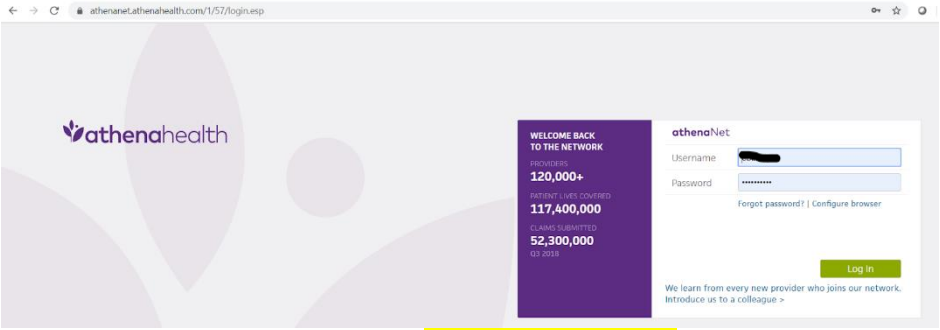
TENNESSEE CHARITABLE CARE NETWORK

Step-by-step Instructions for Athena:

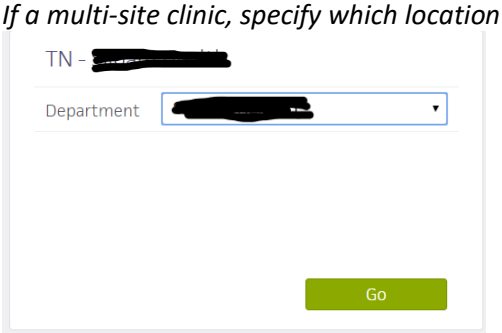
Navigating the Chart & Documenting an Encounter

Login

1. Open a web browser and go to: athenanet.athenahealth.com
2. Type in username and generated password → Log In



3. Confirm department is listed as "Organization Name" → Go
   If a multi-site clinic, specify which location needs to be selected.

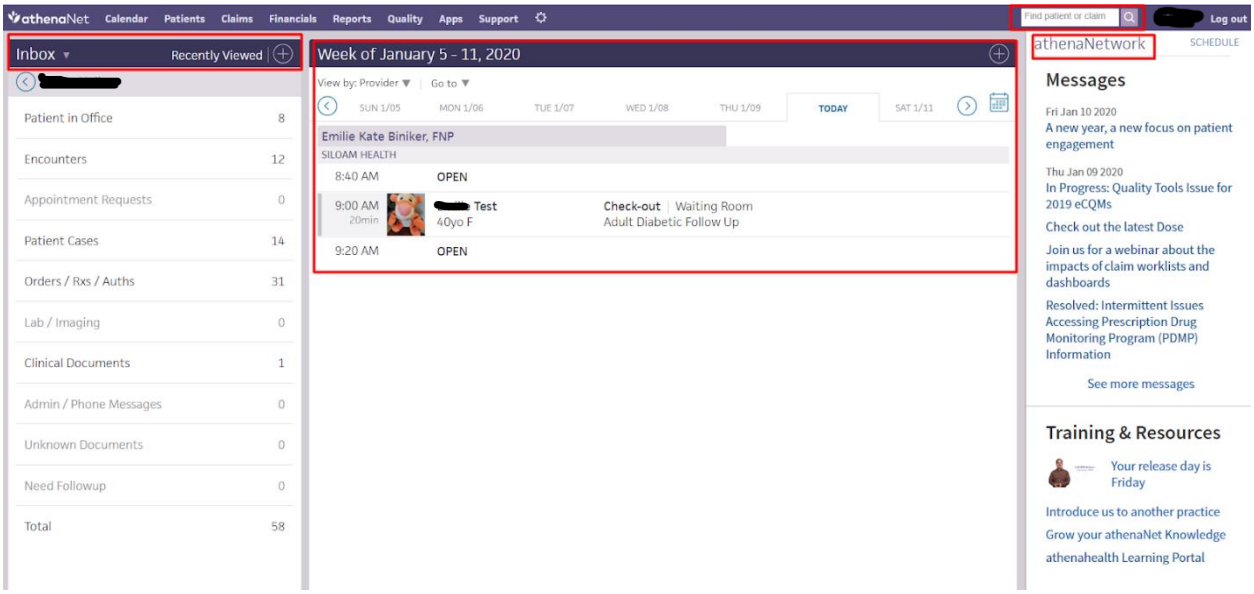


4. Once you login, it will prompt you to create security questions and a new password. Please complete this information and record it in a safe place. Password will expire every 60 days and need to be reset.
5. To open the EHR, select "athenaNet" from whatever page you are on (in the example below, navigating from Onboarding Dashboard to athenaNet)

Reviewing Today's Schedule

Once you have completed the steps above including selecting "athenaNet" to open the EHR, the page below will appear.

