

# Accessing the Patient Chart from different areas of DrChrono

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You can easily access a patient's full chart history from different sections in DrChrono by clicking on the patient's name.

1. From the clinical note, click the patient's name.

The screenshot shows the DrChrono interface. At the top, there is a navigation bar with 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. Below this, there are tabs for 'H&P', 'SOAP', 'ADDITIONAL', and 'APPS'. The main content area is split into two columns. The left column has a 'Preview Note' header and a list of sections: 'onpatient / Check-In', 'Subjective', 'Objective', 'Assessment', 'Plan', 'Medications & Allergies', and 'Billing'. The right column shows a patient profile card for 'Example Patient' (Male | 14 years | 09/12/20) with a 'Sick' status. Below the profile card is a toggle for 'Include in Note' set to 'No' and an 'HPI' section.

2. From the Live Claims Feed

The screenshot shows the 'Live Claims Feed' interface. On the left is a sidebar menu with options: 'Billing Summary', 'Live Claims Feed', 'Patient Payments (beta)', 'Day Sheet', 'Transactions', 'Remittance Reports', 'Unmatched ERAs', 'Accounts Receivable', 'Patient Statements', 'Product / Procedure', 'Balance / Ledger', 'Fee Schedule', and 'Underpaid Items'. The main area has a header 'Live Claims Feed' and several filters: 'Select All Offices', 'Select None', 'Primary Office: All', 'Claim St: All', 'Billing St: All', 'Appt Profiles: All', 'Calculate Counts', 'What's this?', and 'TFL Warning'. There are also input fields for 'Date of Accident', 'Date bitten by spider', and 'Appointment Created by'. A search bar shows 'Example Patient' and 'Payer Name'. Below these are fields for 'Payer ID', 'drc claim #', and a date range from '08/11/2018' to '09/11/2018'. There is an 'Open window in new tab' checkbox. At the bottom, there are buttons for 'Batch Status Change', 'Export to File', 'Custom Export', 'Display', '+ Schedule', and 'Internal'. A table below shows claim data:

Info	Claim ID	Patient	Date of Service	Office	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Bal	Claim Bal	Exp Rel
				Totals:	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$75.00	\$75.00	
	104432256	Example Patient	9/11/2018 10:00AM	Primary Office	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$75.00	\$75.00	
				Totals:	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$75.00	\$75.00	

3. From the Audit Log Report

# Audit Log Report

Patient's Name [v] User's Name [v]

Export to File

Date ↓	Time	Patient
09/11/2018	12:00:39 PM	<u>Example Patient</u> [PABR000001]
09/11/2018	12:00:36 PM	

4. From the iPad EHR app.

The screenshot shows the iPad EHR app interface. At the top, there's a status bar with 'iPad', signal strength, '12:03 PM', and '96%' battery. Below that, a navigation bar contains 'Filters', 'Today', a refresh icon, a search icon, and a plus icon. A search bar labeled 'Search Appointment' is visible. The main header area shows a patient profile for 'Example Patient' (Male | 14 | 09/12/2003) with a red box around the name. A menu is open over the patient profile, listing various options under 'Patient' and 'Actions'. The 'Patient' menu includes: Patient Information, Patient History, Face Sheet, Timeline, Problems (0), Medications (2), Allergies (1), Labs, Patient Flags, Appointment List, Family History, and Growth Charts. The 'Actions' menu includes: Send eRx, Log Phone Call, Check Insurance Eligibility, Take Clinical Photo, Upload Files, Send Referral, Data Visualization, Patient Education, and App Directory. Below the menu, there are 'Patient Flags (3)' listed: 'RX Refill Needs Authorization' (orange), 'Likes Cats' (blue), and 'Not Nice' (green). A 'Start Visit' button is on the right. At the bottom, there's a navigation bar with 'dr chrono' logo, 'Dashboard', 'EHR', 'Messages (60)', 'Tasks (35)', and 'Account'.