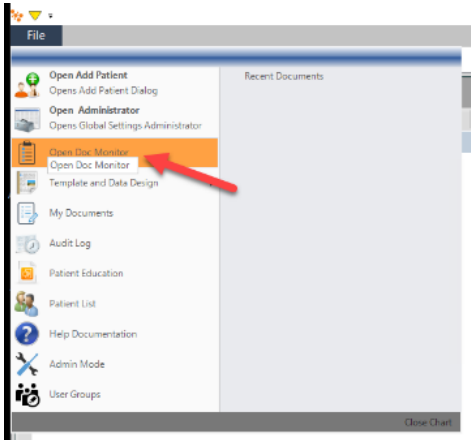


MEDAFFINITY EHR – DOC MONITOR

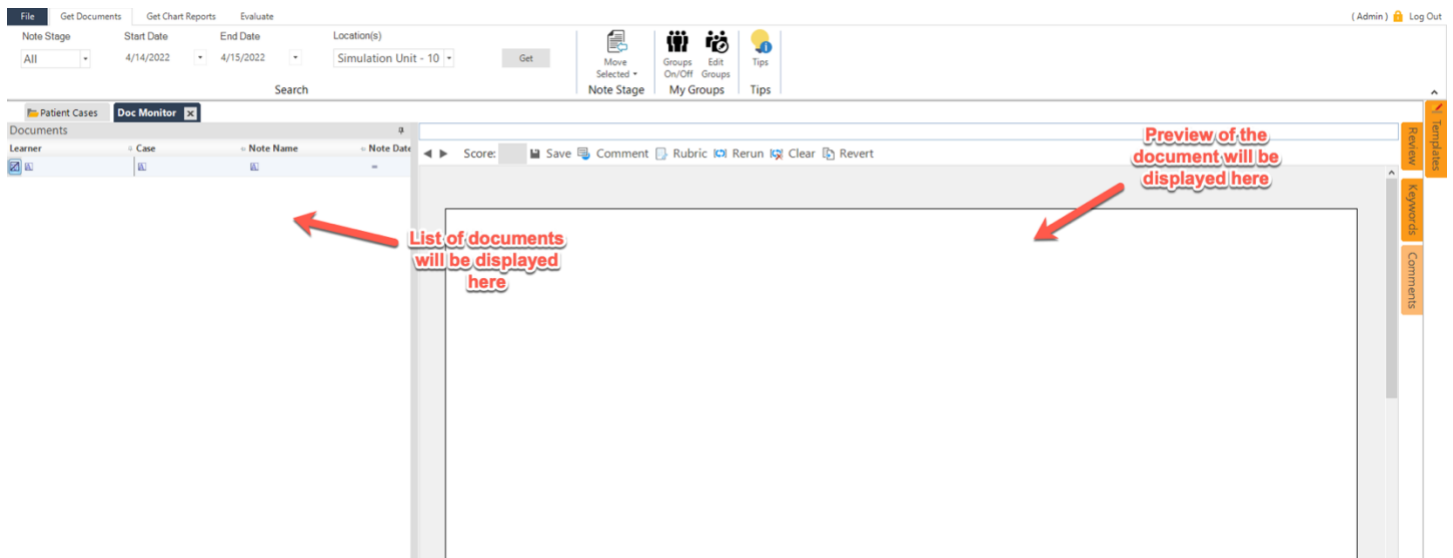
OPENING THE DOC MONITOR

After logging in, click on “File” in the upper left and select “Open Doc Monitor.”



