Flow Sheet Set Up & Maintenance

The Flow Sheets allow practices to display data in a user defined way. To view the Flow Sheets open a patient chart in Clinical, then click on the tab labeled Flow Sheets. You will see a set of sub-tabs, these are all re-nameable except for Vitals, Immunizations, and Orders. Since the Export flow sheet is used for the Patient Portal and other interfaces, it is recommended not to delete or rename this flow sheet.

All maintenance of the flow sheets is done in the Flow Sheet Set Up. Here you can add, delete, rename, and edit the flow sheets.

To access the set up go to Tools> EMR Set-Up> Flow Sheet Set-Up.

When you open the Flow Sheet set up it defaults to edit the Export flow sheet. If you wish to work with a different flow sheet, pull down the Flowsheet menu and choose the desired flow sheet.

Once you are on the desired flow sheet, you can add, delete, reorder and rename the items displayed in that flow sheet. The Format menu allows you to display the dates horizontally or vertically for each flow sheet.

If you would like to add a new flow sheet, pull down the Flowsheet menu and scroll to the bottom. Here, the option to create a new flow sheet is available.

To delete an item from a flow sheet, click once on the item to select that item, then choose delete field.

To add a field, click the Add Field button. Here you can choose to pick a lab from your results, select a field (and its linkage) from another flow sheet, or create a new field. The unique field is used in cases where you you would like to track data, such as the date of the last diabetic eye exam, that does not come in as a lab result. Linking to other fields allows you to use previously set up flow sheet fields inside of this flow sheet.

Linking A Lab
The option to select a standard lab result allows you to add your individual lab test results to a flow sheet. When you select this option a search field opens up. Type in a few letters of the name of the test and click on the magnifying glass. A list of matches will appear. Double click on the test you want to add and the test will be added to the flow sheet.
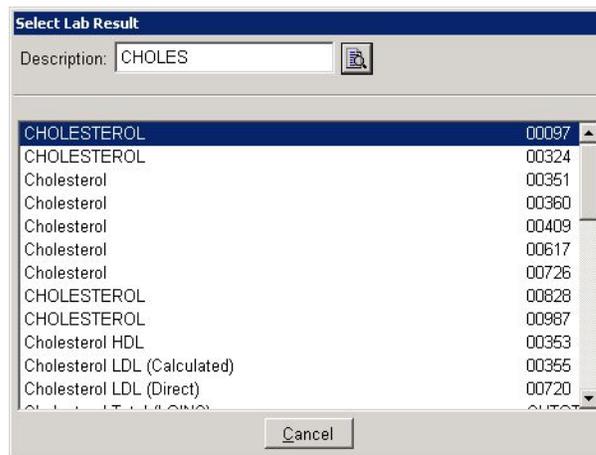
To reorder, change the description, or link lab codes, double click the item and an Edit Field Set-Up window opens. The Field Type is the size and type of data filed in the flow sheet for the item. For most lab values a 5 character text field is sufficient. The Description is what is displayed in the flow sheet as that item; here the word Cholesterol will be displayed. The Data Type is the formatting of the data, it can be yes or no, a date, or various other formats. For our purposes we are going to leave it defaulted to Lab Result. The Line # effects the order the item is listed in the flow sheet. Here you can reorder the items to allow them to be displayed as you
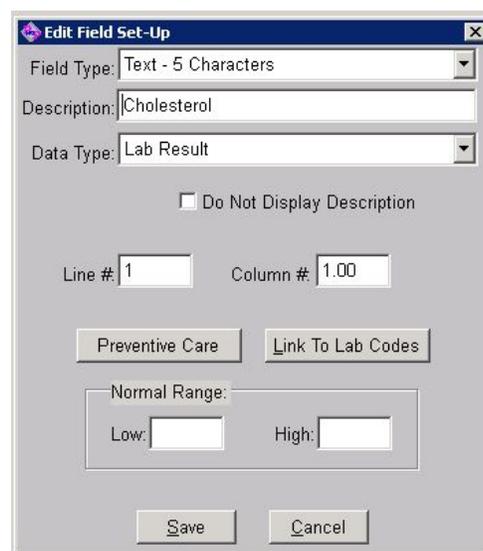
see fit. For best results each item should have a unique line number, but if there are duplicates the system will decide how to display them. The Preventive Care button allows you to link this item to any of you Preventive Care measures. You can also link to the flow sheet data from within the Preventive Care Set Up. The Normal Range for the item can be set here if desired. If you are not receiving lab results electronically you may want to fill these in, but since most labs are now sending this data as part of the electronic result files, you should leave this blank so the range defaults to the lab's specifications.

The Link To Lab Codes is a vital part of the flow sheet set up. This is how the individual lab results are sent into the flow sheet so they can be displayed. There are multiple codes for each result, and all the appropriate codes should be linked. Each laboratory uses their own codes, and they change these codes from time to time. If you notice a result is not populating the flow sheet, in all likelyhood the issue is that the lab code is not linked to the field on the flow sheet.

Note: These codes vary widely. For example, cholesterol may be listed as Cholesterol, Total Cholesterol, Cholesterol Total, Cholesterol Whole Blood, or Whole Blood Cholesterol.

Another example: The Cholesterol HDL visible in this screenshot. You will also find this as HDL, HDL Cholesterol, and possibly Total HDL Cholesterol.
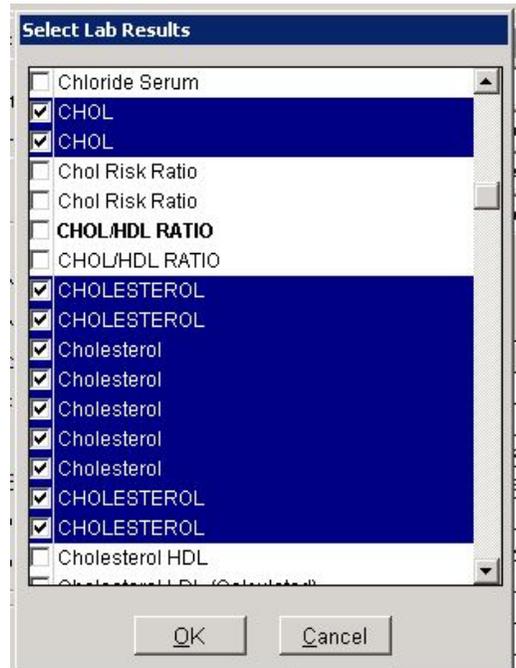
Once you have selected all the lab codes, press OK on the Select Lab Results window. A window will pop open letting you know the links have been established, click OK. If you are done with the Edit Field Set-up, click OK and you will be back to your Flow Sheet Set Up. After you are done editing your flow sheets, just press the Exit button to exit the set up.

You now have a flow sheet that should auto-populate with the electronic lab values sent from the laboratories.