Canto Physician Quick Start Guide

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Getting Started

Welcome to Canto, Epic's mobile app for use with the Apple iPad®.

Log in

1. On your device, tap the Canto icon.
2. Enter your user ID and password in the login fields.

!	If you forget your user ID or password, <call the Help Desk and ask for the Security team.>

Use the dashboard

The dashboard is your home workspace in Canto. From the dashboard, you can open:

- A patient's chart by tapping on the patient's name.
- An In Basket folder by tapping on the name of the folder.
- A dictation by tapping on its title.

What is an activity?

Each activity supports a specific task, such as reviewing the chart or e-prescribing medications. You can access activities from the tabs on the bottom of the screen or by tapping a patient's name from the schedule or patient list.

See more of the screen

Hold the device horizontally, in landscape mode, to make more efficient use of the screen when reading patient reports or In Basket messages.

Log out

When you leave Canto to go to your device home screen or switch to another app, Canto continues to run in the background. For security reasons, Canto automatically logs you out after <x minutes>of inactivity. However, you can also log out yourself if you know you won't need to use the app for a while.

1. From the dashboard, tap Canto.
2. Tap **Logout**.

Find Your Patients

Your patient lists and schedule from Hyperspace also appear on your iPad. Your default patient list in Hyperspace is also your default patient list in Canto. Simply tap the patient's name to open his chart.

Open another patient list

Tap on the dashboard to access available system lists.

Access your schedule

If you are using Canto for an outpatient practice, the current day's schedule is available on your dashboard. Past and future days might also be available.

If you're a surgeon and your cases are scheduled in Epic, they also appear on your schedule.

The schedule shows each patient's age and gender, as well the appointment type. Your department and clinic also appear in an abbreviated form (in this example, Fm, Vcc for Family Medicine, Verona Central Clinic).

The ring icons that appear under the appointment time specify when the appointment occurs and its length. If you are a surgeon, your cases appear with a surgical icon.

1:30 PM	Previous appointment (yellow), 15 minutes
7:00 AM	Current appointment (green), 30 minutes
9:00 AM	Future appointment (blue), 15 minutes
8:50 AM	Surgery

Find patients not on your patient list or schedule

Use the search field on the dashboard to find patients not on your patient list or schedule. Enter the patient's last name, followed by a comma and the patient's first name (Smith, John). Or, enter the MRN.

Identify patients with new results and notes

When a patient has new information in her chart that you haven't reviewed, icons appear in the patient list. A key to the icons appears below.

	Abnormal result
	Critical result
	New note

Note that you can only remove these icons in Hyperspace by clicking **Time Mark** in the Notes activity or the Results Review activity.

Capture Patient Photos and Media

You can update patient demographic photos and capture clinical images and video from the patient's chart in Canto.

Update a patient's photo

You can update a patient's demographic photo by taking her picture with your device.

1. In the patient's chart, tap the patient photo or camera icon in the upper-left corner of the screen. The Media Capture activity opens.
2. Tap **Take Patient Photo**.
3. Use the camera on your device to take a picture.
4. Tap **Use Photo** to save the photo to the Demographics activity in the chart.

Capture clinical images

1. In the Media Capture activity, tap **Take Clinical Image**.
2. Use the camera on your device to take a picture.
3. Tap **Use Photo**. The Media Properties screen appears.
4. Select a document type and enter a description.
5. Tap **Save** to save the media to the chart. You can review media captures in the Media Manager or the Chart Review activity in Hyperspace.

Review Patient Information

Review a snapshot of medical information

You can see an overview of the patient's current medical information in the Patient Summary activity. This includes medications, allergies, and the problem list.

In the Current Medications section, the icon indicates a long-term medication and the icon indicates a patient-reported medication.

Review multiple encounter notes

The Notes activity shows you all of a patient's encounter notes in one location, so you don't need to open every encounter to view its related note.

From a patient's chart, tap to open the Notes activity. Select the note you want to review.

