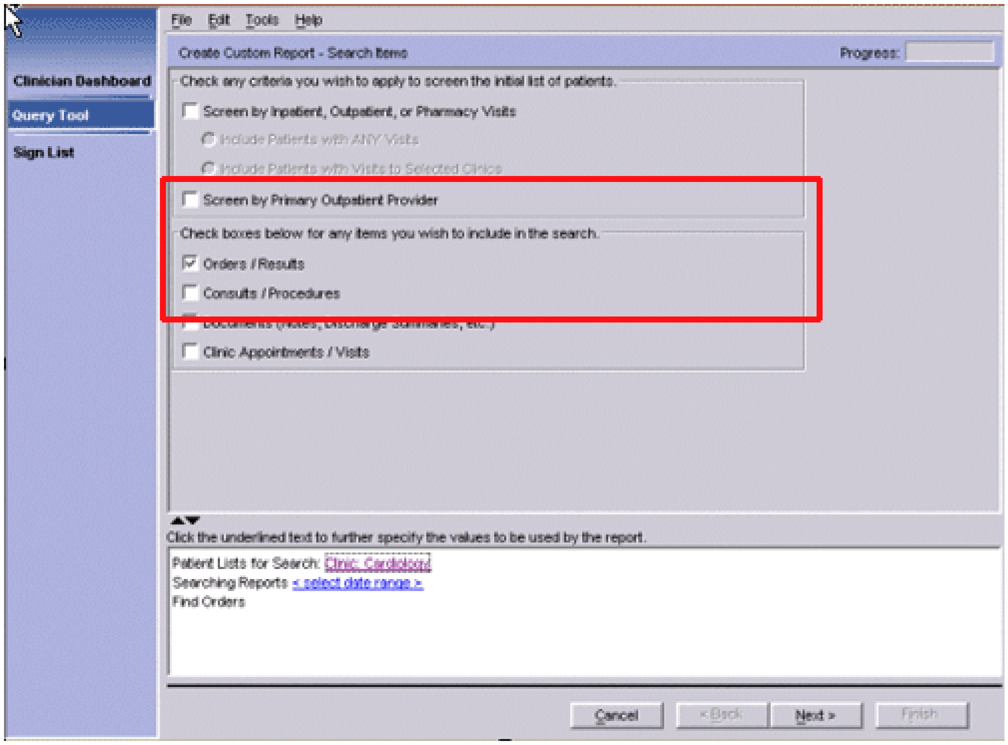
If you select a custom report, you must also select the items to include in the report (p. 58). In addition, you select a date range for the specified items (p. 59) and (optionally) filter the selected patient lists (p. 60).

Selecting the Items to Include in the Report

You can select the following items for your custom report:

- Orders / Results
- Consults / Procedures
- Documents
- Clinic Appointments / Visits

To include one of these items in the report, select the appropriate check box in the lower half of the upper pane. For example, if you want to include orders and results in the report, click the *Orders / Results* check box.



You can specify the items you want to include in the report by checking the appropriate boxes.

Selecting the Date Range for the Selected Items

You must specify a date range for the item(s) you selected in Selecting the Items to Include in the Report (p. 58).

To specify a date range, follow these steps:

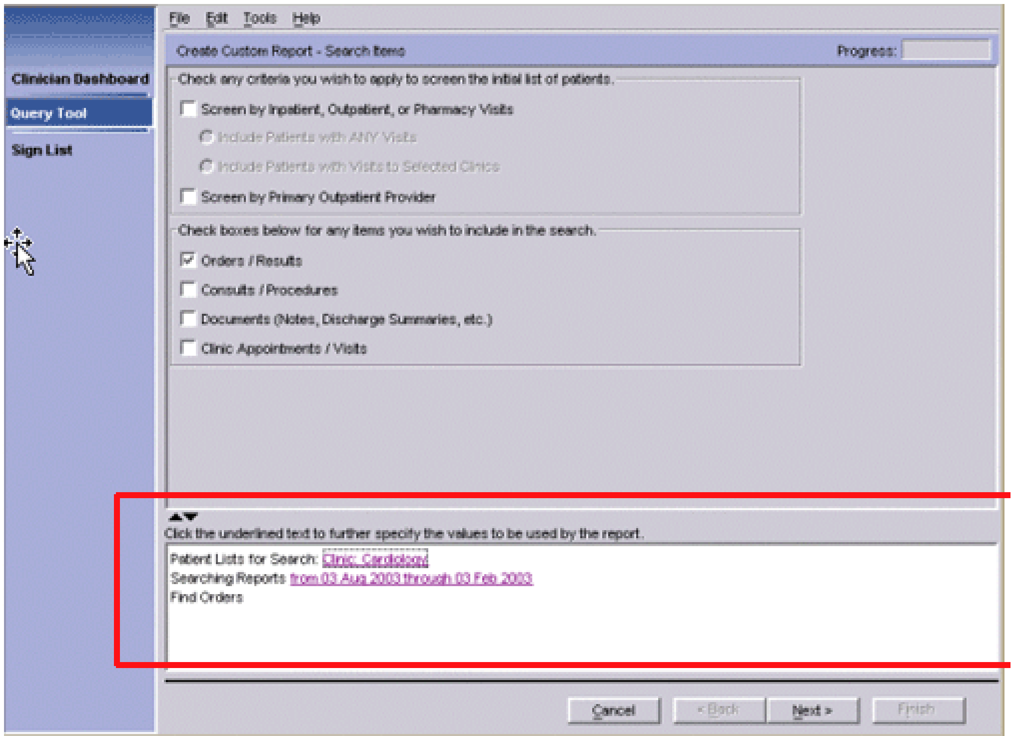
1. Click on the <select date range> hyperlink in the lower pane.
   The *Date Range* dialog box appears.

