# Appendix B: Stanford Children’s Health EHR Observation Checklist

This is an online form that allows the user to write as much as needed and is stored in a sharepoint database.

<table>
<thead>
<tr>
<th>ID *</th>
<th>[ ]</th>
<th>Specialty</th>
<th>[ ]</th>
<th>Location</th>
<th>[ ]</th>
<th>Date and Time</th>
<th>[ ]</th>
</tr>
</thead>
</table>

**Simple Description of Observation**

**Using CPOE?**

- [ ] Is the provider using CPOE for all orders?

**Correctly Orders Labs?**

- [ ] Is the provider ordering labs accurately?

**Managing Problem List from Order Entry**

- [ ] Does the provider add Problems from within Order Entry?

**Documenting using Widescreen view**

- [ ] Does the provider use the Widescreen View?

**Why/Why not using Widescreen for documentation**

- [ ] Explain why the provider prefers to or has decided against using Widescreen View for Documentation

**Documenting in advance**

- [ ] Does the provider document in advance of seeing patient?

**Why/Why not documenting in advance**

- [ ] Does the provider document while with the patient in exam room?

**Document in Exam Room**

- [ ] Does the provider document in a linear fashion?

**Describe the documentation fashion**

- [ ] In what fashion does the provider document?

**Using Dragon?**

- [ ] Does the provider currently use Dragon for documentation?
Would like to use Dragon

Reason(s) for/against using Dragon

Ever used Dragon for documentation?

User Dictionary

Aware of User Dictionary?

Able to find labs easily

Finding labs - How?

Accessing Templates

Ambulatory Manager Dashboard

Chart Review Report

Preview

Chart Search

Results review or Results in InBasket

Filters in Chart Review

Media tab

Ordering using Search or Preference List

Closing encounters b/w patients

List common SmartLinks

Would the provider like to use Dragon software for documentation?

Describe why the provider does/does not wish to use Dragon for documentation

Has the provider ever used Dragon for documentation?

(Anywhere)

Using the User Dictionary?

Is the provider aware of the User Dictionary?

How does the provider find labs?

How does the provider Access Templates?

Results Review

Results in InBasket

Does the provider use filters in order to Review Chart more quickly/easily?

Does the provider use the Media Tab in Chart Review to review the Chart?

Search

Preference List

Which does the provider use for ordering?

Which SmartLinks is the provider using most often?
Using Communication Management
Using last of previous buttons

Is provider using the last or previous buttons to cc: people from previous visit?

Copy & paste labs
Correct toolbar buttons
Co-signing Notes from

Where does the provider co-sign notes?

Edit (link to edit items)
Efficient Searching
Excessive Scrolling
Extra Keyboard to Mouse moves
Filters
Home Dashboard
Keyboard Shortcuts
Letter Templates
LOS Shortcuts
Marking InBasket b/w patients
Note Sidebar
Note template/SmartPhrase

Pinning Notes to Sidebar
Preference List
Reasons for or against pinning notes to sidebar

Reporting Workbench

Does the provider use the reporting workbench?

RX Auth correctly
Select multiples when available
Slicer Dicer
SmartLinks
Snipping Tool
When do you close encounters?
- Before seeing patients
- In between patients
- After all patients are seen
- Specify your own value:

Where do you close encounters?
- Clinic
- Home
- Specify your own value:

Workflow for Research Patients

Co-sign Notes from
- Inpatient
- Ambulatory
- Transcription
- Specify your own value:

General Notes regarding Observation

Note on Strengths

Notes on Opportunities