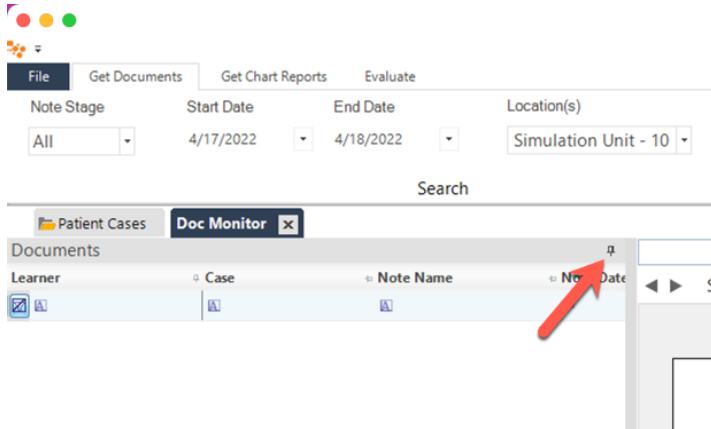
UNDERSTANDING THE DOC MONITOR

You will then be taken to the Doc Monitor, which allows you to comment on students' work. You will see a list of all the documents within your course on the left. In the main window, you will see a preview of the document that is selected in that list.

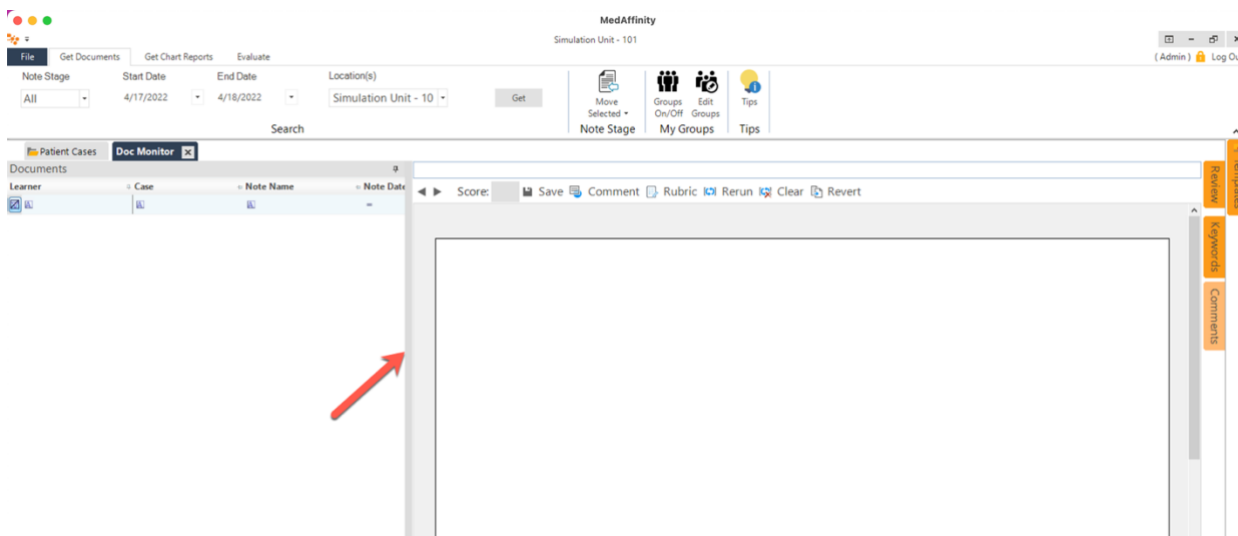


ADJUSTING VIEWS

- Pin or unpin the Documents window

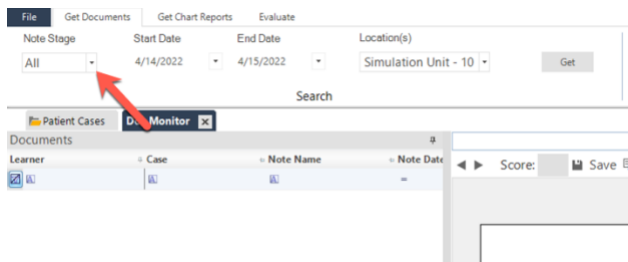


- Slide the center divider to the left or right to give a bigger view of the monitor.



REFINING THE DOCUMENT LIST

- To narrow or change the range of documents that appear listed on your screen, in the far upper left corner, you can change the selections under Note Stage (All, Not Ready, Ready, Reviewed or N/A), Start Date, End Date and Location. Then click "Get" to refresh the screen.



- When the screen refreshes, the document list will be repopulated to reflect the criteria you selected.

