

Patient Chart - User Guide

This guide explains the new Patient Chart layout and features introduced in the latest update. It's designed to help you quickly navigate the redesigned interface, understand where to find key functions, and take advantage of new workflow improvements such as favorites, inline actions, and simplified episode creation.

About the Three-Dot Menu

Throughout the redesigned Patient Chart, you'll notice small **three-dot icons** next to many items.

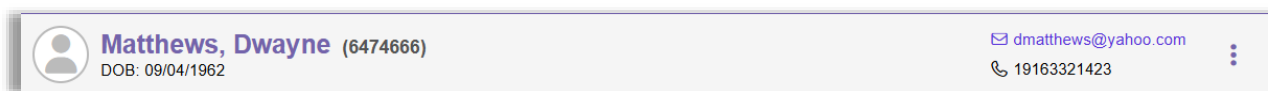


These icons open a **context menu** with additional actions for that item. For example, editing or deleting a patient, episode, or visit. This new pattern keeps the interface cleaner by placing less-frequently used options within these menus, while keeping the most common actions visible.

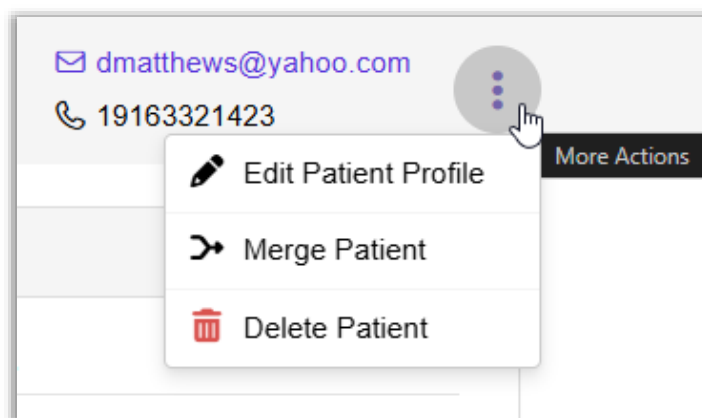
Layout Overview

Header

The new patient chart features a header across the top, which shows the patient's name, date of birth, and MRN on the left-hand side. If any contact information is entered for the patient, those details will be visible on the right-hand side of the header.



Clicking the **three-dot icon** in the top-right corner displays a drop-down menu with actions related to the patient, including editing the patient's identifiers, deleting the patient, or merging the patient with a duplicate.



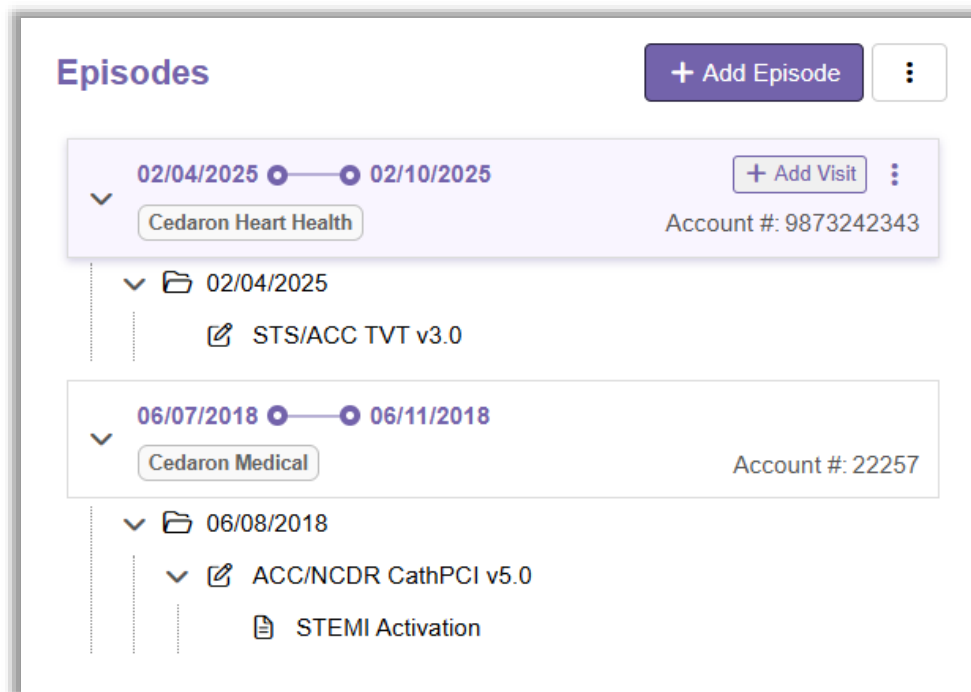
Clicking the silhouette image in the top-left corner also opens a dialog to edit the patient's identifiers.



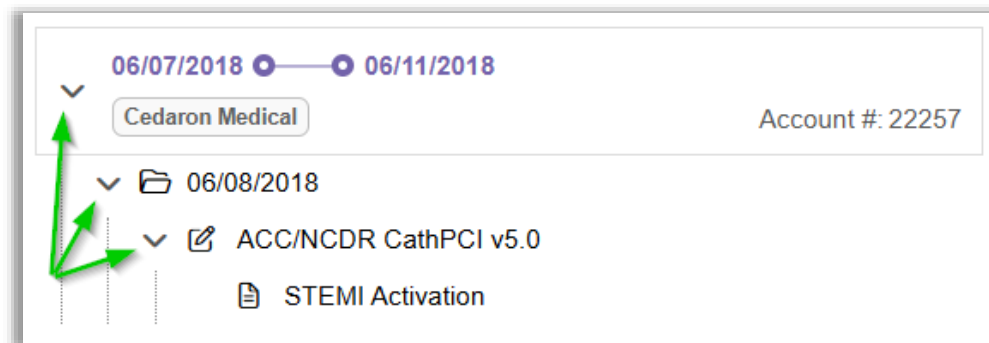
Episode Tree

Just like in the previous user interface, the left side of the page is the episode tree, which contains all the patient's episodes, visits, and data form records in a tree-like navigational structure.