Use filters to narrow down the list of notes

To filter the notes you see in the activity, tap and choose a filter category. For example, you might filter by note type and show only progress notes. Tap **Done** to apply the filters you've selected.

Review documents from outside organizations

If your patient has associated documents from outside organizations, you can review them in the CE Reports activity. The activity shows clinical and encounter summaries already requested from other organizations.

From a patient's chart, tap

to open the CE Reports activity, and then tap **Reports**.

- Tap **Summary** to review a patient's clinical summary.
- Tap **Documents** to review a patient's clinical documents.

Documents listed in black text are available to view, while documents listed in gray text must be requested from Hyperspace before you can view them.

Review Results

You can view a patient's lab, imaging, microbiology, and EKG results from the Results activity.

Review results

After you open the patient's chart, tap

to access the Results activity.

- For lab tests, a table of lab results appears.
- For imaging or EKG results, a narrative report appears.

Review a patient's new or abnormal results

An icon appears in the patient list for patients with any new results. These same icons appear in the Results activity.

	Abnormal result
	Critical result

At this time, the ability to forward results is not available.

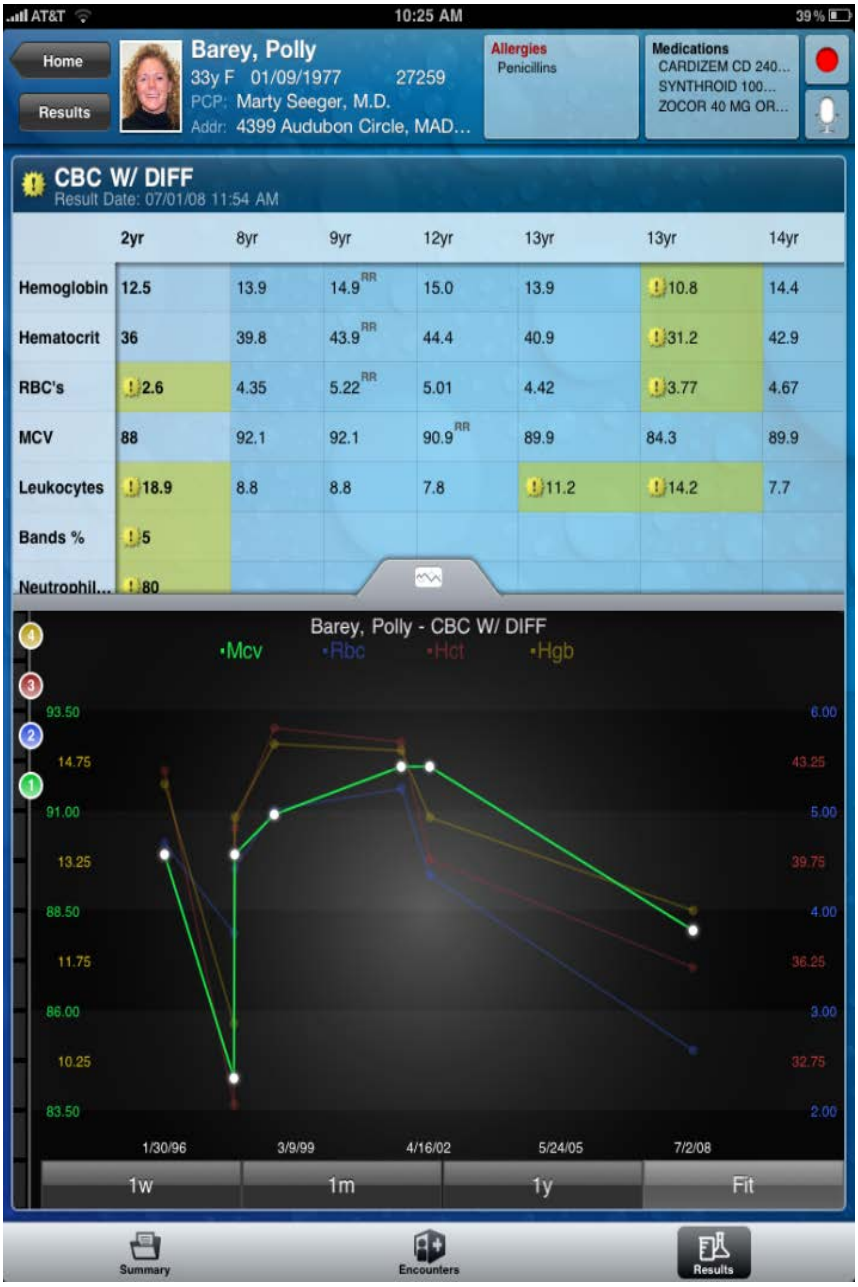
View a graph of results

Review discrete lab results in a graph by tapping at the bottom of the screen.

Each result component appears on the graph in a unique color. To help you match the line color to a particular result component, a key appears at the top of the graph.

Focus on one type of result

Tap the colored circle on the left side of the screen that corresponds to that component's color. The line that represents that component appears brighter than the other lines.



Slide your finger up and down in order to choose the component you want to bring to the front of the graph.