The screenshot shows the MedAffinity EHR interface. At the top, there are navigation tabs: File, Get Documents, Get Chart Reports, and Evaluate. Below these are filters for Note Stage (All), Start Date (4/14/2021), End Date (4/14/2022), and Location(s) (Simulation Unit - 10). A 'Get' button is present. On the right, there are icons for Move Selected, Groups On/Off, Edit Groups, and Tips. The main area is split into two panes. The left pane, titled 'Documents', contains a table with columns: Learner, Case, Note Name, and Note Date. The right pane shows a preview of a document for 'Learner: Five, Learner', 'Case: Bellemy, Randal A', 'Location: Simulation Unit - 101', and 'Note Name: Initial (EX)'. The preview includes the MedAffinity EHR logo, patient name (Bellemy, Randal), DOB (5/7/1949), and a 'Reason for Visit' section describing abdominal pain.

Learner	Case	Note Name	Note Date
Five, Learner	Bellemy, Randal A	Initial (EX)	03/19/22
Five, Learner	Sugamoto, Keegan A	SBAR (Form)	03/24/22
Four, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
One, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
One, Learner	Mellem, Edythe	TELEPHONIC NURSING	03/18/22
One, Learner	Bellemy, Randal A	Assessment (V1) - under	03/20/22
Six, Learner	Bellemy, Randal A	SOAP Note (EX3) Abd Pa	03/19/22
Three, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
Three, Learner	Mellem, Edythe	TELEPHONIC NURSING	03/18/22
Two, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
Two, Learner	Mellem, Edythe	TELEPHONIC NURSING	03/18/22
Two, Learner	Bellemy, Randal A	Assessment (V1) - under	03/20/22

SELECTING THE DOCUMENT FOR GRADING

- From the list of documents on the left, you can select the document you wish to grade. To do so, click on the document name, and a preview of the document will appear in the main window.

This screenshot shows the same MedAffinity EHR interface as the previous one, but with a different document selected. In the 'Documents' table, the row for 'Three, Learner' with 'Case: Spongale, Sam' and 'Note Name: Focused Soap (R)' is highlighted. A red arrow points to this row. The preview pane on the right now shows details for 'Learner: Three', 'Name: Spongale, Sam', and 'DOB: 3/11/1968'. The 'Chief Complaint' section states 'patient is interested in establishing care and obtaining an STI test'. The 'HPI' section provides a detailed history of the patient's interest in STI testing.

Learner	Case	Note Name	Note Date
Five, Learner	Bellemy, Randal A	Initial (EX)	03/19/22
Five, Learner	Sugamoto, Keegan A	SBAR (Form)	03/24/22
Four, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
One, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
One, Learner	Mellem, Edythe	TELEPHONIC NURSING	03/18/22
One, Learner	Bellemy, Randal A	Assessment (V1) - under	03/20/22
Six, Learner	Bellemy, Randal A	SOAP Note (EX3) Abd Pa	03/19/22
Three, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
Three, Learner	Mellem, Edythe	TELEPHONIC NURSING	03/18/22
Two, Learner	Spongale, Sam	Focused Soap (R)	03/16/22
Two, Learner	Mellem, Edythe	TELEPHONIC NURSING	03/18/22
Two, Learner	Bellemy, Randal A	Assessment (V1) - under	03/20/22

- Then, in menu in the far upper left, click on "Evaluate."

This is a close-up screenshot of the top navigation bar of the MedAffinity EHR interface. The 'Evaluate' button is highlighted with a red arrow. Other buttons visible are 'File', 'Get Documents', 'Get Chart Reports', and 'Search'. Below the buttons are filter fields for Note Stage (All), Start Date (4/14/2021), End Date (4/14/2022), and Location(s) (Simulation Unit - 10).