- L column: **Inbox -** Can change view to see by document type. Encounters = unsigned notes. Please confirm this is 0 before you leave your shift.
- Center: **Schedule -** Use (+) to add your name to the schedule (if needed).
- R column: athena news, training information, links to articles, etc.



Today's schedule will automatically appear. See the schedule colors (below) to determine the status of a patient from check-in to check-out.

- If you work with a nurse, **orange "Ready for Staff"** means the nurse needs to complete the intake process/documentation. When the color changes to **green** and says **"Ready for Provider",** you can now open the note and document the encounter.
- If you bring back your own patients without a nurse (i.e. _____), it will immediately say **"Ready for Provider"** and color-coded **green.** No nurse intake needs to be completed for this visit.

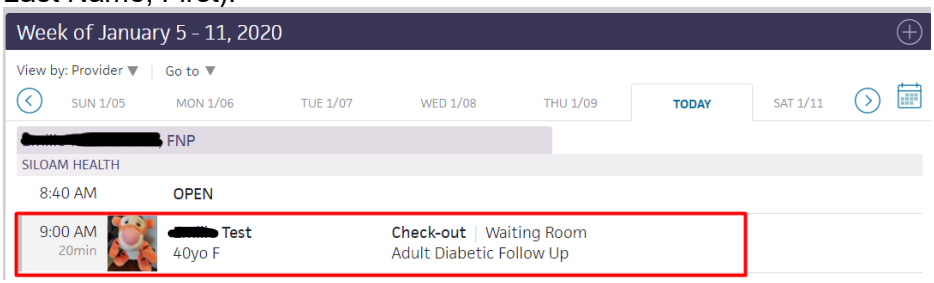
Clinician View Schedule Colors

- **No highlight:** The patient has not yet arrived. The reason for the visit should be listed on the right of the patient's name.
- **Purple:** The patient has arrived (Arrived), and the check-in process has begun.
  - Note: he front desk staff has clicked "start check-in," but check-in is not yet complete.
- **Orange:** The patient is checked in and ready for staff (Ready for staff).
  - Note: The appointment should appear in the Encounters bucket of the clinician home page, and the color should match the schedule color.
- **Blue:** The patient is with staff (With Staff), and the Intake process has begun.
- **Green:** The patient has completed Intake and is ready for the provider (Ready for provider).
- **Teal:** The patient is with the provider (With Provider), and the Exam process has begun.
- **Gray:** The patient is ready for checkout (Checkout)/encounter is open.
- **No highlight:** The patient has checked out.
- **Gray text:** The encounter is closed.

Basic Navigation of a Patient's Chart

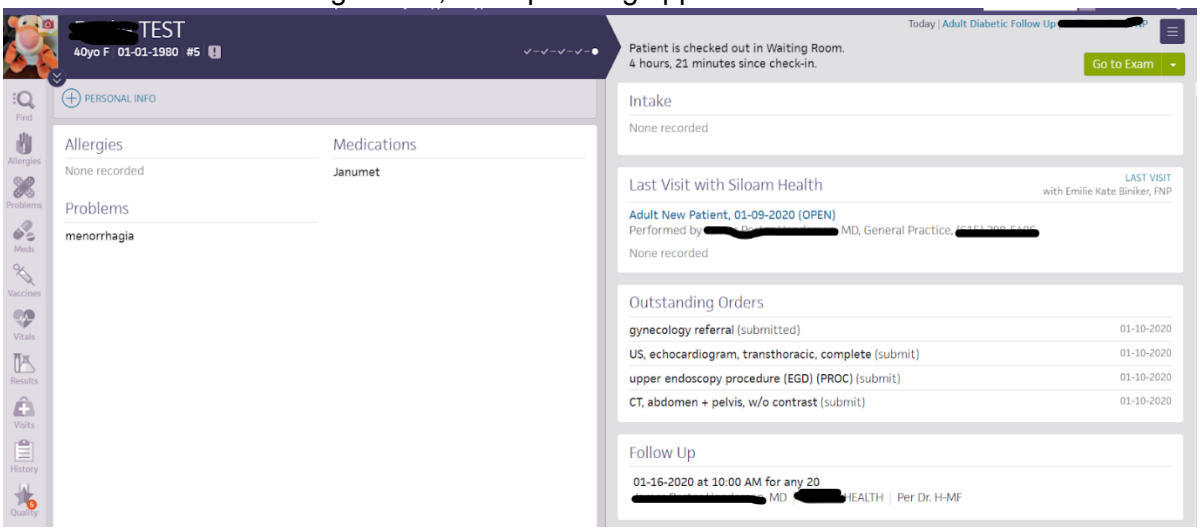
1. To open the patient's chart, select their name from the schedule (or use the search feature in top R hand corner if not on your schedule today by searching DOB, ID# or

Last Name, First).