The *Date Range* dialog box

2. Select the appropriate date range.

3. Click **OK**.

The date range appears in the criteria pane.



This report will return patients who had an appointment in the Cardiology clinic and who have orders that were entered between August 3, 2002 and February 3, 2003.

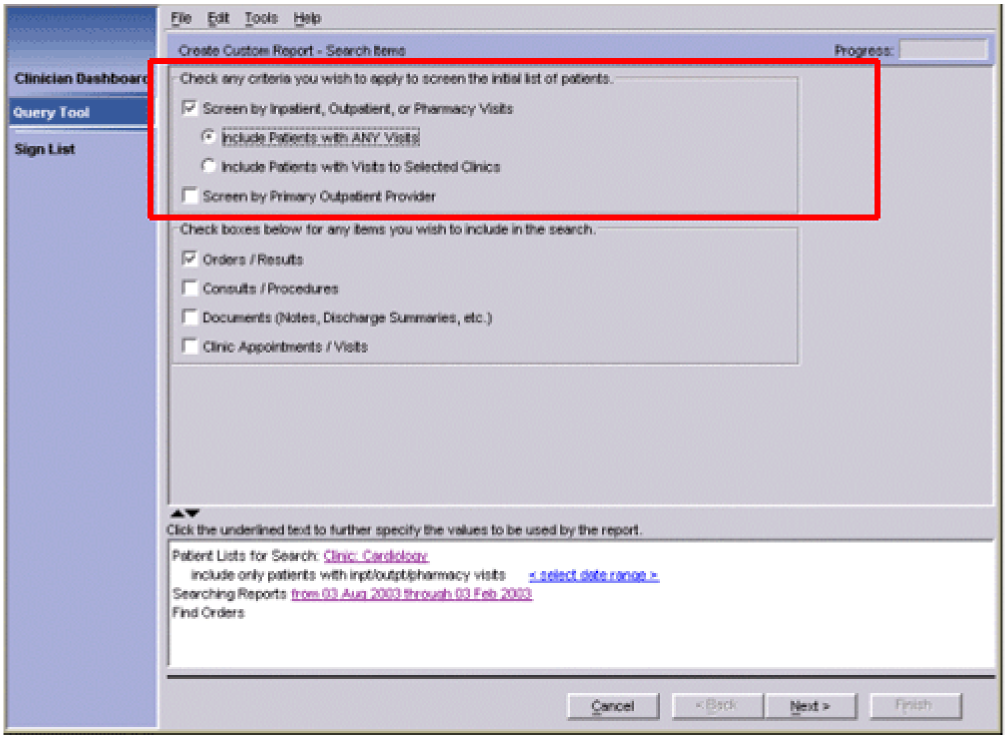
Filtering the Selected Patient Lists

After you have followed the steps in Selecting the Items to Include in the Report (p. 58) you can (optionally) filter the patient list(s) you selected in Defining the Patient Lists to Search (p. 54). For example, suppose you selected patients in Ward 2B, but want a report that includes only Ward 2B patients for whom you are the provider. You can filter the Ward 2B patient list to include only these patients. You can apply one or more of the following filters to refine the patient lists you select:

- Patients with inpatient, outpatient, or pharmacy visits during a specific date range
- Patients with inpatient, outpatient, or pharmacy visits to a specific clinic
- Patients with a specific primary outpatient provider

