

# HEALTHe NL HELP PAGES

## Patient Summary tab and Clinical Document View (CDV) Tree

## Content

Click on any of the items listed below for information on that topic.

**New (December 2018):** An **Organ Donor** flag received from MCP has been added to the Patient's Summary tab, under the demographics section. Two values will be displayed based on MCP data: "Yes" and "Unspecified." To learn more about this click on Patient Dynamic Summary section.

### 1. Patient Dynamic Summary

[Patient Dynamic Summary –overview –](#) **New December 2018 Organ donor Flag**

### 2. The Clinical Document View (CDV) Tree

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# 1. Patient Dynamic Summary

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1. Once a patient has been selected from a search or a worklist and brought into context, the **Patient Dynamic summary (Figure 1)** is displayed, consisting of three main parts:
  - a) Patient Context Bar.
  - b) The Patient Record tabs, displaying the Patient Summary tab by default and next to the right the Timeline, Encounters, Medication Profile, Referrals and Immunizations tabs.
  - c) The Clinical Document View (CDV) Tree.

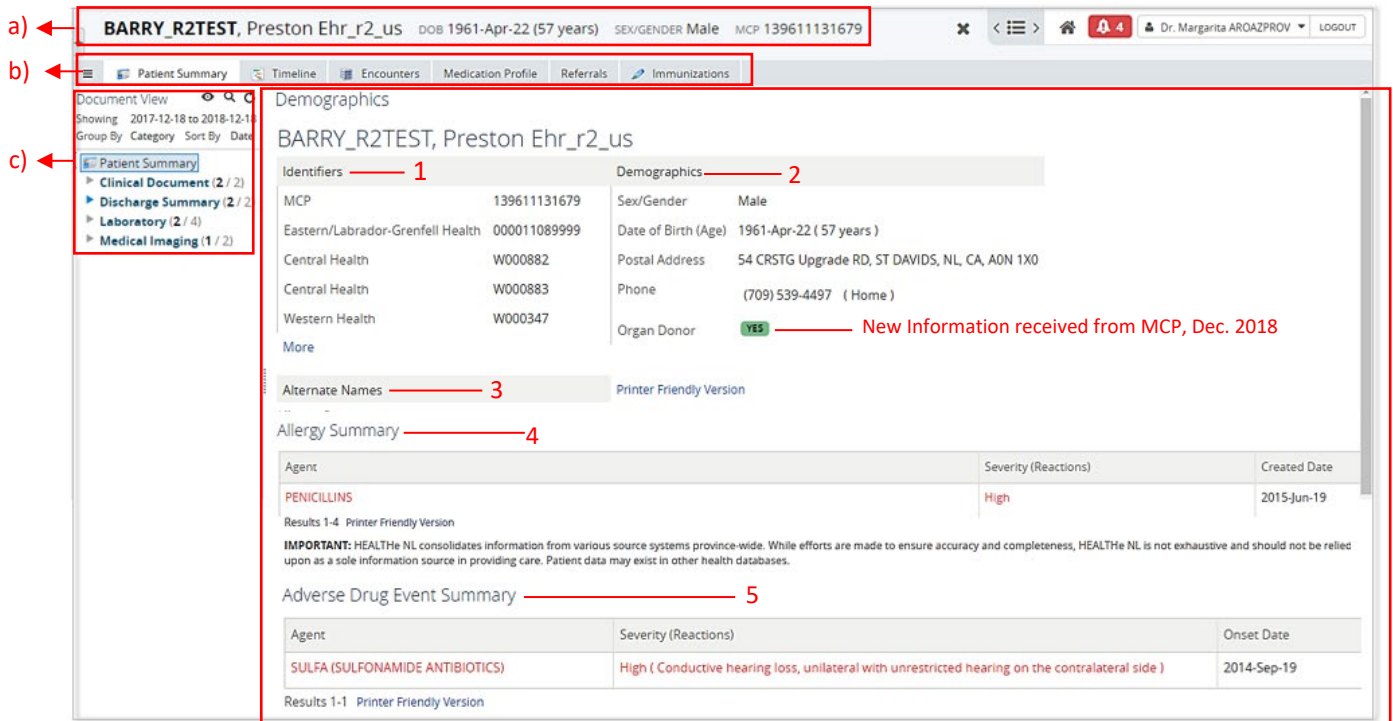
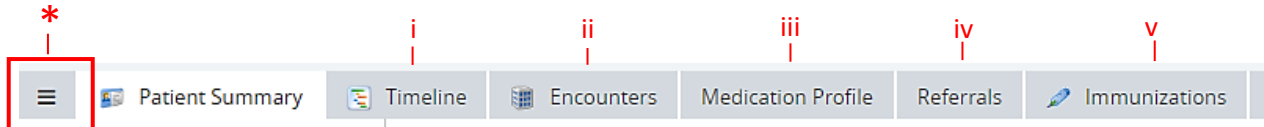


Figure 1: Patient Dynamic Summary

- a) **The Patient Context Bar** displays a concise summary of information about the current patient. Name, last name, date of birth (DOB), age, gender and MCP number.
- b) **The Patient Summary tab** displays the **Demographics** section and provides the following information (if available) about a patient:
  1. **Identifiers:** Displays all available HCNs (i.e. Health Care Numbers from RHA, or other province).
  2. **Demographics:** Displays gender, date of birth (Age), address including physical and postal address if provided, and any available phone numbers. An organ donor flag received from MCP. Two values can be displayed only **YES** or **UNSPECIFIED** (New December 2018.) If the patient is deceased, it is indicated by the presence of the **DECEASED** label alongside his or her name.
  3. **Alternate Names:** Displays any available alternate name. Please note that it does not display what *type* of alternate name it is (i.e. alias).
  4. **Allergy Summary:** Lists the patients recorded allergies in the Pharmacy Network.
  5. **Adverse Drug Event Summary:** Lists the patients recorded ADE in the Pharmacy Network.