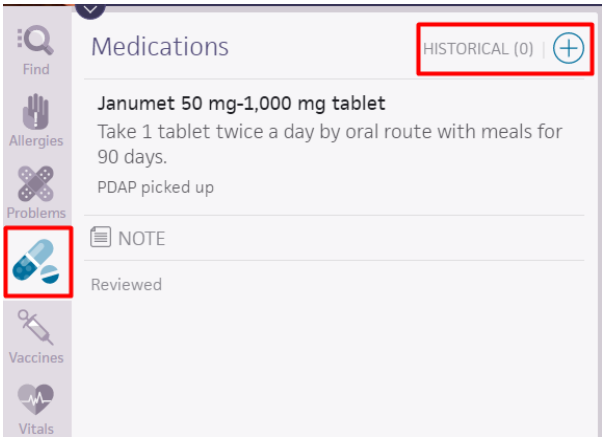
   a. The following information will show next to a patient's name on the schedule: appointment time and duration, patient's age and gender, the status of the check-in/check-out process (and color coded), the location of the patient, and appointment type.

2. Once you enter the patient's chart, it will appear as below.
   a. Top L (navy): patient banner with name & basic information. This can be customized.
   b. L column: Navigating patient's history & information (PMH, med list, allergies, imaging/lab results, Social/Family/Surgical History, etc.)
   c. L center panel: Patient Briefing such as allergies, active problems, medications (can customize this)
   d. R panel: Any intake information provided by the nurse, last visit information, outstanding orders, and upcoming appointments

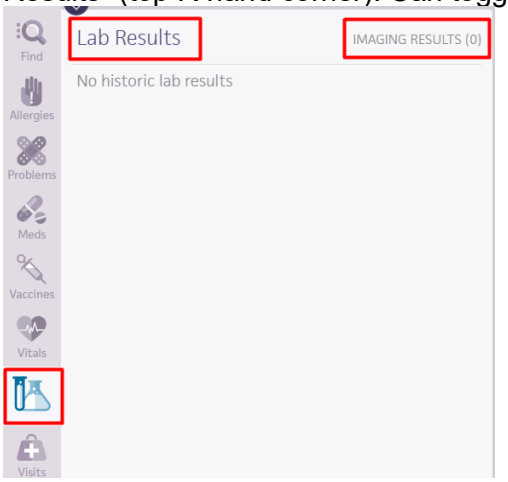


3. Utilize the features of the L column to navigate through the patient's medical information.
   a. Find: can search by type or time (chronological order) or can free text in the search bar to look for a specific test, encounter, etc. This is very useful!
   b. Navigate through the different icons to review Allergies, Problems, Medications, Vaccines, Vitals (most recent visit only), Results (labs/imaging), and history (social, family, past medical, surgical, etc.). Note that many of the tabs have Active vs Historical list view. These sections can be updated by clicking the (+). Also, additional information can be added to "Notes" under the appropriate section. To close this area, re-click the selected icon.

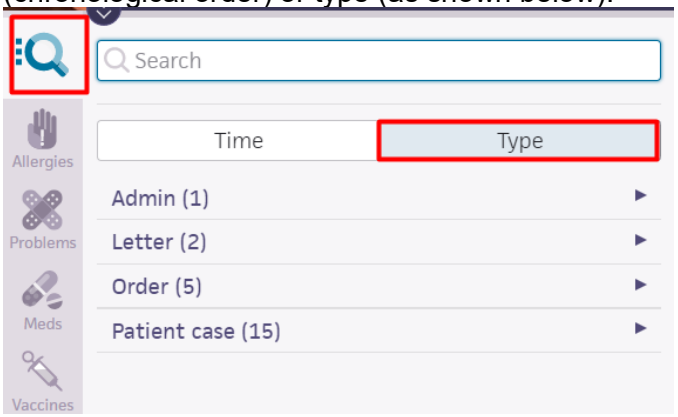
Example #1: medication list. Can select “Historical” to see previously Rx meds or (+) to add a new medicine to their list.



