Advanced Medication Platform (AMPL)  
Graphic User Interface (GUI)

Frequently Asked Questions (FAQ)



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Artifact Rationale

The FAQ provides answers to frequently asked questions which may be needed by the AMPL GUI and AMPL GUI support teams to answer questions as they arise during the development and continuation of AMPL GUI. The FAQ is an optional resource which serves as addition to required documentation support for AMPL GUI users and testers.

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# Introduction

## What is AMPL GUI?

The Advanced Medication Platform (AMPL) Graphic User Interface (GUI) is a front-end application supporting the Department of Veterans Affairs (VA) pharmacists by fulfilling the need for medical knowledge during patient care. AMPL GUI provides a single point of access for pharmacists to do their work, such as reviewing patient records and processing pending orders.

Currently, AMPL GUI is a READ ONLY application. Writing and processing of orders as well as note writing, etc. is planned for a later phase.

# Logging On

## How do I log on to AMPL GUI?

1. Enter the AMPL URL (<https://ampl.vaec.va.gov/login>) into the address bar of your internet browser.
2. After selecting **Login**, users are redirected to the VA SSOi page.

* Click on **Sign In** with VA Personal Identity Verification (PIV) Card graphic.
* Select the appropriate certificate.
* Enter your Personal Identification Number (PIN) and select **OK**.

Figure : VA Advanced Medication Platform Login Page

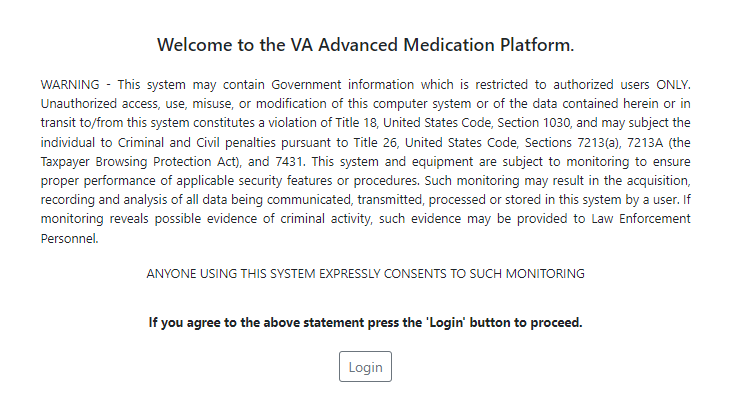
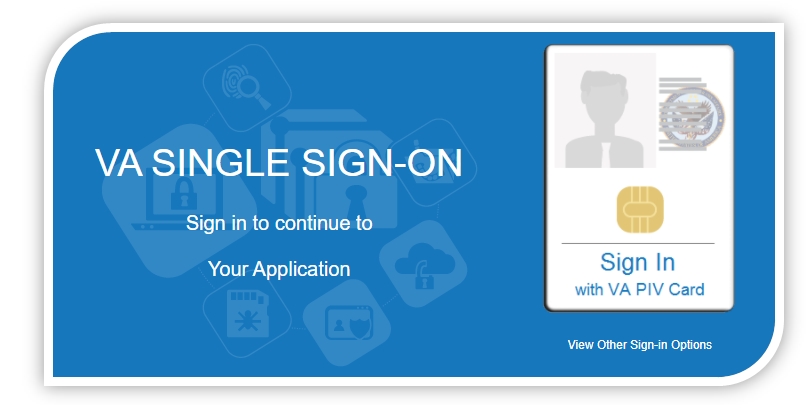
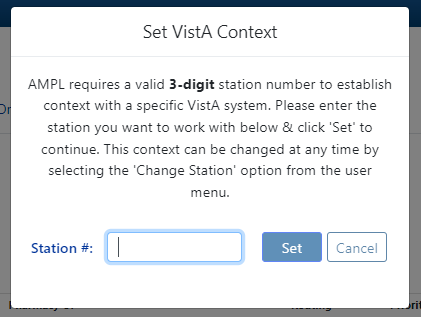


Figure : VA Single Sign-On



### How do I know what my 3-digit station number is?

Figure : Set VistA Context 3-Digit Station Number



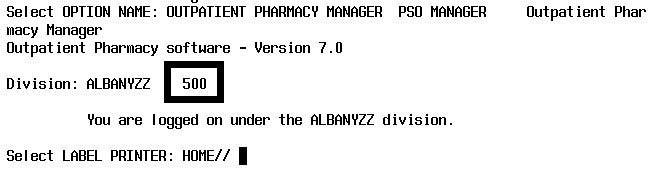
The links below can be used to get a report of facilities and their station number:

**Internet -** [**To Facility Listing - Locations (va.gov)**](https://www.va.gov/directory/guide/rpt_fac_list.cfm)

**Intranet - [Report - Facility Listing - Facilities Locator & Leadership Directory (va.gov)](https://vaww.va.gov/directory/guide/rpt_fac_list.cfm?isflash=1)**

Your station number is also found in VistA, it is displayed when you enter your division. See example below:

Figure : Station Number in VistA



# Pending Orders Manager (POM)

## What is the “Pending Orders Manager”?

The pending orders manager of POM is a dashboard intended to help pharmacists manage and process pending orders for their facility.

## Why are patients not showing under the Pending Orders Manager?

To display a list of patients under the **Pending Orders Manager**, select an outpatient site from the dropdown list next to **Select Outpatient Site**.

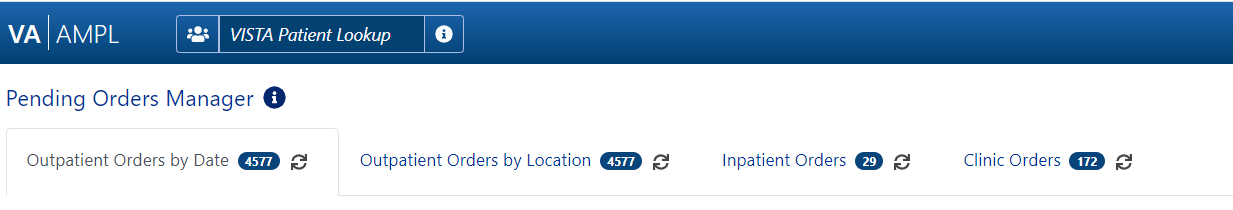
## What does the “Select Ordering Institution” button do?

**Select Ordering Institution** allows users to drill down to see orders for a specific CBOC or VAMC included under a Station.

## What are those numbers I see in the blue bubbles on the tabs?

In the category tabs on the POM, the number of orders within that tab are displayed in the blue bubble on the tab.

Figure : POM Number of Orders



## What are those green arrows in the column headers?

To reveal if a column is sortable, click the column header. If it is sortable, the Green arrowicon will display. Repeatedly clicking the sortable column will toggle between ascending, descending then back to default. If more than 1 column is sorted, a small number by the arrow green arrow with number indicates the order.

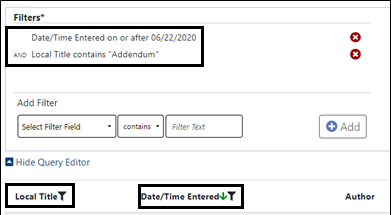
Figure : Green Arrows Sorting Columns

Screenshot showing the Green Arrows that mean a column is sortable

## What is the black funnel symbol I see in the column headers?

The black funnel symbol indicates that column is included in the current query.

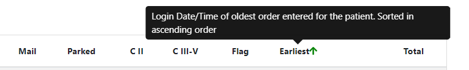
Figure : Black Funnel Symbol



## How can I get more information about the column headers?

Hovering your mouse over the column headers will reveal help text providing additional information. The hover functionality is available throughout AMPL, if you are not sure, hover!

Figure : Hover Text

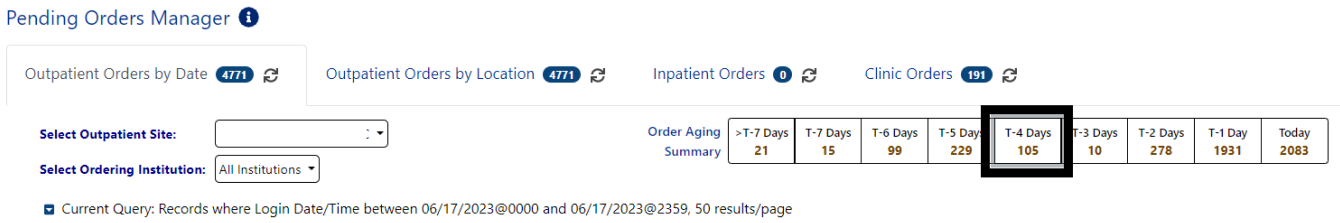


## Can I sort the patients by the age of the orders?

By default, pending orders are displayed oldest first.

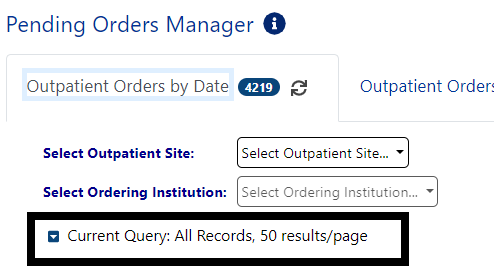
Clicking on the desired date range in the **Order Aging Summary**, located near the upper right-hand section of your screen will display only the orders that fall within that date range.

Figure : VA Order Aging Summary



Orders that display in any of the Pending Orders tabs may also be filtered using the Query Editor. Clicking on the blue arrow will expand the Query Editor.

Figure : Current Query: All Records



## How can I take advantage of Clinic Sort Groups or Ward Groups that are set-up in VistA?

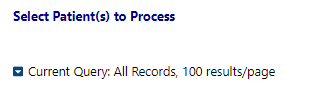
Choose the **Outpatient Orders by Location**, **Inpatient Orders**, or **Clinic Orders** tab near the top of your screen. You will find Outpatient Clinic Sort Groups, Inpatient Ward Groups and **Clinic Groups** for Clinic Orders if you have them set up at your facility.

When you check a box for a clinic group or ward group, patients in the clinic or ward group with pending orders will be viewable below in the **Select Patients to Process** section (you may have to scroll down if there are a lot of groups).

There is also a Query Editor available in the **Select Patients to Process** section to further filter the list of patients. To filter the list, click on the down arrow to access the Query Editor (shown below).

**Note**: Currently, AMPL is read only. The ability to process orders will be added in a later version.

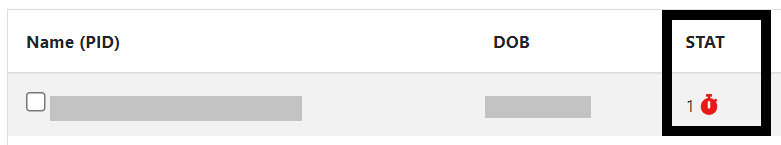
Figure : Select Patient(s) to Process



## For Inpatient pending orders, do ASAP orders show up under the STAT heading?

Yes. The red symbol displays next to STAT orders, so they are easy to locate.

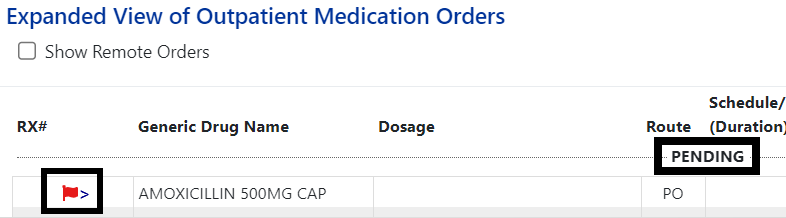
Figure : Priority Indication Screen



## Can I find flagged Outpatient orders in AMPL?

Yes. The red flag symbol displays next to Flagged orders, so they are easy to locate.

