

Timeline

Last Modified on 03/20/2025 12:08 pm EDT

The Timeline within the Summary chart tab allows a user to see key data points that have been added to a patient's chart over time. Each clinical marker can be hovered over to see basic information about that new chart time. Once clicked, more details are displayed. Users can customize this view as they see fit.

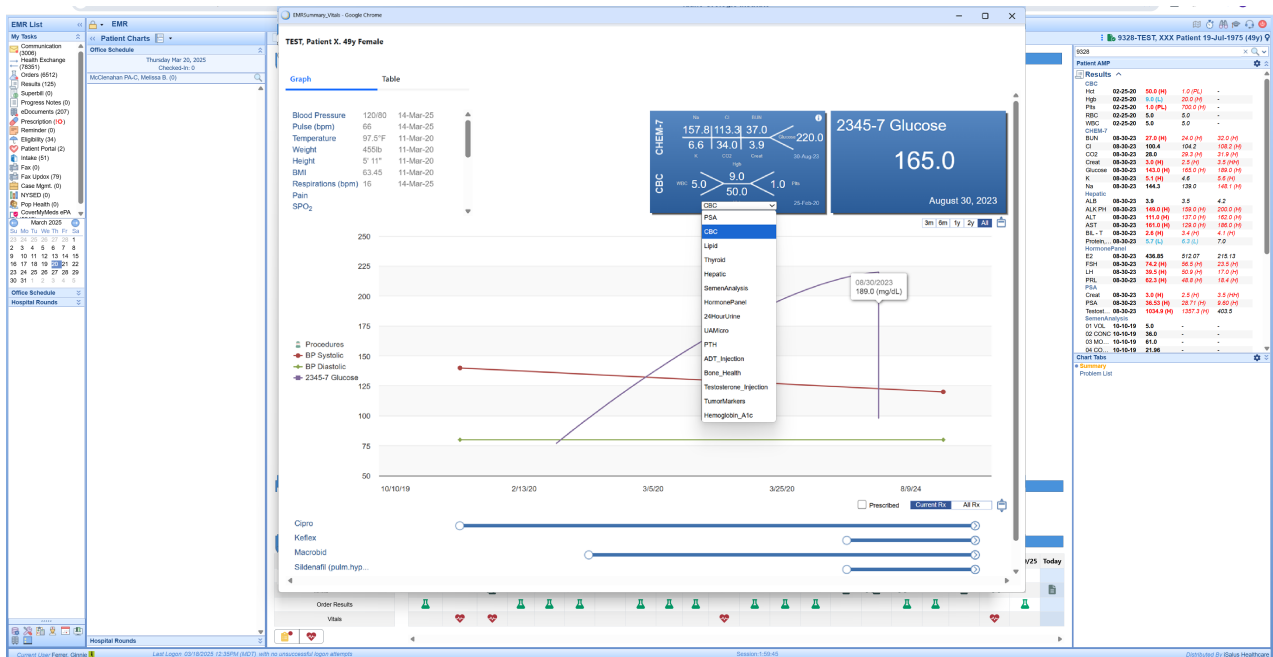
Vitals Clinical Marker

The **Vitals** clinical marker will be added to the timeline whenever a new vital record is saved in the Vitals chart tab. While the information is originally triggered by a new vital record, a large amount of information can be viewed in the Vitals Trends screen.

Graph View

When the Vitals Clinical Marker is selected, the **Graph View** will be displayed. This allows a user to visualize changes to vitals, lab results, procedures, and medications over a period of time.

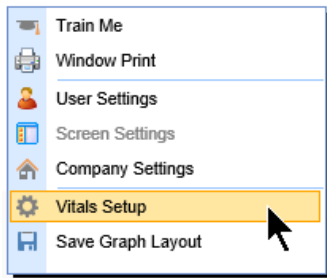
- Users can click on the Vitals or Lab Result data points within the screen to add the values to the graph.
- Users can filter the data by time range
- Users can customize the screen to meet their unique needs