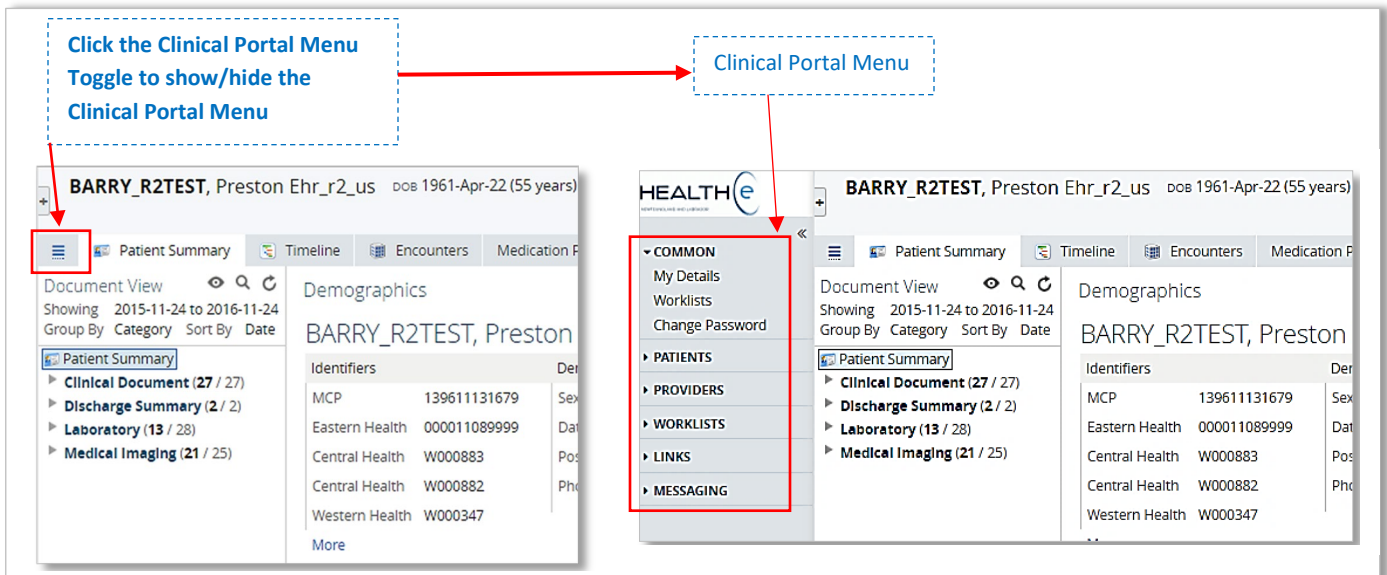
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In addition to the Patient Summary tab mentioned in the previous page, the following Patient Record tabs are available next to the patient Summary tab (**Figure 2**). Depending on the role assigned to your user account, you may not have access to all of them.



**Figure 2: Patient Record Tabs**

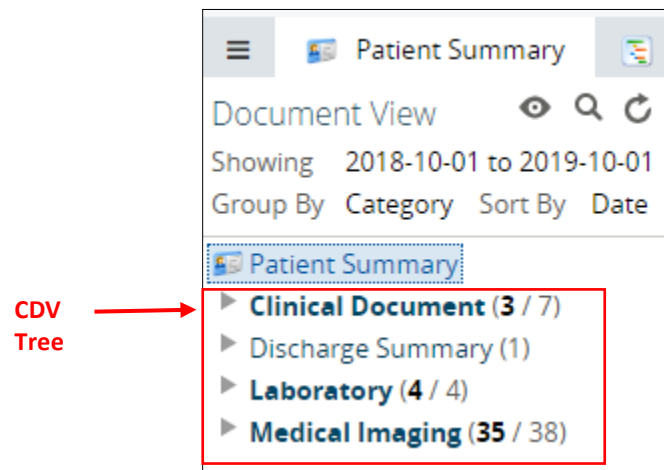
- i. **Timeline Tab (New - December 2016):** Gives an overall perspective of a patient’s medical history, since the date HEALTHe NL started receiving data (April 2015), using a visual representation of encounters, documents and reports available for that patient.
  - ii. **Encounters Tab:** Shows all the encounters a patient has had since the date HEALTHe NL started receiving data. The encounters are divided in Emergency, Inpatient, and Outpatient encounters.
  - iii. **Medication Profile Tab:** Lists the available history of the medications prescribed to a patient in the last 4 months, and the last 2 years. Additionally you can access any existing information about patient’s allergies and adverse drug events, prescribed devices, medical conditions and pharmacy notes.
  - iv. **Referrals Tab (New – June 2018):** It provides access to myCCath, an application for approved clinicians to order cardiac catheterizations. Starting in Fall 2019 it will allow approved clinicians to create and submit electronic referrals to the Vascular Lab.
  - v. **Immunizations Tab:** It provides patient immunization records and related adverse reaction data sourced from the Provincial Client and Referral Management System (CRMS) for patients born 2003 or after.
- \* **The Clinical Portal Menu Toggle (New - December 2016):** This icon allows to show/hide the Clinical Portal Menu (found on the left side of your Home page) that you were prior to putting a patient in contest (**Figure 3**).