Focus on one result value

Each white data point on the graph represents a specific result value for a component. Tap and hold near a data point to view more information about that value, including the actual result value, the reference range, the result date, and the result time.

Record a Dictation

Canot provides a dictation activity for you to record and file dictations as notes within in the patient's chart for you to read in Canto or Hyperspace.

Record a new dictation

1. From the patient's chart, tap to open the dictation popup.
2. Tap to start a dictation.
3. Tap the Progress Note or Letter link in the popup to choose whether the dictation is filed as a Progress Note or Letter.
4. While recording a dictation, tap the screen to close the dictation popup and access other activities. While you remain in the patient's chart, the recording continues.
5. Tap to pause the recording.
6. Tap to return to the dictation popup.
7. In the popup, you can also tap **Pend** to pause the recording. Pended dictations are saved on your device until filed.
8. To delete a dictation from your device, tap **Delete**.

!	Recorded dications are not sent to a dictation pool. They are filed as a "note" within the patient's chart.
ⓘ	If you leave the chart while recording, the dictation pauses. When you return, you can continue your dictation where you left off.

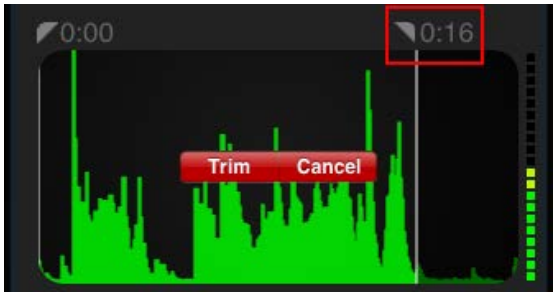
Open pended dictations

To resume recording a pended dictation, tap the name of the note you want to open on the dashboard. Or, from within a patient's chart, tap .

Edit a dictation

If you are interrupted while recording a dictation or want to re-record some information, you can edit the dictation.

1. Open the dictation you want to edit.
2. Tap and hold one of the icons in the upper corners of the recording.
3. Slide the line to the section you want to trim. The section to be removed appears dark green.
4. Tap **Trim** to remove the dark green section from the recording.

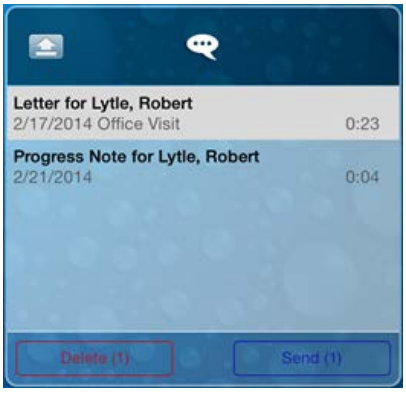


> Note that you cannot edit filed dictations.