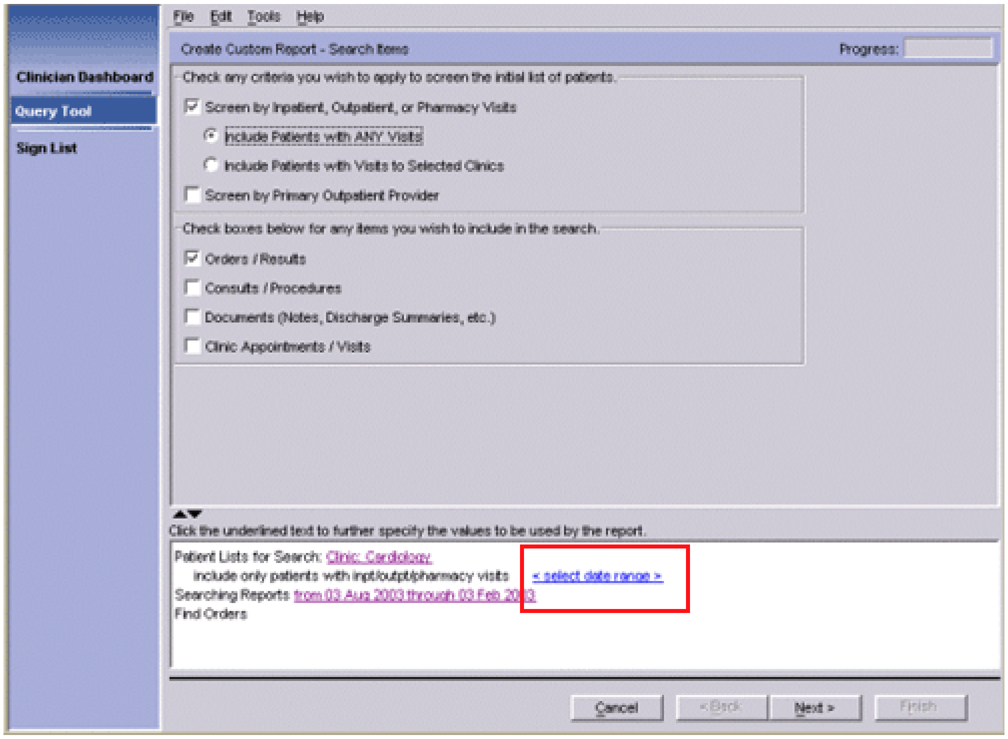
Including Patients who had an Inpatient, Outpatient, or Pharmacy Visit to any clinic During a Specific Date Range

1. Select the *Screen by Inpatient, Outpatient, or Pharmacy Visits* check box.
2. Select the *Include Patients with ANY visit*s radio button.



To only include patients who had an inpatient, outpatient, or pharmacy visit during a specific date range, select the *Screen by Inpatient, Outpatient, or Pharmacy Visits check box* and the *Include Patients with ANY visit*s radio button.

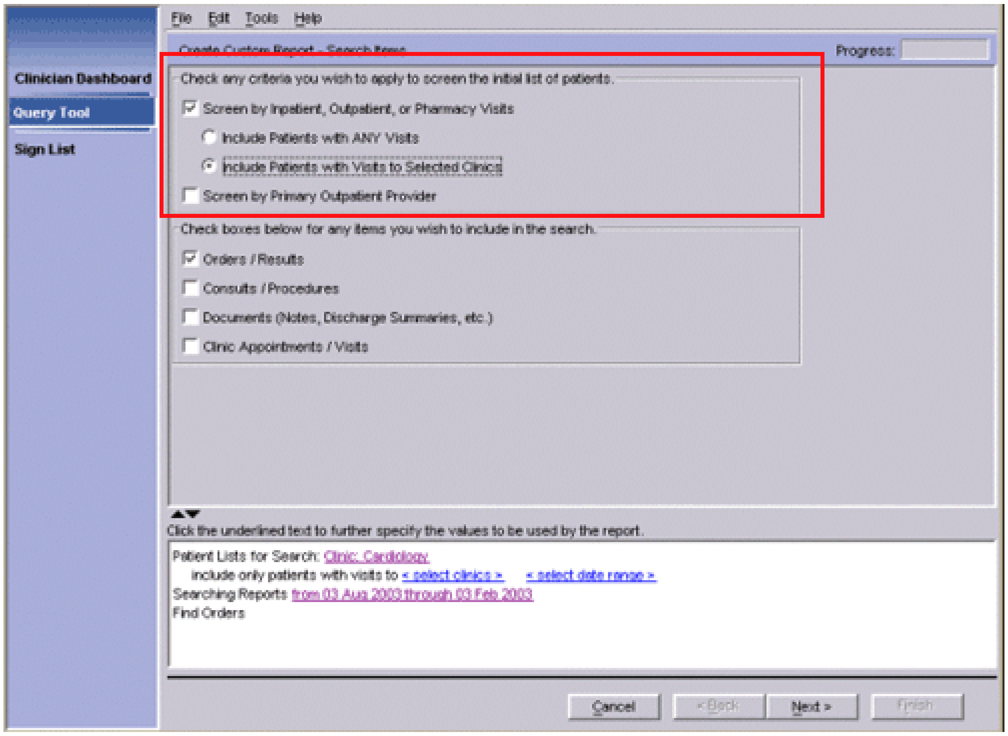
3. Set the date range for the visits by clicking the <select date range> hyperlink, which is displayed after the following: *include only patients with inpt/outpt/pharmacy visits.*



Set the date range for the visits by clicking the <select date range> hyperlink, which is displayed after the following words: *include only patients with inpt/outpt/pharmacy visits.*

Including Patients who had an Inpatient, Outpatient, or Pharmacy Visit to a Specific Clinic

1. Select the *Screen by Inpatient, Outpatient, or Pharmacy Visits* check box.
2. Select the *Include Patients with Visits to Selected Clinics* radio button.

