

Reports: Medical Record

The following document provides detail on the available options when printing/saving a resident's medical record. Additionally, detail is provided about what happens when you generate a resident's medical record, either from Reports or the Resident's Summary page, and how to use the Medical Records Request Log.

- Available Options for Each Record Type
- Generating a Resident's Medical Record from the Resident Summary Page
- Generating a Resident's Medical Record from Reports
- Understanding the Medical Records Request Log

Available Options for Each Record Type

Record Type	Options
Administration Record	All: Include all types of Administration Record (i.e., MAR, TAR, Respiratory Therapy Admin Record).
	Include: Will allow the selection of specific administration records to include in the Medical Records from the Designation drop-down.
	Exclude: Will allow the selection of specific administration records that should not be included in the Medical Records from the Designation drop-down.
Care Plans	No options. All care plans active in the report date range will be included. All care plan meeting notes will be included if checkbox is checked.
Clinical Monitoring	No options. All Clinical Monitoring captured in the report date range will be included.
Clinical Assessments	All: Include all Clinical Assessments completed for the resident in the report date range.
	Include: Will allow the selection of specific Clinical Assessments to include in the Medical Records. Select the included from the Form drop-down.
	Exclude: Will allow the selection of specific Clinical Assessments that should NOT be included in the Medical Records. Select the assessments to not include from the Form drop-down.
CNA Documentation Record	No options. All CNA Documentation captured in the report date range will be included.
ICD-9 Diagnoses	No options. All ICD-9 diagnoses captured in the report date range will be included.
ICD-10 Diagnoses	No options. All ICD-10 diagnoses captured in the report date range will be included.
Documents	All: Include all Documents completed for the resident in the report date range.
	Include: Will allow the selection of specific types of Documents to include in the Medical Records. Select the included document types from the Type drop-down.
	Exclude: Will allow the selection of specific types of Documents that should NOT be included in the Medical Records. Select the document type to not include from the Type drop-down.
Lab Results	No options. All Lab Results received in the report date range will be included.

Reports: Medical Record

MDS	No options. All MDS Assessments with an ARD in the report date range will be included.
Nurse Instructions	No options. All Nurse Instructions active in the report date range will be included.
Physician Orders	The physician order form that should be used in the Medical Records needs to be selected in the Form: drop down.
Progress Notes	All: Include Progress Notes from all disciplines entered for the resident in the report date range.
	Include: Will allow the selection of specific disciplines to include in the Medical Records. Select the included disciplines from the Discipline drop-down.
	Exclude: Will allow the selection of specific disciplines that should NOT be included in the Medical Records. Select the discipline to not include from the Discipline drop-down.

Reports: Medical Record

Generating a Resident's Medical Record from the Resident Summary Page

Step 1. From the Resident Summary page, to the right of the resident's photo, click the **Print Record** icon.

Samantha Augusta    		PHI +Prgm						
DOB: 01/12/1920 (98 y)	Gender: Female	Room/Bed: Room 116/A	Physician: Doctor 04, Sigma					
Unit: Unit 04	Facility: Training Facility	Medical: Medicare Part B	System ID: 446610					
Drug: Pharmacy - OCR Default	Facility ID:	Renewal Cycle: Manual (#1)	Edit	Resident Information  				
Cycle Start: 09/07/2011	Renew Now	Last Admit: 09/07/2011	Cycle End:					

Step 2. In the **Date From** and **Date To** fields, indicate the time range in which you want to capture the resident's medical record.

Step 3. Check the components you want to include in the printed Medical Record and adjust the options, as necessary.

Note: The [Available Options for Each Record Type section](#) provides details on your available options. You will only see the record types that your facility is licensed to use.

Admin Record CNA Assignments ADL Sum 2 Medical Records

Template: Medical Records

Resident: Resident, Rita

Date From: Date To:

3

Face Sheet

Administration Record

All Include Exclude

Designation:

No items have been selected.

Exclude

Medication Group:

No medication groups have been selected.

Care Plans

Active on

Include Care Plan Meetings?

Clinical Assessments

Include Pending Sign-Off?

All Include Exclude

Form:

No items have been selected.

Clinical Monitoring

CNA Documentation Record

Diagnoses (ICD-9)

Diagnoses (ICD-10)

Diagnostic Results

Documents

INTERACT® - SBAR

MDS

Nurse Instructions

Physician Orders

Form: Physician's Orders - Split

Progress Notes

Include Pending Sign-Off?

All Include Exclude

Discipline:

No items have been selected.

4 Run + Close

Step 4. Click **Run + Close**.

The Medical Records Request Log opens to show the current status of the medical record generation. For a review of the available statuses, see the [Understanding the Medical Records Request Log section](#).

Reports: Medical Record

Generating a Resident's Medical Record from Reports

Step 1. From the Navigation Bar, click **Reports > Medical Records**.