Figure : Flagged Outpatient Pending Orders



## I have my patient list, now what?

One or more patients may be selected from the list for processing using the **Process Selected** or **Process All** buttons. If multiple patients are selected, the first one will open to the **Patient Coversheet** and the rest will be added to the patient queue and their names will display at the bottom of the screen and using the patient queue button at the top of the screen.

Figure : Patient Queue for Multiple Patients

Screenshot of the Patient Queue button

## How do I change patients?

Once patient(s) are selected, you will be taken to the **Patient Coversheet**. If you want to go back into the **Pending Orders Manager**, you can select **Pending Orders** from the upper right corner of your screen. If you selected multiple patients and want to change patients, click on the Patient Queue button.

Figure : POM Button Toggle to Coversheet and Retained in Patient Queue

Screenshot showing the Coversheet button

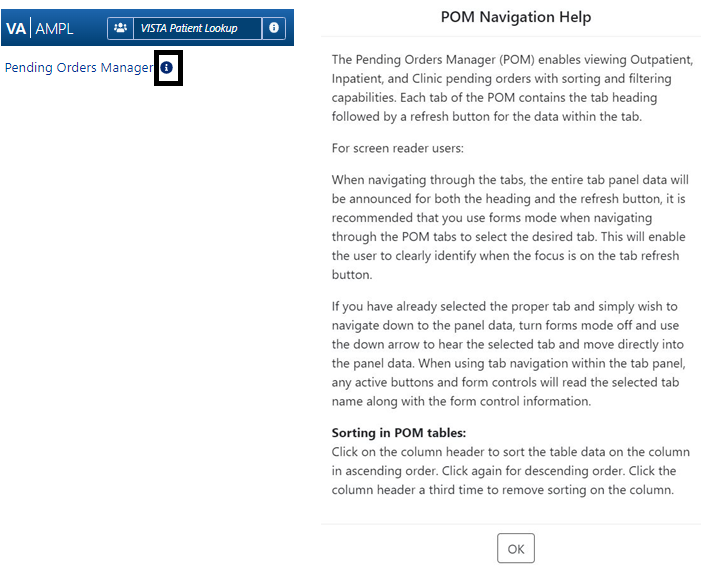
Figure : Patient Cover Sheet with Patient Queue List

Screenshot showing the Patient Queue button

## What is the “i” symbol next to Pending Orders Manager?

The **“i”** next to **Pending Orders Manager** text gives informational text regarding POM Navigational help once it is clicked.

Figure : Pending Orders Manager "i" Button



## What if I just want to go to an individual patient not on the Pending Orders Manager?

You can locate and select individual patients from the **VISTA Patient Lookup** located in the upper left corner of your screen.

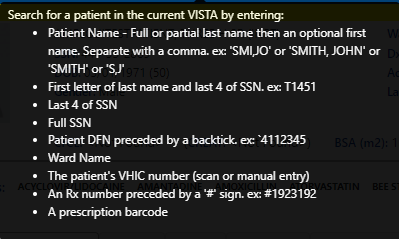
Figure : Pending Order Manager VistA Patient Lookup



## What is the “i” symbol next to VISTA Patient Lookup?

When you click on the **“i”** next to **VISTA Patient Lookup**, it will display help text on different ways to search for the patient you need.

Figure : VistA Patient Lookup Help Text

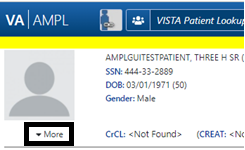


# Patient Coversheet

## How do I view more detailed patient demographics?

Click the down arrow to the left of More (below where the patient’s picture would be) to get more patient demographics.

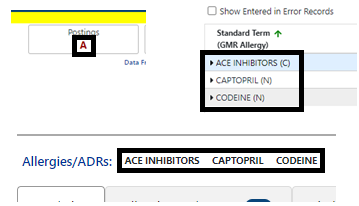
Figure : More Patient Demographics



## How do I get more detailed Allergy/ADR information?

Click on the allergen in the allergy summary ribbon, on the Allergies and ADRs tab or in the CWAD section.

Figure : More Information for Allergies and ADRs



## What is CWAD and how do I find that information?

CWAD is Crisis, Warnings, Allergies, and Directives found in the Postings button in the upper right corner. Click on this button, to see the CWAD entries for that patient. Hovering over the Postings button shows additional information.

Figure : Postings CWAD Button



## How do I see recent additions or changes to the patient's data from VistA or CPRS?

Like VistA and CPRS, new changes made to patient data after the patient’s record is accessed in AMPL (entering a new order, discontinuing an active order) are not seen until the patient is refreshed. See figure below:

* In AMPL, the Refresh button is used
* In CPRS, the File/Refresh Patient Information is used
* In VistA, close the patient in a backdoor pharmacy option and open the patient again.

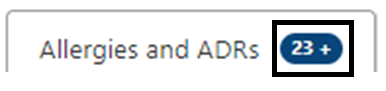
Figure : Refresh Patient Data



## What is the number that I sometimes see next to the Tab Name?

A numeric value indicates the total number of Allergy and Adverse Reaction records for the selected patient and the “+" sign indicates that patient has "allergies/ADRs that were entered in error".

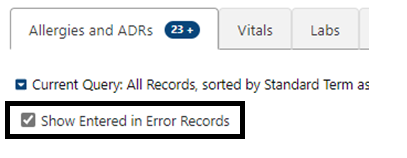
Figure : Total Number of Allergy and Adverse Reactions

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## Is there a way to see allergies or ADRS that were “Entered in Error”?

Yes, click on the check box to the left of Show Entered in Error Records.

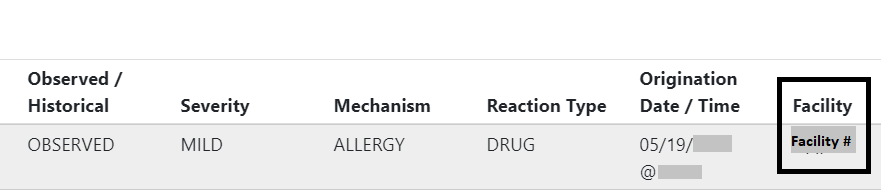
Figure : Allergies Entered in Error



## How do I know what facility entered the allergy/ADR?

The facility number where the allergy/ADR originated is in the last column to the right in the Allergies and ADRs tab.

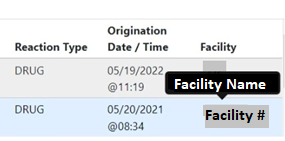
Figure : Originating Facility for Allergies and ADRs



## Okay, but how do I know what facility corresponds to that facility number?

Hover over the facility number and the facility name will appear.

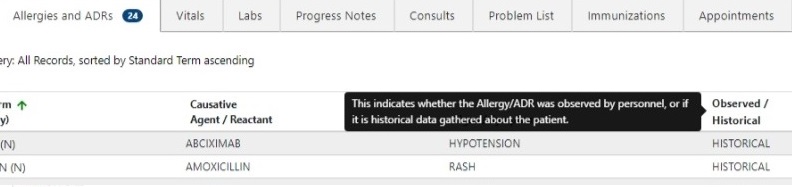
Figure : Hover for Facility Name



## How do I find more information about column headers?

Hover over the header and information about that header will appear.

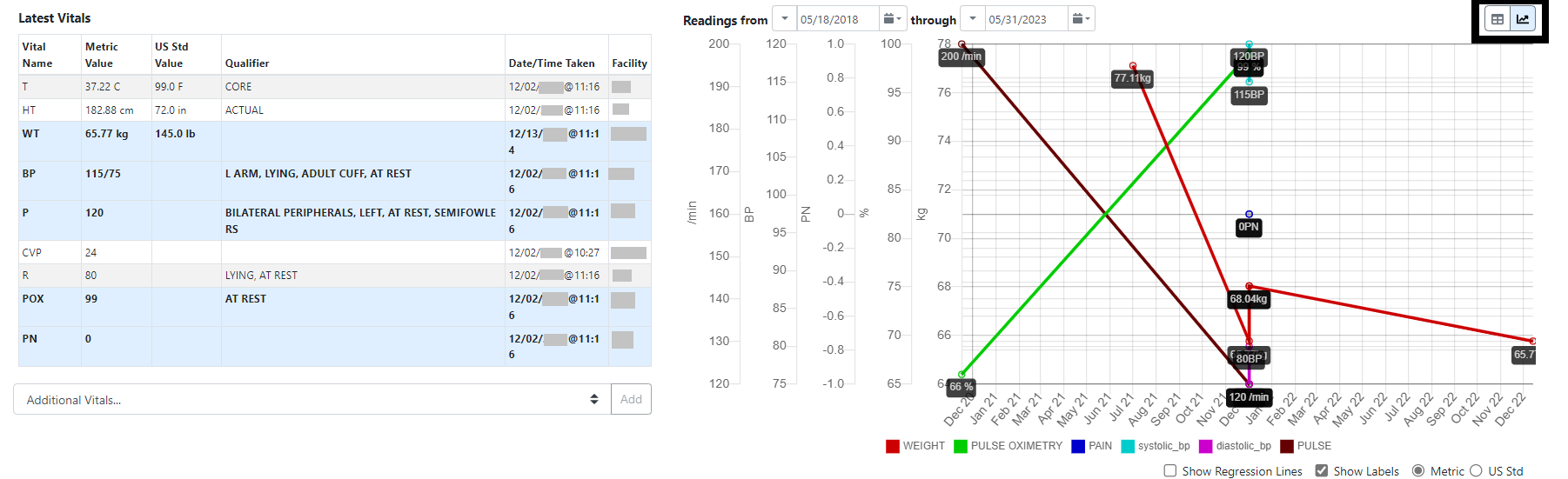
Figure : Hover Text for Column Headers



## It would be nice to be able to graph vitals to see trends, can I do that with AMPL?

Yes, you can select date ranges, toggle between metric and US Standard units, and graph the vitals. The graph button is on the far right and next to it is the table button to return to table view.

Figure : Graph Vitals



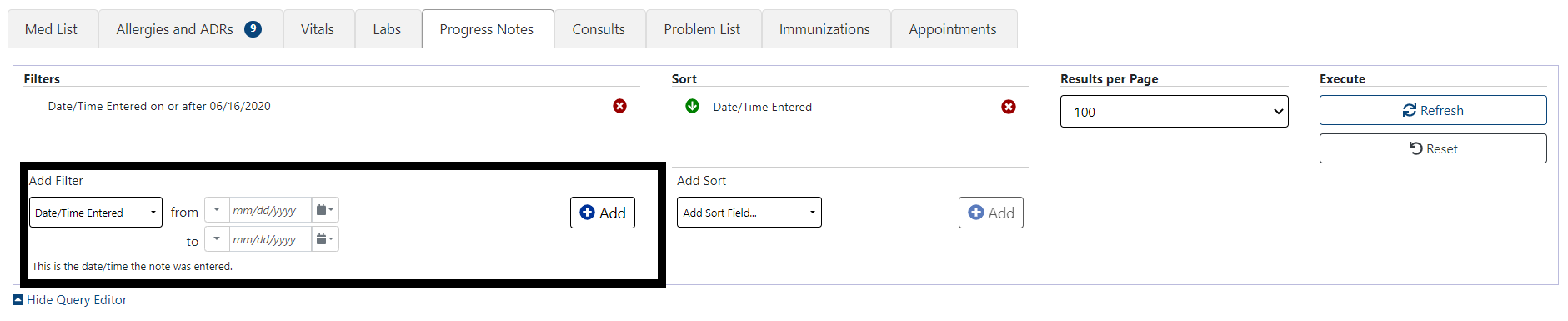
## How many progress note titles are displayed per page?