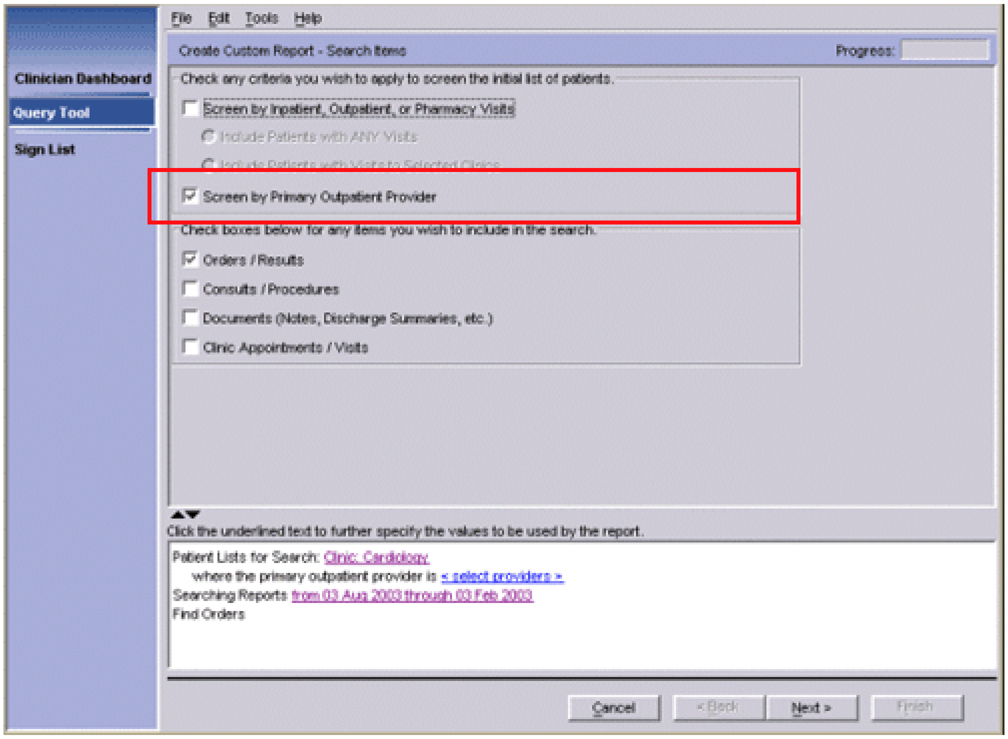


To include patients who had an inpatient, outpatient, or pharmacy visit to a specific clinic, select the corresponding check boxes.

3. Click the <select clinics> hyperlink (in the lower pane) to select the clinic(s).
4. If you want to select a date range for the visits, click the <select date range> hyperlink (on the same line on as the <select clinics> hyperlink).

Including Patients with a Specific Primary Outpatient Provider

1. Select the *Screen by Primary Outpatient Provider* check box.



The Query Tool allows you to screen the patient list by primary outpatient provider.

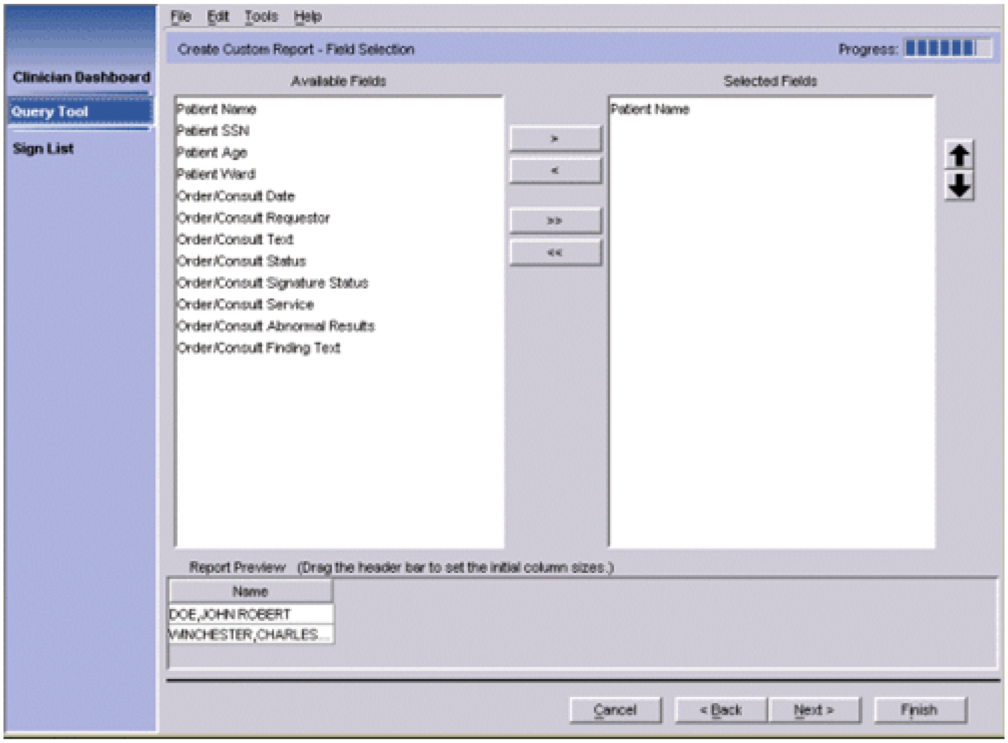
2. Select a primary provider by clicking the <select providers> hyperlink in the lower pane.

