# Medical Records

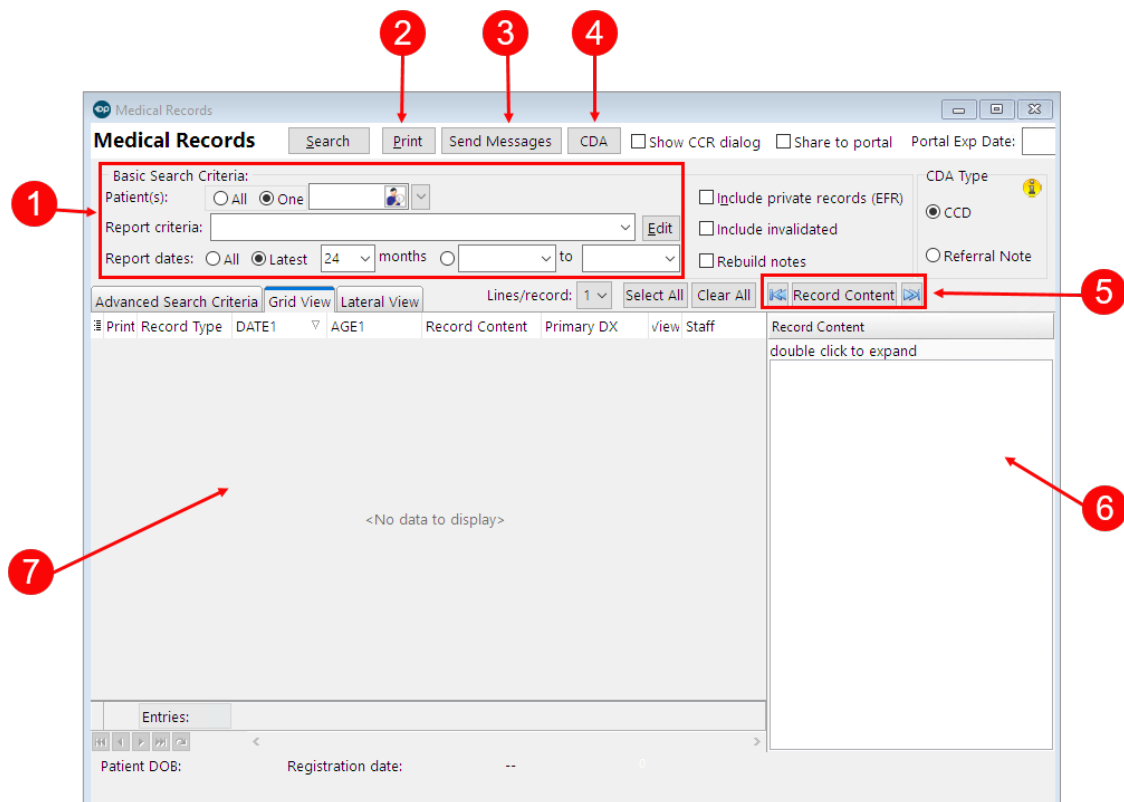Last Modified on 12/28/2022 8:51 am EST

Version 21.0

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 Medical Records

The Medical Records window is a compilation of a patient's complete medical records. Every office visit, lab report, letter from a specialist, phone message, or other event is displayed in a chronological grid for easy viewing and printing. The grid can easily be sorted and filtered to customize your needs.