MAKING COMMENTS AND INLINE COMMENTS

INLINE COMMENTS

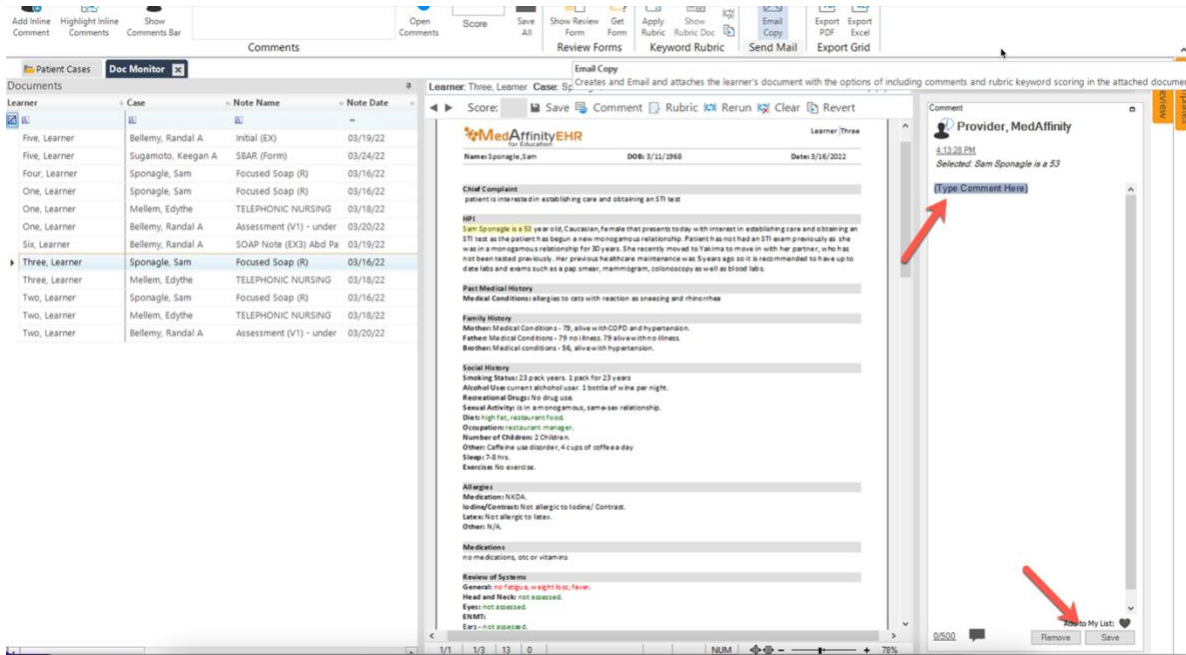
- Using the “Evaluate” menu, you can make detailed, inline comments on and grade the student’s work.

The screenshot shows the MedAffinity EHR interface. The top menu bar includes 'File', 'Get Documents', 'Get Chart Reports', and 'Evaluate'. Below the menu is a toolbar with icons for 'Add Inline Comment', 'Highlight Inline Comments', 'Show Comments Bar', 'Open Comments', 'Score', 'Save All', 'Show Review Form', 'Get Form', 'Apply Rubric', 'Review Forms', 'Keyword Rubric', 'Send Mail', 'Email Copy', 'Export PDF', 'Export Excel', and 'Export Grid'. The main window displays a patient record for 'Learner: Three, Learner' with 'Case: Spongale, Sam'. The patient's name, DOB (3/11/1968), and Date (3/16/2022) are visible. The 'Chief Complaint' section states: 'patient is interested in establishing care and obtaining an STI test'. The 'HPI' section contains a detailed history of present illness. The 'Past Medical History' section lists 'Medical Conditions: allergies to cats with reaction as sneezing and rhinorrhea'. The 'Family History' section lists 'Mother: Medical Conditions - 79, alive with COPD and hypertension', 'Father: Medical Conditions - 79 no illness. 79 alive with no illness', and 'Brother: Medical conditions - 56, alive with hypertension'. The 'Social History' section lists 'Smoking Status: 23 pack years. 1 pack for 23 years', 'Alcohol Use: current alcohol user. 1 bottle of wine per night', and 'Recreational Drugs: No drug use'.

- To make an inline comment, select the text in the preview window that you want to comment on.
- Then you can click on the icon that pops up when you select the text or you can click on “Add Inline Comment” in the upper left.