Moving to the Next Pane

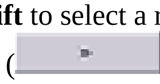
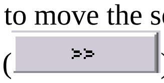
After you have defined all of the necessary criteria on a pane (all of the blue text is now maroon), click **Next**. Additional panes appear, allowing you to further refine your search. Complete each pane until the *Available Fields* pane appears.

Choosing the Fields that Appear on the Report

1. The available fields are now displayed in the *Available Fields* pane.

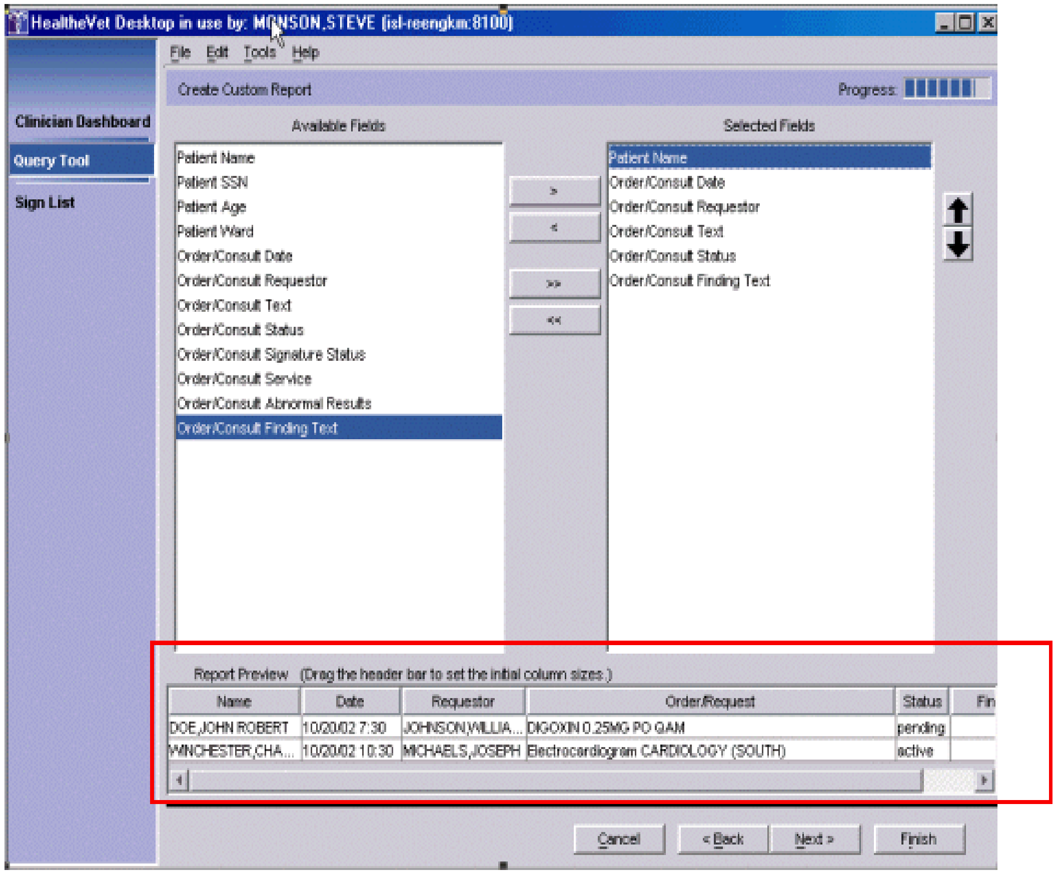


The fields that can be included in this report are displayed in the Available Fields pane. Note: This list varies depending on which options you selected earlier.

2. Select the fields you want to include in the report. Press and hold **Ctrl** to select multiple fields or **Shift** to select a range of fields.
3. Click the right arrow () to move the selected fields to the *Selected Fields* pane. Click the double arrow () to move all of the fields to the *Selected Fields* pane.

   Note: You can also double-click an item to move it to the Selected Fields *pane.*

4. A preview of the report appears in the lower pane. You can reposition a header by dragging the header to a new position or by using the up and down buttons on the right side of the screen. You can also expand or contract a column by dragging the edge of the column.