Episode nodes now feature more information available at a glance, so you can tell where and when an episode took place, without having to view each one individually. The top-left corner of each episode node displays the episode's date range. The range is the arrival or admission date (depending on which date was entered) to the discharge date.

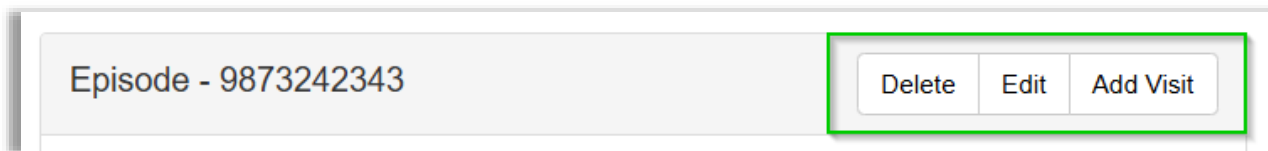


Click the caret icon to expand and collapse nodes as needed.

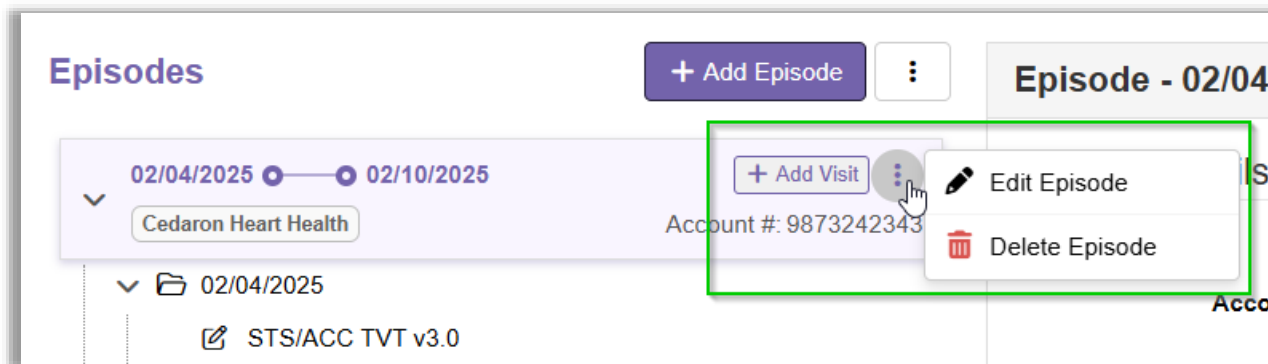


The actions related to each tree node have moved from the right-side of the page to the tree nodes themselves. For example, episode tree nodes have an Add Visit button right on the node itself, along with a three-dot icon that opens a menu with additional actions, including **Edit** and **Delete**.

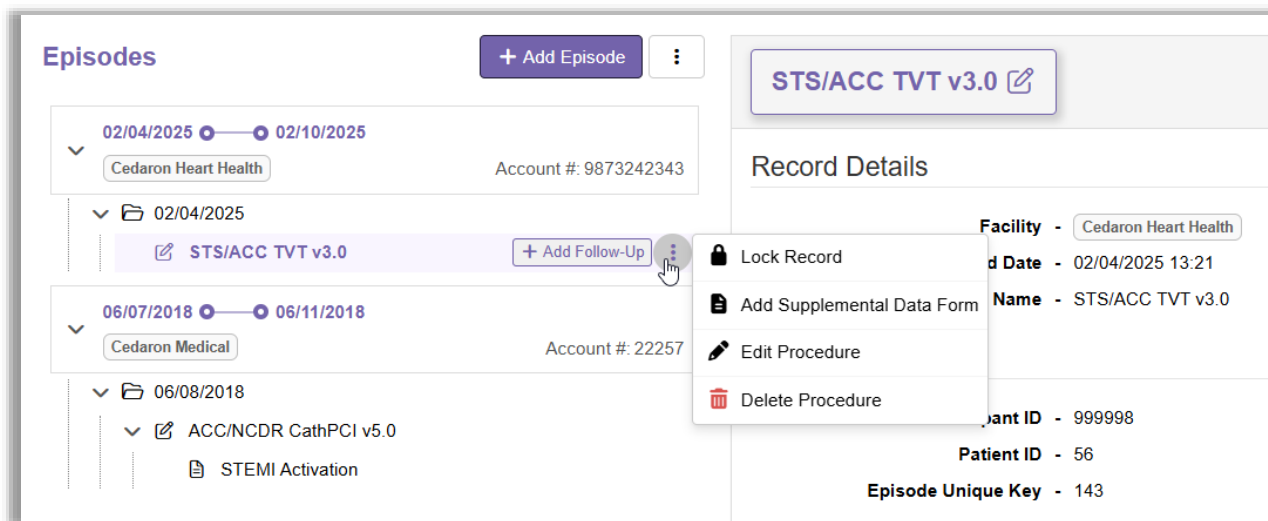
Before:



After:



All actions related to a node can be found directly on the node itself and inside the node's **three-dot icon** menu.



Details Panel

The **details panel**, which occupies the right two-thirds of the page, displays information about the currently selected item in the episode tree. Details for episodes and visits remain largely the same as in the previous interface. When a data form is chosen, however, the panel now includes additional registry-specific information.