## Medical Records (Selecting from the Clinical tab)
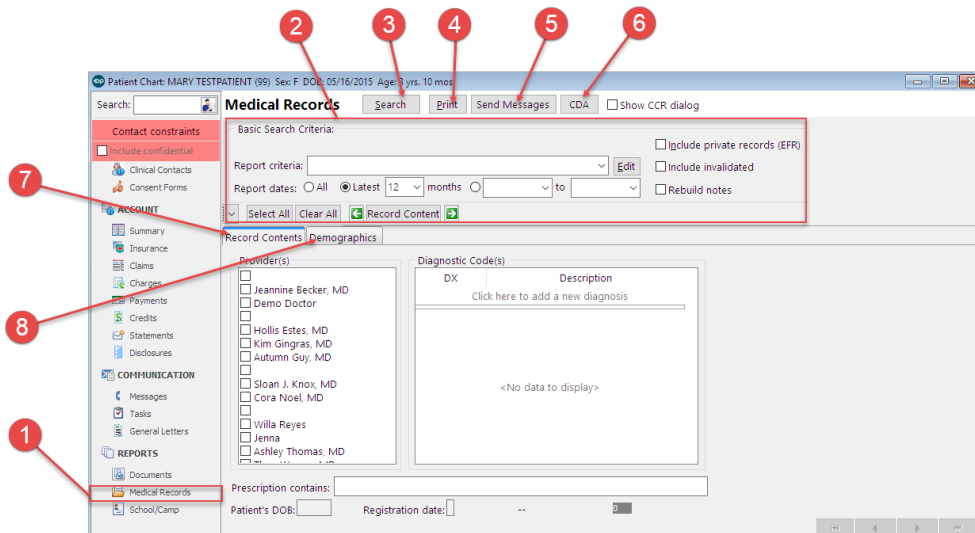
> **Path: Clinical tab > Medical Records button**



## Medical Records Map

| Number | Section | Description |
|--------|---------|-------------|
|        |         |             |

| 1 | Search Criteria | The Search Criteria help filter down the displayed records in the Medical Records. Records can be displayed based on patient, report criteria, and date range. Search criteria settings are saved by clicking the Save Settings button. The Report Criteria field allows you to choose any reports you have created and saved. Criteria for the chosen report can be viewed by clicking on the Advanced Search Criteria tab in the Event Chronology record grid. |
|---|---|---|
| 2 | Print button | The Print button prints the records. The information can be sent to the printer or displayed as a PDF on the screen. |
| 3 | Send Messages button | The Send Messages button opens the Patient Message eXchange to send a message. |
| 4 | CDA | The CDA button creates or selects a CDA. Only one encounter or one well visit can be selected at a time. |
| 5 | Record Content button | The Record Content button displays and hides the Record Content pane. Click the left arrow to hide the Record Content pane. Click the right arrow to display the Record Content pane. |
| 6 | Record Content pane | The Record Content pane displays the details for the selected event record in the Record grid. |
| 7 | Record Grid | The record grid displays the medical record results. The record view is customizable. Choose a vertical Grid View or horizontal Lateral View by clicking either tab above the Event Chronology list. |

## Medical Records (Selecting from the Patient Chart)

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

## Patient Chart: Medical Records Map

| Number | Section | Description |
|---|---|---|
| 1 | Medical Records | The Medical Records button opens the Medical Records within the patient's chart. |

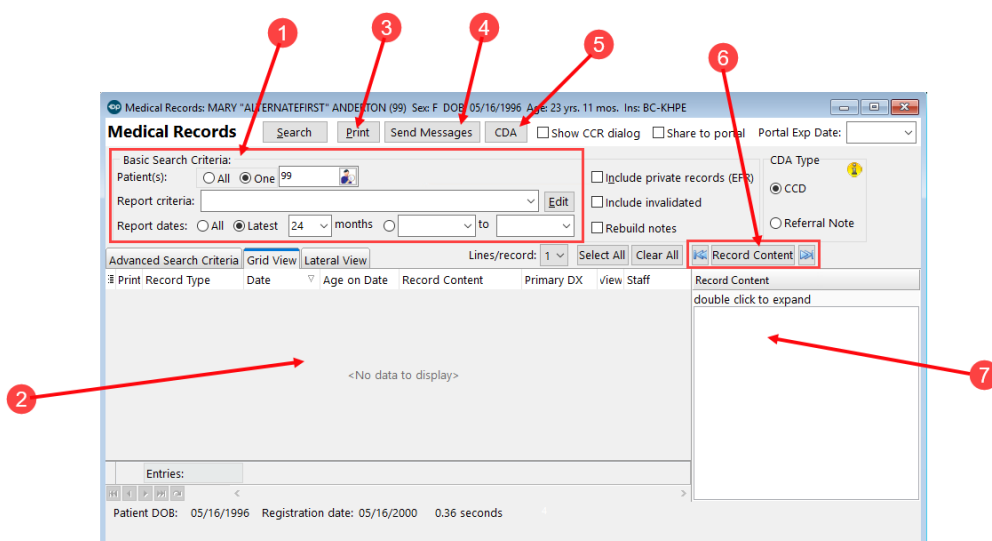| 2 | Basic Search Criteria group | The Basic Search Criteria group allows you to filter the displayed records. Records can be displayed based on patient, report criteria, and date range. The Report Criteria field allows you to choose any report you have created and saved. |
|---|---|---|
| 3 | Search | The Search button searches for records based on the criteria established in the Basic Search Criteria group. |
| 4 | Print | The Print button prints the records. The information can be sent to the printer or displayed as a PDF on the screen. |
| 5 | Send Messages | The Send Messages button opens the Patient Message eXchange to send a message. |
| 6 | CDA | The CDA button creates a CDA for the selected data. Only one encounter or one well visit may be selected at a time. |
| 7 | Record Contents | Provides the provider, diagnostic code, prescriptions, and date of birth information for the report. |
| 8 | Demographics | The Demographics tab provides the patient's demographic data for the report. The options on this tab are used to filter reports involving multiple patients. |

