Allergies
# Table of Contents

1. **Accessing the Allergies Application** ................................................................. 1  
2. **Adding Allergies** ............................................................................................. 3  
3. **Updating Allergy Details** .................................................................................. 6  
4. **Resolving Allergies** .......................................................................................... 7  
5. **Reviewing and Filtering the Allergy List** ........................................................... 8  
   5.1 Reviewing the Allergy List .............................................................................. 8  
   5.2 Filtering the Allergy List ............................................................................... 10  
6. **Viewing Allergy Interactions** ........................................................................... 11  
7. **Printing the Allergy List** .................................................................................. 12  
8. **Viewing the Activity Log of an Allergy** ............................................................. 13
1 Accessing the Allergies Application

The Allergies application consists of a patient's current and past allergies to avoid possible adverse reactions when a medication is prescribed. You can maintain the complete list by manually recording allergies, uploading via the Document Management module, or importing allergy information from a CCD. You can manage the list of allergies by updating details, flagging allergies that needs attention, and checking for interactions between allergies and active patient medications. All active allergies recorded for the patient display in various locations in Optum PM and Physician EMR. You can also view allergies that are resolved and inactive by selecting the Show Inactive check box. An inactive allergy appears dimmed with "Inactive" next to the allergy name.

To access the Allergies application:

1. Access the Medical Record module using one of the following methods:
   - Pull the patient into context, and click the Medical Record module.
   - If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.

2. In the Patient Health History pane, click Allergies. Optum PM and Physician EMR displays the Allergies window with a list of patient allergies.

The table below describes the columns in the Allergies window.

<table>
<thead>
<tr>
<th>ALLERGIES COLUMNS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
</tr>
<tr>
<td>Allergy</td>
</tr>
<tr>
<td>Reaction</td>
</tr>
<tr>
<td>Reported Start Date</td>
</tr>
<tr>
<td>Reported End Date</td>
</tr>
<tr>
<td>Note</td>
</tr>
<tr>
<td>Interaction</td>
</tr>
<tr>
<td>Log</td>
</tr>
</tbody>
</table>
### ALLERGIES COLUMNS

| Documents | Displays allergies that are uploaded or scanned via the **Document Management** module. The list is sorted based on the document date entered when you upload or scan the document. You can move the pointer over the document to view a summary of the allergies and click the document to open in the Document Viewer. |
2 Adding Allergies

The Allergies application helps manually add new and existing allergies to a patient's medical record. It is important to ensure that all active allergies are recorded for accurate drug-allergy contradiction checks when prescribing medications and ordering immunizations. The allergies recorded also display in the Allergies section of the Chart Summary and the Allergies list in the Chart Viewer.

To add an allergy:

1. Access the Medical Record module using one of the following methods:
   - Pull the patient into context, and click the Medical Record module.
   - If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.

2. In the Patient Health History pane, click Allergies. Optum PM and Physician EMR displays the Allergies window.

3. Click + Add Allergy. Optum PM and Physician EMR displays the Patient Allergy dialog box.

4. In the Allergy list, click an allergy from the favorites saved in the list, or click the Search icon to search for an allergy.

To search for an allergy:

a. By default, the Search For list is set to All. However, you can search for an allergy in a specific category if you want. Example: If the patient is allergic to all types of beta blockers, you can select Drug Class, then search and add Beta Blocker as an allergy to the patient's allergy list.

b. By default, the Search Terms list is set to Begins with. However, you can change the option to Contains if necessary, and enter the full or partial name of the allergy based on the category type selected.

c. In the Search Text box, enter the keyword based on your selection in the Search Terms list.

d. Click Search. Optum PM and Physician EMR displays a list of allergies that match the search criteria.

e. Select the allergy you want to add.

Note: You can add an allergy to the provider's favorite list by clicking the Add as Favorite icon in the search results. If the allergy is not listed, click the Not in List link. Optum PM and Physician EMR adds Uncoded Nonscreenable Allergen in the Allergy list, and displays the allergy name in the Notes box. An allergy that is not in the list is not screened for interactions.