Example #2: Select “Results” icon to view Lab Results (current page) or select “Imaging Results” (top R hand corner). Can toggle back & forth between the two windows.

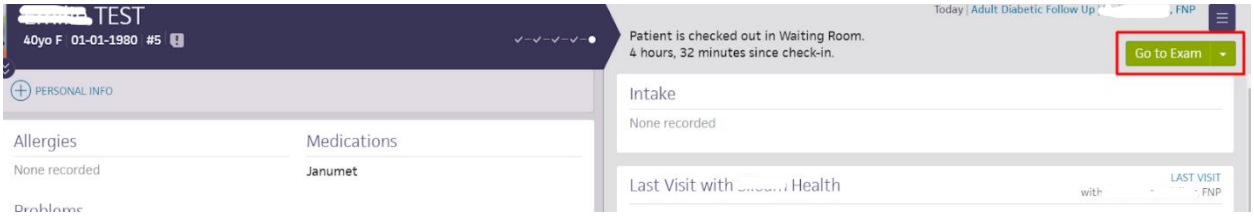


Example #3: Utilize the “Find” icon to search the chart for prior tests/imaging, diagnoses or other keywords, etc. You can type in a keyword into the search bar or view documents by time (chronological order) or type (as shown below).

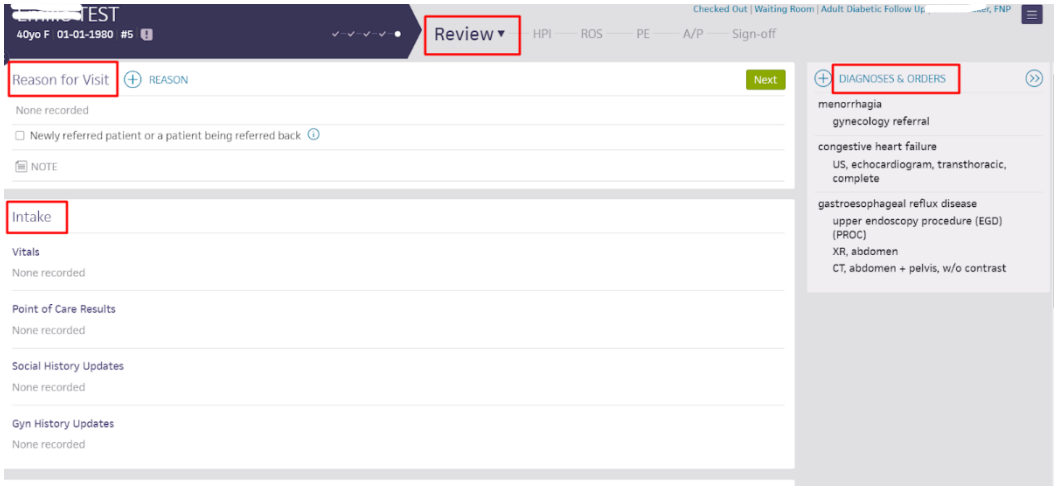


Documenting a Patient Encounter

1. If a nurse is working up the patient for you, he/she will complete the intake. The intake includes documenting the chief complaint, updating allergies and medication list (see any notes from the nurse informing you if a patient isn't taking meds as prescribed), and vitals. The nurse may go ahead and order any point-of-care tests that are needed (i.e. urinalysis, hemoglobin A1c, EKG, etc.).
2. Once the schedule status changes to "Ready for Provider", select patient's name to open the chart. Then, select "Go to Exam" (Green box in top R hand corner). *If you work up your own patient without a nurse, select the arrow to the right of "Go to Intake" to select "Go to Exam" instead to skip the intake process.*

