

# 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	<b>All:</b> Include all types of Administration Record (i.e., MAR, TAR, Respiratory Therapy Admin Record).
	<b>Include:</b> Will allow the selection of specific administration records to include in the Medical Records from the Designation drop-down.
	<b>Exclude:</b> 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	<b>All:</b> Include all Clinical Assessments completed for the resident in the report date range.
	<b>Include:</b> Will allow the selection of specific Clinical Assessments to include in the Medical Records. Select the included from the Form drop-down.
	<b>Exclude:</b> 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	<b>All:</b> Include all Documents completed for the resident in the report date range.
	<b>Include:</b> 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.
	<b>Exclude:</b> 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.

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<b>MDS</b>	No options. All MDS Assessments with an ARD in the report date range will be included.
<b>Nurse Instructions</b>	No options. All Nurse Instructions active in the report date range will be included.
<b>Physician Orders</b>	The physician order form that should be used in the Medical Records needs to be selected in the Form: drop down.
<b>Progress Notes</b>	<b>All:</b> Include Progress Notes from all disciplines entered for the resident in the report date range.
	<b>Include:</b> Will allow the selection of specific disciplines to include in the Medical Records. Select the included disciplines from the Discipline drop-down.
	<b>Exclude:</b> 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.

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## 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		+AD +Allergy		PHI +Prgm	
DOB:	01/12/1920 (98 y)	Gender:	Female		
Unit:	Unit 04	Room/Bed:	Room 116/A		
Facility:	Training Facility	Physician:	Doctor 04, Sigma		

  

Resident Information		Print Face Sheet		Print Wristband	
Medical:	Medicare Part B	System ID:	446610		
Drug:	Pharmacy - OCR Default	Facility ID:			
Renewal Cycle:	Manual (#1)	Last Admit:	09/07/2011		
Cycle Start:	09/07/2011	Renew Now	Cycle End:		

  

  

ADT Info	Alerts	Allergies	PHI Audit
Contacts	Demographics	Consent	Chart Tracking
Member	Insurance	Private Phys	Resident Audit
			<b>Print Records</b>

**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**

  

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Template: Medical Records  
Resident: Resident, Rita  
Date From:  Date To:   
☒ 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.

  

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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](#).

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## 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.

**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](#).

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