Viewing Document Pointers and Accessing Previous Medical Records in Soarian

Viewing Document Pointers:

- Log into Soarian

- Perform a patient search & Select patient
  - Can perform search by Name, Medical Record Number, Account Number, etc. via **By Name** or **By ID** tabs.

- Select the document type you are searching for via drop down menu on the left hand side of window

- For Example: To view Transcribed Reports
  - Select Transcribed reports from the drop down menu
Click on the icon (circled red) to view the document.

When selecting the icon, a document view window will open.

To exit viewer window, select the X on the top right of the viewer.

- Patient Demographics Bar:
  - Patient Level: Displays Patient Name, Date of Birth, Sex, EPN, Current Age.
  - Encounter Level: Displays Admit Date, MRN, Facility, Discharge Date, Encounter Number, GPI.

- Information button – Displays additional details regarding patient level and encounter level information.

- View Tools – displays additional options to customize view: Zoom, Best Fit Width, Best Fit Height, Rotate Image, etc.

- Print – Local Print options or open output queue window.

- Account Settings – Access personal user settings.

- Help Window – Can text search additional questions for McKesson OneContent.

- Document Navigation – The arrows will help you navigate through the pages of the document.
• This viewer also gives the user the ability to perform text searches in the document
  o To do so, type your text in the bottom right of the document viewer

  ![Search Bar](image)

  - For example:
    
    ```
    - Present Illness:
      - A 47-year-old gentleman with no past history. Diagnosed with borderline hypertension. He has been disabled since 2002 secondary to severe arthritis. He cannot walk a couple of blocks without significant exertional shortness of breath. He has had no recent respiratory illnesses, fevers, or chills. History: negative Family, Social, and past medical history.
    
    He has no known allergies to medications.
    
    Recent Past History: Include more recent surgeries.
    
    Previous Medical History: Include past left breast surgery.
    
    Footnote: Include recent surgeries.
    
    ![Search Result](image)
    
    - The word “Chronic” was typed into the search box feature. The word Chronic will highlight in the document every time the word appears.

Accessing Previous Medical Records:

• When you are in a patient’s account in Soarian, the Previous Medical Records option is listed in a drop down menu from the patient toolbar:

  ![Toolbar](image)

  - Select the icon and a dropdown list will appear
    o Select Previous Medical Records from the list of options

  ![Dropdown List](image)

  - This will open another viewer window and display the patient’s entire encounter history.
• From this window, you will have the ability to view documents across all the encounters or view specific encounter documentation.
  ○ In the screenshot above:
    ▪ To view documents across ALL patient encounters, select:
      (You can select the patient name which is a hyperlink or you can launch into all the encounters by select the Folder Icon without selecting individual encounters)
      
      | 5897337 | 8 | 3100191992 |
      | 5897337 | 8 | 3100191971 |
      | 5897337 | 8 | 3100191448 |

    ▪ To view documents for one specific encounter, select:
      (You can double click on a single encounter or check off the account you wish to open and launch into it via the Folder Icon)

    and then

    • For example, the following screenshot displays how to view documents across all patient encounters:

    ○ To exit the view, select the X on the top-right of the window.