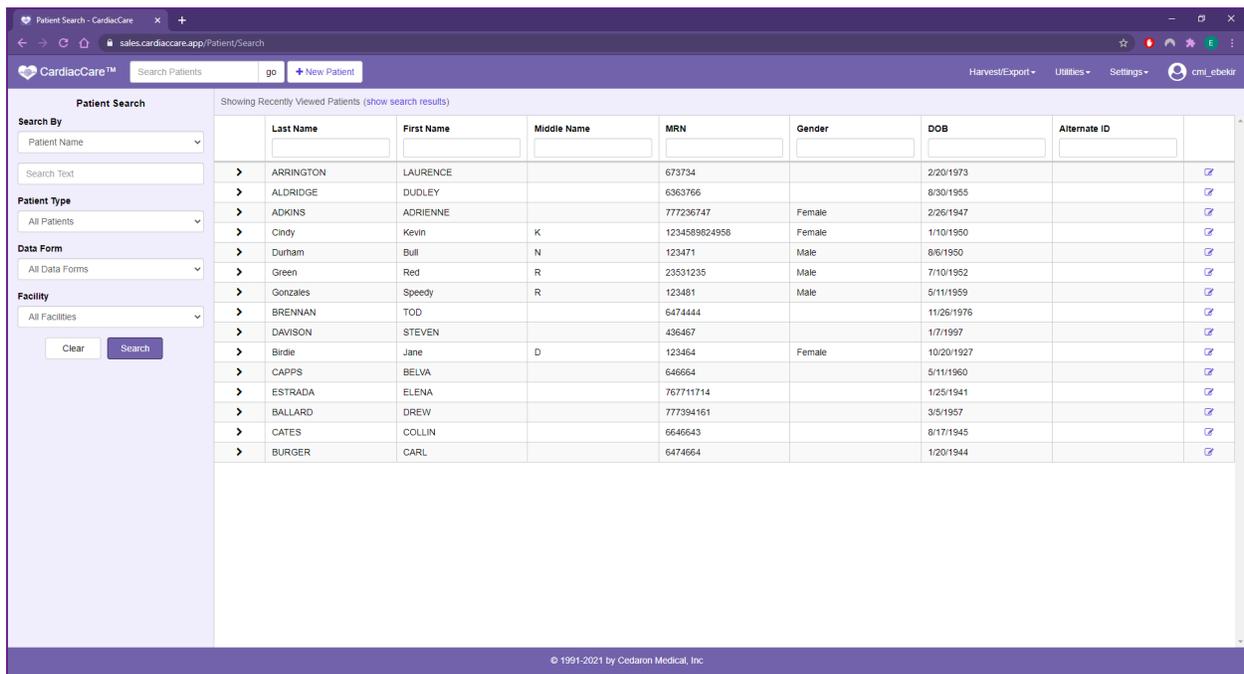# CardiacCare Patient Search

The homepage of CardiacCare is an intuitive patient search page that makes it simple to search for specific patients using various desired search criteria as well as view the most recently accessed patients.

When CardiacCare is first opened, as well as when the CardiacCare logo in the upper left corner is clicked, you will be brought to the patient search screen.

Anytime you are using CardiacCare and want to search for or access a new patient, you can simply click the CardiacCare logo and you will be brought to the Patient Search screen.


By default, the CardiacCare home screen/patient search screen will show the last fifteen patients that were accessed. This setting can be changed, if desired, to display a smaller or larger number of recently viewed patients, in **System Settings**.

❖ **Important note about systems settings**: Only system admins and specific users with permissions can access the CardiacCare system settings.

➢ If you do have permissions and make changes to any settings in system settings, those settings will be changed for all your CardiacCare users in your organization.