File or delete a dictation

From the dashboard, you can select the currently pended dictation that you want to file. Note that you must be connected to your local network to file a dictation. You cannot be on a 3G or remote network, unless you are using a virtual private network (VPN).

1. Tap .
2. Select the dictations you want to delete or file and then tap **Delete** or **Send**. You can also tap **Delete** or **Send** without selecting individual dictations to delete or file all pended dictations at once.



> Recorded dications are not sent to a dictation pool. They are filed as a "note" within the patient's chart.

Create Notes and Letters

You can use the Notes Entry activity to create progress notes and letters. <If your organization is licensed for Nuance speech recognition software, you can dictate your notes and letters.>

Create a note or letter

Notes and letters you create are automatically associated with an encounter in the patient's chart. You can create new notes and letters or edit ones that you have pended.

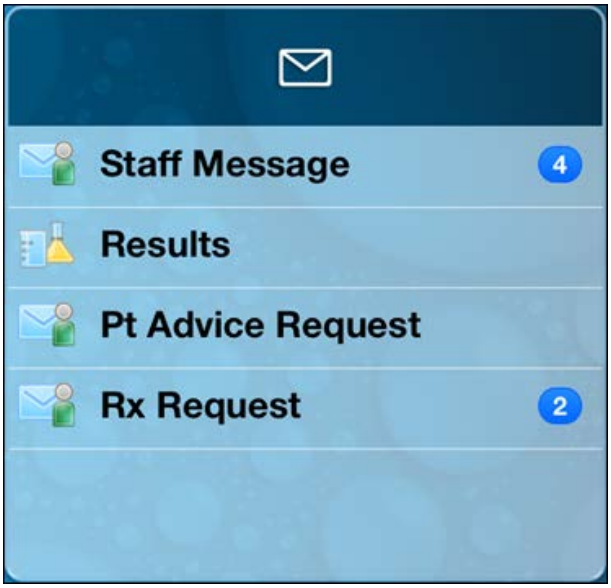
1. In a patient's chart, tap to open the Notes Entry activity.
2. Tap **New Note** to create a new note or letter. The encounter associated with the note appears in a gray banner under the patient header.
3. Tap **Note Type** and choose Progress Note or Letter.
4. Type or dictate your note.
5. Tap **Pend** or **Sign**. Pended notes appear in the Notes Entry activity, where you can edit them later. Signed notes are filed to the chart.

Manage In Basket Messages

In the In Basket activity, you can read and respond to the following types of messages:

- Staff Message
- Results
- Rx Request
- Pt Advice Request

You can also create new Staff Messages.



Prioritize messages

The following icons appear next to messages in a folder to help you prioritize them:

	High priority
	Low priority
	Unread message
	Pended message (In Hyperspace, you can mark messages that you want to remain in your In Basket as pended).
	Overdue message (In Hyperspace, when sending a message, the sender can include an action, such as "Call patient". The action can also be flagged with a due date and time. If that due date and time has passed, the message appears as overdue in Hyperspace and Haiku or Canto).

Create, reply to, or forward a Staff Message

After reading a message, you can reply to the message or forward it.

1. To create a new Staff Message, tap in the Staff Messages folder.
2. To reply to or forward a Staff Message, open the Staff Messages folder and select the message you want to reply to or forward.
3. Tap to reply or tap to forward the message.
4. Tap the response option you want to take and complete your message.
5. Tap **Send**. Optionally, add the following flags to the message before sending it:

	Flag recipient to call you.
	Flag message as high priority.