A maximum of 100 progress notes can be displayed per page. Additional notes may be viewed, 100 at a time, by clicking the Next button at the bottom of the page.

## How can I see a particular date range or an earlier date range than what is shown?

The Query Editor can be used to filter and/or sort data for a date range. The Query Editor is opened by selecting the down arrow next to the Current Query button. Choose the Add Filter button to show filter options. Date/Time Entered is one of the options. See Section 5: Filter and Sort for more info on the Query Editor.

Figure : Query Editor for Date Range



## There are a lot of progress notes, how do I sort and filter them?

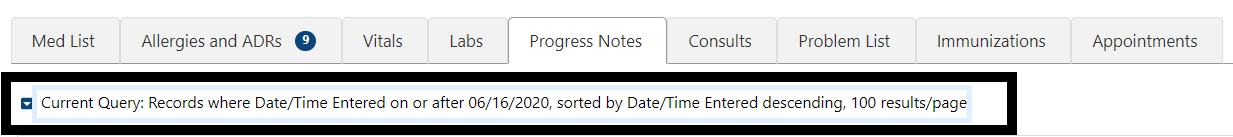
In the Progress Notes Tab, is a **Current Query** with a down arrow to the left of it. **Select the** down arrow to bring up the Sort and Filter options. Choose the **Add Filter** button to showfilter options.

If Add Sort Field is selected, the same options appear, but will sort by those fields instead of filter.

Don’t forget to click Add after you make your selection (multiple filters and sort fields may be added at once). Execute the new filter and sort criteria by clicking on the Refresh button to the right of the page.

See **5.1.5: Progress Notes** for more info on sorting and filtering Progress Notes

Figure : Progress Notes Sort and Filter



## How do I see the actual progress note?

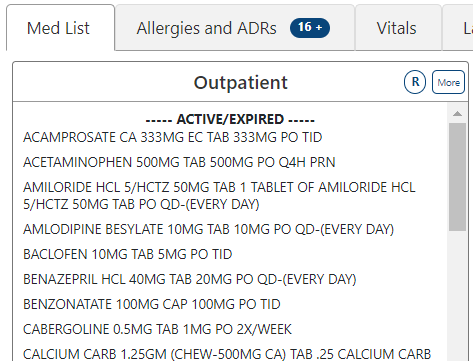
Click on the note title to get a detailed view.

## How do I see Remote meds?

If there are remote meds, under the Med List Tab, there will be a circle with an “R” inside to the right of the column header. Click on that “R”.

Note: There will be no “inpatient” remote medications.

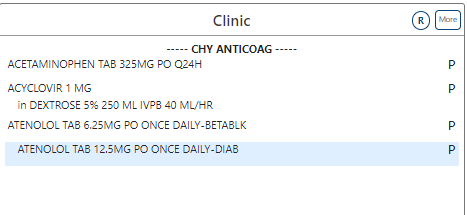
Figure : Remote Meds



## How do I see a more detailed view of the meds?

Click on More to the right of the header. This will give more information about all the meds in that section.

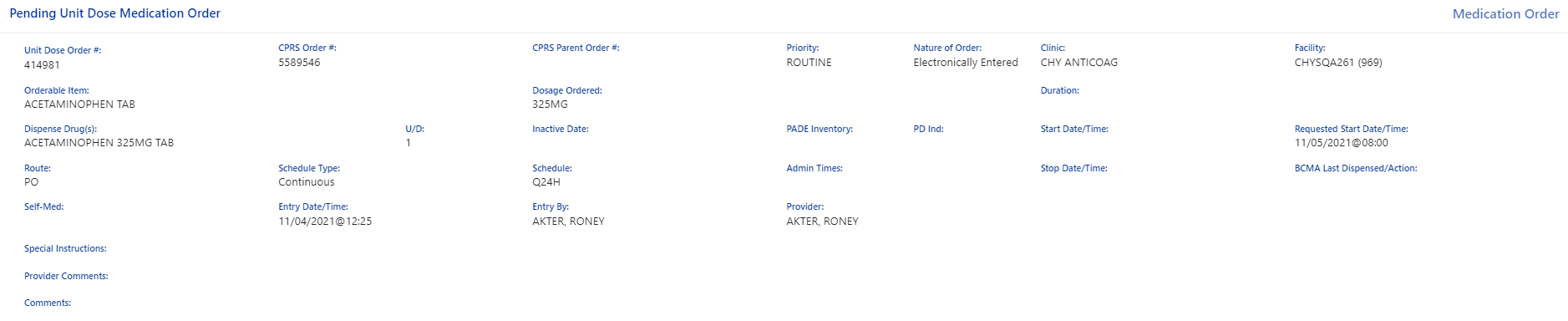
Figure : Detailed View of Meds



## Okay, but how do I see an even MORE detailed view of the medication orders?

Click on the medication name in the section and it will give you a detailed view of the medication order.

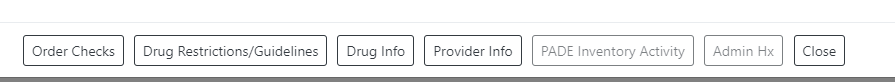
Figure : Even More Detailed View of Medication Order



## I see buttons at the bottom of that view, what are those for?

A screenshot of those buttons is below. They include Order Checks, Drug Restrictions/Guidelines, Drug Info, Provider Info, PADE Inventory Activity, Admin Hx, and Close. These buttons put often needed information that you can find in VistA and CPRS, but in a much easier to find and read format for each order. If the button is greyed out, there is no information for that item.

Figure : Order Checks, Drug Restrictions/Guidelines, Drug Info, Provider Info, PADE Inventory Activity, Admin Hx, and Close



## For Inpatient and Clinical Med Orders, can I see PADE inventory amounts for the associated device?

Yes, click on the PADE Inventory Activity button at the bottom of the screen when in a medications detailed view.

Figure : PADE Inventory Activity



# Filter and Sort

## Can I get more information on sort and filter functionality for Allergies and ADRs, Labs, Consults, Progress Notes, Immunizations, Problem List, and Appointments tabs?

Each tab has its own unique filter and sort criteria to easily filter and sort to find the information you need quickly and efficiently.

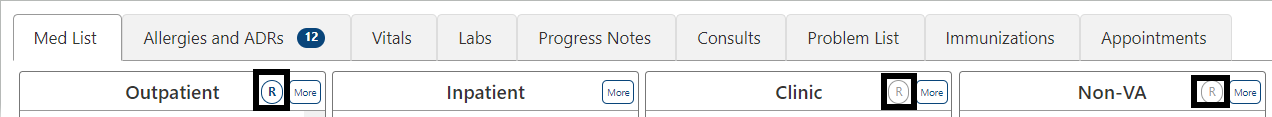
There are several things to remember. After selecting the filter or sort, don’t forget to click the **Add** button to add your new criteria to the filter or sort section above the options. You can add multiple filter or sort criteria if needed. Once you have your filter and sort criteria finished, click the **Refresh** button to the right side of the screen. Below the Refresh button is a **Reset** button to return to the default search and sort settings.

Listed below are figures and information for each tab to show what types of data may be used to filter or sort data.

### Meds

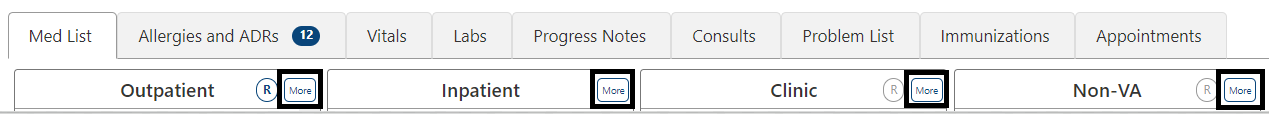
Starting out with an exception, the Med List tab doesn’t currently include a Query Editor. Instead, it displays all Active/Recently Expired, Pending and Non-Verified orders. **Remote** Outpatient, Clinic and Non-VA orders may be added by checking the **R button** in the section header.

Figure : Remote Order Button



An **expanded view** for orders in a category may be accessed by clicking the **More** button for that category. Additional details for a specific order are displayed by clicking on the order from the Expanded View.

Figure : More Button



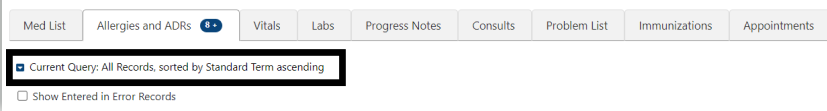
NOTE: The Outpatient medications included in the discontinued and expired categories are determined by RECENTLY DC’D/EXPIRED DAYS Field (#3.2) in the OUTPATIENT SITE (#59) File. Inpatient Medication Order include orders that were discontinued or expired in the last 24 hours in the RECENTLY DC’D/EXPIRED section.

For more FAQs about the **Meds tab**, see **Section 4.14** of this document.

### Allergies

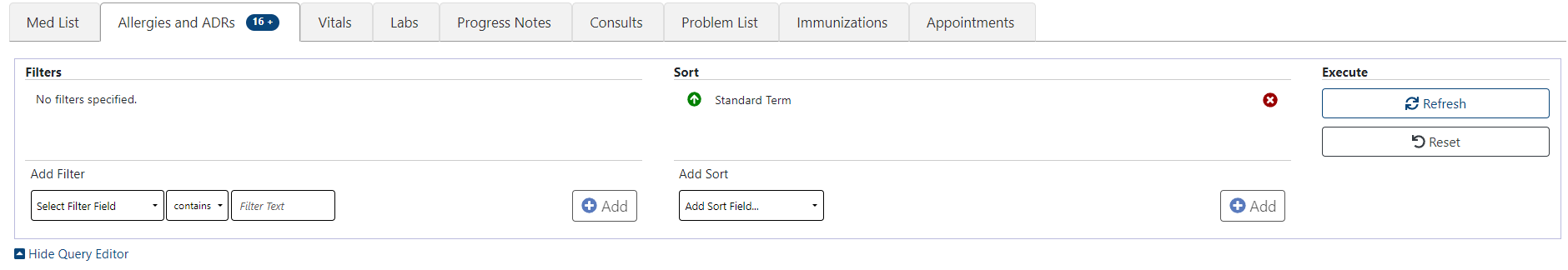
Allergies/ADRs and Assessments are displayed for all sites where a patient has been seen. Records may be further filtered or sorted using the **Query Editor**. It is accessed by clicking on the down arrow next to the **Current Query**.

Figure : Current Query



After adding new filter or sort criteria, don’t forget to click the **Add** button to add your new criteria to the Filters or Sort sections above the options. You may add multiple filter or sort criteria. Once you have completed filter and sort criteria changes, click the **Refresh** button to the right side of the screen.Below the Refresh button is a **Reset** button to return to the default search and sort settings.

Figure : Allergies Filtering and Sorting



**Adding Filter Criteria:**

The drop-down list of Filter Fields displays a list of fields that can be used to restrict the list. The list of operators’ changes based on the type of data selected in the filter field.