Note: You can manage your favorite allergies by clicking the Favorites icon.
To add an allergy to the list of favorites:

a. Click the Manage Favorites icon next to Allergy list. Optum PM and Physician EMR displays the Manage Favorites dialog box.

b. Click the Search icon. Optum PM and Physician EMR displays the Allergy Search dialog box.

c. Click Add. The allergy is saved as a favorite in the list of favorite allergies.

d. Click Save.

5. **Screen for allergy contra indications.**

The selected allergy is screened to check for possible contra indications with the patient’s active medications, allergies and problems, and alerts you if the interaction is higher than the severity level set by you.

If the screening triggers an interaction that is higher than the severity settings you set, Optum PM and Physician EMR displays the Interaction Screening dialog box for informational purposes only. An entry is also recorded in the clinical log to indicate that the interaction check is acknowledged.

**Note:** Provider level screening preferences or the default severity level is set via the Provider Screening application. You can access the application by clicking Administration module > Clinical tab > Provider Screening link under the System Administration section. Screening preferences for operators are based on the level set for the provider. For more information on setting screening preferences, see Administration Module > Clinical > System Administration > Provider Screening in the Help system.

6. In the Reaction list, select one or more effects the allergy has on the patient.

7. In the Reported Start Date box enter the date of onset for the allergy in MM/DD/YYYY format or click the Calendar icon to select the date.

**Note:** By default, the Status is set to Active to indicate that the allergy is an active allergy.

8. In the Notes box, enter additional comments if necessary.

9. (Optional) Select Soft Alert (Soft Alert: The soft alert displays in the Clinical Alerts dialog box accessible by clicking the Alert icon on the Patient Detail bar) or Popup Alert (Pop up Alert: Displays the alert when the patient medical record is launched and stops displaying when the alert is closed. You can also click the Alert icon next to the patient’s chart number on the Patient Detail bar to view the pop up alerts) to add an alert for the allergy.

10. Click the action item you want.

<table>
<thead>
<tr>
<th>ACTION OPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Icon</strong></td>
</tr>
<tr>
<td>Save</td>
</tr>
<tr>
<td>Save &amp; New</td>
</tr>
</tbody>
</table>
**Note:** Optum PM and Physician EMR records the **Allergy Added** entry with the date and time in the Clinical log and the Allergy log for each allergy recorded.
3 Updating Allergy Details

The Allergies application helps update allergies in a patient's medical record by changing patient reaction, active status, date the allergy was resolved, or adding comments.

To update allergy details:
1. Access the Medical Record module using one of the following methods:
   • Pull the patient into context, and click the Medical Record module.
   • If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.
2. In the Patient Health History pane, click Allergies. The Allergies window displays a list of patient allergies.
3. Click the allergy to update. Optum PM and Physician EMR displays the Patient Allergy dialog box.
4. Make necessary changes.
5. Click Save.

Note: If you deactivate an allergy, you can select the Show Inactive check box in the Allergies application to view inactive allergies. An inactive allergy appears dimmed with "Inactive" next to the allergy name.
4 Resolving Allergies

The Allergies application helps flag allergies in a patient's medical record as resolved by entering a date in the Reported End Date box. When entering a date, do not select a date beyond the current encounter date. Entering an end date, deselects the Active check box automatically indicating that the patient no longer suffers from the allergy.

When an allergy is flagged as resolved, the “Allergy Removed/Inactivated” entry is recorded under the Event column in the Clinical log with the allergy name.

You can view the resolved allergies by selecting the Show Inactive check box in the Allergies application. An inactive allergy appears dimmed with “Inactive” next to the allergy name.

To flag an allergy as resolved:

1. Access the Medical Record module using one of the following methods:
   • Pull the patient into context, and click the Medical Record module.
   • If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.
2. In the Patient Health History pane, click Allergies. The Allergies window displays a list of patient allergies.
3. Click the allergy to update. Optum PM and Physician EMR displays the Patient Allergy dialog box.
4. In the Reported End Date box, enter the date the allergy is resolved.
5. (Optional) In the Notes box, enter comments.
6. Click Save.
5 Reviewed and Filtering the Allergy List

The Allergies application allows you to review the patient's allergy list at the point of care to ensure the list is up to date. This helps prevent potential problems when prescribing medications or administering immunizations. Additionally, you can filter the list of allergies based on the status and the onset date of the allergy.