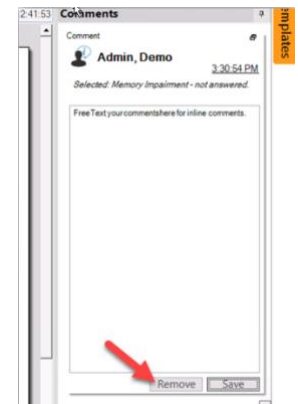
This screenshot is similar to the one above, but it highlights the process of adding an inline comment. A red arrow points to the 'Add Inline Comment' button in the top left toolbar. Another red arrow points to a comment icon (a speech bubble with a plus sign) that has appeared over the text 'Sam Spongale is a 53 year old, Caucasian, female that presents today with interest in establishing care and obtaining an STI test as the patient has begun a new monogamous relationship.' in the HPI section. The rest of the interface, including the menu bar, toolbar, and patient record details, is identical to the previous screenshot.

- Place your cursor in the text box and enter your comments. Then click “Save” at the bottom of that comment box. As you add more comments, they will all appear on the far right of your screen.

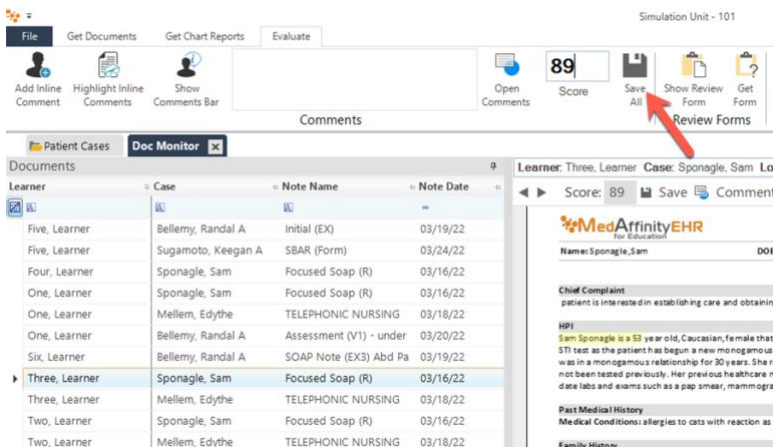


Note: Comments will automatically appear highlighted in the preview window, and you will see all your comments on the far right side of the screen. To remove the highlighting or the comment bar, de-select the “Highlight Inline Comments” and “Show Comments Bar” buttons, respectively, at the top left of the screen. To make them re-appear, click these buttons again so they are highlighted.

Tip: If you wish to edit or remove a comment, select the text in the preview window that corresponds with the comment. This will bring that comment box to the top of the list on the right. Then, at the bottom of that comment’s text box, click “Remove.” Be sure you are hitting “Remove” on the correct comment box! Similarly, to edit a previous comment, select the text in the preview window that corresponds with the comment you wish to edit. This will bring that comment box to the top of the list. From there, make any changes within the comment box, and hit “Save.”

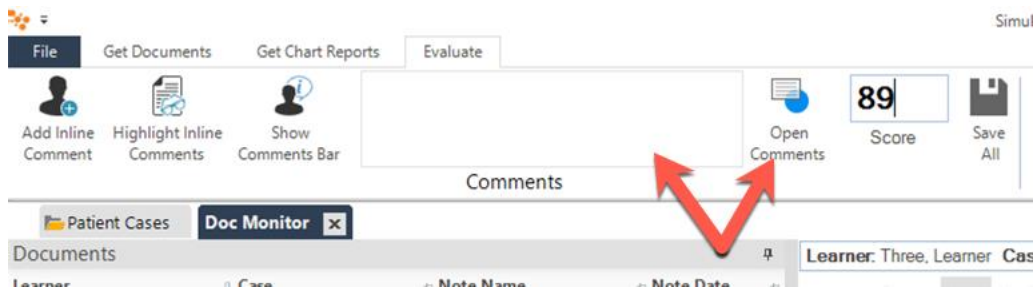


- When you are done with inline comments make sure you click “Save” to make sure all the comments are saved to the document.