**Figure 3: Screen showing Clinical Portal Menu by clicking the Clinical Portal Menu Toggle**

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- c) **The Clinical Document View Tree (CDV Tree)** displayed on the left side of the screen, shows all the current reports for the selected patient that fall within the default system-configured time range, which is the past year from the current date, to a maximum limit of 10,000 reports. The CDV tree contains folders that sort's the current patient's reports into groupings. Each folder corresponds to a category and some folders have subcategories. Folders are only visible when there are patient reports available in that category and the user has the appropriate role to view the data. Data may exist for a patient in a particular category but due to user permissions is not shown in the CDV tree; otherwise the folder is not displayed in the CDV tree (*Figure 4*).



*Figure 4: CDV Tree*

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## 2. The Clinical Document View Tree (CDV Tree)

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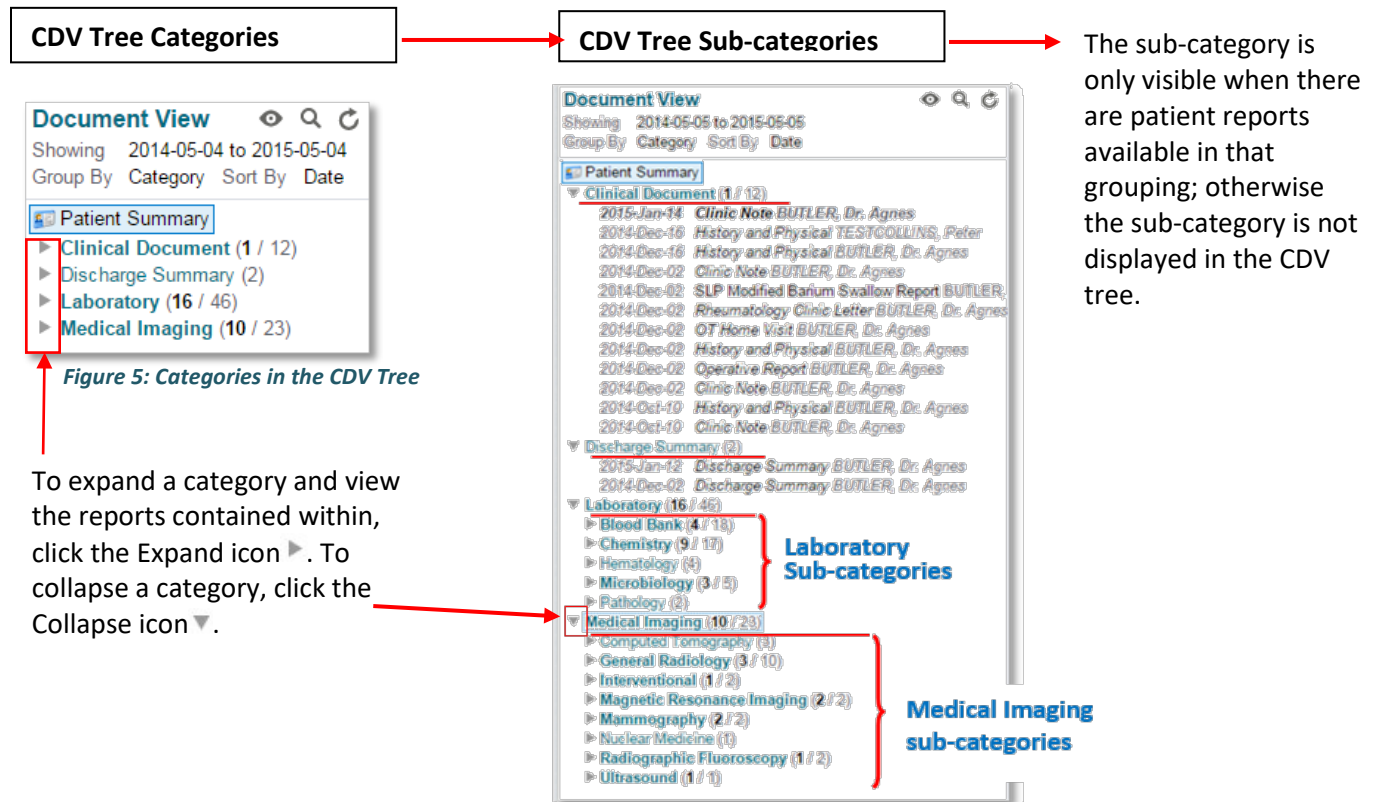
The **Clinical Document View (CDV) tree** displays the current reports for the selected patient that fall within the default system-configured time-range, which is the past year from the current date, to a maximum limit of 10,000 reports for Laboratory Reports and Clinical Documents & Diagnostic Imaging reports, each.

### 2.1 CDV tree Categories and Sub-categories

By default the reports are group by **category** and **sub-category**. The **CDV tree** can display 4 categories: **Clinical Documents**, **Discharge Summaries**, **Laboratory** and **Medical Imaging**. (Figure 5) The category is only visible when there are patient reports available in that grouping; otherwise the category is not displayed in the CDV tree.

**Laboratory category** can display the following subcategories: Blood Bank, Chemistry, Hematology, Microbiology, and Pathology. Each subcategory corresponds to a Meditech module. (Figure 6)

**Medical Imaging category** can display the following subcategories: Computed Tomography, General Radiology, Interventional, Magnetic Resonance Imaging, Mammography, Nuclear Medicine, Radiographic Fluoroscopy, and Ultrasound. Each subcategory corresponds to the diagnostic imaging modalities' available in the province (Figure 6).



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## 2.2 Viewing CDV Tree Reports

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Only the latest version of a given report is displayed in the CDV tree (**Figure 7**).

