

# Patient Chart: Overview

Last Modified on 08/08/2022 11:29 am EDT

Version 20.17



This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

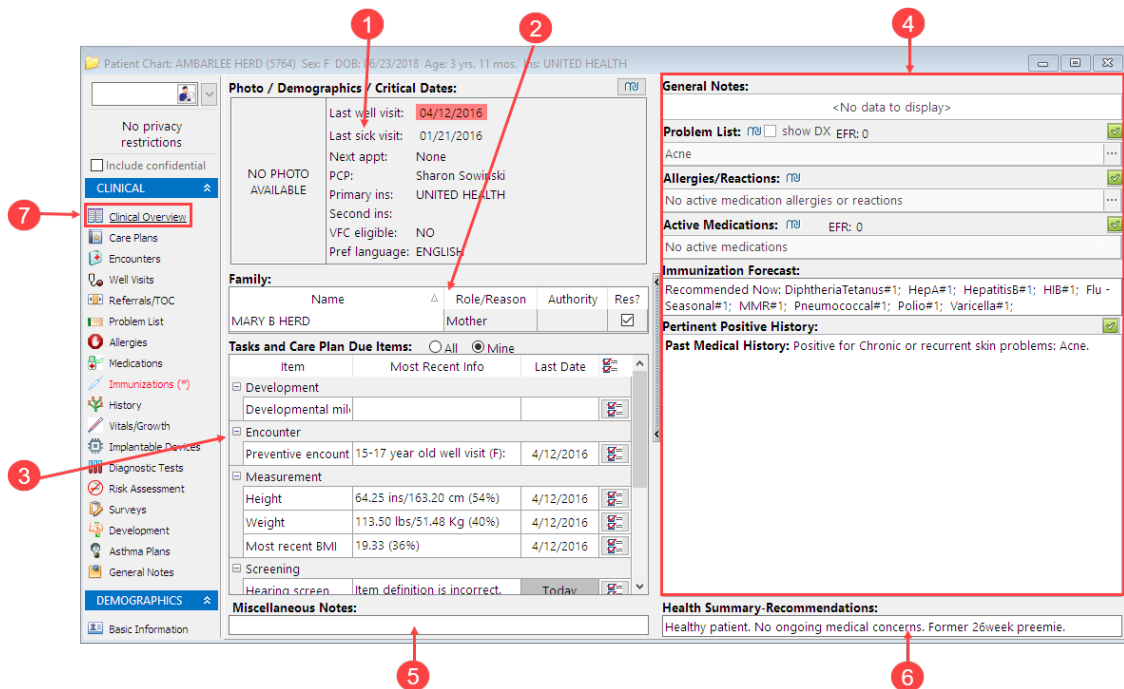
## About Patient Chart: Clinical Overview

**Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Clinical Overview**

The Overview section of the Patient Chart provides high-level patient information and notes.



**Note:** Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.



The screenshot shows the 'Patient Chart: Clinical Overview' window for patient AMBARLEE HERD (5764). The window is divided into several sections:

- 1:** Photo / Demographics / Critical Dates: Displays patient photo (none available), last well visit (04/12/2016), last sick visit (01/21/2016), next appointment (none), PCP (Sharon Sowijski), insurance (UNITED HEALTH), VFC eligibility (NO), and preferred language (ENGLISH).
- 2:** Family: Lists family members, including MARY B HERD (Mother).
- 3:** Tasks and Care Plan Due Items: Lists upcoming tasks such as Developmental milestones, Encounters (Preventive encounter), and Measurements (Height, Weight, BMI, Screening).
- 4:** General Notes: A large text area for clinical notes.
- 5:** Miscellaneous Notes: A section for additional notes.
- 6:** Health Summary-Recommendations: Provides a summary of the patient's health, stating 'Healthy patient. No ongoing medical concerns. Former 26week preemie.'
- 7:** Clinical Overview: The selected tab in the left-hand navigation menu.

## Patient Chart: Clinical Overview Map

Number	Section	Description
1	Photo/Demographics/Critical Dates	This section of the window displays the patient's photo (if saved into OP), the dates of the last Well and Sick Visit, the date of the next scheduled appointment, the patient's PCP, insurance(s), VFC eligibility, and preferred language.
2	Family	This section provides a list of the family members that are linked to the patient.