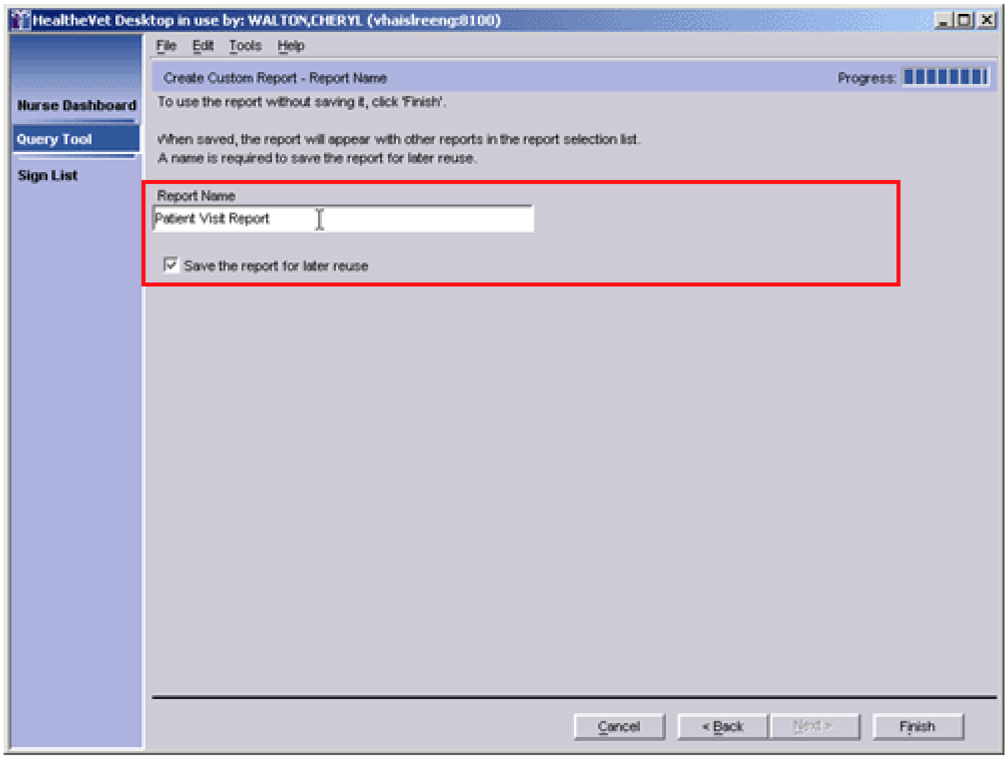
A preview of the custom report appears in the lower pane.

5. Click **Next**.
   The *Report Name* pane appears.

Naming the Report

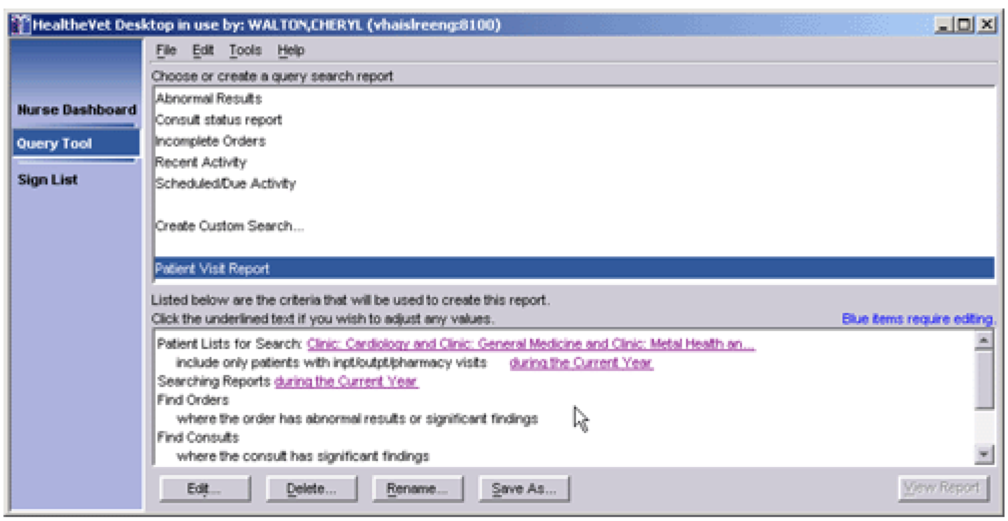
1. Type a name for the report in the *Report Name* field.

   Note: If you want to save this report for future use, be sure the Save the report for later reuse *checkbox is selected. If you do not select this checkbox, the report will be available only until you close the HealtheVet Desktop.*



This report will be named Patient Visit Report.

