UW Family Medicine Clerkship Electronic Health Record (EHR) Checklist

The following is a checklist that can used to orient to any EHR system. Some EHR’s will not have all the elements listed below, however they might have something similar. You can use this check list as a self-orientation tool or to make sure that all important elements are covered. Your goal is to find out how each of the following tasks are accomplished in the EHR that you will be using.

1. Basic Navigation

* Login
* Finding a patient

2. Data Review

* Previous Notes
* Problem List
* Medications / Allergies
* Past Medical / Surgical
* History Family / Social History
* Health Maintenance
* Lab / Radiology
* Consultations
* Other documents

3. Data Entry

* Writing a new Note (Templates, Free text, Voice Recognition)
* Computerized Provider Order Entry CPOE
* Ordering Medications / Refills
* Ordering Labs and Radiology
* Referrals
* Updating Medical database
* Problem List
* Medications / Allergies
* Past Medical / Surgical History
* Family/ Social History
* Health Maintenance
* Lab/ Radiology
* Consultations
* Other documents
* Clinical Communications
* Sending note to faculty
* Responding to patient communications

4. Aggregator Functions

* Patient Lists
* Disease specific patient lists (e.g. Diabetes)
* Health Maintenance
* List that shows which patient is due to what HM (e.g. Colon Cancer screening)

5. Patient Education

* Patient education resources
* After Visit Summary

6. Clinical Decision Support

* Allergy checking
* Drug interaction checking
* Lab and Health Maintenance reminders
* Drug dosing suggestions
* Disease / Condition specific smart sets
* Links to clinical resources