Currently, these enhanced details are available only for the most recent version of each registry. Future updates may expand this feature to include older versions and allow users to customize which data fields are displayed.

ACC/NCDR CathPCI v5.0

Record Details

Facility - Cedar Medical

Record Date - 06/08/2018 12:17

Name - ACC/NCDR CathPCI v5.0

Registry Identifiers

Participant ID - 999996

Patient ID - 197

Episode Unique Key - 2945

Timeline

Arrival Date and Time - 06/07/2018 18:46

Procedure Start Date and Time - 06/08/2018 12:17

Procedure End Date and Time - 06/08/2018 13:26

Discharge Date and Time - 06/11/2018 12:30

Procedure

Diagnostic Coronary Angiography Procedure - Yes

Diagnostic Catheterization Operator - WOOD, CHRISTOPHER [20021292]

PCI - Yes

PCI Operator - BELL, GERALD [1325398969]

PCI Indication - NSTE - ACS

Metrics

Age at Time of Procedure - 55

Lesions Attempted - 1

Lesions Successfully Dilated - 0

Arrival to First Device Activation -

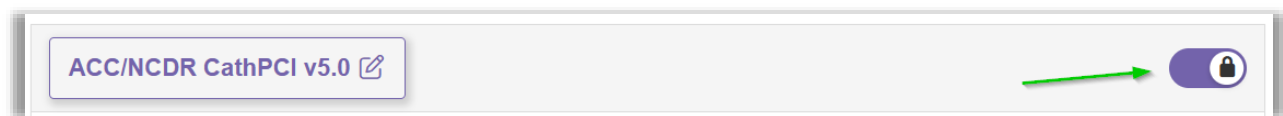
LOS - Arrival to Procedure - 0.73 days

LOS - Procedure to Discharge - 3.009 days

LOS - Arrival to Discharge - 3.739 days

History

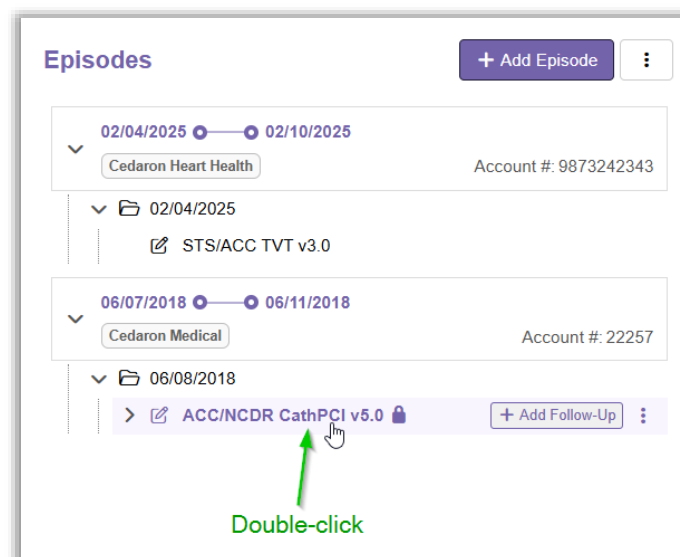
When a procedure/data form node is selected, the details panel displays a lock/unlock toggle in the top-right corner. When the toggle button is turned on (switch to the right with the lock icon displayed), the record is locked for editing. Clicking the toggle button again will unlock the record.



Features and Behavior

Opening a Case for Abstraction

As in the previous user interface, double-clicking the data form node in the episode tree opens the data form for abstraction.



When a data form node is selected, the data form name button in the details panel heading also opens the data form for abstraction.

The screenshot shows the 'Record Details' panel. At the top, there is a button labeled 'ACC/NCDR CathPCI v5.0' with a pencil icon. A green arrow points to this button with the text 'Single-click'. Below the button is a 'View/Edit Form' button. The panel also displays 'Record Details' and 'Procedure' sections. Under 'Record Details', it shows 'Facility - Cedaron Medical', 'Record Date - 06/08/2018 12:17', and 'Name - ACC/NCDR CathPCI v5.0'. Under 'Procedure', it shows 'Diagnosis'.

Favorite Registries and Data Forms

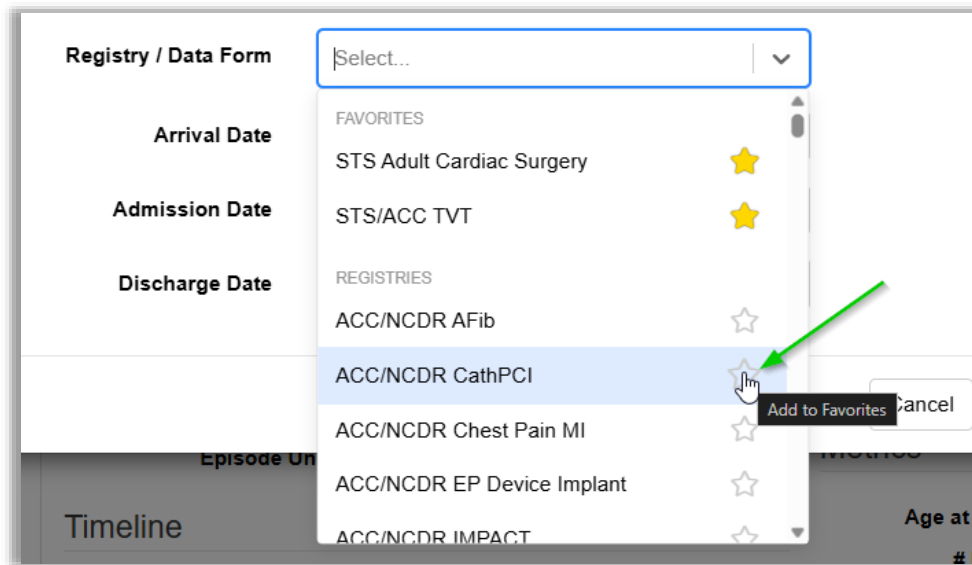
For users who abstract only a subset of the registries their hospital participates in, the **Favorites** feature makes it easier to find and select frequently used registries when creating new records. The **Registry/Data Form** drop-down lists favorite registries and forms at the top, followed by the remaining registries and any custom data forms.

