

Open and navigate an encounter

Open a booked visit and find the information you need in the encounter workspace.

For: Physicians

Before you start

- Access to the patient's appointment and encounter.

What you'll achieve

The correct encounter is open, with visit information and chart panels available.

1

Open the booked visit

Confirm the patient and appointment, then choose Start Encounter.

The screenshot displays a medical software interface for managing a booked visit. The top navigation bar includes a search bar, a user profile for Dr. Elena Vasquez, and icons for grid, list, and search. The left sidebar shows a 'Work' icon and a user profile icon. The main content area is divided into several sections:

- Appointment Details:** Patient name 'Jeff Adams', treatment 'Standard Treatment', and appointment time '2:00 PM' on 'Oct 1, 2026' for a duration of '30m'. Below this, there are two red error messages: 'Service Not Valid For Client Type' and 'Requires Location'.
- Set Location:** A section with a dropdown arrow, containing three options under 'ATTENDANCE MODE': 'Office Visit' (Client comes to your office location), 'External Location' (Meet at client location or other venue), and 'Virtual Meeting' (Video call or phone appointment). Each option has a radio button. A 'SAVE LOCATION' button is at the bottom right of this section.
- Task List:** A horizontal bar with icons and labels for '+ ADD', 'Documents', 'Session prep', 'Video call', 'Tasks', 'Budgets', 'Comments', and 'Notifications'.
- CLINICAL Section:** Contains two items: 'Appointment Details' (with a red 'Needs Location' error and a count of '4') and 'Charting' (with a 'New Chart Entry' button and a microphone icon).
- FINANCIAL Section:** Contains two items: 'Billing' (with a red 'Invalid Service' error and a 'PENDING' status) and 'Earnings'.

On the right side of the interface, there is a 'SYSTEM' section with links for 'Appointment History' and 'Communications' (with a 'Log' link). A vertical 'Feedback' button is located on the far right edge.

Orient yourself in the workspace

Confirm the patient in the encounter header. Locate Visit Stream, Clinical Notes and Context.

The screenshot displays the InToday workspace for patient **Jeff Adams [MSP]** (Standard Treatment). The top header includes navigation icons, a page indicator (5 of 5), and action buttons: **Full Chart**, **CareConnect**, **Prescribe**, and **Record**. Below the header, a status bar indicates **1 note is still unsigned from today.** with a **Dismiss** link.

The main workspace is divided into two primary sections:

- Visit Stream:** Contains a text input field with the placeholder "Tell the AI what to do..." and a "Paste transcript" button. Below this is a navigation bar with **Clinical Notes** and **New Chart Entry** (with a dropdown arrow). A microphone icon and a count of **1** are also present.
- Context:** A sidebar on the right listing various clinical data points, each with a right-pointing arrow:
 - Since Last Visit
 - Summary
 - Problem List
 - Recent Visits
 - Care Team Activity
 - Medications
 - Labs
 - Documents
 - Dev

At the bottom of the Visit Stream section, there are several action buttons: **Book follow-up**, **Lab requisition**, **Prescription**, **Summary letter**, **Code this visit**, and **Add fee codes**.

3

Choose a chart view

Open the Full Chart menu and choose the view that fits your work.

Jeff Adams [MSP]
Standard Treatment

5 of 5

Full Chart

CareConnect Prescribe Record

1 note is still unsigned from today.

Dismiss

Visit Stream

Tell the AI what to do... press **Enter** to launch

Clinical Notes New Chart Entry

Book follow-up Lab requisition Prescription Summary letter Code this visit Add fee codes

Context

- Since Last Visit
- Summary
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4

Review results alongside the visit

Open Labs to see the patient's recorded laboratory results without leaving the encounter.

**Labs**

7

ADD LAB RESULT**Glucose Fasting**

5.1mmol/L

Sep 4

Normal

**Cholesterol Total**

4.8mmol/L

Sep 4

Normal

**LDL Cholesterol**

2.9mmol/L

Sep 4

Normal

**Creatinine**

84umol/L

Sep 4

Normal

**TSH**

1.9mU/L

Sep 4

Normal