2. Click **Finish**.
   The name of the report you created appears under "Create Custom Search" in the upper pane.



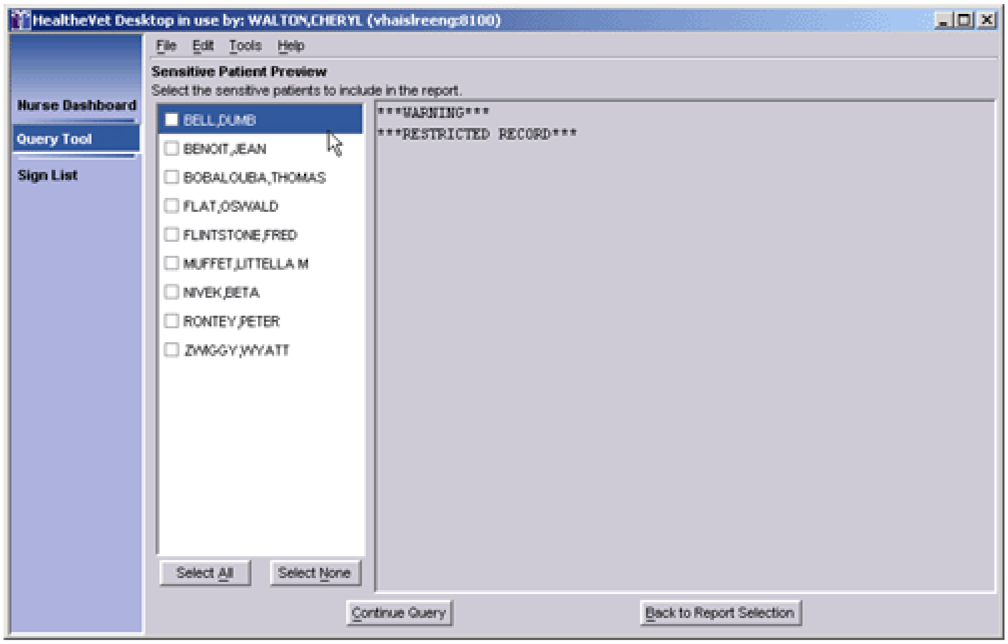
The Patient Visit Report is displayed in the upper pane.

Displaying the Report

To display the report, follow these steps:

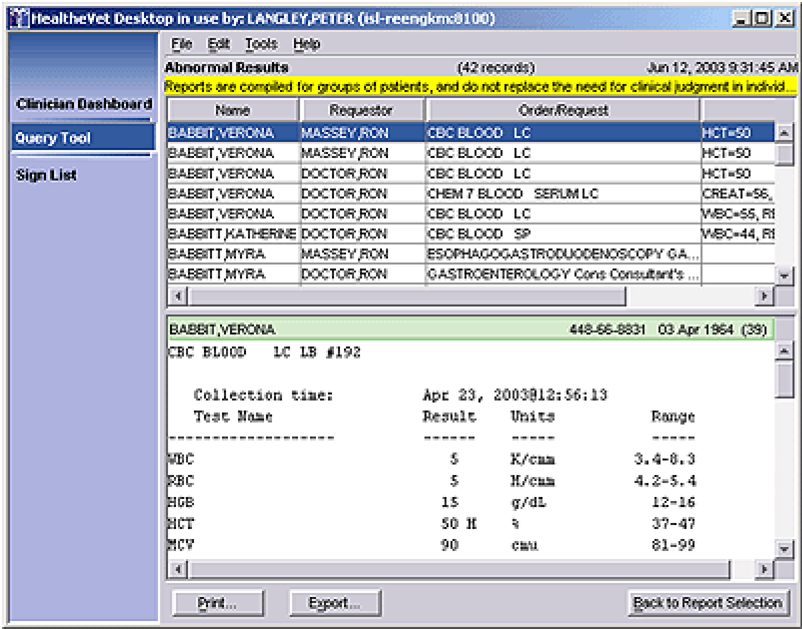
1. Click **View Report**.
   The Query Tool polls the database. After a few moments, the report appears in a table in the upper pane.

   Note: If sensitive patients are included in the patient lists you select, a pane displaying the names of these sensitive patients appears. From this pane, you can select or deselect the sensitive patients you wish to include/exclude from the report. If a sensitive patient is included in a report, an entry is made into the DG SECURITY LOG file.



From the *Sensitive Patient Preview* pane, you can select or deselect sensitive patients whom you want to include in or exclude from your report.

2. Click an item in the table to see details about the item.
   The details appear in the lower pane.



The results of the Abnormal Results report are displayed on the lower pane.

Printing the Report

Note: You must have the ORRC QUERY RESULT EXPORT key to print a report.

After you have displayed the report, you can print the report by clicking **Print**. However, only the information in the upper pane will print.