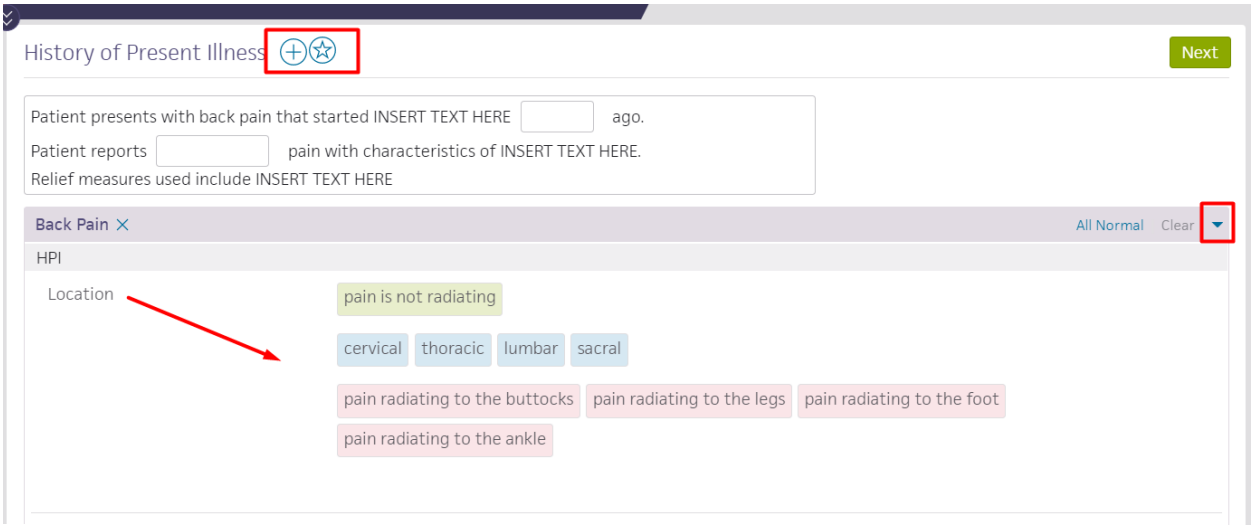


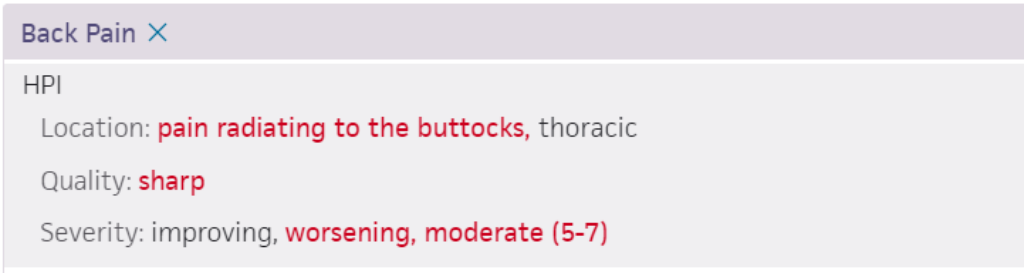
3. Once you open the Exam note, it will start on the "Review" page. This includes the Reason for Visit (chief complaint), any information added during Intake, and to the right, any Diagnoses & Orders that were already queued up by the nurse. Navigate through the note by selecting the green Next button or selecting the section of the chart to enter (i.e. Review → HPI → ROS → PE → A/P → Sign off).



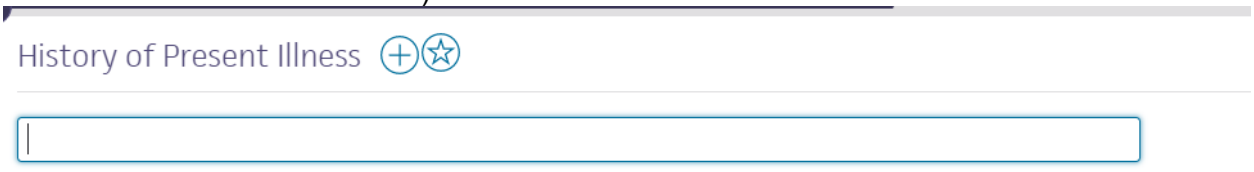
4. HPI
   - Click the **Next** button to proceed to the HPI step. The HPI section appears in the center pane, and the Exam stage navigation bar changes to highlight HPI. Click the plus icon to search for saved findings (templates you've created) or encounter templates (designed by the system). You can save templates by clicking on the star icon at the top of the section and name the template or save a text macro by clicking on the star to the right of the text box. The HPI can be free-texted using the text box rather than a template if you prefer.
   - Once you pull in a template, select a finding by clicking on the down arrow (red box to R side of image below). The status of a finding is indicated by color: Normal (gray-green), neutral (light blue), abnormal (pink). Select the components

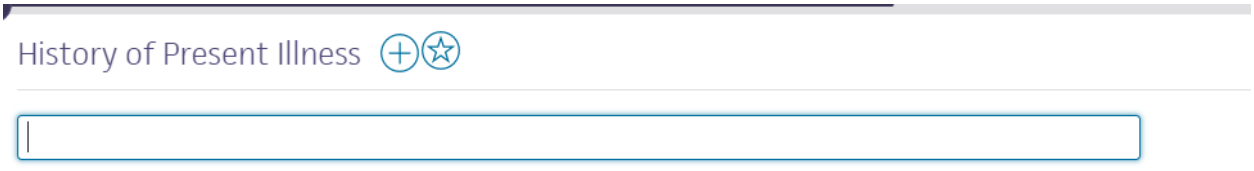
to document. Anything *not* highlighted will not show up in the HPI. At the bottom of each section, you can add a note or double click on the selected result to free text. Close the HPI template by selecting the arrow again and it will show what components have been completed (second image below).