The screenshot shows the 'Add Episode' form. It includes fields for 'Facility' (Cedaron Heart Health), 'Account Number', 'Registry / Data Form', 'Arrival Date', 'Admission Date', and 'Discharge Date'. The 'Registry / Data Form' dropdown is open, showing a list of options. The 'FAVORITES' section is highlighted with a green box and contains 'STS Adult Cardiac Surgery' and 'STS/ACC TVT', both with star icons. The 'REGISTRIES' section lists 'ACC/NCDR AFib', 'ACC/NCDR CathPCI', 'ACC/NCDR Chest Pain MI', 'ACC/NCDR EP Device Implant', and 'ACC/NCDR IMPACT', each with a star icon. A 'Cancel' button and a 'Save' button are at the bottom right.

The drop-down also supports free text search.

The screenshot shows the 'Registry / Data Form' dropdown menu. The search bar contains 'Chest Pain'. The dropdown list shows 'REGISTRIES' and 'ACC/NCDR Chest Pain MI' with a star icon. Below the dropdown are input fields for 'Arrival Date' and 'Admission Date'.

To add or remove favorite registries and data forms, click the star button on the right-side of the drop-down option. A solid yellow star indicates the option is a favorite. **NOTE:** When an option is marked as a favorite, it will be added to the favorites group when the drop-down is reopened. Favorite registries and data forms are a per-user setting.



Creating a New Episode

Starting From a Brand-New Patient

The patient creation process has remained unchanged. Once the desired patient identifiers and demographics have been entered and the Create button clicked, the patient chart page opens, and the Add Episode dialog appears.

The screenshot shows the 'New Patient' form in the CardiacCare™ system. The form is titled 'New Patient' and has a search bar at the top. The form contains the following fields: MRN (3242343), Alternate ID, First Name (Bob), Middle Name, Last Name (Smith), DOB (03/01/1967), Gender (dropdown), Email Address, Address Line 1, Address Line 2, City, County, State, Zip Code, Country (United States of America), and Primary Phone Number. There is a 'Test Patient' checkbox and a 'Create' button at the bottom. The footer of the page reads 'Powered by CEDARON — © 1991-2025 by Cedaron Medical, Inc.'.

CardiacCare™ Search Patients go New Patient Analytics Harvest/Export Utilities Settings Nick Pearson

Smith, Bob (3423423)
DOB: 08/07/1968

Add Episode

* Facility Select...

Account Number

Registry / Data Form Select...

Arrival Date mm/dd/yyyy hh:mm

Admission Date mm/dd/yyyy hh:mm

Discharge Date mm/dd/yyyy hh:mm

Cancel Save

Create Episode

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Starting From an Existing Patient Without Any Episodes

Sometimes patients are created without entering an episode at the same time, either through an interface or manually. When a patient hasn't had any episodes yet, the page displays a message indicating there are no episodes to display in the tree, along with a **Create Episode** button to get started. Clicking this button displays the *Add Episode* dialog.

Smith, Bob (3423423)
DOB: 08/07/1968

No Episodes Yet

This patient doesn't have any episodes on file yet.

Create a new episode to begin abstracting data.

Create Episode

Starting From an Existing Patient with Episodes

The **Add Episode** button at the top of the episode tree launches the *Add Episode* dialog.

The screenshot shows the 'Episodes' section of a software interface. At the top, there is a header 'Episodes' and a purple button labeled '+ Add Episode' with a green arrow pointing to it. Below the header, there are two episode entries. The first entry is for the dates 02/04/2025 to 02/10/2025, associated with 'Cedaron Heart Health' and Account #: 9873242343. It shows a folder icon for 02/04/2025 and a document icon for STS/ACC TVT v3.0. The second entry is for the dates 06/07/2018 to 06/11/2018, associated with 'Cedaron Medical' and Account #: 22257. It shows a folder icon for 06/08/2018 and a document icon for ACC/NCDR CathPCI v5.0 (locked). To the right of the second entry is a purple button labeled '+ Add Follow-Up' and a three-dot menu icon.

The Add Episode Workflow

The *Add Episode* dialog has been greatly simplified to make the process easier and more intuitive.

1. Rather than first entering dates related to the episode, start by selecting the facility for the new record (the facility will be preselected for single-hospital instances).
2. Optionally enter an account number for this episode.
3. Select which registry type you want to create. The **Registry/Data Form** selector is prefiltered to show only those registries that are licensed for the selected facility.
4. Once the registry/data form is selected, the date fields are updated to reflect only the fields applicable to the selected registry.
5. When enough information is provided to determine the correct registry version, the version is automatically selected. If the correct version cannot be determined from the entered dates or if multiple data forms are available for the selected registry, the **Data Form Version** selector remains enabled, and a selection can be made.