System settings can be accessed by hovering your mouse over **Settings** then clicking on **System Settings** in the dropdown.
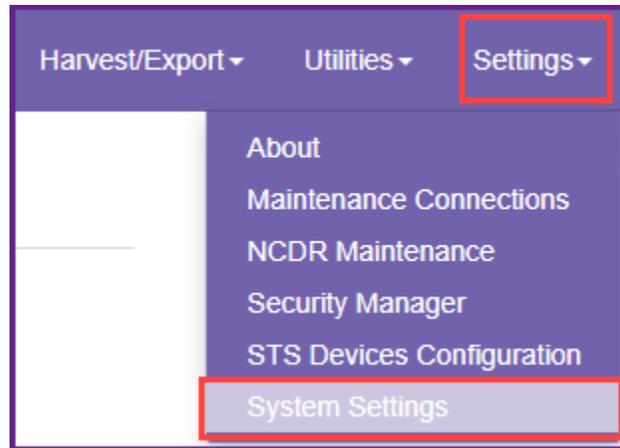
Once in system settings, scroll down to find the **Recently Viewed Patient List Size** setting and adjust the number as desired.
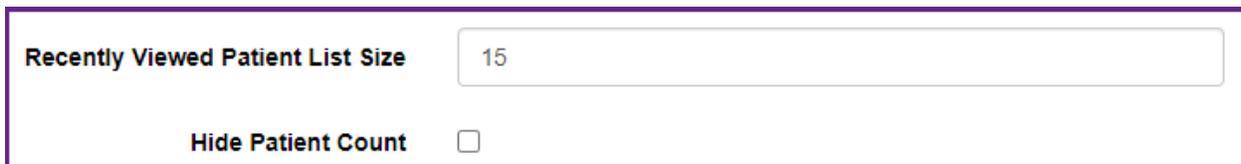
Here you can also, change the **Hide Patient Count** setting if desired (this is unchecked by default). When you perform a search, by default, the number of results will be displayed in the upper-right corner of the search screen, followed by the total number of patient's in your CardiacCare system (in red below – "34 result(s) of 2526 patients").
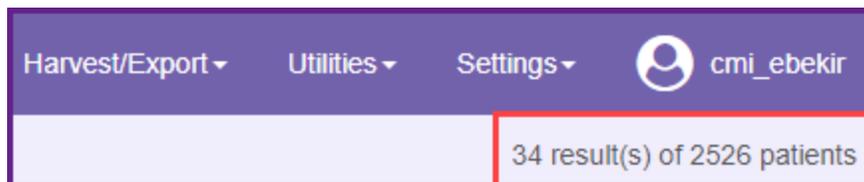
If the Hide Patient Count setting is **checked**, only the matching results number will display, without the total number of patients listed (in red below).
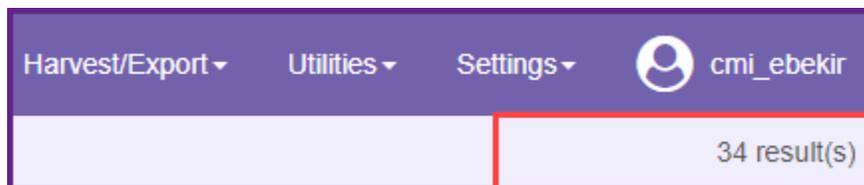
If any changes are made to System Settings, be sure to click **Save** at the bottom to save the new settings.

Using Patient Search

You may access the patient chart of a desired patient by double clicking anywhere on the row displaying that patient's information or by clicking on the paper and pencil icon at the end of the row.

You may also click on the arrow in front of a patient's last name to expand their information to display any procedures they have had. With the expanded information displaying, you may double click on the row for a specific procedure or the paper and pencil icon at the end of the row to access the corresponding data form.

You can click on the same arrow again to collapse the additional information.

Search Criteria and Search Filters

In the Patient Search panel on the left side of the screen, there will be four search criteria and search filter options:

| ❖ Search By	❖ Patient Type
❖ Data Form	❖ Facility

➢ **Search By**: Using the Search By dropdown, you may select from the standard criteria you would like to search by, such as: patient name (this is the default search by selection), medical record number, account number, procedure date, etc.

Depending on which registries an organization participates in, there may also be additional registry specific search by options available such as: NCDR patient ID, STS record ID/Operations ID, NHS number, etc.
Searching by registry specific Search By options can be especially helpful.

➢ **For example:** If you are performing QA/Data corrections for your AHA patients by comparing to the AHA site, the AHA site may be listing only the patient's AHA patient ID, and you can search their AHA ID in CardiacCare by selecting the proper Search By option.
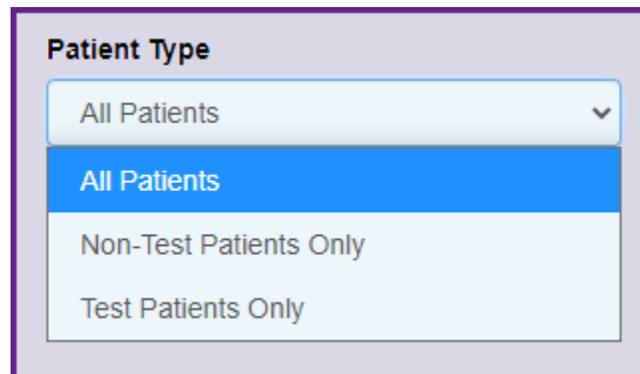
Once you have selected your desired search by criteria, you will enter in your search text in the search text box below the search by dropdown (illustrated below with a patient name of "testington" entered).
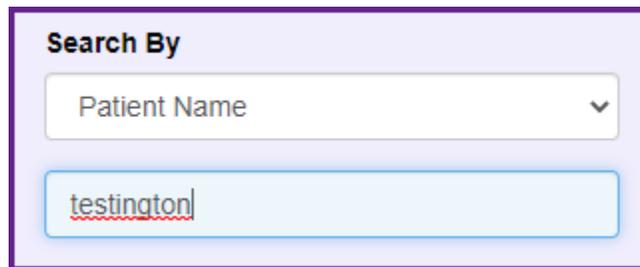

➢ **Patient Type**: If desired, you may select from the Patient Type dropdown (by default this is set to All Patients). There are three options to choose from: All Patients, Non-Test Patients Only and Test Patients only.