Version 20.18

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## Medical Records (Selecting from the Clinical tab)
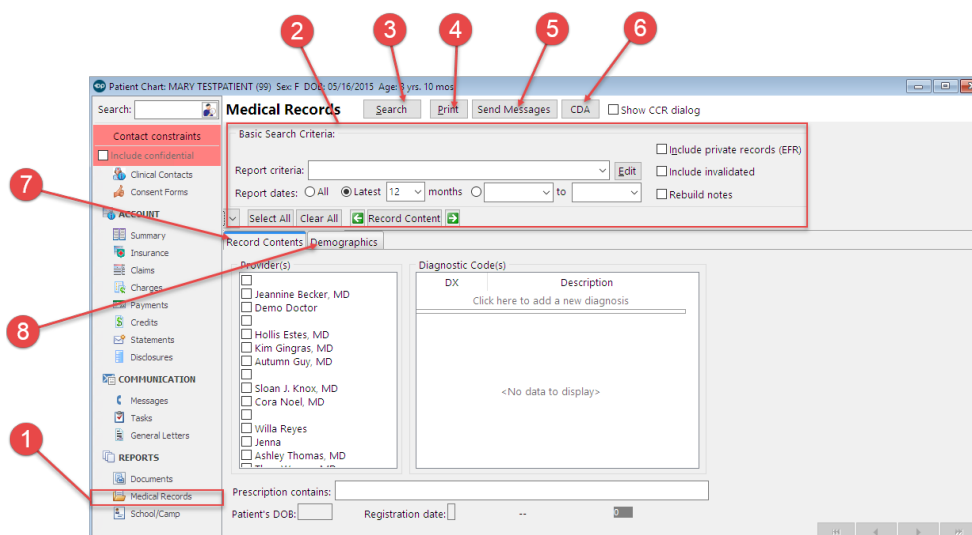
**Path: Clinical tab > Medical Records button**

## Medical Records Map

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| 2 | Record Grid | The record grid displays the chronology record results. The record view is customizable. Choose a vertical Grid View or horizontal Lateral View by clicking either tab above the Event Chronology list. |
| 3 | Print button | The Print button prints the records. The information can be sent to the printer or displayed as a PDF on the screen. |
| 4 | Send Messages button | The Send Messages button opens the Patient Message eXchange to send a message. |
| 3 | CDA | The CDA button creates or selects a CDA. Only one encounter or one well visit can be selected at a time. |
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## Medical Records (Selecting from the Patient Chart)

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



## Patient Chart: Medical Records Map

| Number | Section | Description |
|--------|---------|-------------|
| 1 | Medical Records | The Medical Records button opens the Medical Records within the patient's chart. |

| 2 | Basic Search Criteria group | The Basic Search Criteria group allows you to filter the displayed records. Records can be displayed based on patient, report criteria, and date range. The Report Criteria field allows you to choose any report you have created and saved. |
|---|---|---|
| 3 | Search | The Search button searches for records based on the criteria established in the Basic Search Criteria group. |
| 4 | Print | The Print button prints the records. The information can be sent to the printer or displayed as a PDF on the screen. |
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