5.1 Reviewing the Allergy List

To review the allergy list:

1. Access the Medical Record module using one of the following methods:
   - Pull the patient into context, and click the Medical Record module.
   - If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.

2. In the Patient Health History pane, click Allergies. The Allergies window displays a list of patient allergies.

   **Note:** You must have an encounter in context when reviewing the allergy list. If an encounter is not in context, you are prompted to select an existing encounter, or create a new encounter.

To create an encounter:

a. Click Create a New Encounter. The Optum PM and Physician EMR displays the Create a new Encounter dialog box.

b. In the Type list, click the type of encounter you want to create.

   **Note:** You can use global encounter types provided by Optum PM and Physician EMR or set up your own custom encounter types via the Encounter Types application. Custom encounters that are flagged as an "Office Visit" are used for calculations in Key Performance Indicator (KPI) reports. To count an encounter towards Meaningful Use Quality Measure reporting, you must either create a visit using the Visit application or save the visit as a charge. However, if you want to use an encounter not counted towards meaningful use, you must select an encounter that is not flagged as an office visit. To access the Encounter Types application, click the Administration module, Clinical tab, and then click the Encounter Types link under the Clinical section. For more information on creating custom encounter types, see Administration Module > Clinical > Daily Administration > Encounter Types in the Help system.

c. By default, the Service Date list is set to the current date. However, you can enter a different date in MM/DD/YYYY format or click the Calendar icon to select the date of the encounter.

d. In the Responsible Provider list, click the name of the provider associated with the encounter.

e. By default, the Supervising Provider list displays a provider only if one supervising provider is assigned or a default supervising provider is selected in the Cosignature application.
However, you must select a provider if many supervising providers are linked and the provider requires a co-signature when initiating an encounter centric action.

**Note:** The *Supervising Provider* list is unavailable when a co-signature is not required for the provider initiating the encounter centric action. To access the Cosignature application, click the *Administration* module, *Clinical* tab and then click the *Cosignature* link.

f. By default, the *Patient Case* list is set to *Default*. However, you can click a different case from the list if necessary.

g. In the *Location* list, click the location of the encounter.

h. By default, the *Transition of Care* list is set to *No*.

i. (Optional) In the *Description* box, enter a description about the encounter.

j. Click *OK*.

3. Click *Confirm No Known Allergies* or review the allergy list and click *Mark Reviewed*.

**Note:** If the patient has no allergies recorded, Optum PM and Physician EMR displays the *Confirm No Known Allergies* button. If the patient has allergies, Optum PM and Physician EMR displays the *Mark Reviewed* button.

- Clicking *Confirm No Known Allergies* updates the following locations of the patient's medical record:
  - Displays a check mark in the *Allergy List Reviewed* check box in the Progress Note template.
  - Displays the *No Known Allergies* entry with the current date in the Allergies section of the narrative.
  - Displays the *No Known Allergies* entry with the current date under the Reported Start Date column in the Allergy application.

  **Note:** The allergy list in the Chart Viewer and the Allergy application displays *No known Allergies* until an allergy is added for the patient. If an allergy is added and then deactivated, Optum PM and Physician EMR displays *No Known Allergies* entry.

- Displays the No Known Allergies entry with the current date in the Allergy section of the Chart Summary and the Chart Viewer.

- Clicking *Mark Reviewed* updates the following locations of the patient's medical record:
  - Displays a check mark in the *Allergy List Reviewed* check box in the Progress Note template.
  - Displays the *Allergies Reviewed* entry with the current date in the Allergies section of the narrative.
  - Displays the operator name, date and time the allergy list was reviewed in the Allergies application, allergy list in the Chart Viewer, and the Allergy section of the Chart Summary.
Note: If an interaction exists for an allergy in the list, you can click the Interaction icon to view details about interactions and override reasons available. Additionally, if comments were entered when recording the allergy, you can view the note by moving the pointer over the Note icon. The icons appear dimmed if no interactions or notes are available.