### 2.3 CDV Tree Report Format

Each report displayed appears in the following format:

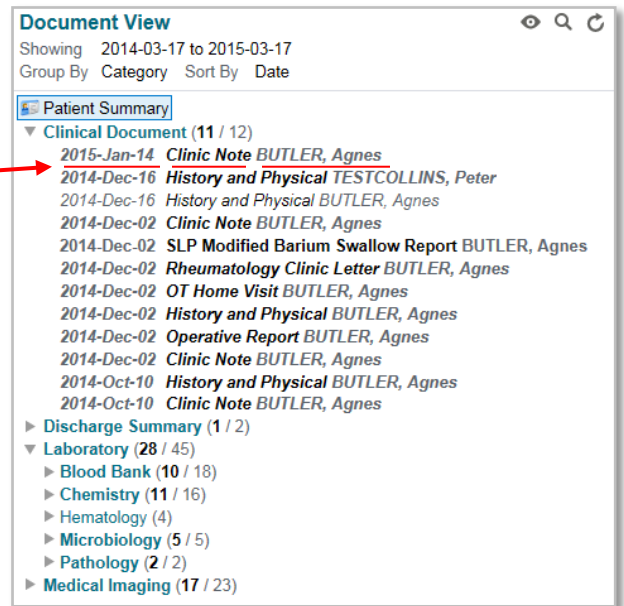
**<Date> <Title> <Author>**

(Date format = YYYY-Mon-DD; E.g., “2013-Oct-21”)

Depending on the report type, each of the above elements corresponds to a different item:

Report Category	Date	Title	Author
Clinical Documents	Service Date	Report Title	Dictating Provider
Discharge Summary	Discharge Date (or Dictated Date)	Discharge Summary	Dictating Provider
Laboratory	Collected Date	Test Name	Ordering Provider
Medical Imaging	Exam Date	Test Name	Ordering Provider

Please note that for Laboratory category the displayed test name is the Provincial Standardized name applied across all Regional Health Authorities (**Figure 8**).

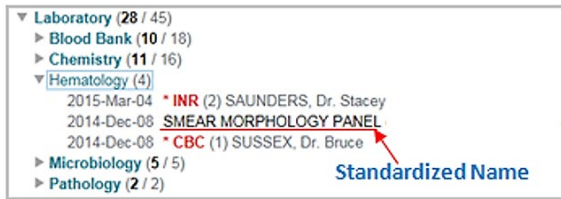


**Document View**  
Showing 2014-03-17 to 2015-03-17  
Group By Category Sort By Date

**Patient Summary**

- ▼ **Clinical Document (11 / 12)**
  - 2015-Jan-14 **Clinic Note** BUTLER, Agnes
  - 2014-Dec-16 **History and Physical** TESTCOLLINS, Peter
  - 2014-Dec-16 **History and Physical** BUTLER, Agnes
  - 2014-Dec-02 **Clinic Note** BUTLER, Agnes
  - 2014-Dec-02 **SLP Modified Barium Swallow Report** BUTLER, Agnes
  - 2014-Dec-02 **Rheumatology Clinic Letter** BUTLER, Agnes
  - 2014-Dec-02 **OT Home Visit** BUTLER, Agnes
  - 2014-Dec-02 **History and Physical** BUTLER, Agnes
  - 2014-Dec-02 **Operative Report** BUTLER, Agnes
  - 2014-Dec-02 **Clinic Note** BUTLER, Agnes
  - 2014-Oct-10 **History and Physical** BUTLER, Agnes
  - 2014-Oct-10 **Clinic Note** BUTLER, Agnes
- ▶ **Discharge Summary (1 / 2)**
- ▼ **Laboratory (28 / 45)**
  - ▶ **Blood Bank (10 / 18)**
  - ▶ **Chemistry (11 / 16)**
  - ▶ **Hematology (4)**
  - ▶ **Microbiology (5 / 5)**
  - ▶ **Pathology (2 / 2)**
  - ▶ **Medical Imaging (17 / 23)**

Figure 7: Viewing CDV Reports



▼ **Laboratory (28 / 45)**

- ▶ **Blood Bank (10 / 18)**
- ▶ **Chemistry (11 / 16)**
- ▼ **Hematology (4)**
  - 2015-Mar-04 \* **INR** (2) SAUNDERS, Dr. Stacey
  - 2014-Dec-08 **SMEAR MORPHOLOGY PANEL**
  - 2014-Dec-08 \* **CBC** (1) SUSSEX, Dr. Bruce
- ▶ **Microbiology (5 / 5)**
- ▶ **Pathology (2 / 2)**

Standardized Name

Figure 8: Laboratory category Test name

### 2.4 CDV Tree Abnormality Indicators

HEALTHe NL highlights when a result in a lab report contains an abnormally high or low value, based on the result reference or a Medical Imaging Report has critical significant findings. An example of a high or low value in a laboratory report is shown in **Figure 8**. The following table summarizes the Abnormality Indicators found on the CDV Tree.

Category	Report Result containing	Abnormality Indicator	Report's title color
Laboratory	High/ low or Critical high/ low value in the series (Not the most recent result)	No indicator	Red
Laboratory	High or low value (the most recent result in the series)	* (single asterisk)	Red
Laboratory	Critical high or low value (the most recent result in the series)	** (double asterisk)	Red
Medical Imaging	Critical significant findings	** (double asterisk)	Red
Medical Imaging (New Sept. 2016)	High Importance (Report Originated from the Emergency Room department)	!_ (exclamation mark)	Red
All	Values within normal range	No indicator	Black

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Some reports are rolled up in the CDV tree (see section [“Rolled Up Reports”](#)). In this case, the abnormality indicator represents the abnormality of the latest report in the series. When a rolled up report entry is displayed in the CDV tree with the red colour but no abnormality indicator, this means that some report in the series was abnormal (but not the latest one).

## 2.5 CDV Tree Report Status Indicators

The status of a report is reflected in the CDV tree through the font styling to give the user visual cues about the status of the report. The table below summarizes the font styling that is shown in each report status.