Figure : Allergies Adding Filter Criteria

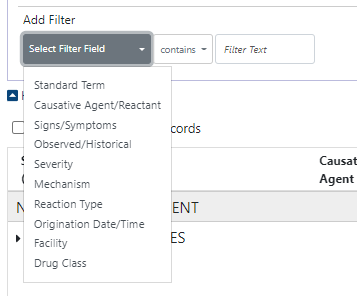
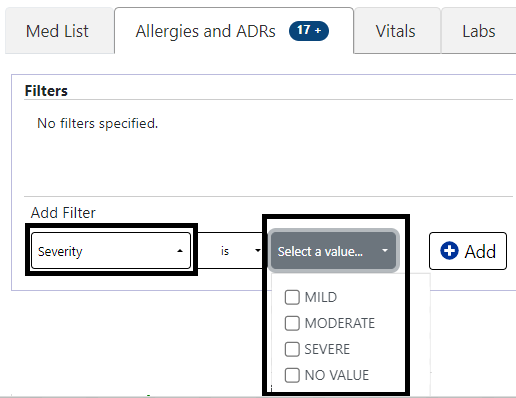
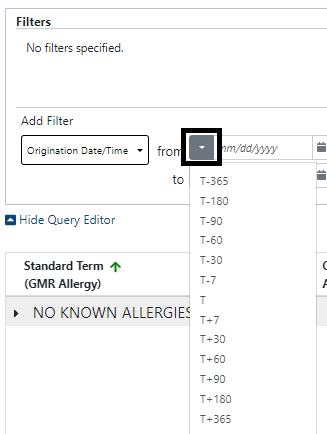


Figure : Allergies Adding Filter



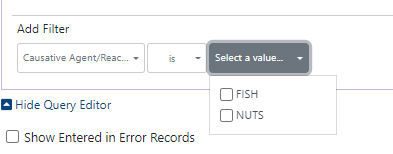
If the filter is a date range, there are several ways to enter dates - typing the date, clicking on the calendars or select from **common date ranges** by clicking on the **down arrows** to the left of the date/time as shown below:

Figure : Allergies Date Range Filter



If a text field is selected, the Filter Text box turns into a **Select a Value** drop down that includes only values included in the patient’s data. In the example below for causative agent, the possible options are displayed and as many or few as you like can be checked.

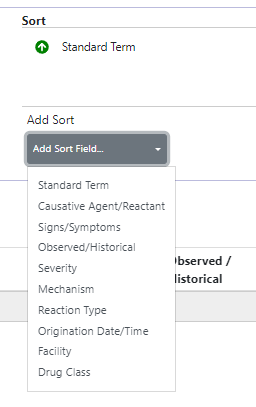
Figure : Allergies Selecting a Value



**Adding Sort Criteria:**

Setting **Sort** criteria is like setting filter criteria. A dropdown box shows the fields that can be used for sorting.

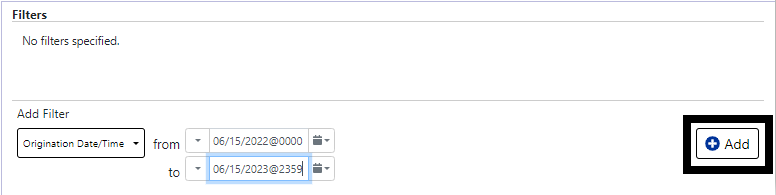
Figure : Allergies Adding Sort Field



As each filter or sort is defined, click the **Add** button to add it to the query.

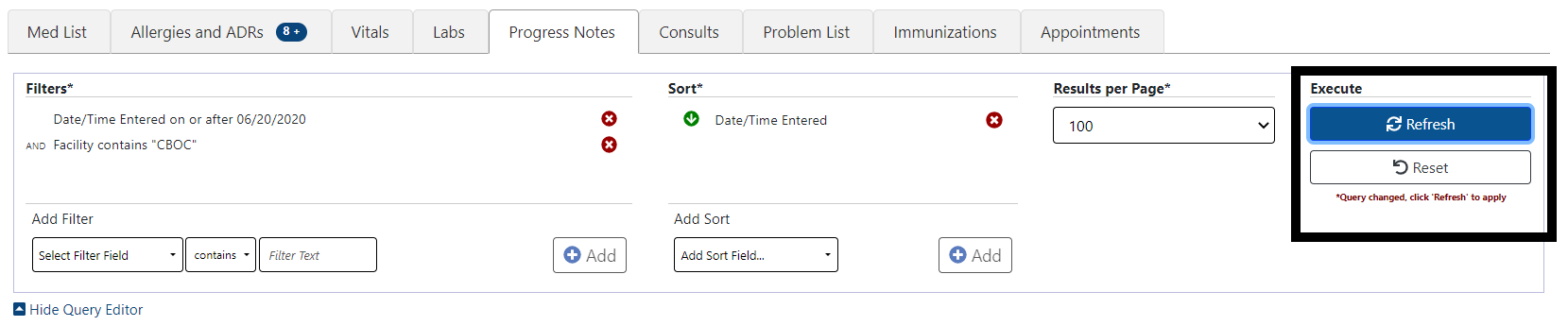
There is an Add button for both filter and Sort sections, located on the right side of the section.

Figure : Allergies New Filter Add Button



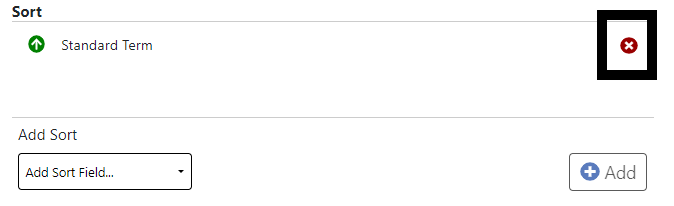
The **Refresh** and **Reset** buttons are in the Execute section on the right of the Query Editor. Refresh will apply any new filters. Reset will return the display to the default criteria.

Figure : Allergies Refresh Button



To remove single filter or sort criteria, including one of the defaults, click the Red X next to it.

Figure : Allergies Red "X" Button



To clear all filters and sorts added by the user and return to the tab’s default, clickthe **Reset** button.

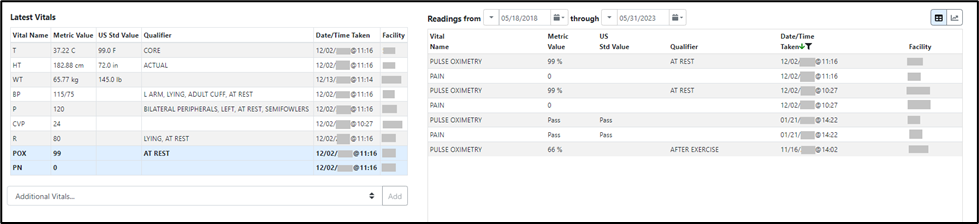
Figure : Allergies Reset Button



### Vitals

Vitals is the second tab that does not include a query editor. Instead, the vitals tab initially displays a table of the latest common vitals. You can view past readings by clicking on the vital name, results will display to the right with a default date range of **one year for Outpatient** and **one week for Inpatient**. Additional Vitals may be added to the table by clicking on the **Vital name**. They can be removed by clicking again.

Figure : Vitals Display



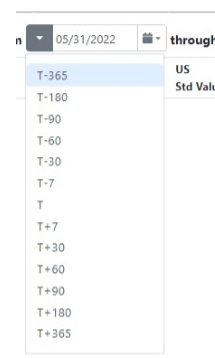
To change the date range, modify the Readings from or through dates.

Figure : Vitals Date Range

This image shows the Date Range 

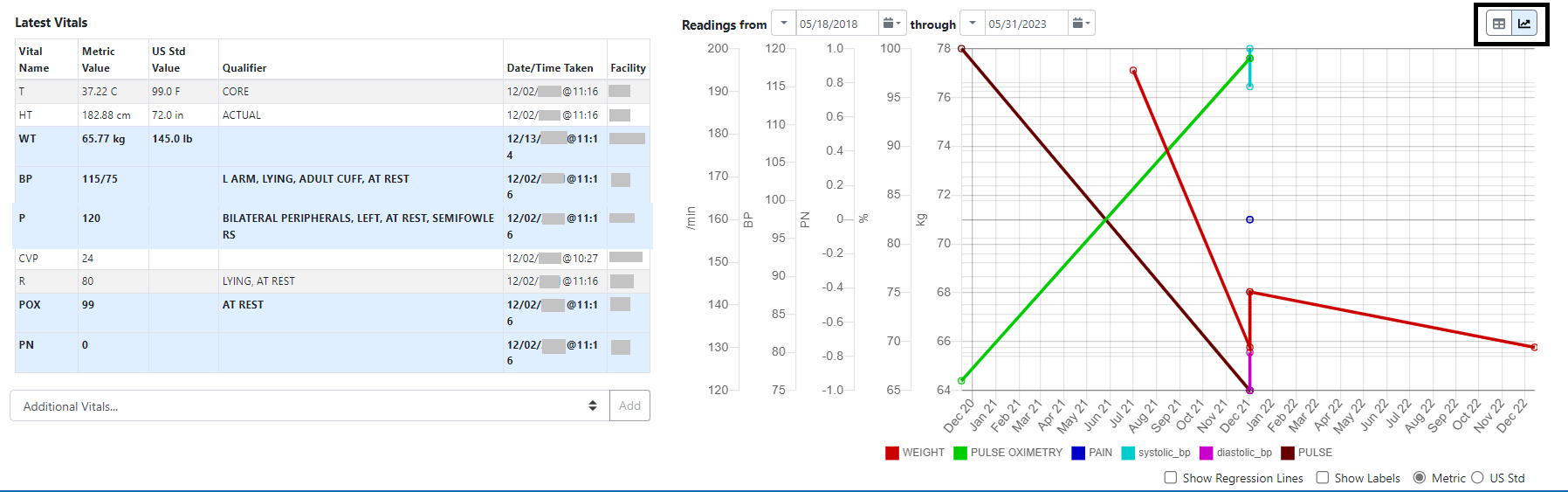
There are several ways to enter dates - typing the date, clicking on the calendars or select from **common date ranges** by clicking on the **down arrows** to the left of the date/time as shown below.

Figure : Vitals Commonly Used Date Ranges



Vital types in the date range table may also be shown in a graph by selecting the **graphing icon** located in the top right corner of the Vitals screen.

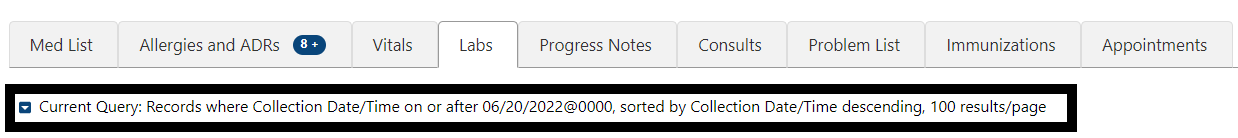
Figure : Vitals Graphing



### Labs

The Current Query default for Labs is Collection Date/Time within the past year, sorted by Collection Date/Time with newest results first, and 100 records per page. The Filter and sort criteria can be changed using the Query Editor. The Query Editor is accessed by clicking the blue down arrow.

Figure : Labs Current Query



**Adding Filter Criteria:**

The drop-down list of Filter Fields displays a list of fields that can be used to restrict the list. The list of operators’ changes based on the type of data selected in the filter field.

Figure : Labs Select Filter Field

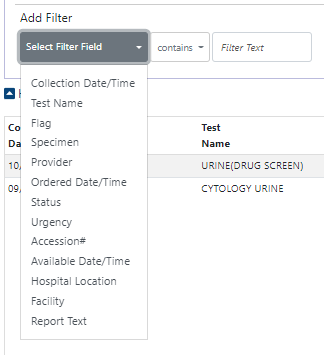
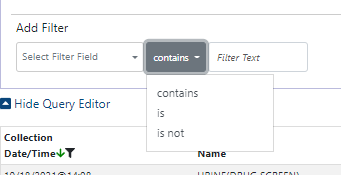


Figure : Labs Filter Contains Field



For efficiency, the Filter Text box turns into a Select a Value drop down with options specific to the patient’s data.