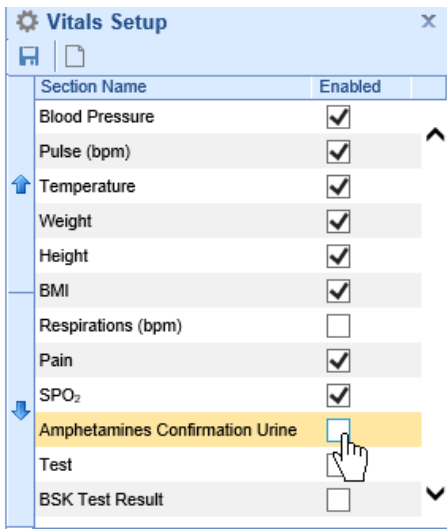
Customize the Vitals List

If you would like to change the order or decide which options are available to you within the list of Vitals section in the upper left, follow these steps:

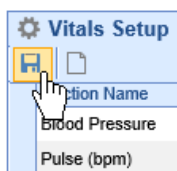
1. Right click over the window
2. Select **Vitals Setup**



3. Use the arrows to move items up or down in the list. Use the **Enabled** indicator to turn items on or off.



4. Use the **New** button to add custom data points to the list. NOTE: Please contact iSalus Support for this.
5. Click **Save**



Customize the Procedures List

Users can choose to have procedures that are billed for in the office to be added to the timeline. This is done by pulling in specific CPT codes from the billing system. This is setup as both a Company and a User Setting.

User Setting: [Procedure List for Vitals Timeline Wireframe Summary](#)

Company Setting: [Procedure List for Vitals Timeline Wireframe Summary](#)

Customize the Lab Results List

Users can choose to have a list of lab results groupings added to the timeline. This is done by pulling in electronic or hand-entered lab result values from across the application. The exact list of options available are setup as both a Company and a User Setting.

User Setting: [Wireframe List for Vitals Timeline Wireframe Summary](#)

Company Setting: [Wireframe List for Vitals Timeline Wireframe Summary](#)

Save the Graph Layout

Once you have determined which items you would want turned on/off and graphed out together, you can save this graph layout so that it appears each time this window is opened.

1. Configure the window to your liking by:
 1. Adding or removing vital items from the graph
 2. Adding or removing lab results from the graph
 3. Setting the time frame that you care about
 4. Deciding if you want to see All or Current Medications. And, if only Prescribed medications are displayed.
2. Right click over the window
3. Select **Save Graph Layout**

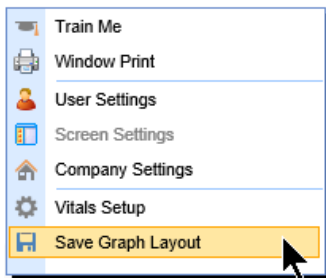



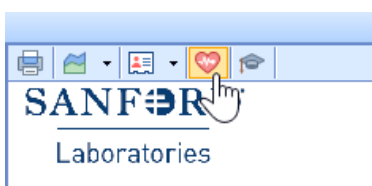
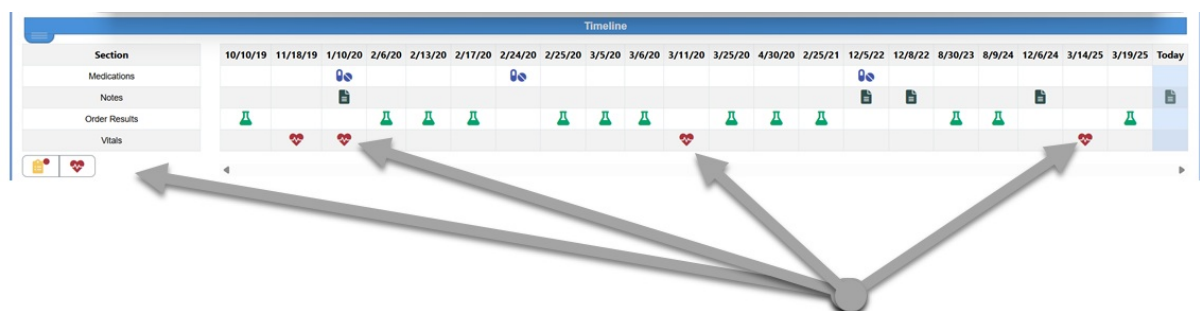
Table View

Users can switch to the **Table View** by clicking the toggle in the upper left hand corner of the window. The information displayed is the raw data representation of the same information shown in the Graph View. The settings described above will also control the Table View.