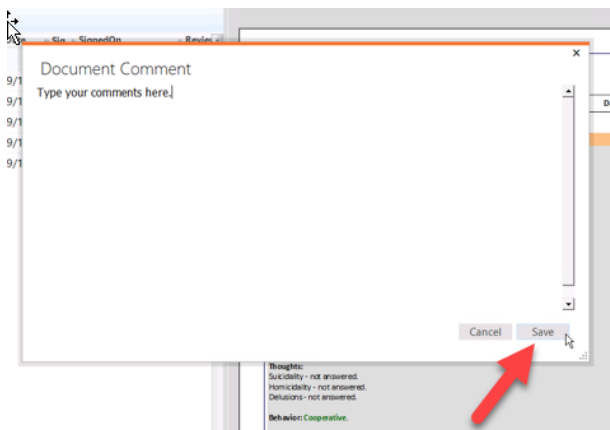


OVERALL COMMENT

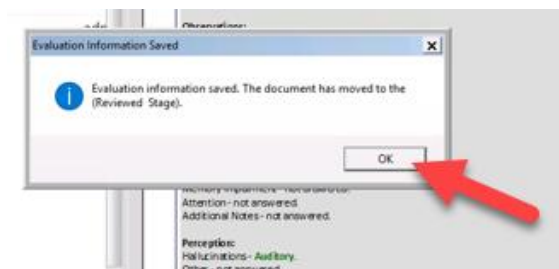
- To make an overall comment of the learner's work, you just click within the comment box or click on "Open Comments".



- When the comment box opens, you can type your overall comment in there.
- Once you have completed making your comment, click "Save" at the bottom right part of the comment box.

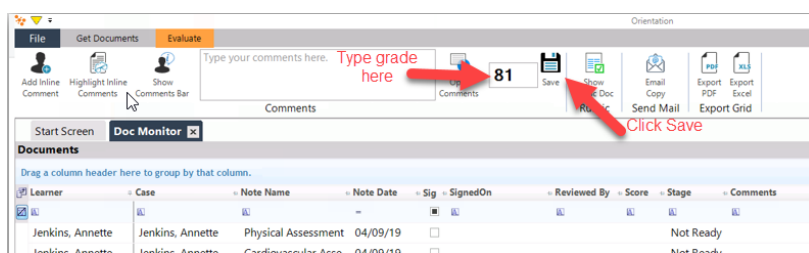


- Click "OK" in the Evaluation Information Saved box.



ENTERING GRADE

- To enter a grade for that document, type the grade into the text box to the left of the save button then click save.



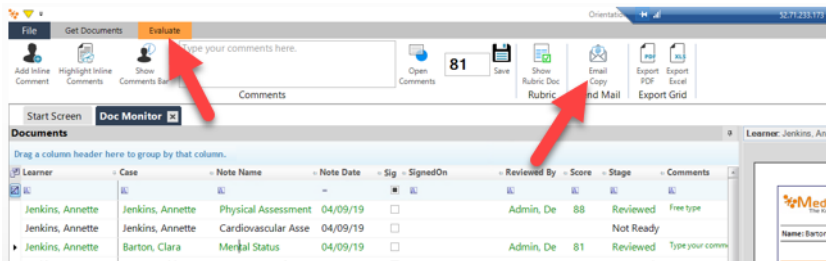
- Once a grade is saved to the learners note, the learners note stage will go from "Ready" to "Reviewed"

date	stage	Reviewed By	Score	Stage
04/09/19	Not Ready			Not Ready
04/09/19	Reviewed	Admin, De	81	Reviewed
04/09/19	Not Ready			Not Ready
04/09/19	Reviewed	admin		Reviewed

The learners note will go from "Ready" to Reviewed.

EMAILING FROM THE DOC MONITOR

- In the "Evaluate" tab click "Email Copy".



- You can email the document as a PDF or Word document to the learner or to yourself (the email addresses will automatically populate). When the email is ready to be sent, click "Send".

Send Email Copy

PDF PDF Word Include Comments Include Score Report

To Learner To Me

To: _____

Subject: Document sent from a MedAffinity EHR System.

Attachment: MedAffinityDocument

Message: Client ID: 217
Document Name: MedAffinityDocument

This document was sent from a MedAffinity EHR System.

View Attached Cancel **Send**

CLOSING THE DOC MONITOR

- Click "X" on the tab at the top of the document list to go back to the patient list.