Category	Report Status	Description	Displayed in
Clinical Documents, and Discharge Summary	Signed	Report has been signed by clinician.	Normal font
	Draft	Report is a draft and not yet signed.	Italicized font
	Pending	Report is pending and cannot be viewed.	Italicized font
	Cancelled	Report has been cancelled and cannot be viewed.	Strikethrough font
	Retracted	Report has been retracted and cannot be viewed.	Gray styling font
Laboratory*	Final	Final results; results stored and verified.	Normal Font
	Pending	Results pending. <u>Applies to results on panels only.</u>	Italicized font
	Cancelled	No results available; Order cancelled.	Strikethrough font
	Retracted	Report has been retracted and cannot be viewed.	Gray styling font
	Correction in progress	Report is being corrected and cannot be viewed	
	Preliminary NEW June 2017	Report is preliminary and not yet Final. <u>Applies to microbiology results only.</u>	Italicized font
Medical Imaging	Signed	Report has been signed by clinician.	Normal font
	Draft	Report is a draft and not yet signed.	Italicized font
	Pending	Report is pending and cannot be viewed.	Italicized font
	HAddendum	An addendum is pending in the report.	Italicized font
	Cancelled	Report has been cancelled and cannot be viewed.	Strikethrough font
	Retracted	Report has been retracted and cannot be viewed.	Gray styling font

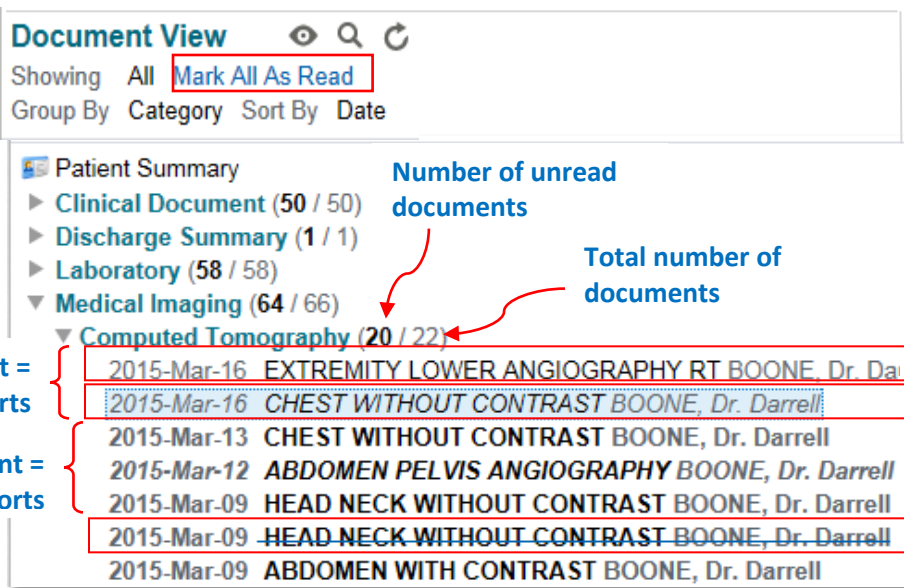
\* For a series displayed in cumulative view (Blood Bank, Chemistry and Hematology only) the report status shown on the CDV tree corresponds to the last result of the series shown in the cumulative view.



## 2.6 CDV Tree Read/ Unread Reports indicator

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Additionally the CDV tree indicates the number of unread reports in a given category, for the current user as shown below in **Figure 9**. Unread documents are displayed in **bold text** in the CDV tree until they have been read. They then display in normal text. If the user has previously read a document and it is displayed in bold in the CDV tree, this is an indication that the document has been updated since it was last read.




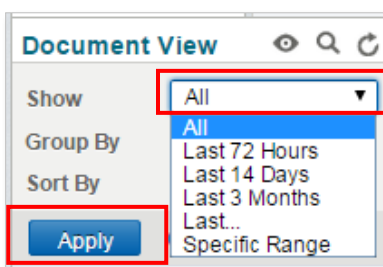
The screenshot shows the 'Document View' interface with a 'Mark All As Read' link highlighted. The CDV tree lists categories with their respective document counts and unread counts. A list of reports follows, with their status indicated by font style and a label on the right.

Report Date	Report Title	Report Status
2015-Mar-16	EXTREMITY LOWER ANGIOGRAPHY RT BOONE, Dr. Darrell	Signed report
2015-Mar-16	CHEST WITHOUT CONTRAST BOONE, Dr. Darrell	Draft or Pending
2015-Mar-13	CHEST WITHOUT CONTRAST BOONE, Dr. Darrell	Unread reports (Bolded Font)
2015-Mar-12	ABDOMEN PELVIS ANGIOGRAPHY BOONE, Dr. Darrell	Unread reports (Bolded Font)
2015-Mar-09	HEAD NECK WITHOUT CONTRAST BOONE, Dr. Darrell	Unread reports (Bolded Font)
2015-Mar-09	HEAD NECK WITHOUT CONTRAST BOONE, Dr. Darrell	Cancelled report
2015-Mar-09	ABDOMEN WITH CONTRAST BOONE, Dr. Darrell	Unread reports (Bolded Font)

Figure 9: Examples of Report status Indicators and read/ unread reports

At the top of the CDV tree there is a link **“Mark All As Read”** that can be used to mark all reports as read for the current user (**Figure 9**).

Please note that the **“Mark All As Read”** link only shows when the CDV filter is configured to show **“All”** documents. If you do not see the **“Mark All As Read”** link you have to filter the CDV tree to show **“All”** documents by clicking on the  icon, then in the **“Show”** box select the **“All”** option and then click the Apply button (**Figure 10**).



The screenshot shows the 'Document View' interface with the 'Show' dropdown menu open, displaying the 'All' option selected. The 'Apply' button is also visible.