Figure : Labs Filter Contains Field

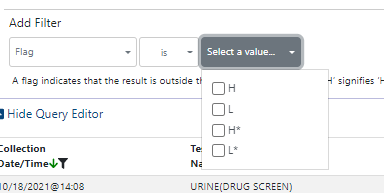
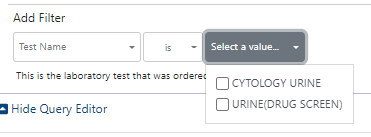
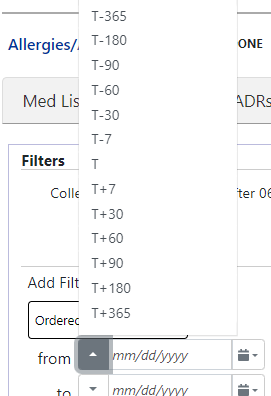


Figure : Labs Selecting a Value



If the filter is a date range, there are several ways to enter dates - typing the date, clicking on the calendars, or clicking on the down arrows to the left of the date/time box which displays common date ranges as shown below:

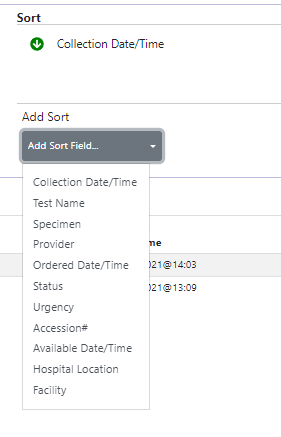
Figure : Labs Selecting a Date Range



**Adding Sort Criteria:**

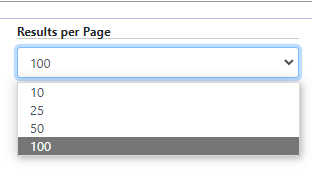
Setting **Sort** criteria is like setting filter criteria. A dropdown box shows the fields that can be used for sorting.

Figure : Labs Adding Sort Criteria



By selecting Results per Page, you can decrease the number of results per page as below, the default is 100.

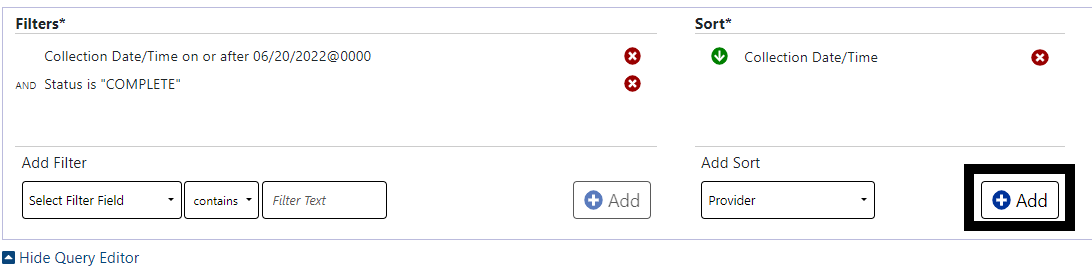
Figure : Labs Results Per Page



As each filter or sort is defined, click the **Add** button to add it to the query.

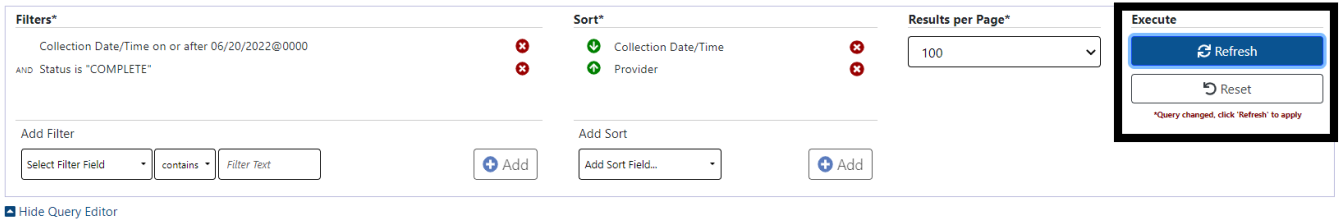
There is an Add button for each section, located in the right side of the section.

Figure : Labs Add Button for Sort criteria



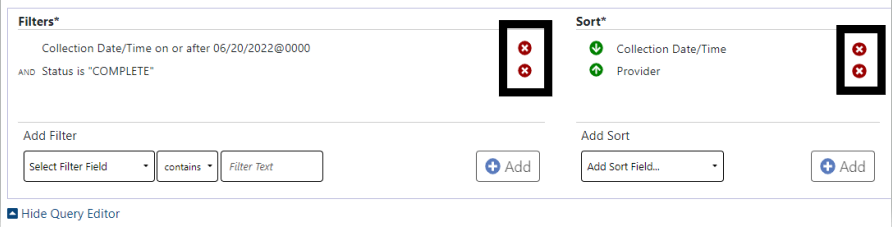
To process the list with your new criteria, click the Refresh button.

Figure : Labs Refresh Button



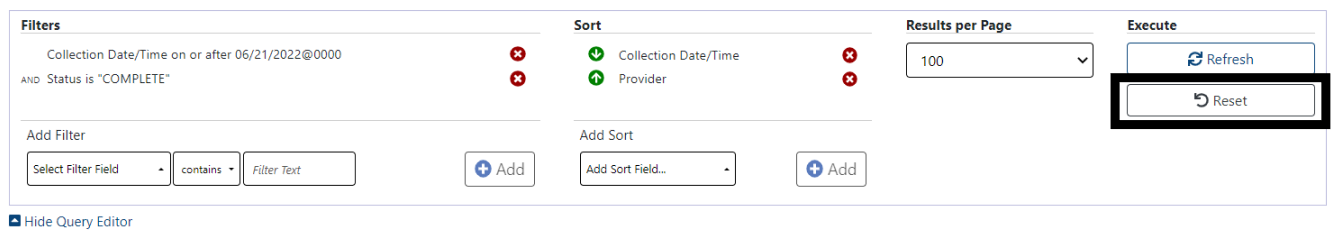
To remove single filter or sort criteria, including one of the defaults, click the **Red X** next to it.

Figure : Labs Red "X" Buttons



To clear all filters and sorts added by the user and return to the tab’s default, clickthe **Reset** button.

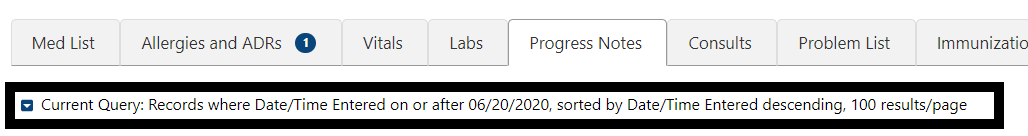
Figure : Labs Reset Button



### Progress Notes

The default filter/sort criteria for Progress Notes is: Records within the last year, sorted by Date/Time Entered with most recent notes first, 100 results per page. These criteria may be changed using the Query Editor by clicking on the blue drop-down arrow to the left of the Current Query.

Figure : Progress Notes Current Query



**Adding Filter Criteria:**

The drop-down list of Filter Fields displays a list of fields that can be used to restrict the list. The list of operators’ changes based on the type of data selected in the filter field.

Figure : Progress Notes Select Filter Field

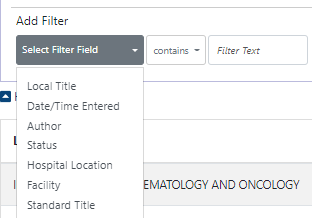
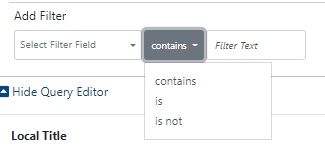
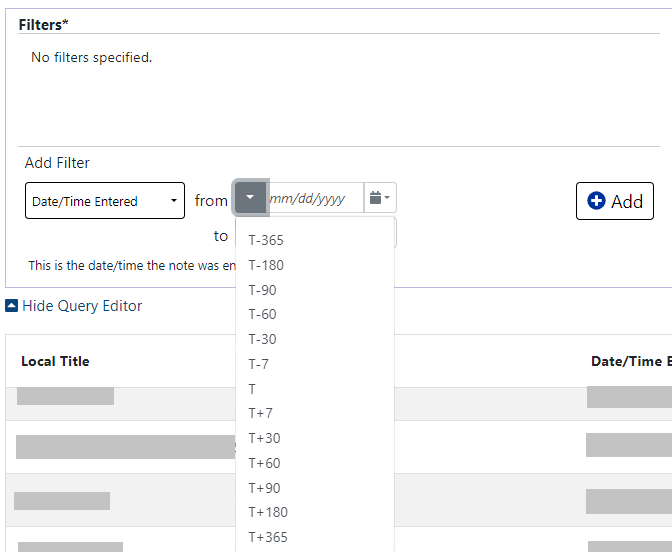


Figure : Progress Notes Add Filter Contains



If the filter is a date range, there are several ways to enter dates - typing the date, clicking on the calendars, or clicking on the down arrows to the left of the date/time box which displays common date ranges as shown below:

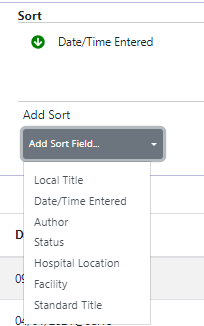
Figure : Progress Notes Add Filter



**Adding Sort Criteria:**

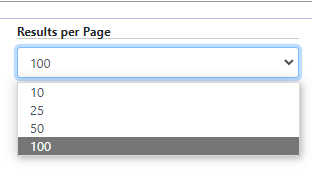
Setting **Sort** criteria is like setting filter criteria. A dropdown box shows the fields that can be used for sorting.

Figure :Progress Notes Add Sort Field



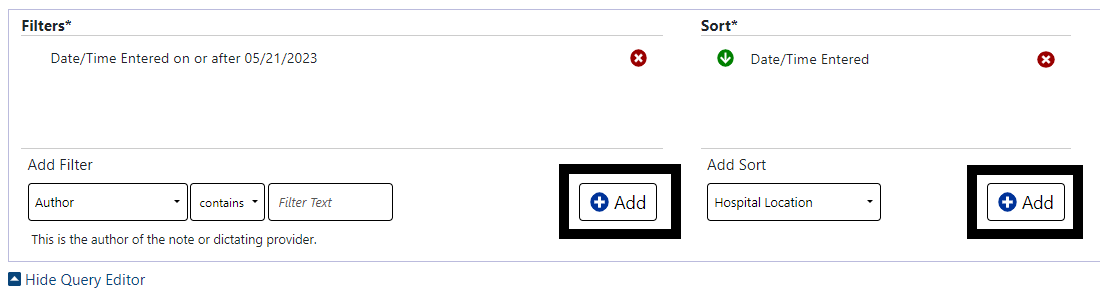
Selecting Results per Page. You can decrease the number of results per page as below, the default is 100.