3	Tasks and Care Plan Due Items	This section lists and edits tasks and due items for the patient.
4	Important Notes and Information	<p>Provides a quick at-a-glance view of all the pertinent patient medical information.</p> <ul style="list-style-type: none"> <li>• <b>General Notes:</b> Displays a list of General Notes, which you can use to enter any notes that you want to keep on record with the patient.</li> <li>• <b>Problem List:</b> Displays a list of items from the patient's Problem List. If there are any Exempt from reporting items in this list, the number of items will be indicated in the EFR count to the upper right of the field.</li> <li>• <b>Allergies/Reactions:</b> Displays items from the Allergies section of the patient's chart note.</li> <li>• <b>Active Medications:</b> Displays current and ongoing items from the patient's Medications List. If there are any "Exempt from reporting" items in this list, the number of items will be indicated in the EFR count to the upper right of the field.</li> <li>• <b>Immunization Forecast:</b> Links to the patient's Immunization Chart, shows what is behind or past due.</li> <li>• <b>Pertinent Positive History:</b> Provides an overview statement about the child's health with special instructions for school/camp personnel.</li> <li>• <b>Past Medical History:</b> Displays items from the Patient's Past History section, when the data is available in the Patient's chart.</li> </ul>
5	Miscellaneous Notes	The Miscellaneous Notes field provides information the provider or staff deems necessary about the patient. This pulls from the Notes/Addl info section of the chart.
6	Health Summary Recommendations	The Health Summary Recommendations field provides an overview statement about the child's health with special instructions for school/camp personnel.
7	Clinical Overview button	The Clinical Overview button accesses the Overview window in the patient's chart.

Version 20.16



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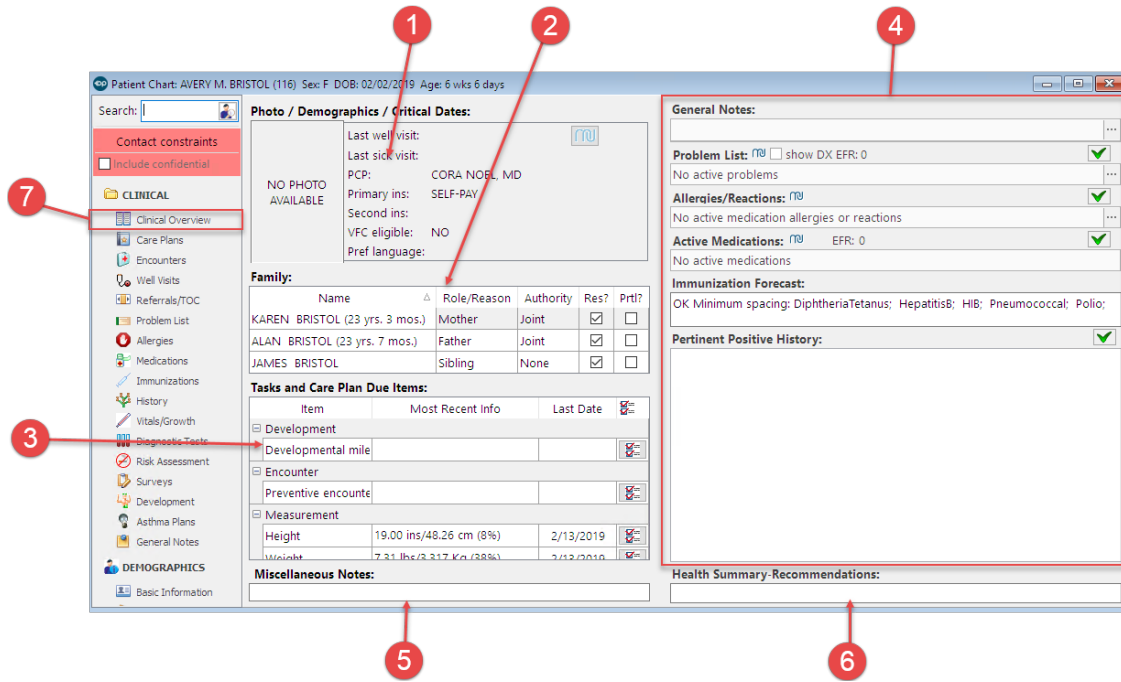
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