Figure 10: CDV filter to show All Documents

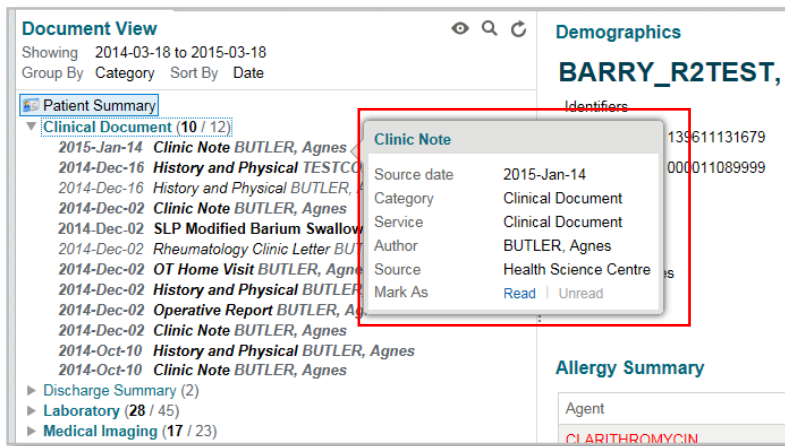
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## 2.7 CDV Tree Popover/Tooltip

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When viewing reports in the CDV tree and hovering the mouse over a report, a popover/tooltip appears providing the user with quick information about the report. The popover for each report in the CDV tree contains the following elements: Title, Source Date, Category, Service, Author, Source and Mark as **(Figure 11)**. See section [“CDV Tree Popover/ Tooltip Elements”](#) for details on each of these elements.

The “Mark As” attribute contains links that allow the user to mark this report (or multiple reports/documents if viewing a link for a cumulative report) as Read or Unread, which causes the CDV Tree to reflect the read/unread status visually. See section [“CDV Tree Report Status Indicators and Read/ Unread Reports”](#) for more information on the visual display on read and unread reports.



**Figure 11: CVD Tree Popover/ Tooltip**

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## 2.8 CDV Tree Popover/ Tooltip Elements

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Depending on the report category, each of the popover/ tooltip elements corresponds to a different item, see table below:

Report Category	1.Title	2. Source Date	3. Category	4. Service	5. Author	6.Source
Clinical Documents	Report Title	Service Date	Clinical Documents	Clinical Documents	Dictating Provider	The site associated with the result. (only Eastern Health facilities) <b>E.g.</b> Health Science Centre
Discharge Summary	Discharge Summary	Discharge Date (or Dictated Date)	Discharge Summary	Discharge Summary	Dictating Provider	The site associated with the result. (only Eastern Health facilities) <b>E.g.</b> Health Science Centre
Laboratory	Test Name	Collected Date	Depending on the test: <ul style="list-style-type: none"> <li>• Blood Bank;</li> <li>• Chemistry;</li> <li>• Hematology;</li> <li>• Microbiology; or</li> <li>• Pathology.</li> </ul>	Laboratory	Ordering Provider	The site associated with the result. (Eastern Health - April 2015, Central Health facilities- Sept 2016, and <b>Western Health facilities – NEW June 2017</b> ) <b>E.g.</b> James Paton Memorial Regional Health Centre
Medical Imaging	Test Name	Exam Date	Depending on the procedure: <ul style="list-style-type: none"> <li>• Computed Tomography;</li> <li>• General Radiology;</li> <li>• Interventional;</li> <li>• Magnetic Resonance Imaging;</li> <li>• Mammography;</li> <li>• Nuclear Medicine;</li> <li>• Radiographic Fluoroscopy; or</li> <li>• Ultrasound</li> </ul>	Medical Imaging	Ordering Provider	The site associated with the result. <b>E.g.</b> Health Science Centre

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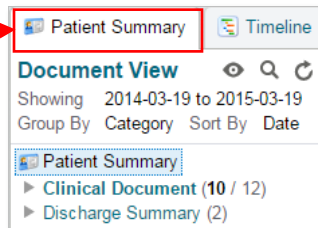
## 2.9 Refreshing the CDV Tree

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By default, the reports contained in each category are displayed by date in descending order, beginning with the most recent (within the category). However this order can be changed and the reports can be filtered by date, grouped or sorted by specific attributes. To learn more about filtering, sorting, and grouping see section [“CDV Tree Display Options”](#).

After a filtering, sorting or grouping option is applied to refresh and go back to the original/ default CDV Tree view click on the “Patient Summary” tab (**Figure 12**) or “F5” on your keyboard.

Click “Patient Summary”  
Tab to Refresh



**Figure 12: Refreshing the CDV Tree**

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## 2.10 CDV Tree Rolled up Reports and Cumulative View