- Also, you can utilize the text box at the top of the HPI to free text (as below). Remember, you can save text macros here if needed (and any field that has the "star" icon next to it).

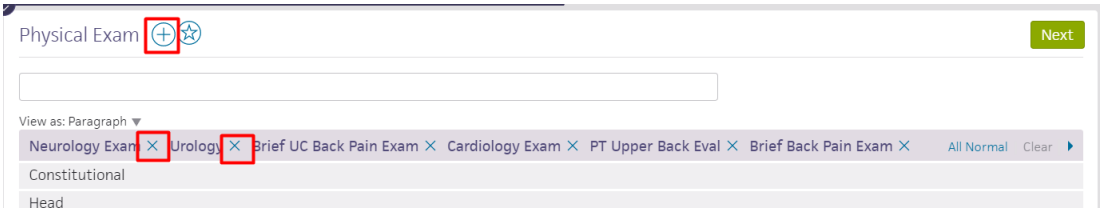




5. Review of Systems (ROS)
   - Click the **Next** button or click ROS on the Exam navigation bar to proceed to the ROS step. The Review of Systems section appears in the center pane, and the Exam stage navigation bar changes to highlight ROS. Click the plus icon (+) to search for saved findings or previous encounter templates. A list of your commonly used templates and saved findings for this type of encounter and patient history appears.

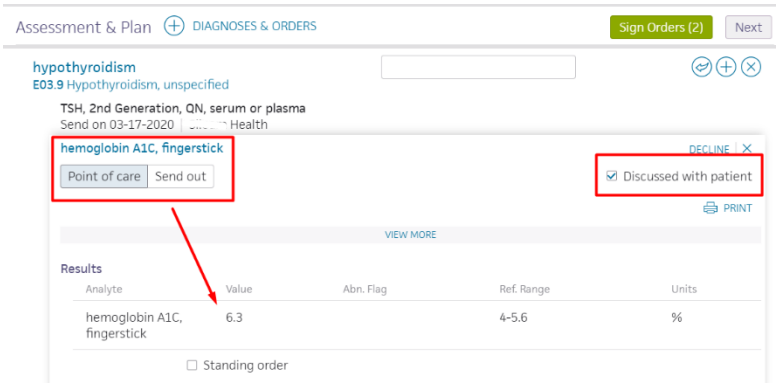
- Click an item in a template to expand the section.
- Select a finding. The status of a finding is indicated by color: Normal (gray-green), Neutral (light-blue) or Abnormal (pink). Abnormal findings appear in bold in the summary view.
- Tip: You can click the All Normal or Clear links at the paragraph or sentence level to reset all items to normal status or clear all items in the exam templates.
- To bypass ROS, select "ROS as noted in HPI" at the bottom of the HPI section.

6. Physical Exam (PE)
   - Click the **Next** button or click PE to proceed to the PE step. The Physical Exam section appears in the center pane, and the Exam stage navigation bar changes to highlight PE.
   - To add a PE template, click the (+) icon (the system may pull in some templates for you also if an encounter plan was generated from the Reason for Visit). Select arrow to open template and click through the boxes. A text box also exists to free text if needed (at the top or in each section).
   - If you are performing a procedure, select the (+) next to Procedure (at the bottom of the PE section) to select an appropriate template. *This may generate a charge in the billing tab if the procedure is associated with a fee*.
   - Since Athena is a "smart system", it may pull in a PE template based on the Reason For Visit that was selected. Click the (X) next to the template name (as below) if you would like to remove it (but will be blank unless you add something).