5.2 Filtering the Allergy List

To filter the allergy list:

1. Access the Medical Record module using one of the following methods:
   - Pull the patient into context, and click the Medical Record module.
   - If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.

2. In the Patient Health History pane, Click Allergies. The Allergies window displays a list of patient allergies.
   - By default, the Allergies window displays all active allergy information for a patient. Select the Show Inactive check box to view all patient allergies including resolved allergies. An inactive allergy appears dimmed with "Inactive" next to the allergy name.
   - Filter the list based on the onset date for the allergy by clicking Last Encounter, Past 6 months, or Past year tabs.
6 Viewing Allergy Interactions

The Allergies application enables you to check for interactions between an allergy, and the active medications and diagnoses recorded for the patient.

To check for interactions:

1. Access the Medical Record module using one of the following methods:
   - Pull the patient into context, and click the Medical Record module.
   - If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.

2. In the Patient Health History pane, click Allergies. The Allergies window displays a list of patient allergies.

3. Click the Interaction icon pertaining to the allergy you want to review. The Interaction Screening dialog box displays with information about the existing conflicts and override reasons, if available.

Note: If an interaction was not returned when the allergy is added, the Interaction icon appears dimmed indicating that no interactions are available.
7 Printing the Allergy List

The Allergies application enables you to print a list of active patient allergies. This list can be given to a patient, or can be used to share information with other entities such as allergists, providers, clinics, and schools. The list helps the patient keep track of their own allergies as well as helps other entities to provide effective evaluation and therapy for allergic conditions. However, if you confirm that the patient does not have active allergies, the Allergies report displays **No Known Allergies**.

**To print the list of allergies:**

1. Access the **Medical Record** module using one of the following methods:
   - Pull the patient into context, and click the **Medical Record** module.
   - If the patient has an appointment, click the patient name in the Appointments application of the **Clinical Today** module.

2. In the Patient Health History pane, click **Allergies**. The Allergies window displays a list of patient allergies.

3. Click the arrow next to **Print** on the Clinical toolbar, and then click **Allergies**. Optum PM and Physician EMR displays the File Download dialog box.

4. Click **Open**. The patient's allergy list opens in PDF format.

5. Right-click, and then click **Print** on the shortcut menu to print the list of allergies.

**Note:** The report displays a detailed list of the patient's active allergies only. Allergies marked as inactive do not display in the report.
8 Viewing the Activity Log of an Allergy

The activity log tracks all activity related to a patient's active and inactive allergies, and is a helpful reference for audit purposes. The log displays information such as date, user responsible for the action, the action performed, and comments associated with an action. The log provides protection to patients, and helps providers demonstrate compliance with privacy laws and regulations such as Health Insurance Portability and Accountability Act (HIPAA).

To view the activity log of an allergy:

1. Access the Medical Record module using one of the following methods:
   - Pull the patient into context, and click the Medical Record module.
   - If the patient has an appointment, click the patient name in the Appointments application of the Clinical Today module.

2. In the Patient Health History pane, click Allergies. The Allergies window displays a list of patient allergies.

3. Click the Log icon for the allergy.

4. (Optional) Select a date range and an operator, and then click Show Log to filter the activity log.

Tip: You can click the allergy to view the operator, date and time for the last update in the Allergy dialog box. You can also click the Log link to access the Activity dialog box with all activities associated with the allergy.

The table below describes the entries in the activity log.

<table>
<thead>
<tr>
<th>ALLERGY ACTIVITY LOG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry</td>
</tr>
<tr>
<td>Allergy Added</td>
</tr>
<tr>
<td>Allergy Added-CCD</td>
</tr>
<tr>
<td>Allergy Accessed</td>
</tr>
<tr>
<td>Allergy Modified</td>
</tr>
<tr>
<td>Allergy Reviewed</td>
</tr>
<tr>
<td>Allergy Removed</td>
</tr>
</tbody>
</table>