Add Episode

1

* Facility

Cedaron Heart Health

x

v

2

Account Number

3

Registry / Data Form

STS/ACC TVT

x

v

4

* Procedure Start Date and Time

10/12/2025

08:44

5

* Data Form Version

STS/ACC TVT v3.0

v

Arrival Date and Time

mm/dd/yyyy

hh:mm

Discharge Date

mm/dd/yyyy

Cancel

Save

Example: Creating a new Episode with STS Adult Cardiac

Add Episode

* Facility

Cedaron Heart Health

x

v

Account Number

Registry / Data Form

STS Adult Cardiac Surgery

x

v

Admit Date

10/04/2025

* Date of Surgery

10/04/2025

Hospital Discharge Date

10/12/2025

* Data Form Version

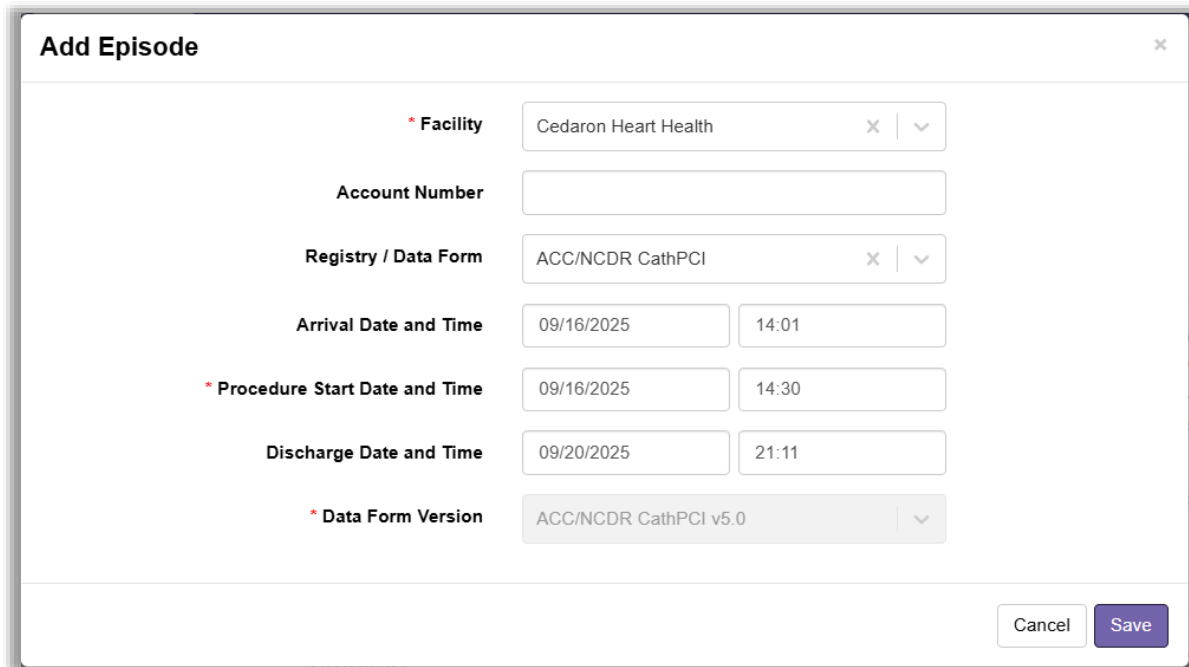
STS Adult Cardiac Surgery v4.20

v

Cancel

Save

Example: Creating a new Episode with NCDR CathPCI



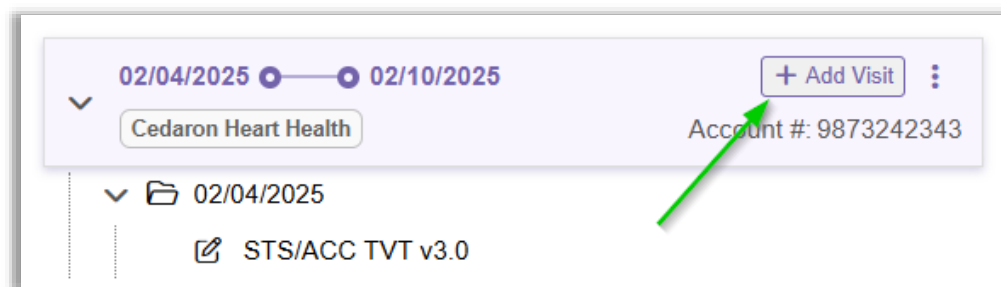
The "Add Episode" dialog box contains the following fields:

Field	Value
* Facility	Cedaron Heart Health
Account Number	
Registry / Data Form	ACC/NCDR CathPCI
Arrival Date and Time	09/16/2025 14:01
* Procedure Start Date and Time	09/16/2025 14:30
Discharge Date and Time	09/20/2025 21:11
* Data Form Version	ACC/NCDR CathPCI v5.0

Buttons: Cancel, Save

Adding a Visit to an Existing Episode

To add a visit to an existing episode, click the **Add Visit** button on the episode in which the visit should be added.