If your organization does not have any test patients in its system, then you do not have to change it from the default All Patients. If you do have test patients in your system and want to narrow down your search results to display only Non-Test or only Test patients, then you would select the appropriate option from the Patient type dropdown.
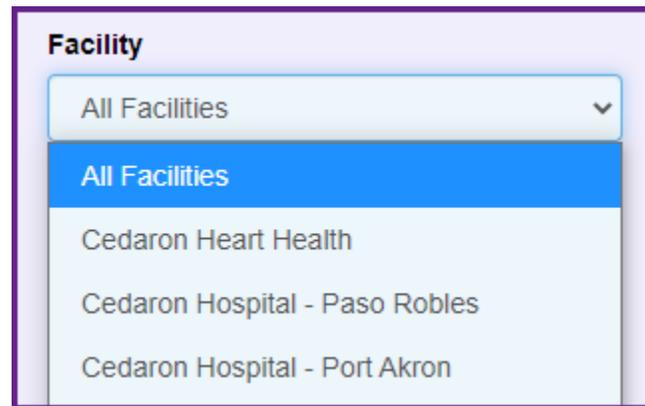

➢ **Data Form**: Allows you to narrow your search results to patients that have had procedures under specific data forms. By default this is set to All Data Forms.
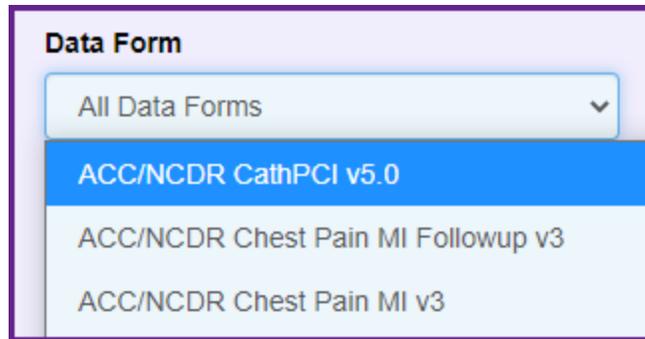
> ➢ **Facility**: If your organization has multiple facilities, you may narrow down your search results to patients who had procedures at a specific location. By default this is set to All Facilities.

Once you have entered in your desired search by information and/or selected your desired options from Patient Type, Data Form, Facility, click **Search** to perform your search.

If there are matches to your search criteria, they will load in the middle of the screen. If there are no matches to your search criteria, the search results panel will be blank.

- ❖ **Important**: You may use any search criteria combination that you desire. For example, if you wanted to see all patients at one location you can leave all other search options, including the search text, blank and select the specified facility from the Facility dropdown, then click search. Or, if you wanted to see all ACC/NCDR Chest Pain MI v3 patients, you would select that data form from the Data Form dropdown, leave everything else blank or set to All and click search.
- ❖ **Currently, only the top 1000 results will ever be returned in the search results.**
  If you do perform a search that returns 1000 results and the patient you are looking for is not listed, you will need to narrow down your results by entering additional patient search criteria.

In the <u>example search displayed below</u>, the search being performed is to find all ACC/NCDR Chest Pain MI v3 patients at one specific location (Cedaron Heart Health). No search criteria was typed into the Search Text box and Patient Type is unchanged from the default All Patients.

There are seven patients that meet the search criteria that load for the example search.

From the search results, the patient charts can be accessed and their information expanded as stated previously.

The text above the last name column (shown in red above and below) will indicate if your search results are displaying or the most recently view patients. You may toggle back and forth between search results and recent patients by clicking the (**show recent**) or (**show search results**) text.

You may perform a patient search using the Search Patients box in the menu bar as well. This search box is always displayed in the menu bar, regardless of what screen you are on, so you can perform a quick patient search from any screen within CardiacCare.

❖ **Important note about the Search Patients box**: This search box will only return results for the standard search items of <u>First and Last Name and MRN</u>.

❖ To perform a patient search using any other criteria, including registry specific search criteria, such as NCDR Patient IDs, STS Record IDs, NHS Numbers, etc. please use the Patient Search feature on the CardiacCare homepage.

Filtering Search Results

The search screen will always have the same seven columns displayed: Last Name, First Name, Middle Name, MRN, Gender, DOB and Alternate ID.

These columns can be used to sort and filter search results. By default, search results are listed in ascending alphabetical order (A-Z) by last name.

You may sort your results by any column (for example by first name or by date of birth) in ascending or descending order by clicking on the column name.

The text boxes under each column name can be used to filter search results. You may type text into any of the text boxes (a last name, first name, MRN, etc., in the corresponding box) and if there are any matches, the information will load.

For example: We performed a search just by facility, to view all patients at a facility. The search results are displayed below.

By looking at the number in the top right corner (marked in red above), we can see that there are 100 patients displayed at this one facility.

From our 100 results, if we wanted to quickly find a patient named Jack, we can type in the full first name, or a part of it, and the matching results will display:

We now have three patients that match the first name filter of "JAC" (displayed in red above).

You may use one or multiple filter boxes together at one time, for example, type in part of a first name in the first name box and part of an MRN in the MRN box to filter you results further.

Once you clear the text in the filter box(es), your full results will display again.