Figure : Progress Notes Results Per Page



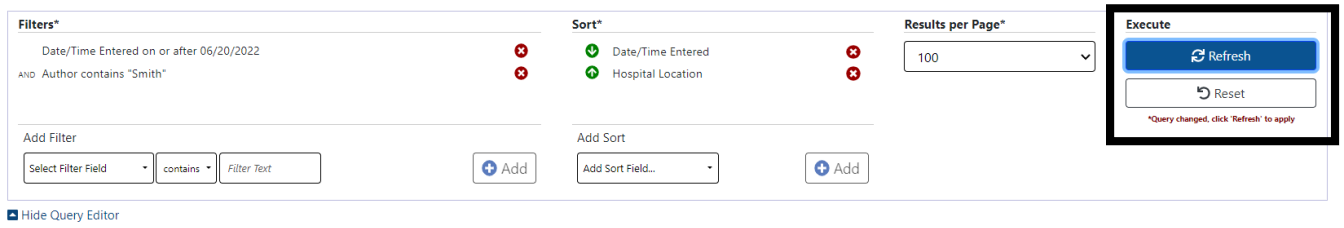
As each filter or sort is defined, click the **Add**button to add it to the query. There is an Add button for each section, located in the right side of the section.

Figure : Progress Notes Add Buttons



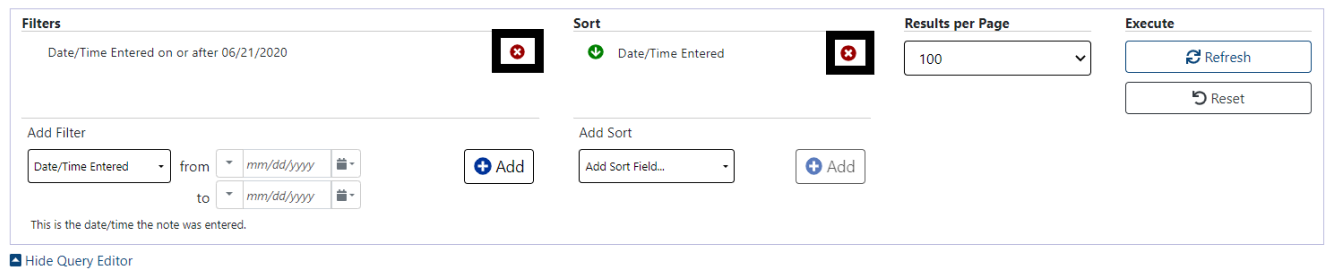
To process the list with your new criteria, click the Refresh button.

Figure : Refresh Button



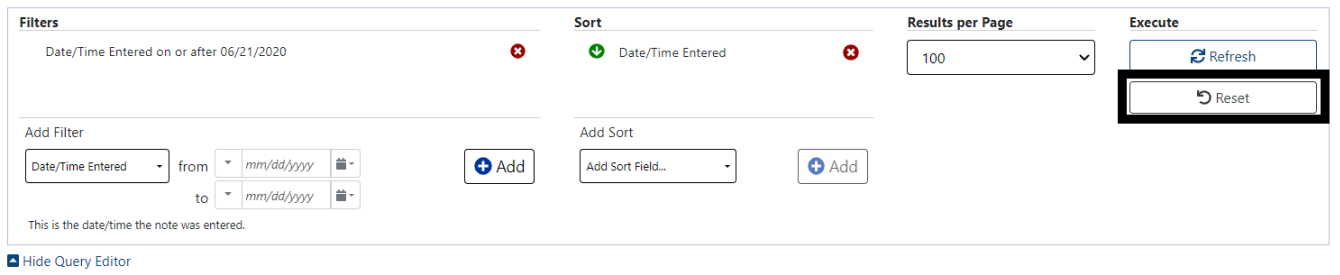
To remove single filter or sort criteria, including one of the defaults, click the **Red X** next to it.

Figure : Remove single criteria Notes tab



To clear all filters and sorts added by the user and return to the tab’s default, clickthe **Reset** button.

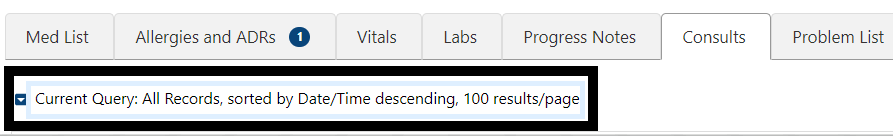
Figure : Reset button for Notes



### Consults

The default display for the Consults tab is All Records, sorted by Date/Time descending, 100 results/page. The filter and sort criteria maybe changed using the Query Editor.

Figure : Consults current query



Adding Filter Criteria:

The drop-down list of Filter Fields displays a list of fields that can be used to restrict the list. The list of operators’ changes based on the type of data selected in the filter field.

Figure :Consults Select Filter Field

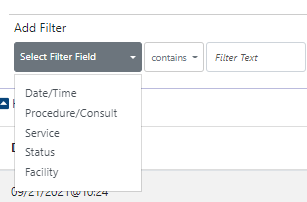
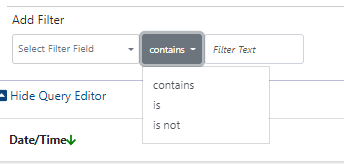
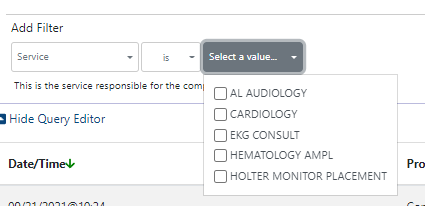


Figure :Consults Filter Contains



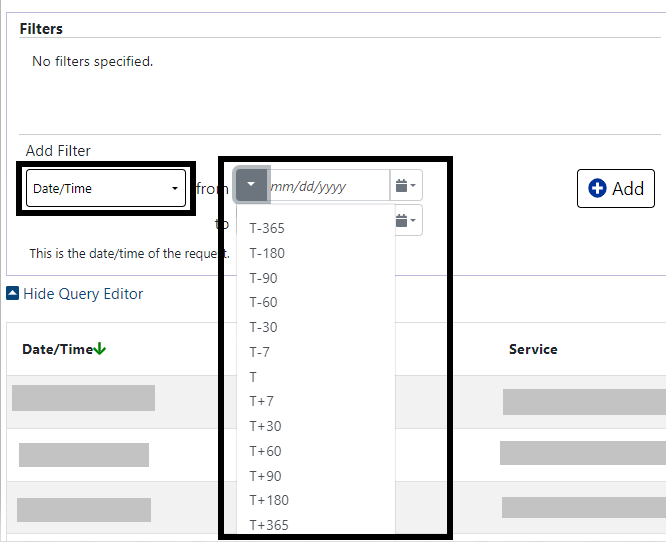
To make it easy to add filters, the Filter Text box turns into a **Select a Value** drop down with options specific to the patient’s data.

Figure :Consults Selecting a Value



If the filter is a date range, there are several ways to enter dates - typing the date, clicking on the calendars, or clicking on the down arrows to the left of the date/time box which displays common date ranges as shown below:

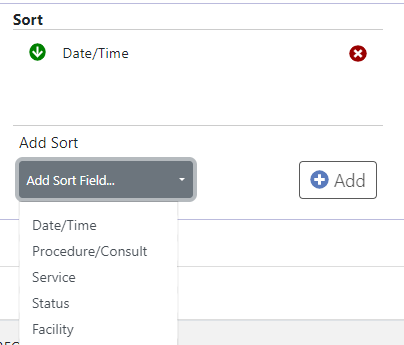
Figure : Consult Date/time filter



Adding Sort Criteria:

Setting **Sort** criteria is like setting filter criteria. A dropdown box shows the fields that can be used for sorting.

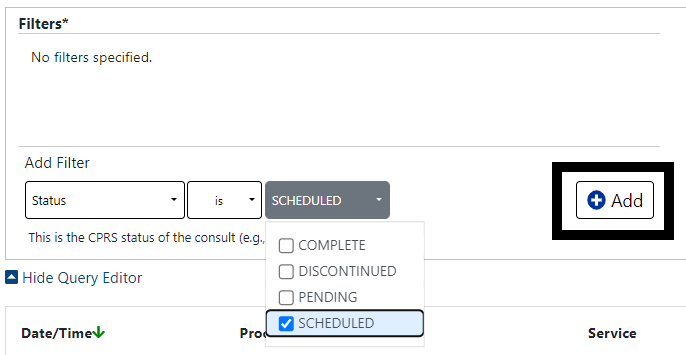
Figure : Consults Add Sort Field



As each filter or sort is defined, click the **Add** button to add it to the query.

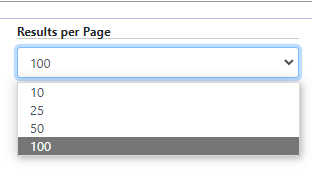
There is an Add button for each section, located in the right side of the section.

Figure : Consults New Filter Add button



Selecting **Results per Page**. You can decrease the number of results per page as shown below, the default is 100.

Figure : Consults Results Per Page



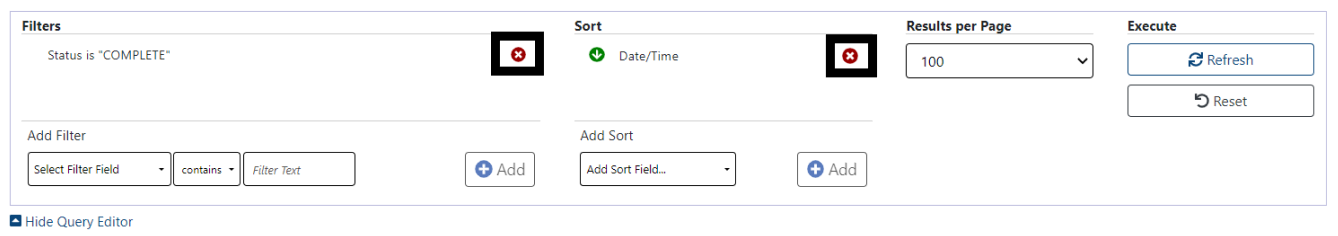
To process the list with your new criteria, click the Refresh button.

Figure : Refresh/Reset Buttons



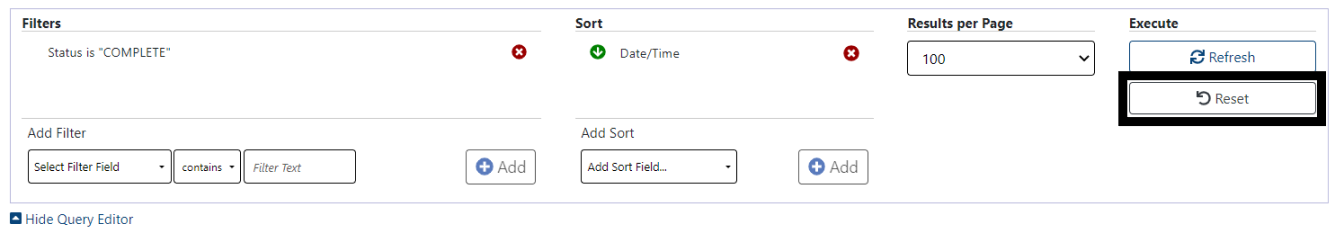
To remove single filter or sort criteria, including one of the defaults, click the **Red X** next to it.

Figure : Consult Remove Single Criteria



To clear all filters and sorts added by the user and return to the tab’s default, clickthe **Reset** button.

Figure : Consult Reset Button



### Problem List

The default view for the Problem List tab is all active problems sorted by Immediacy (Acute, Chronic or Unknown) in alphabetical order, then by Description in Alphabetical order.

Figure : Problem List Current Query



**Adding Filter Criteria:**

The drop-down list of Filter Fields displays a list of fields that can be used to restrict the list. The list of operators’ changes based on the type of data selected in the filter field.