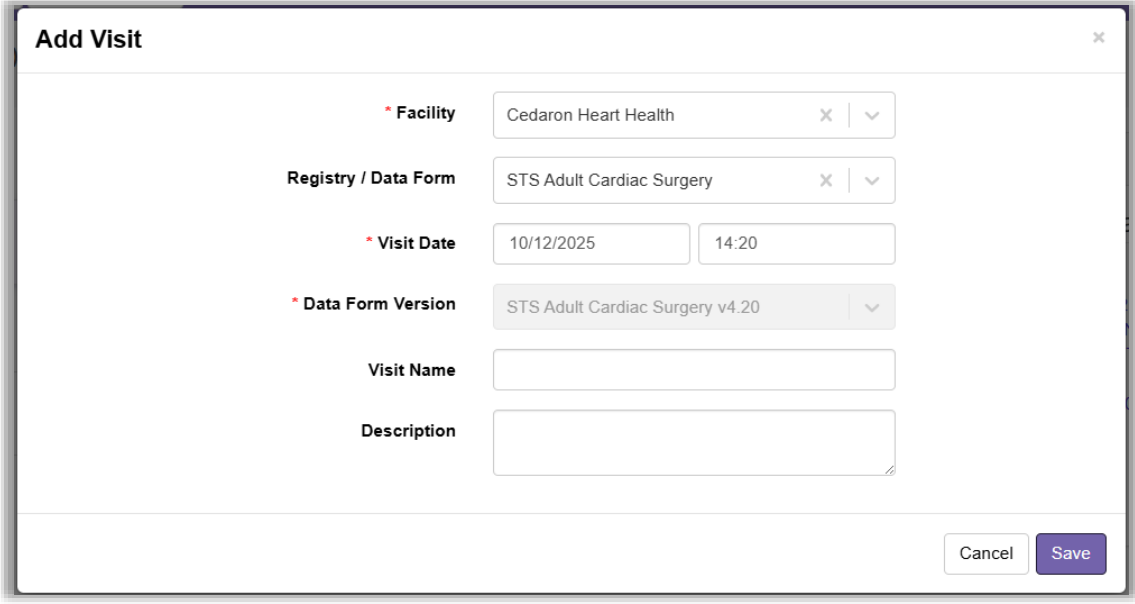


The episode card displays the following information:

- Timeline: 02/04/2025 — 02/10/2025
- Facility: Cedaron Heart Health
- Account #: 9873242343
- Visit: 02/04/2025
- Procedure: STS/ACC TVT v3.0

A green arrow points to the "+ Add Visit" button located on the right side of the episode card.

This brings up the **Add Visit** dialog. Choose the registry/data form, enter the visit date, and fill out any optional fields before clicking the **Save** button.



Add Visit

* Facility: Cedaron Heart Health

Registry / Data Form: STS Adult Cardiac Surgery

* Visit Date: 10/12/2025 14:20

* Data Form Version: STS Adult Cardiac Surgery v4.20

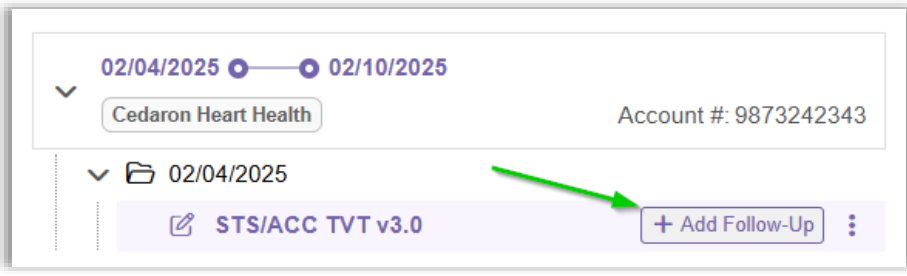
Visit Name:

Description:

Cancel Save

Adding a Follow-Up Record

For sites that participate in registries requiring follow-up records at various time intervals, we've simplified the process for creating them. Locate the base record in the episode tree and either select the node or hover your mouse over the node to reveal the **Add Follow-Up** button.



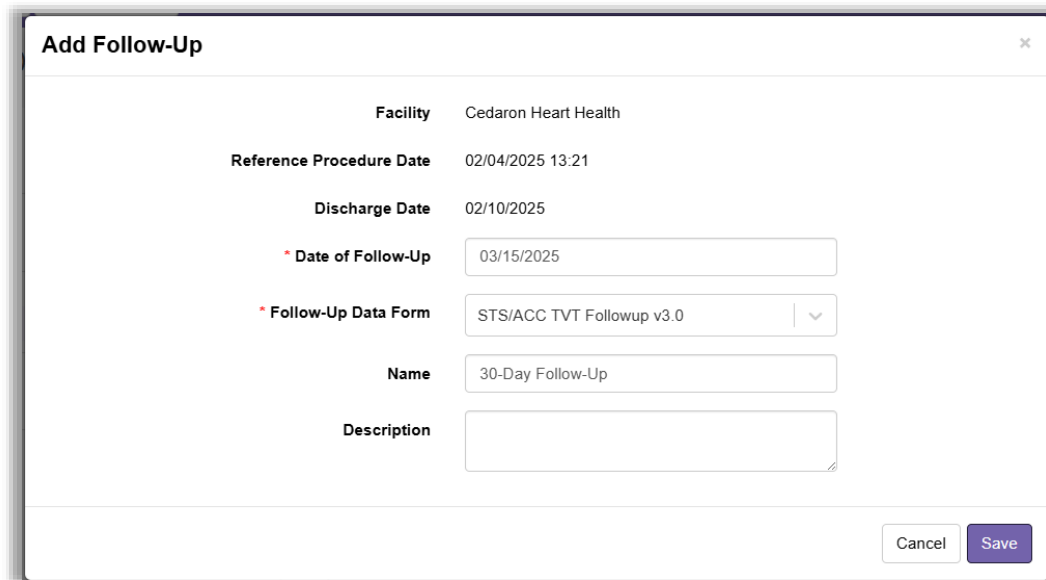
02/04/2025 — 02/10/2025

✓ Cedaron Heart Health Account #: 9873242343

✓ 02/04/2025

✎ STS/ACC TVT v3.0 + Add Follow-Up

Clicking this button launches the **Add Follow-Up** dialog. Enter the date of the follow-up and optionally a name and/or description for the follow-up visit. The follow-up data form will be automatically determined by the follow-up date. Click the **Save** button to create the follow-up record and launch the data form for abstraction.