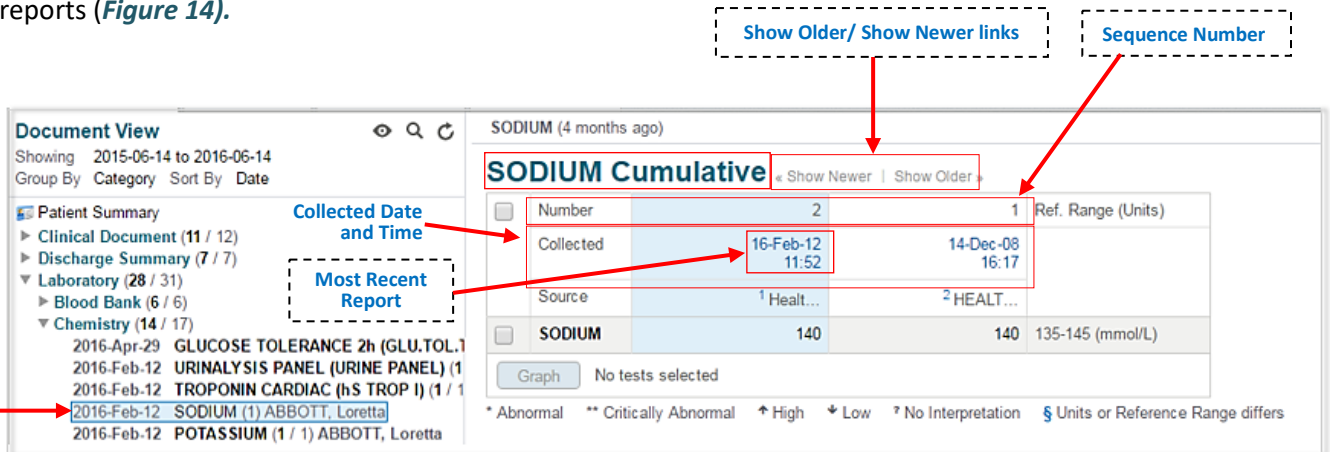
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Similar reports are displayed under one report or title in the CDV tree. For example, three separate CBC test instances may be rolled up into one entry in the CDV tree (**Figure 13**).



**Figure 13: CDV Tree Rolled up Reports Example**

When reports are rolled up they are displayed in **cumulative view** when selected from the CDV tree. Next to the report's name the word "Cumulative" is displayed. The Cumulative View presents a series of reports of the same type (i.e. having the same report mnemonic code) over time. They are presented in a tabular view, in ascending order by Collected Date and time, with the **five newest** reports being presented first in the default view. In case of more than 5 reports available, next to the report's name the "<< Show Older" and "Show Newer >>" links are available to navigate through the entire series of reports (**Figure 14**).



**Figure 14: Rolled up report selected from the CDV Tree**

The date shown for rolled up reports in the CDV tree is the date of the most recent report (highlighted in light blue) in set of rolled up reports (**Figure 14**).

The read/unread status of rolled up reports is changed by accessing the cumulative view. After three seconds, the individual reports displayed within the cumulative view are marked as read for the user.

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Each report has a sequence number. This is the number assigned to the test in chronological order based on collection date and time. For instance if the collection date is the same for two test the second criteria HEALTHe NL considers to order the test is the time of the test, leaving the most recent report on the far right (**Figure 15**).

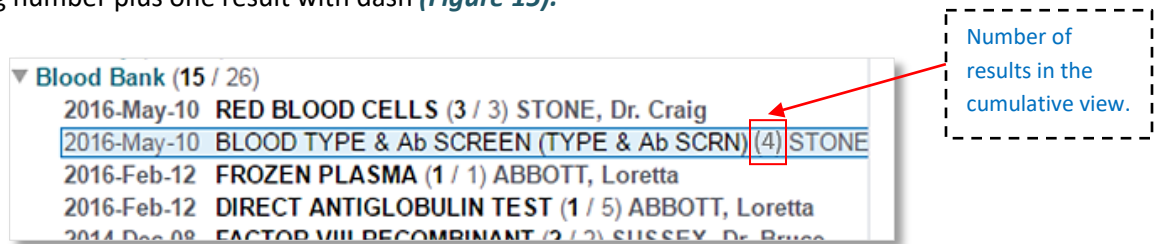
When there is a dash instead of number it means that the results are part of the series but they were ordered individually or as part of another panel.

Number	Collected	Source	ABO & Rh GROUP	ANTIBODY SCREEN
4	16-May-10 13:34	<sup>1</sup> Healt...	AB POSITIVE	NEGATIVE
-	16-Feb-12 11:11	<sup>2</sup> Healt...	AB POSITIVE	NEGATIVE
3	14-Dec-08 15:00	<sup>3</sup> 2.16...	GROUP AB Rh P...	NEGATIVE
2	14-Dec-08 14:35	<sup>4</sup> HEALT...	GROUP AB Rh P...	NEGATIVE
1	14-Dec-08 14:29	<sup>5</sup> HEALT...	GROUP AB Rh P...	NEGATIVE

**Figure 15: Example of cumulative View of Rolled up reports with dash instead of a number**

Please note that this rollup of results is only performed for Blood Bank, Chemistry and Hematology reports.

For instance you may see a cumulative report in the CDV tree that says 4 in brackets (**Figure 16**), (meaning that there are 4 results rolled up, and when you open the report you see 4 results with their corresponding number plus one result with dash (**Figure 15**).



**Figure 16: Example of cumulative view number of results in brackets**

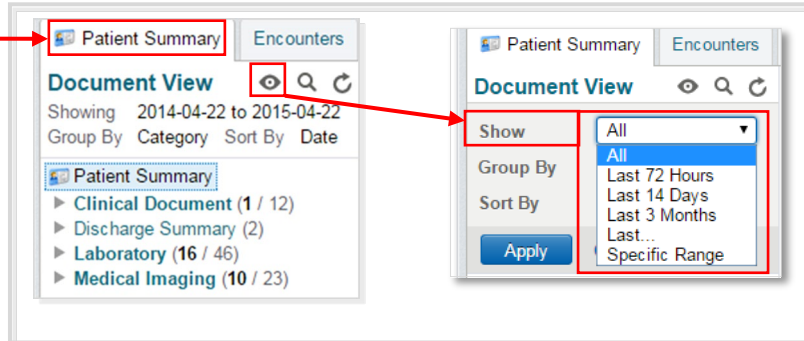
### 3 CDV Tree Display Options


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#### 3.1 CDV Tree Filtering by Date Range

By default, the CDV tree is filtered to display reports for the past year (from the current date). The CDV tree may be filtered to show only reports whose Date attribute falls within a different specified date range. This filtering can be applied by the Last 72 Hours, Last 14 Days, Last 3 Months, or a Specific Range set by the user (*Figure 17*).