Review a Results message

The following icons can appear next to messages in the Results folder:

	These icons indicate that the patient has abnormal results. The smaller icon indicates that you have read the message, and the larger one indicates that you haven't read the message yet.
	These icons indicate that the patient has critical results. The smaller icon indicates that you have read the message, and the larger one indicates that you haven't read the message yet.
	This icon indicates that the patient had a previously abnormal result for this order.
	The green circle in this icon indicates that all the patient's orders have been resulted. The number indicates the total number of orders.
	This icon indicates that not all orders for this patient have been resulted. For example, this icon indicates that six orders have been resulted but there are additional orders outstanding.
	This icon indicates that you are responsible for the message. Messages with responsibility allow recipients to more closely track whether someone has started working on a task. Only the person who has responsibility for a message can mark it as Done.

Reassign a Results message

To reassign responsibility for a result to another physician, you can tap when you forward a Results message.

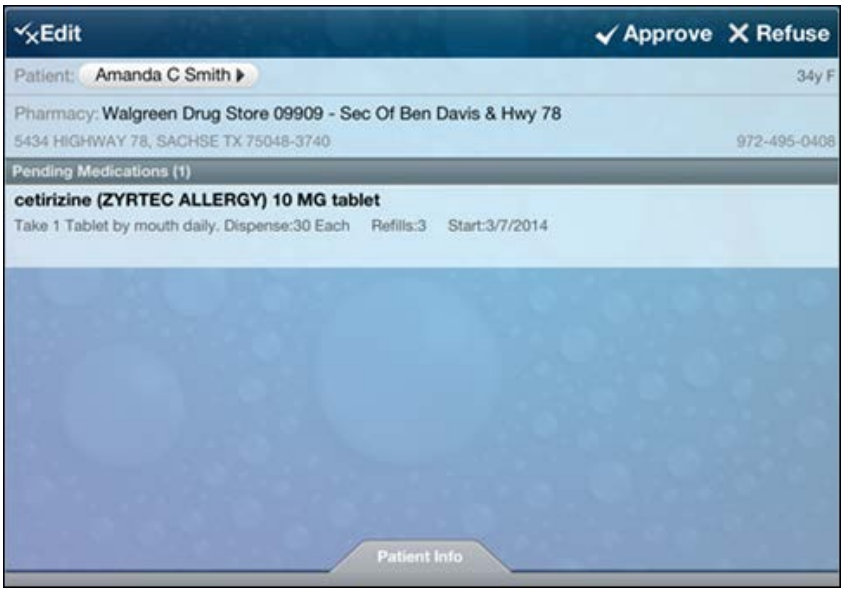
Send a reminder about a result you want to follow up on

If you see a result in a Results message that you want to investigate further, you can send yourself a reminder to do so. The reminder is sent as a Patient Reminder message with the original Results message attached to it. Note that you can only access the reminder message in your Hyperspace In Basket.

1. In a Results message, tap . The Reminder screen appears.
2. Enter any additional text you want to add to the reminder.
3. Tap **Send** to send the reminder to yourself.

Refill prescriptions

You can refill patients' prescriptions through Rx Request messages.