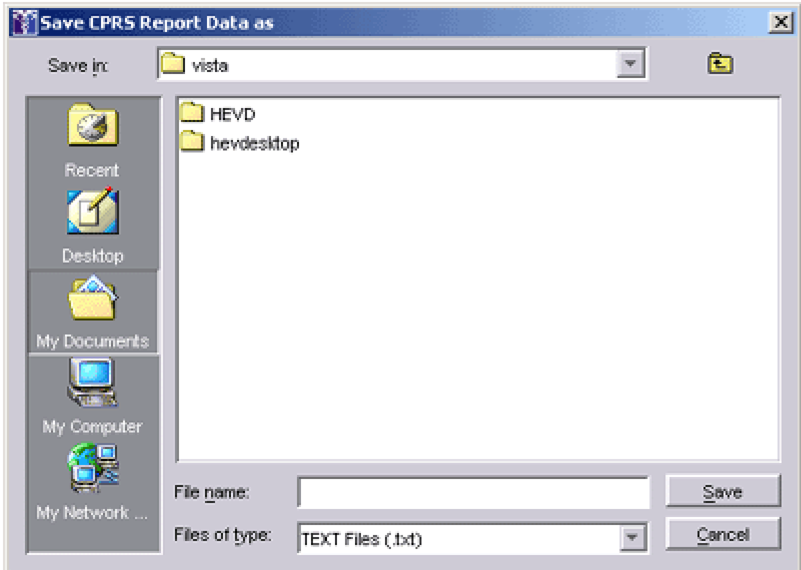
Note: You can also access Page Setup *and* Print Preview *options from the* File *menu.*

Exporting the Report

Note: You must have the ORRC QUERY RESULT EXPORT key to export a report.

To export a report, follow these steps:

1. Click **Export**.
   The *Save CPRS Report Data as* dialog box appears.



The *Save CPRS Report Data as* dialog box

2. Type a name for the exported report.
3. Browse to the location where you want to save the exported report.
4. Click **Save**.
   The report is saved as a text file.

Editing a Report

Note: You can edit both custom and predefined reports. If you choose to edit a predefined report, Care Management creates a copy of the predefined report and saves it as a custom report.

To edit a report, follow these steps:

1. In the Query Tool's upper pane, click the report you want to edit.
2. Click **Edit**.
   The *Create Custom Report – Search Items* pane appears.
3. Edit the report as necessary.

Saving a Report with a Different Name

1. In the Query Tool's upper pane, click the report you want to copy and rename.
2. Click **Save As…**.
   The *Enter New Query Name* dialog box appears.
   Enter a name for the new report.

   Note: Report names are limited to 80 characters and cannot include the ^ character.

3. Click **OK**.
   The report appears in the upper pane under the words Create Custom Search….

Deleting a Custom Report

Note: You cannot delete a predefined report.

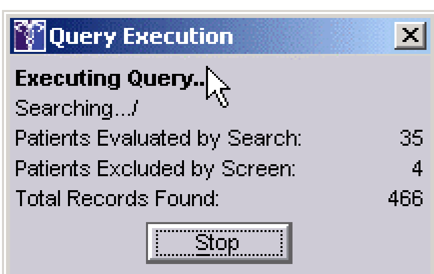
1. From the Query Tool's upper pane, select the custom report you would like to delete.
2. Click **Delete**…
   The *Delete Report* dialog box appears.
3. Click **OK** to delete the report.

Renaming a Custom Report

1. In the Query Tool's upper pane, click the custom report you want to copy and rename.
2. Click **Rename**…
3. Enter a new name for the report in the *Report Name* field.
4. Click **Finish**.
   The renamed report appears in the upper pane.

Stopping a Query or Report in Progress

Because large queries can affect system performance, you may need to stop a query or report in progress. You can do this by clicking the **Stop** button while the query is running. Partial results appear in the upper pane.



You can stop a query or report by clicking the stop button while the query is running.

Keyboard Shortcuts

Menu	Command	Keystroke
Health*e*Vet Desktop (All Modules)		
N/A	Move focus to the next pane or to the perspective selector Move focus to the next field or control Expand or compact a box, place a check in a check box, click a button, or follow a hyperlink. Place a check in a check box	**F6** **Tab** or Arrow Keys **Spacebar** **Spacebar**
File	Page Setup Print Print Preview Exit	**Alt+F-U** **Alt+F-P** **Alt+F-V** **Alt+F-X**
Edit	Redo Cut Copy Paste Delete	**Ctrl+Shift+Z** **Ctrl+X** **Ctrl+C** **Ctrl+V** **Delete**
Tools	Options	**Alt+T-O**
Help	Help Contents What's This About Health*e*Vet Desktop	**Alt+H-H** **Alt+H-T** **Alt+H-A**
Clinician Dashboard		
Action	Refresh Clinician Dashboard	**Alt+A-R, F5**
	Create Task	**Alt+A-C**
	Open the patient selection list	**Alt+P**
Nurse Dashboard		
Action		
	Refresh Dashboard	**Alt+A-R, F5**
	Create Task	**Alt+A-C**
	Open the patient selection list	**Alt+P**
Query Tool		
	Follow a Hyperlink/Click a Button	**Return**
	View Report	**Alt+V**
	Save As…	**Alt+S**
	Stopping a Report in Progress	**Alt+S**
	Export a Report	**Alt+X**
	Back to Report Selection	**Alt+B**