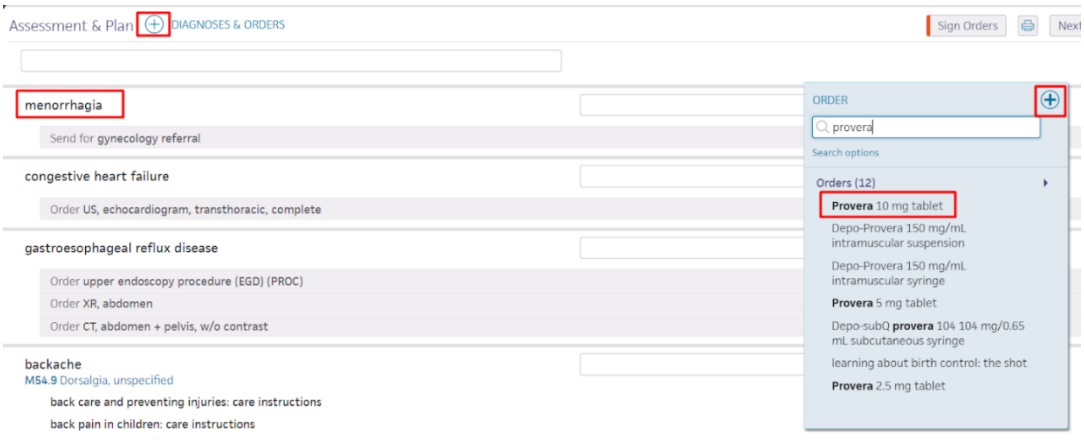


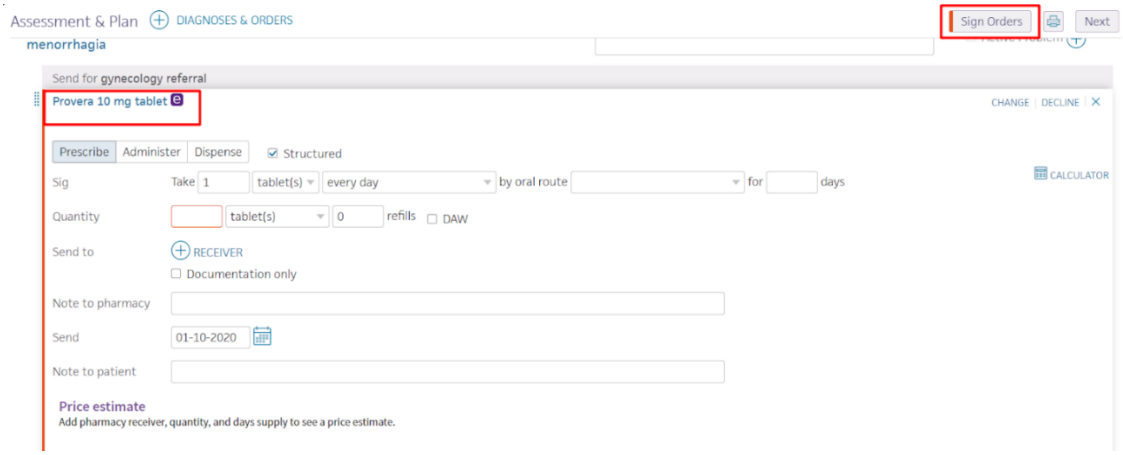
7. Assessment and Plan (A/P)
   - Click the **Next** button or click A/P to proceed to the Assessment & Plan step. Remember, the Diagnosis & Orders list was on the R throughout the entire encounter, so you can add to this at any time. *Note*: Items that need attention are highlighted with an orange bar (i.e. aren't mapped, incomplete documentation, missing an ICD-10 code, etc.).
   - Add diagnoses and orders using the (+) at the top. Your most frequently used selections appear at the top of the list. All orders must be mapped to a diagnosis, so you can drag & drop to map (or once a diagnosis is selected use the (+) sign to the right of the diagnosis to auto-map (image below)). Any point-of-care (in-house) tests must be ordered from the POC list on the dropdown menu (from the + sign) and marked as "Discussed with Patient" once the results are entered to close the order (otherwise it will appear in your inbox).

TCCN
TENNESSEE CHARITABLE CARE NETWORK



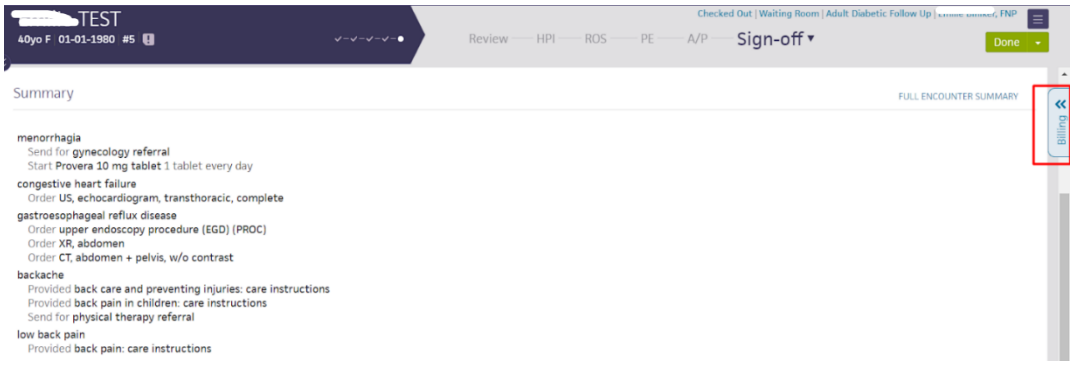
- If ordering labs, please make sure they are ordered through lab name. Include specific ordering instructions, pricing information, test availability, etc here.
- Prescribing: Once a diagnosis is selected, use the (+) to the R of the diagnosis to search the medicine name. Common doses will show and select appropriate option (1st image below). Once the medication is selected, click on name to open box to complete prescription details (2nd image below). Please confirm sig, quantity, refills, pharmacy, etc. Once you complete the entire A/P, select Sign Orders (as below) to send electronic prescription to pharmacy. Prescriptions can also be printed using the printer icon next to the prescription (must select “documentation only” first then sign order before printing). A signature must be on file to send prescriptions electronically or print with signature.