Click here to refresh



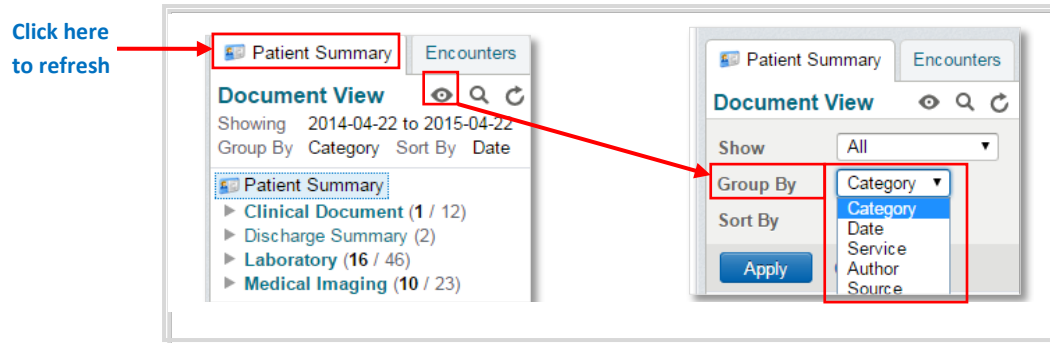
Selecting the “Document View Control”  icon will display the “Show”, “Group by” and “Sort by” options to select from. On the “show” option click on the arrow next to the field and select the attribute (Last 72 Hours, Last 14 Days, Last 3 Months, or a Specific Range) you desire to filter by and click “Apply”.

*Figure 17: Filtering the CDV Tree by Date Range*


To go back to the original CDV Tree view click on the “Patient Summary” tab (*Figure 17*), or “F5” on your keyboard.

#### 3.2 CDV Tree Grouping

By default the reports in the CDV tree are grouped by Category. This can be changed to be grouped by Date, Service, Author, or Source (*Figure 18*).



*Figure 18: Grouping the CDV Tree*

Selecting the “Document View Control”  icon will display the “Show”, “Group by” and “Sort by” options to select from. On the “Group by” option click on the arrow next to the field and select the attribute (Category, Date, Service, Author, or Source) you desire to group by and click “Apply”.

This groups the CDV tree reports with folders named after the values of the selected attribute grouping. E.g., when grouping by Author, the folder name is a provider’s name, and within the folder all the reports where the named clinician is the provider identified as the author.

To go back to the original CDV Tree view click on the “Patient Summary” tab (*Figure 18*).

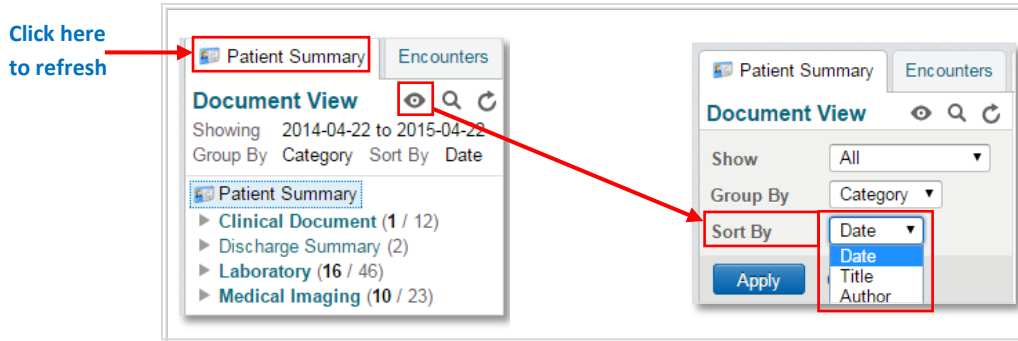
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### 3.3 CDV Tree Sorting

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By default the reports contained in each category are displayed/ sorted by date in descending order, beginning with the most recent (within that category). However this order can be changed and the reports can be sorted by Date, Title, or Author (*Figure 19*).



*Figure 19: Sorting Reports in the CDV Tree*

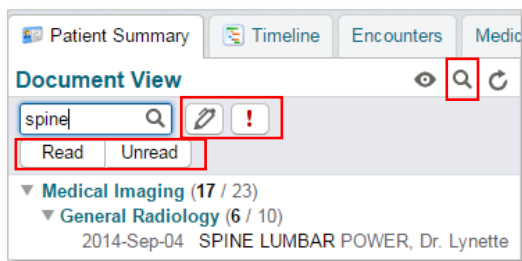
Selecting the “Document View Control” icon will display the “Show”, “Group by” and “Sort by” options to select from. On the “sort by” option click on the arrow next to the field and select the attribute (Date, Title, or Author) you desire to sort by and click “Apply”.

To go back to the original CDV Tree view click on “Patient Summary” tab (*Figure 19*) or “F5” on your keyboard.

### 3.4 CDV Tree Searching

The CDV tree can be searched with free-text to find any reports that have an attribute matching the specified text. This search can be performed by clicking the “Search” icon and typing the desired search text in the text box -case insensitive- (*Figure 20*).

As the text is typed, the CDV tree dynamically matches the specified search text against the attributes of the available reports in the CDV tree.



*Figure 20: CDV Tree Searching*

This icon is used to show documents that have been marked as important. None of current documents display in HEALTHe NL are marked with importance (only abnormality), thus this icon does not have any functionality for now.

This icon is used to show documents not signed off. Document sign-off is not configured in HEALTHe NL, thus this icon does not have any functionality for now.

The “**Read**” and “**Unread**” toggle buttons may be used to show only Read or Unread reports, respectively, in the CDV tree.

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