Add Follow-Up

Facility: Cedaron Heart Health

Reference Procedure Date: 02/04/2025 13:21

Discharge Date: 02/10/2025

* Date of Follow-Up: 03/15/2025

* Follow-Up Data Form: STS/ACC TVT Followup v3.0

Name: 30-Day Follow-Up

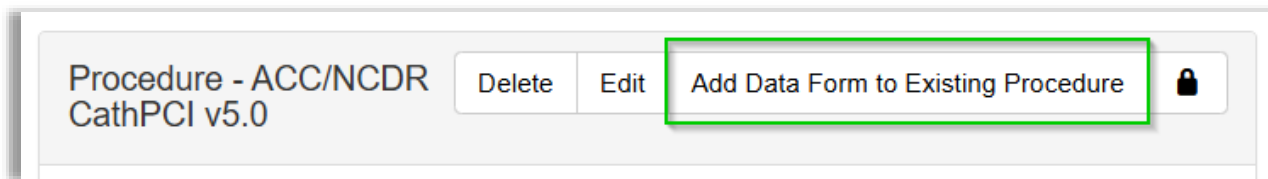
Description:

Cancel Save

Adding a Supplemental Data Form (STEMI Activation)

For sites using the STEMI Activation data form alongside the CathPCI registry, the feature previously called “Add Data Form to Existing Procedure” is now named “Add Supplemental Data Form.” Supplemental data forms allow related data forms to be linked together. This linkage is essential for forms such as STEMI Activation, which must be connected to a CathPCI record to share data and perform calculations based on information entered in the CathPCI form. The **Add Supplemental Data Form** option is now available from a data form node’s **three-dot menu** in the episode tree.

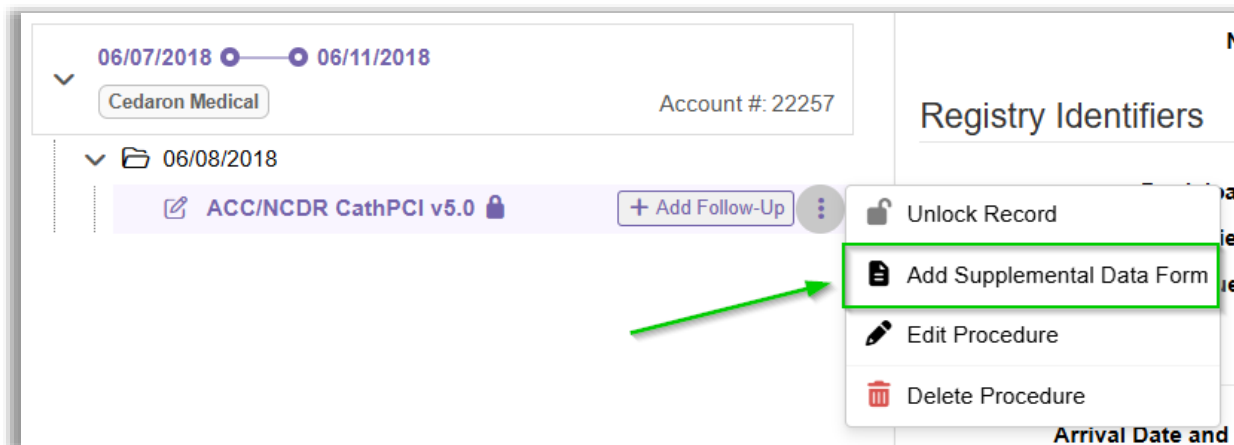
Before:



Procedure - ACC/NCDR CathPCI v5.0

Delete Edit Add Data Form to Existing Procedure

After:



06/07/2018 — 06/11/2018

Cedaron Medical Account #: 22257

Registry Identifiers

06/08/2018

ACC/NCDR CathPCI v5.0

+ Add Follow-Up

Unlock Record

Add Supplemental Data Form

Edit Procedure

Delete Procedure

Arrival Date and

The rest of the process remains the same. Select the supplemental data form and click **Save**.

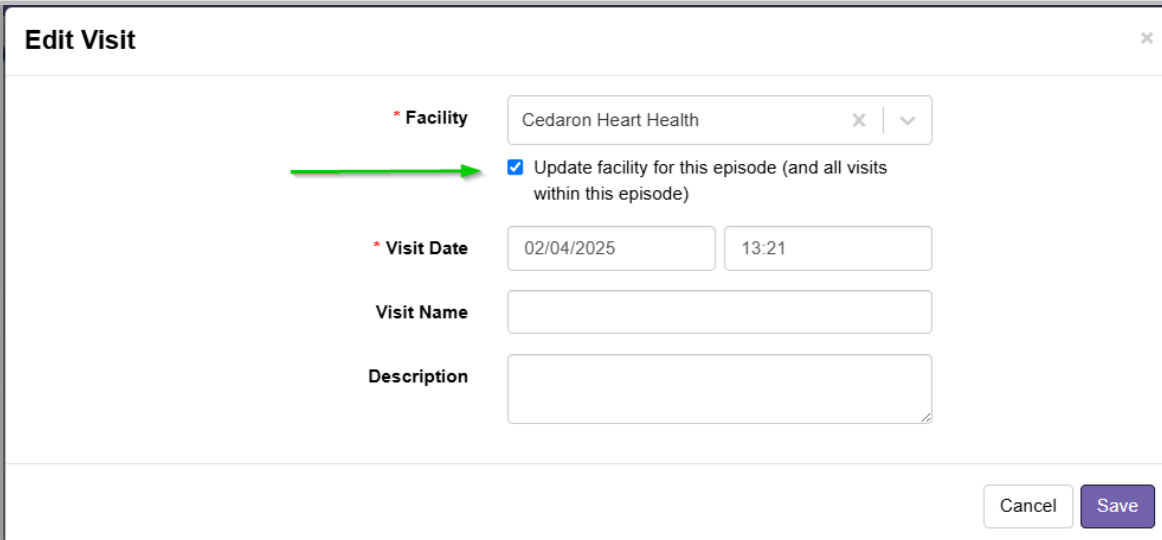
Changing An Encounter Facility

Suppose a mistake is made during data entry, or the facility of a record needs to be changed for any reason. In that case, the facility can be corrected by editing the Visit node (folder icon) in the episode tree. Select or hover over the visit and click the three-dot menu, then select the menu item Edit Visit.