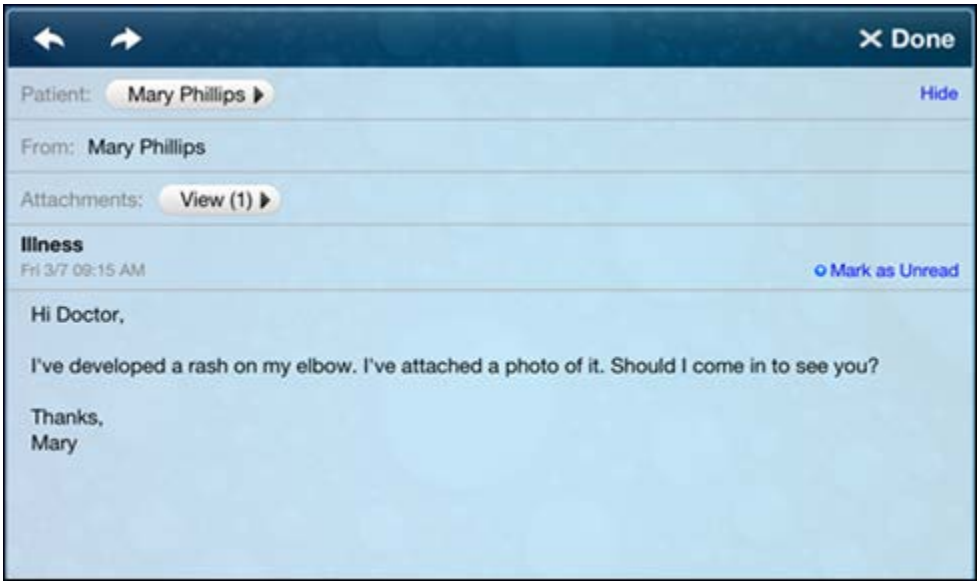


1. In an Rx Request message, tap:
   - The patient's name to review his chart.
   - A pending medication to review the order details. The Order Details screen appears.
2. Tap **Rx Request** to return to the message.
3. Tap:
   - **Edit** to selectively approve and refuse pending medications. The Edit screen appears. You can tap a medication to edit its order details before approving it. When you are finished, tap **Next** to go to the Summary screen after acknowledging any alerts.
   - **Approve** to approve all pending medications. The Summary screen appears unless there are alerts to acknowledge first.
   - **Refuse** to refuse all pending medications. The Alerts screen appears, and you must select a reason for refusal for each medication. Tap **Accept** to go to the Summary screen.
4. Tap **Sign** to sign any approved refill requests. If you have addressed all the requests in the message, it is removed from your In Basket. The Close Encounter screen appears.
5. Close the encounter if desired.

You can also swipe up on the **Patient Info** tab to see more about the patient.

Respond to patient advice requests

You can respond to patient requests for medical advice through Pt Advice Request messages.



1. In a Pt Advice Request message, tap:
   - The patient's name to review her chart.
   - **View** to see any attachments when present.
2. Tap:
   - to reply to the patient by email.
   - to forward the message to another provider.
   -

     to indicate that you have responded by calling the patient. The message is removed from your In Basket.