Figure : Problem List Select Filter Field

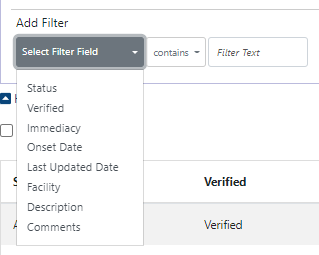
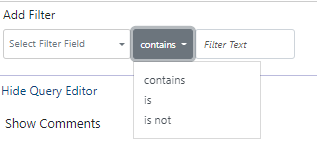
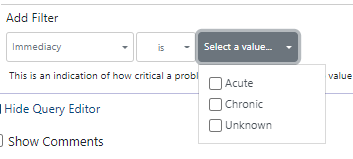


Figure : Problem List Add Filter Operators



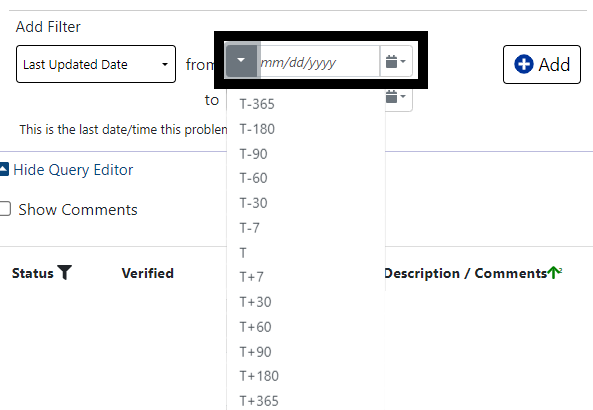
To make it easy to add filters, the Filter Text box turns into a Select a Value drop down with values specific to the patient’s data.

Figure : Problem List Selecting a Value



If the filter is a date range, there are several ways to enter dates - typing the date, clicking on the calendars, or clicking on the down arrows to the left of the date/time box which displays common date ranges as shown below:

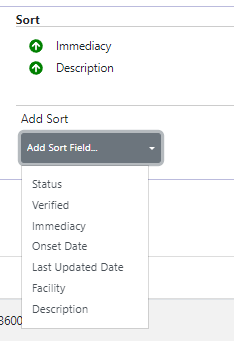
Figure : Problem List Add Date Range Filter



**Adding Sort Criteria:**

Setting **Sort** criteria is like setting filter criteria. A dropdown box shows the fields that can be used for sorting.

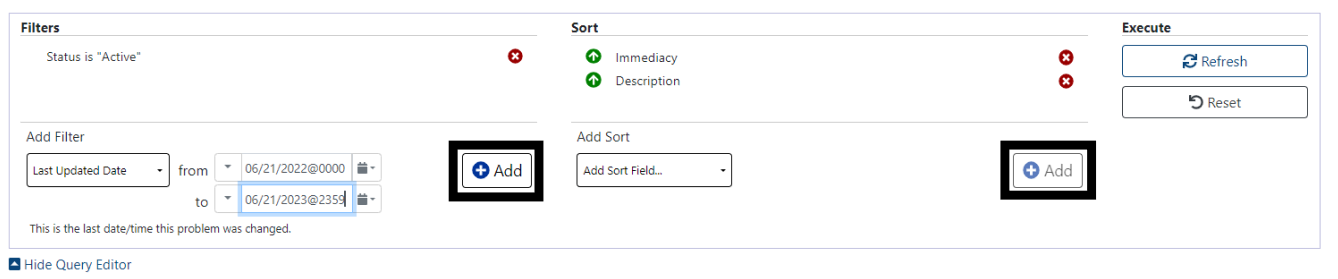
Figure : Problem List Adding Sort Field



As each filter or sort is defined, click the **Add**button to add it to the query.

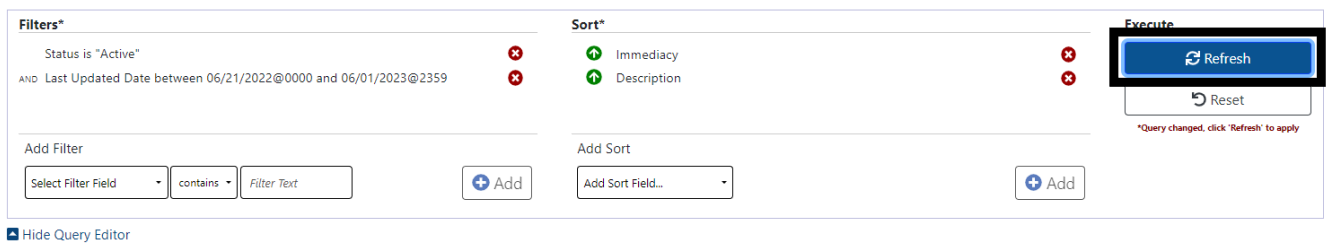
There is an Add button for each section, located in the right side of the section.

Figure : Problem List Add Buttons



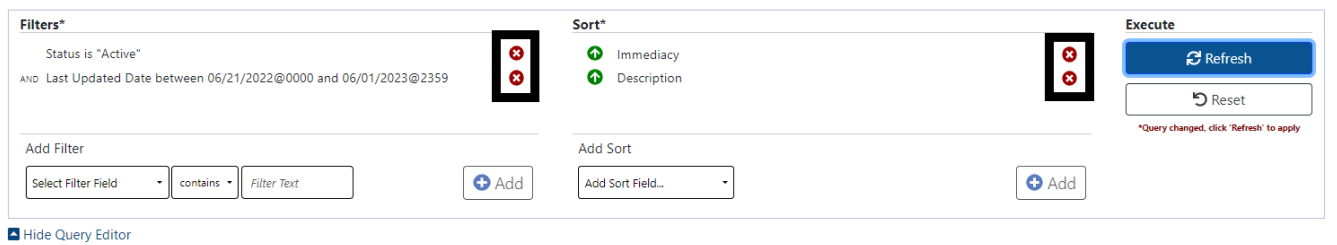
To process the list with your new criteria, click the Refresh button.

Figure : Problem List Refresh Button



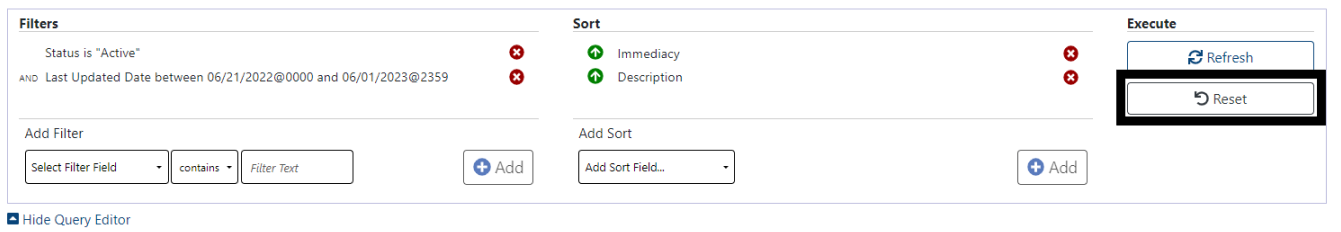
To remove single filter or sort criteria, including one of the defaults, click the **Red X** next to it.

Figure : Problem List Remove single Filter or Sort



To clear all filters and sorts added by the user and return to the tab’s default, clickthe **Reset** button.

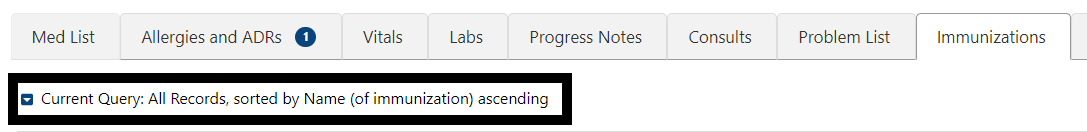
Figure : Problem List Reset button



### Immunizations

The default view for the Immunizations tab is All Records, sorted by Name (of immunization), most recent record first. The filter and sort criteria may be changed using the Query Editor. It is access by be clicking on the blue down-arrow next to the Current Query.

Figure : Immunizations Current Query



**Adding Filter Criteria:**

The drop-down list of Filter Fields displays a list of fields that can be used to restrict the list. The list of operators’ changes based on the type of data selected in the filter field.

Figure : Immunizations Select Filter Field

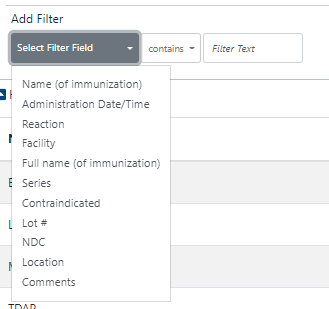
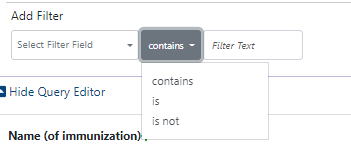
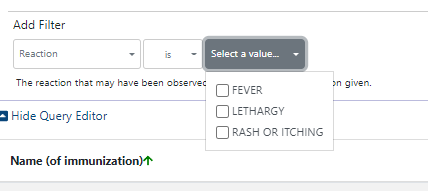


Figure : Immunizations Add Filter Operators



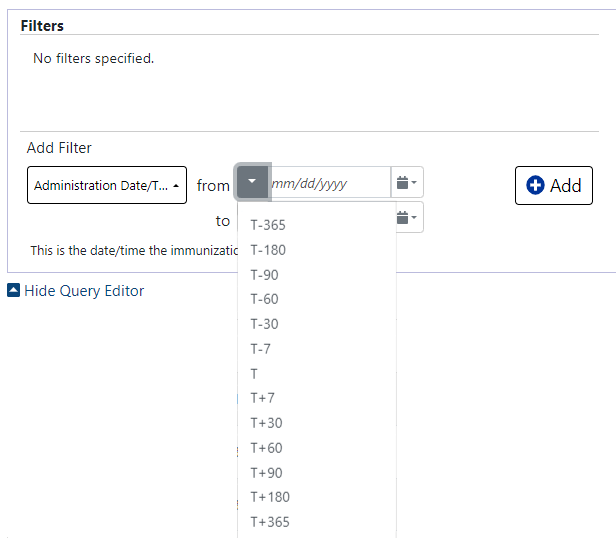
To make it easy to add filters, the Filter Text box turns into a Select a Value drop down with options specific to the patient’s data.

Figure : Immunizations Selecting a Value



If the filter is a date range, there are several ways to enter dates - typing the date, clicking on the calendars, or clicking on the down arrows to the left of the date/time box which displays common date ranges as shown below:

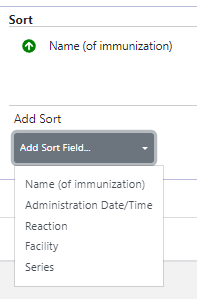
Figure : Immunization Date Filter



**Adding Sort Criteria**:

Setting **Sort** criteria is like setting filter criteria. A dropdown box shows the fields that can be used for sorting.