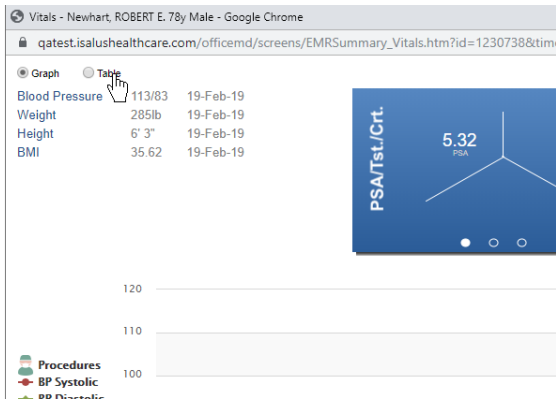
Access the Table View

To see the Table View, follow the below steps:

1.  click on the **Vitals Clinical Marker** icon anywhere you see it on the Timeline or when viewing a Lab Result to launch the data trends.



2. Select the **Table** radio option in the upper left hand corner.



3. The **Table View** is displayed.

EMRSummary_Vitals - Google Chrome

TEST, Patient X. 49y Female 3m 6m 1y **2y** All

Graph Table 📄 🔄

	03/14/2025	08/09/2024 📌	08/30/2023 📌	
E2	-	-	32.93 pg/mL	
FSH	-	-	7.3 mIU/ml	
LH	-	-	3.9 mIU/ml	
PRL	-	-	2.1 ng/dl	
PSA 📄				
Creat	-	-	2.5 mg/dL	
PSA	-	-	0.69 ng/ml	
Testosterone	-	-	79.7 ng/dl	
UAMicro 📄				
Blood	-	Negative	-	
Glucose	-	Negative	-	
Leukocytes	-	Negative	-	
Nitrite	-	Negative	-	
▼ Vitals				
BP	120 / 80 mmHg	- / -	- / -	
Pulse	66 bpm	-	-	

Notes Clinical Marker

The **Notes** clinical marker will be added to the timeline whenever a new SOAP Note is saved in the SOAP Notes chart tab. In addition to simply seeing the note saved on a given day, this screen also allows a user to copy forward an encounter quickly.

Smith, SIMS H. (SIMS) B

Allergies

NO KNOWN ALLERGIES

Reviewed
07/25/2019

Medications

multivitamin oral
Vitamin D3 oral

Reviewed
07/25/2019

Problems

History of radical retropubic prostatectomy (situation)
Encntr for follow-up exam after trtmnt for malignant neoplasm
Calculus of kidney (Kidney Stone)
Elevated prostate specific antigen [PSA]
Asymptomatic microscopic hematuria
Personal history of malignant neoplasm of epididymis

Reviewed
07/25/2019

Clinical Messages

07/25/2019
Office Visit- Allison Lee Np-c (Awaiting Final Sign-Off)

Timeline

Medications																				
Notes																				
Immunizations																				
Order Results																				
Communications																				
eDocuments																				
Vitals																				
Health Exchange																				
	5/12/17	5/22/17	5/25/17	5/16/18	5/18/18	5/22/19	6/3/19	7/19/19	7/25/19	12/3/19	12/4/19	Today								

Viewing Past SOAP Notes

When the Notes Clinical Marker is selected, the Notes from that day will be displayed.

07/25/2019 Office Visit -

Problem List
 49. Active - Z9079 - History of radical retropubic prostatectomy (situation)
 50. Active - Z08 - Encntr for follow-up exam after trmt for malignant neoplasm
 51. Active - N200 - Calculus of kidney (Kidney Stone)
 52. Active - R9720 - Elevated prostate specific antigen [PSA]
 53. Active - R3121 - Asymptomatic microscopic hematuria
 54. Active - Z8548 - Personal history of malignant neoplasm of epididymis

History
 History recorded by McKenzie

History of Present Illness
 Hx of prostate cancer.
 -Underwent radical prostatectomy in 1997
 -PSA rose to 0.37 and has remained stable in that range for years.
 Last PSA was 0.40 on 6/3/19.

Hx of SUI and has previously underwent bulking agent with minimal help.

Hx of stones.

He states he developed gross hematuria Friday after mowing his yard Thursday afternoon. Hematuria resolved Friday afternoon and he has had no further episode since that time. No associated dysuria, flank pain, or voiding difficulty.

He is asymptomatic today. UA is unremarkable.

Physical Exam - Male
General:
Appearance: Development is normal, Nutrition is normal, no acute distress
Neck: Overall appearance is normal
Assessment of respiratory: Intercostal retractions normal, Use of accessory muscles normal
Orientation: Orientated to time, Orientated to place, Orientated to person
Mood and affect: No anxiety, Not agitated
Skin: Warm, Dry

Assessment and Plan
Treatment Plan

- General Counseling**
 - Discussed possible hematuria work up with pt today. Pt verbalized understanding and declines workup at this time.