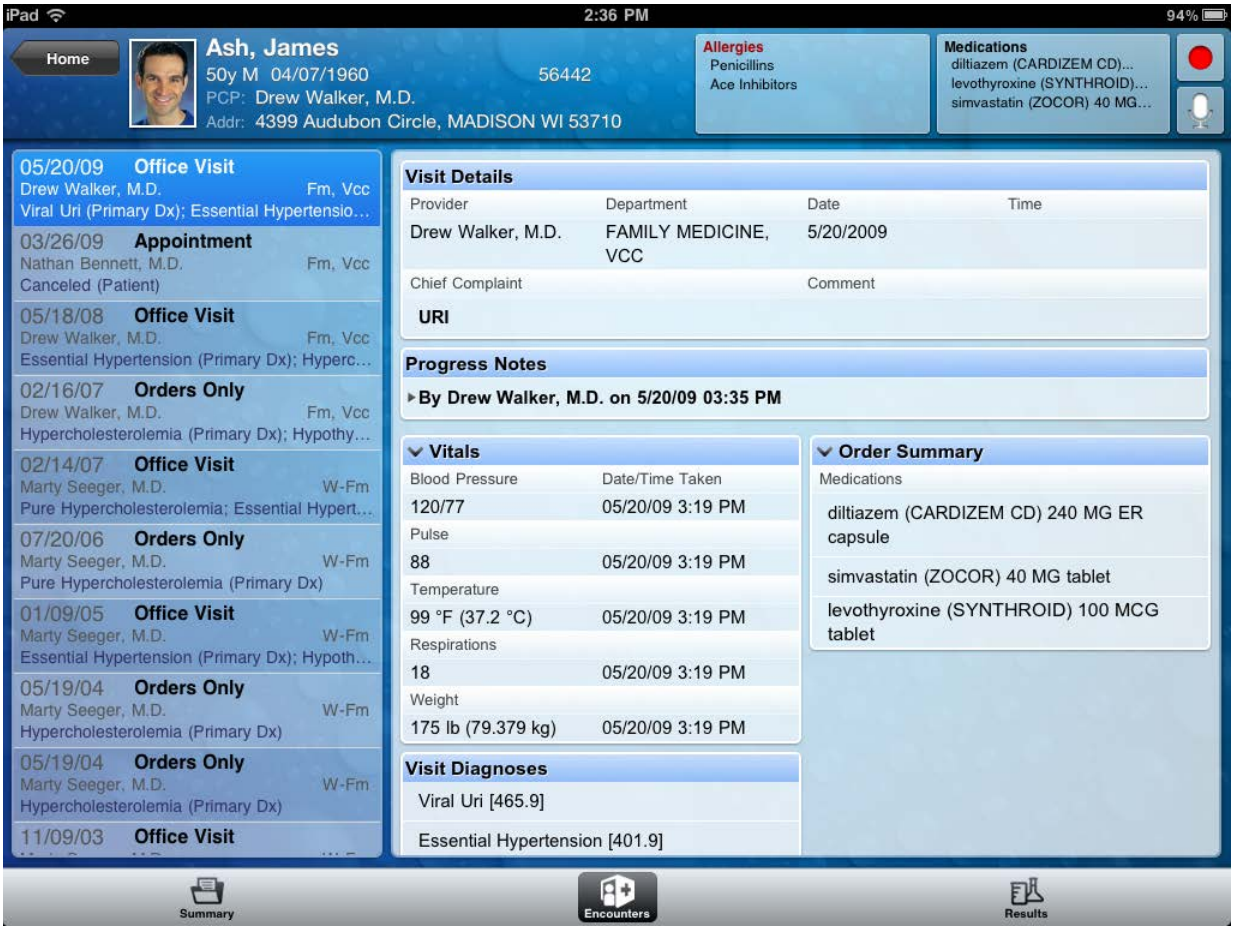
Review Previous Encounters

From the Encounters activity, you can review information about previous encounters, such as a reason for the visit or admission and visit diagnoses or problems. Progress notes are included in the report, as well as vitals. You can review the orders placed during the encounter in the Order Summary section.