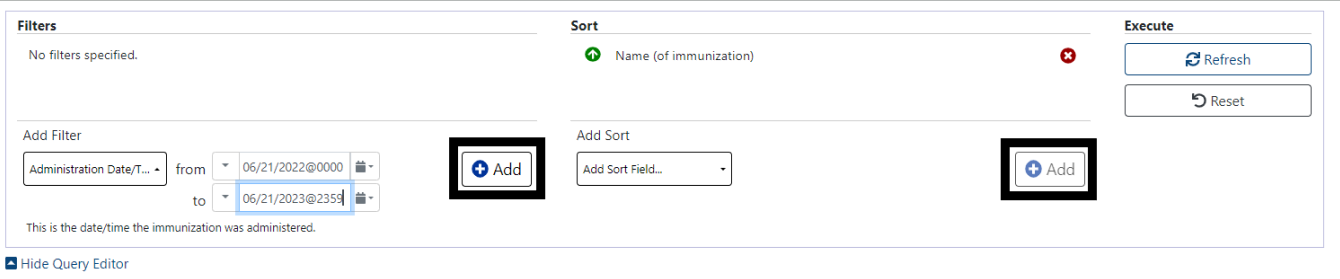
Figure : Immunizations Adding Sort Criteria



As each filter or sort is defined, click the **Add** button to add it to the query.

There is an Add button for each section, located on the right side of the section.

Figure : Immunizations Add Buttons



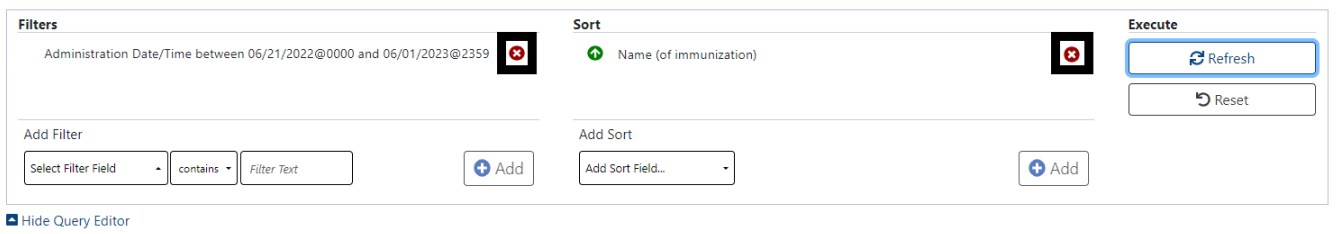
To process the list with your new criteria, click the Refresh button.

Figure : Immunizations Refresh Button



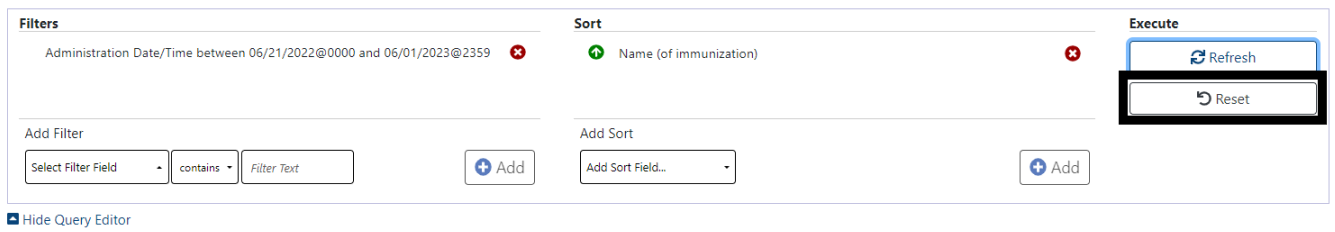
To remove single filter or sort criteria, including one of the defaults, click the **Red X** next to it.

Figure : Immunization Remove Single Criteria



To clear all filters and sorts added by the user and return to the tab’s default, clickthe **Reset** button.

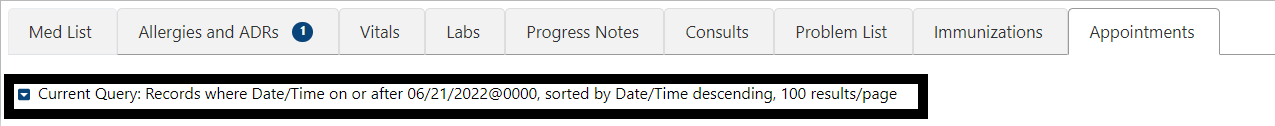
Figure : Immunization Reset button



### Appointments

The default display for the Appointments tab is Records within the last year, sorted by Date/Time descending, 100 results/page. The filter and sort criteria may be changed using the Query Editor. It is access by be clicking on the blue down-arrow next to the Current Query.

Figure : Appointments Current Query



**Adding Filter Criteria:**

The drop-down list of Filter Fields displays a list of fields that can be used to restrict the list. The list of operators’ changes based on the type of data selected in the filter field.

Figure : Appointments Select Filter Field

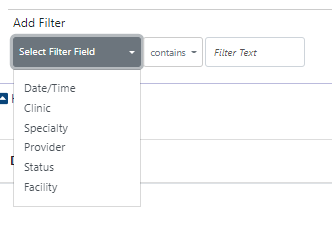
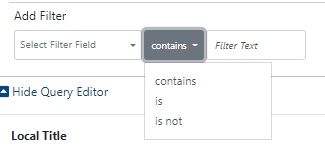
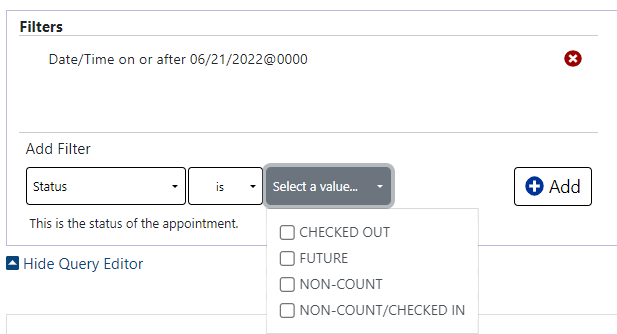


Figure : Appointments Add Filter Operators



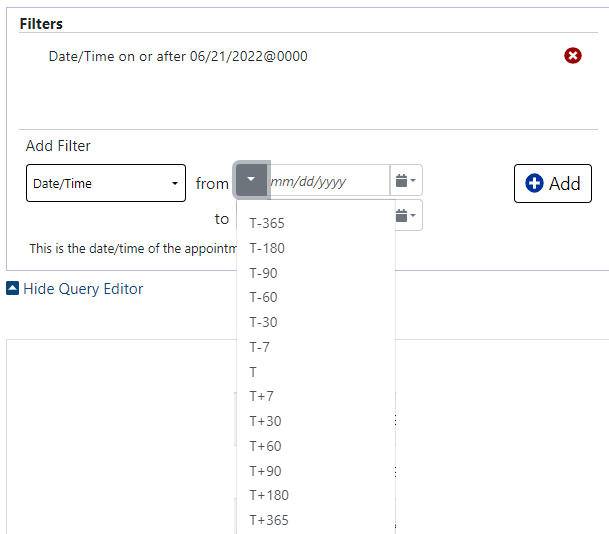
To make it easy to add filters, the Filter Text box turns into a Select a Value drop down with options specific to the patient’s data.

Figure : Appointments Filter



If the filter is a date range, there are several ways to enter dates - typing the date, clicking on the calendars, or clicking on the down arrows to the left of the date/time box which displays common date ranges as shown below:

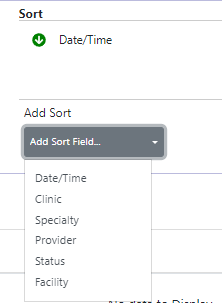
Figure : Appointments Date Filter



**Adding Sort Criteria:**

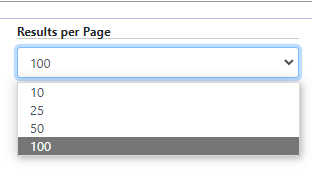
Setting **Sort** criteria is like setting filter criteria. A dropdown box shows the fields that can be used for sorting.

Figure : Appointments Add Sort Criteria



Selecting Results per Page. You can decrease the number of results per page as below, the default is 100.

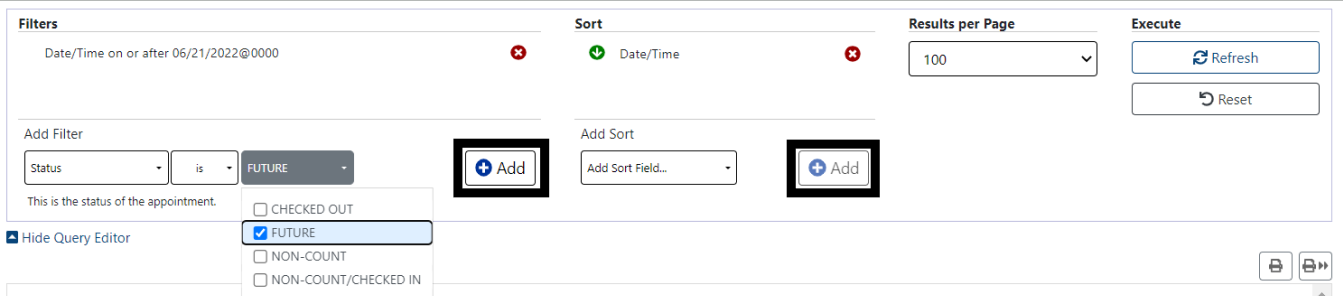
Figure : Appointments Results Per Page



As each filter or sort is defined, click the **Add**button to add it to the query.

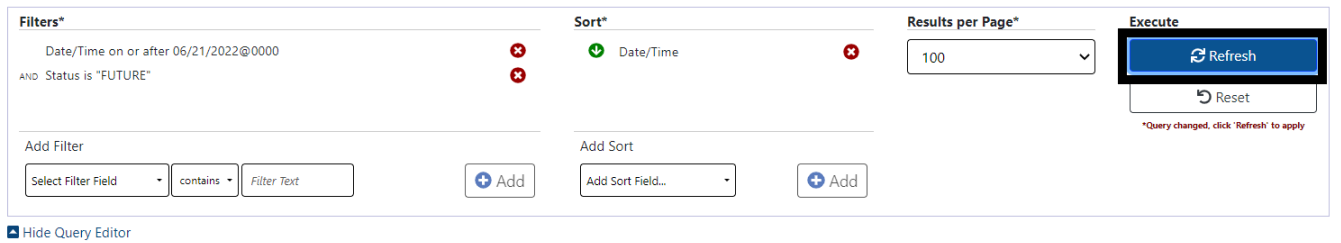
There is an Add button for each section, located in the right side of the section.

Figure : Appointments Add Buttons



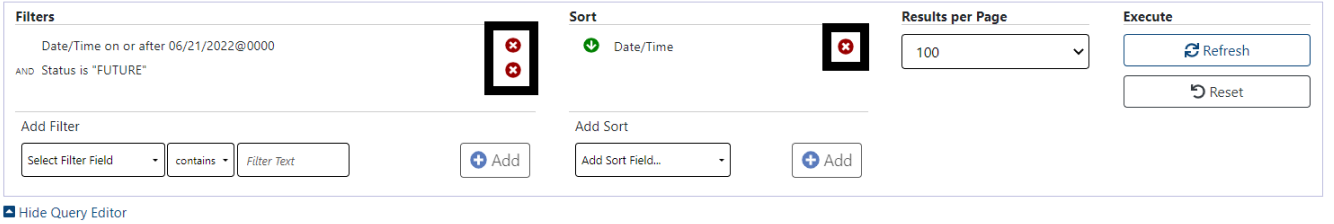
To process the list with your new criteria, click the Refresh button.

Figure : Appointments Refresh Button



To remove single filter or sort criteria, including one of the defaults, click the **Red X** next to it.

Figure : Appointments Remove Single Criteria



To clear all filters and sorts added by the user and return to the tab’s default, clickthe **Reset** button.

Figure : Appointments Reset Button