Allergies
 • NO KNOWN ALLERGIES

History of radical retropubic
 Encntr for follow-up exam af
 Calculus of kidney (Kidney S
 Elevated prostate specific ar
 Asymptomatic microscopic h
 Personal history of malignan

Re
 07

states that he is still able

7/25/19 12/3/19

If more than one note is saved on a given day, you can use the drop down at the top of the screen to select different notes.

05/18/2018 Office Visit - Local Administrator

05/18/2018 Office Visit - Local Administrator

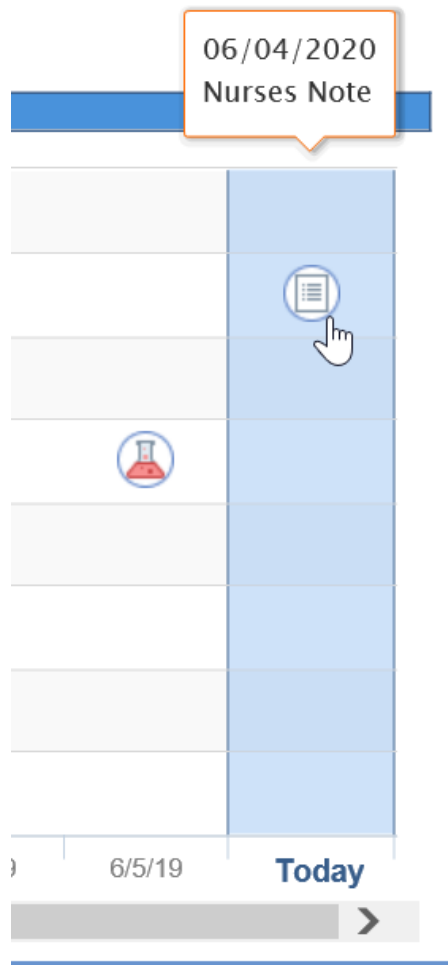
05/18/2018 Other - Local Administrator

05/18/2018 Correspondence - Local Administrator

05/18/2018 Lab Report - Local Administrator

Viewing the Nurses Note

The "Nurses Note" is a special type of note that is always available on the "Today" section. This is available so that providers or staff can click in a single place to review everything that has happened today for this patient. This section is 100% customizable for the individual user. These customization can be made in the Letter Setup window.



Copy an Encounter

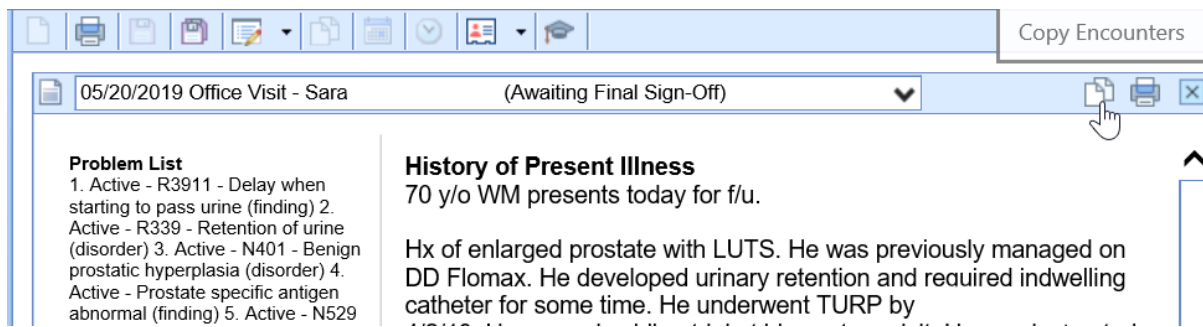
When viewing a past SOAP Note, it may be helpful to be able to "Copy Forward" all or some of the templates that were used to generate that note. The 'Copy' button allows this to happen in a single screen.