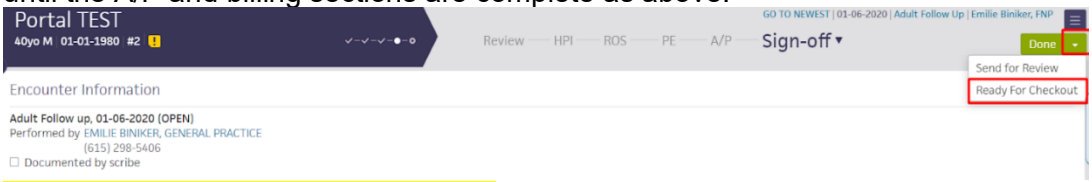
- Sign Orders: All orders in the A/P must be signed by the provider to be submitted. When the **Sign Orders** button is green, click the button to sign all the orders and complete the A/P step. All orders will be submitted when this is selected (send to lab, pharmacy, etc.) so should be done at the completion of the encounter or before a patient is sent to the lab.

8. Sign Off
   - After you complete the A/P step of the Exam stage of the encounter, click **Next** button to proceed to the Sign-off stage. The Sign-off Summary appears in the center pane, and the Exam stage navigation bar changes to highlight Sign-off. The Encounter Information and Summary sections appear at the top of the page (select Full Encounter Summary to view your entire note and ensure all orders are correct.
   - The billing tab must be completed before a patient can check out. From the Sign-off stage of the encounter, select the Billing tab (right side, see image below) and enter charges for the visit (E&M code, select the check box by billing for all orders we will charge the patient for. Will turn green when mapped with CPT code).
     - *Modify per clinic's custom workflow:* A CPT code needs to be documented for anything that was done in-house (i.e. procedures, point of care testing) or will be sent off that day (i.e. lab results). Tests that will be ordered in the future (i.e. off-site imaging) do not need to have a CPT code associated with it (and volunteers should defer to PCP to order diagnostic tests). If the correct test is ordered in the A/P per the pricing list, then it will automatically be mapped with a CPT code.
     - An E&M code needs to be documented for a visit. Use your best judgement from what you documented and visit complexity (i.e. 99212, 99213, or 99214).
     - Click **Save & Mark Reviewed** to save any changes made



Sign Note & Routing for Co-signature

1. When it is time for the patient to check out, please make sure the A/P, Sign-off (Billing tab) are complete. The remainder of the note is *not* required for a patient to check-out but will be required to sign a note.
2. *Customize based on clinic's workflow*: Patient check-out: In the Sign-off section of the note, select the downward green arrow (image below) and "Ready for Checkout". This will change the patient's status on your schedule and notify the front desk they can charge the patient for all services received during today's visit. This should not be done until the A/P and billing sections are complete as above.



3. *Customize based on clinic's workflow:* Once your entire note is complete, select "Close & Send for Signature" and type in the name of the supervising MD to cosign the note. Volunteer specialists will also route all clinic notes to the staff PCP, so place any messages in the A/P section of the note (i.e. if pt needs referral for diagnostic tests or specific f/u recommendations).

TENNESSEE CHARITABLE CARE NETWORK

Chart Tabs Key

	Name	Description
	Actions menu	• Quickview • Chart export
	Default pharmacy	Indicates your default pharmacy
	Delete or remove	• Remove problem • Stop medication
	Favorites	Save a macro, template, or preferred provider
	Flowsheet or Expanded view	View a flowsheet
	Plus	Click to add or select items
	Preferred pharmacy	Indicates your preferred pharmacy
	Settings	Access settings pages
	View less	Collapse
	View more	Expand
×	X	Remove an item from a list