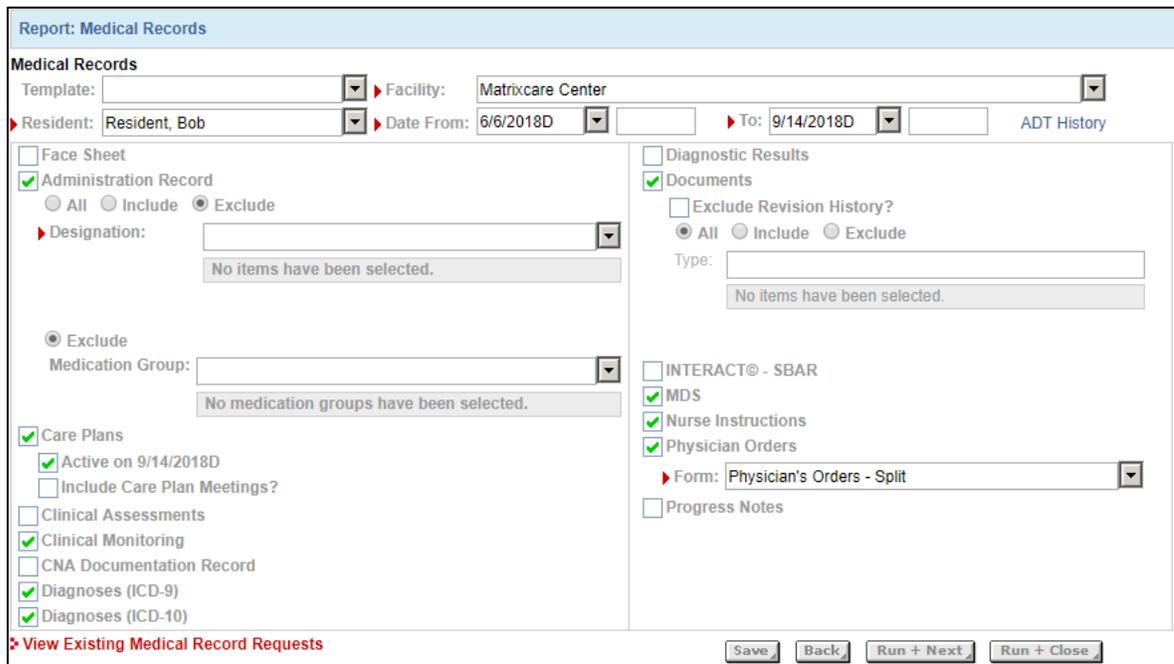
Step 2. From the **Resident** drop-down menu, select the resident for whom you want to print medical records.

Step 3. In the **Date From** and **Date To** fields, indicate the time range in which you want to capture the resident's medical record,

OR click the **ADT History** link and select the resident's encounter for when you want to generate a medical record.

Step 4. Check the components you want to include in the printed Medical Record and adjust the options, as necessary.

Note: The [Available Options for Each Record Type section](#) provides details on your available options. You will only see the record types that your facility is licensed to use.



Report: Medical Records

Medical Records

Template: [] Facility: Matrixcare Center

Resident: Resident, Bob Date From: 6/6/2018D Date To: 9/14/2018D ADT History

Face Sheet

Administration Record

All Include Exclude

Designation: []

No items have been selected.

Exclude

Medication Group: []

No medication groups have been selected.

Care Plans

Active on 9/14/2018D

Include Care Plan Meetings?

Clinical Assessments

Clinical Monitoring

CNA Documentation Record

Diagnoses (ICD-9)

Diagnoses (ICD-10)

Diagnostic Results

Documents

Exclude Revision History?

All Include Exclude

Type: []

No items have been selected.

INTERACT® - SBAR

MDS

Nurse Instructions

Physician Orders

Form: Physician's Orders - Split

Progress Notes

[View Existing Medical Record Requests](#)

Save Back Run + Next Run + Close

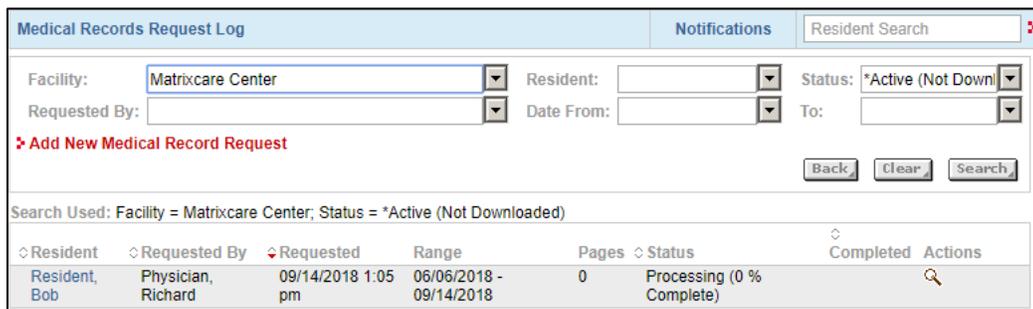
Step 5. Click **Run + Close**.

The **Medical Records Request Log** opens to show the current status of the medical record generation. For a review of the available statuses, see the [Understanding the Medical Records Request Log section](#).

Reports: Medical Record

Understanding the Medical Records Request Log

The Medical Records Request Log provides a list of the medical records that have been generated, along with their statuses.



Resident	Requested By	Requested	Range	Pages	Status	Completed	Actions
Resident, Bob	Physician, Richard	09/14/2018 1:05 pm	06/06/2018 - 09/14/2018	0	Processing (0 % Complete)		  

The following statuses can appear in the Medical Records Log:

Status Type	Description
*Active (Not Downloaded)	The Medical Records Report is not due for deletion and can be downloaded currently.
*Processing	The Medical Records Report request is being processed currently.
Pending Processing	Processing of the Medical Records Report request has not started.
In Progress	The requested reports are being generated.
Packaging	The requested reports have been processed and are currently being packaged in a zip file.
Success	The requested reports have been successfully processed and packaged and are ready for download.
Partial Success	Some of the requested reports have not generated successfully.
Error	The Medical Records Report request was not processed.
Downloaded	The Medical Records Report has been downloaded at least once.
Deleted	The Medical Records Report has been deleted.

You can take action on each medical record:

- Click the printer icon to open or save the report.
- Click the red **X** icon to delete the report.
- Click the magnifying glass icon to review the request details, including the auto-deletion date.