In the **Edit Visit** dialog, select the correct facility in the facility drop-down. Upon changing the facility, a checkbox option becomes visible: **Update facility for this episode (and all visits within this episode)**. With this option checked, the facility change will be applied to the episode as a whole and to all visits within it.

Except in rare circumstances, this option should remain checked, as visits within an episode typically belong to the same facility. In most cases, visits involving different facilities should be considered separate episodes.

Finally, click **Save** to complete the update.



Edit Visit

* Facility: Cedaron Heart Health

☒ Update facility for this episode (and all visits within this episode)

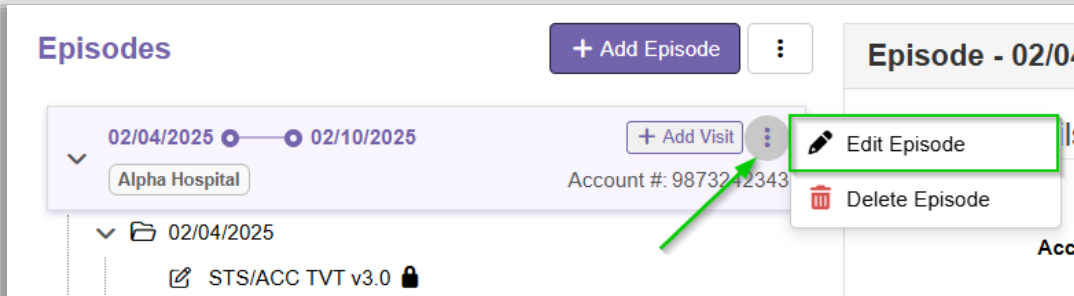
* Visit Date: 02/04/2025 13:21

Visit Name:

Description:

Cancel Save

Similarly, the facility can be updated for the entire episode by changing it in the **Edit Episode** dialog. Leave the option **Update facility for all visits within this episode** checked to ensure the updated facility is propagated to all visits in the episode, and click **Save**.



Episodes

+ Add Episode

02/04/2025 — 02/10/2025

Alpha Hospital

+ Add Visit

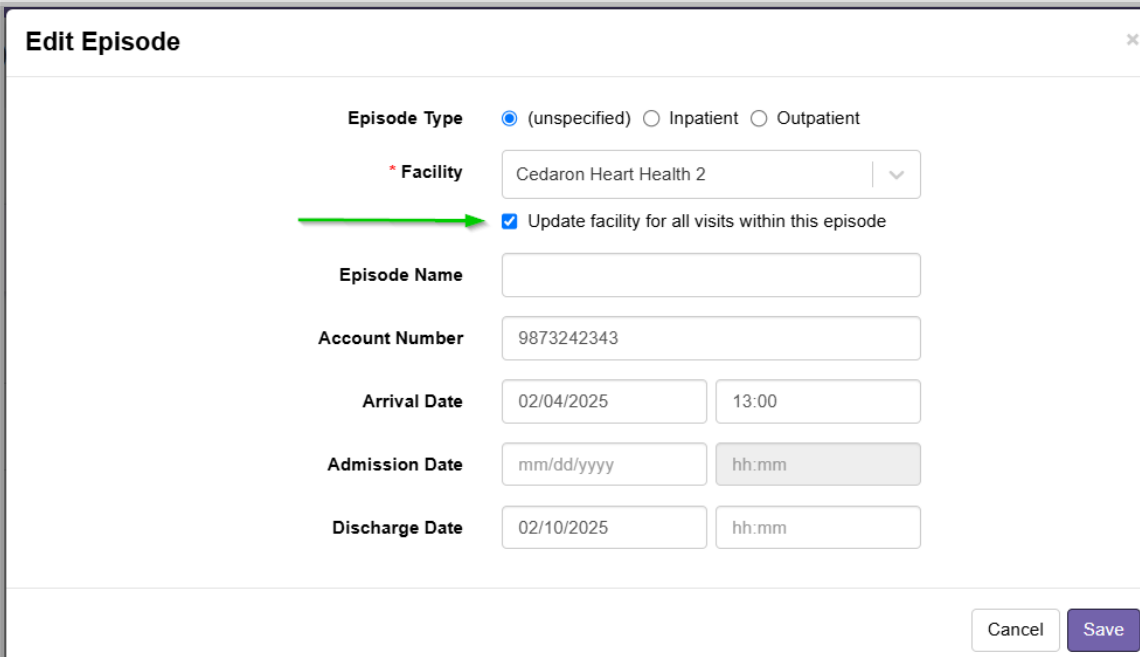
Account #: 9873242343

Edit Episode

Delete Episode

02/04/2025

STS/ACC TVT v3.0



Edit Episode

Episode Type: ☒ (unspecified) ☐ Inpatient ☐ Outpatient

* Facility: Cedaron Heart Health 2

☒ Update facility for all visits within this episode

Episode Name:

Account Number: 9873242343

Arrival Date: 02/04/2025 13:00

Admission Date: mm/dd/yyyy hh:mm

Discharge Date: 02/10/2025 hh:mm

Cancel Save

Test Patients

When viewing a test patient’s chart, there is now a banner across the top indicating you are looking at a test patient.