View details from previous encounters

Tap

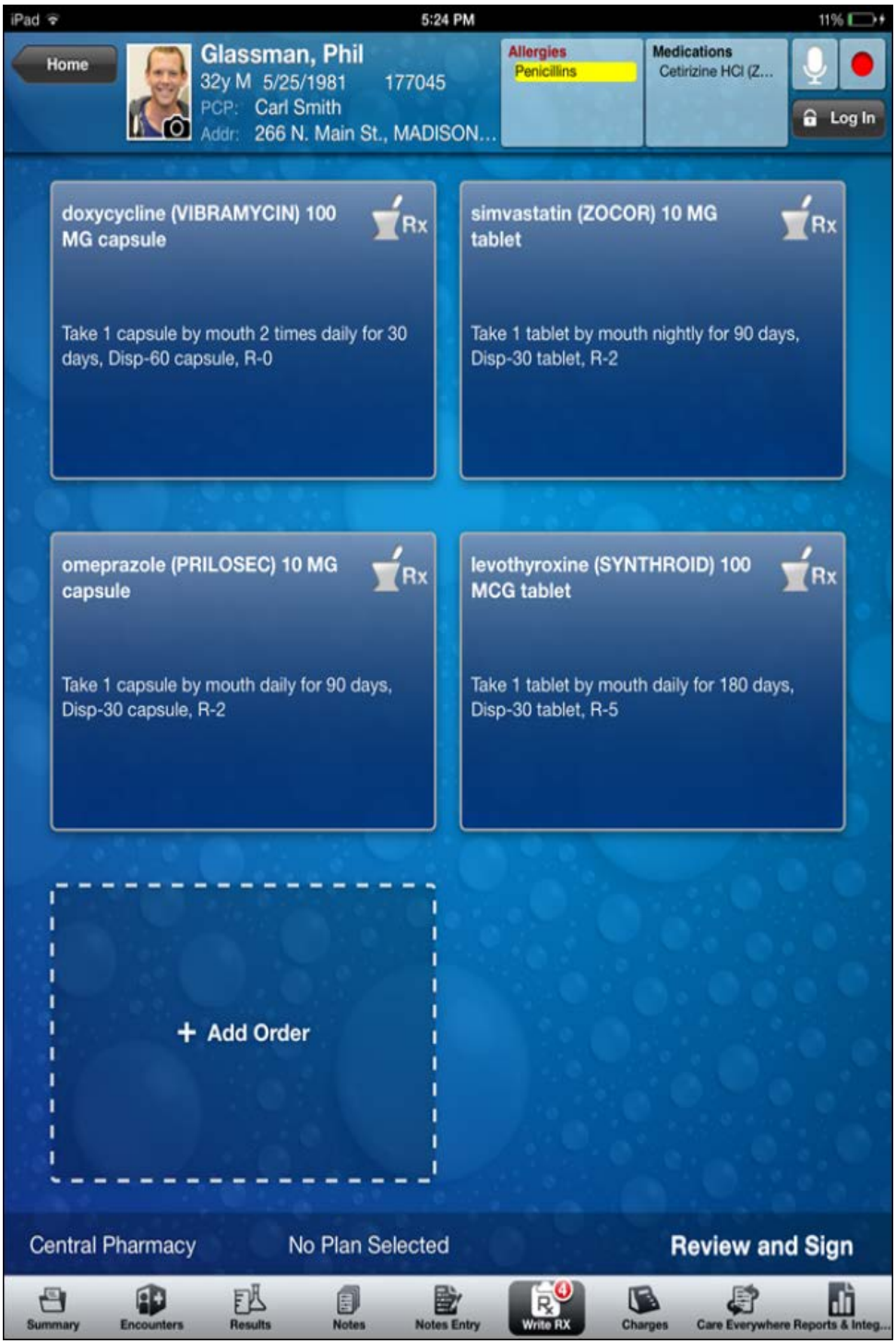
to open the Encounters activity. Tap an encounter to review the report that appears.



E-Prescribe Medications

The E-Prescribing activity allows you to order medications from Canto. Note that you can only order medications, not procedures.

!	**UNABLE TO USE FOR EPCS** (Electronically Prescribed Controlled Subtances) Although the E-Prescribing activity allows you to e-prescribe most outpatient medications, there are some limitations, especially for more complex medications, such as controlled medications. All of these limitations are by design to help ensure appropriate and safe use of the application to e-prescribe medications.



Review medication information

Tap **+ Add Order** to begin prescribing a medication. A complete list of the patient's active medications appears, including medications that cannot be e-prescribed or called in. These medications are indicated with a red banner.

Inpatient medications from a patient's admission do not appear in Canto. When a patient is admitted, you cannot e-prescribe medications for him.

Write a prescription

1. Tap **+ Add Order**.
2. Select a medication from the Active Meds tab, or use the Preference or Search tabs to find a medication.
3. On the Edit screen, enter details for the prescription.
4. Tap **Done**. The order appears in the E-Prescribing activity.
5. Optionally, at the bottom of the screen, tap:
   - The pharmacy name to select a different pharmacy.
   - The plan name to verify the patient's coverage information.
6. Tap **Review and Sign**.
7. If medication warnings appear, enter override reasons for individual warnings or one override reason for all warnings.
8. Tap **Accept**. The order summary screen appears.
9. For call-in orders, tap the circle next to the medication to indicate that you have called it in.
10. Enter your password and tap **Sign**.

The following icons appear next to medications in the preference list and search features:

	Medications that must be called in
	Medications that the system has added to your preference list
	Medications you have added to your preference list

	You can manage your preference list only in Hyperspace.

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