Notes about the Copy Encounter Feature

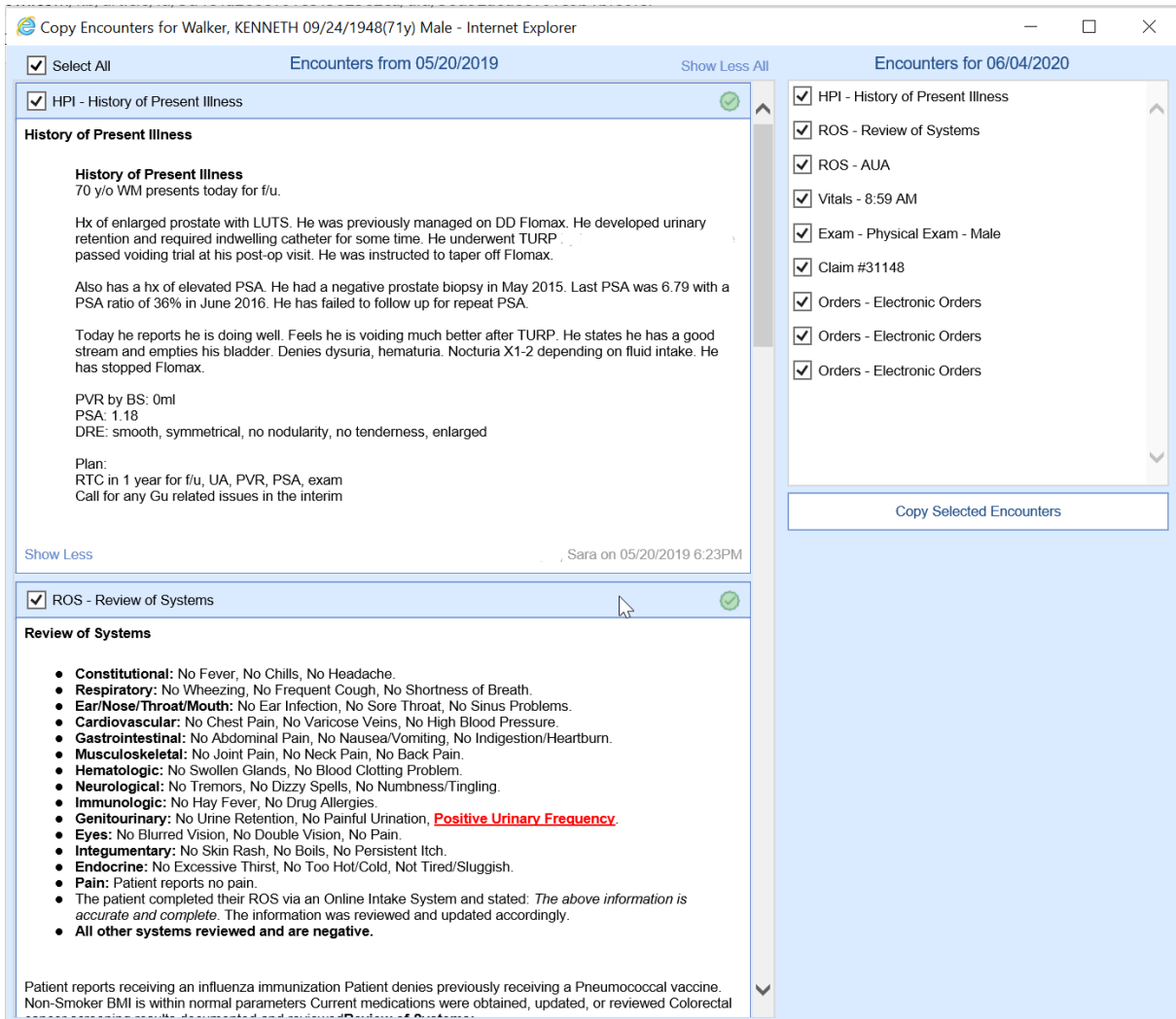
- If a record has already been created that day (i.e. vitals have already been saved), by default the system will recognize this and not auto-select vitals to be copied.
- Only information stored in a template can be copied forward. If you typed information directly into the note and not in a template, this can not be copied forward.
- You can not edit data after it is copied on this screen, you must open the corresponding chart tab to make any additional changes. Because of this, we highly recommend activating the 'Display today's History' settings for the chart tabs that are needed. You can learn more about that by looking for the "Display Today's History" user setting for each cart tab.

To copy an encounter, follow the below steps:

1. Click the **Copy** icon on the toolbar.



2. Use the window to select or deselect which encounter-based templates will be copied forward automatically.



3. Click the **Copy Forward** button once you have made your selections. These templates will be auto-created and auto-saved. You can navigate to the chart tabs to make changes to the copied templates if necessary.

