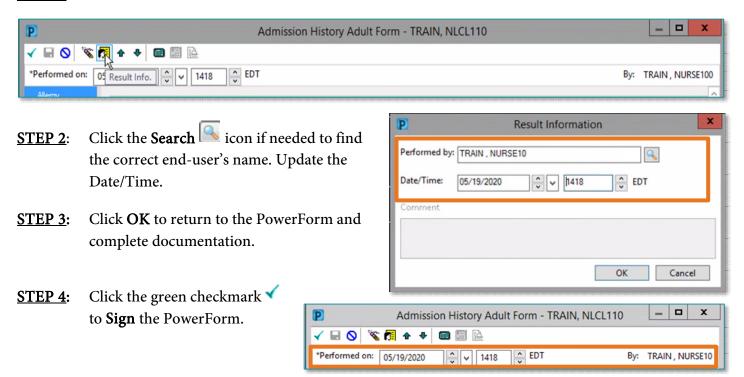**Northern Light Health** sm

At times, end users are called upon to enter documentation into the electronic medical record for a peer. This is called "charting by proxy" or "proxy charting."

This commonly occurs in the recovery period following a Millennium downtime.
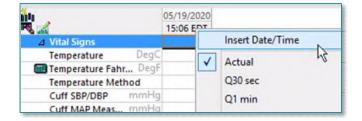
PowerForm Proxy Charting

The name in the upper right corner of a PowerForm is the name of the person to whom the documentation will be attributed. The date and time also display on this line. Follow these steps to change the name (and date and time, if needed).

STEP 1: Click the **Result Info** 📷 icon in the PowerForm menu.

STEP 2: Click the **Search** 🔍 icon if needed to find the correct end-user's name. Update the Date/Time.

STEP 3: Click **OK** to return to the PowerForm and complete documentation.

STEP 4: Click the green checkmark ✓ to **Sign** the PowerForm.

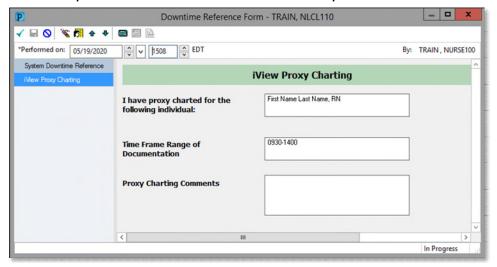
Interactive View and I&O Proxy Charting

STEP 1: Enter and sign results in **Interactive View** in the usual manner. Use the **Insert Date/Time** option when documenting retrospectively.

NOTE: The Insert Date/Time option may be used to document in multiple time columns, if needed.

STEP 2: Click **AdHoc** ![AdHoc] in the Millennium toolbar.

STEP 3: Choose the appropriate PowerForm.

 ➢ **Downtime Reference:** Used for Proxy Charting resulting from a Millennium downtime.

 ➢ **iView Proxy Charting:** Used for Proxy Charting NOT resulting from a Millennium downtime.

STEP 4: In the **iView Proxy Charting** section (available in both PowerForms), enter the **name** of the individual you charted for, the **time frame**, and any **comments**.

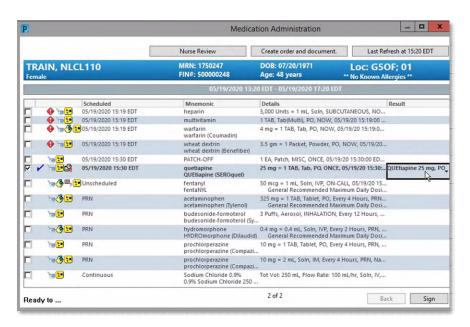**STEP 5:** Click the green checkmark ✔ to **Sign** the PowerForm.

Medication Administration Proxy Charting

Medication Administration Wizard

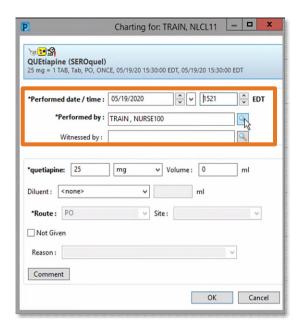**STEP 1:** Select the medication task.

NOTE: **Unless documentation is in real-time, it will be necessary to bypass the scan.**

STEP 2: Open the **Chart Details** window by clicking inside the Result cell.

STEP 3: Click the **Search** 🔍 icon if needed to find the correct end user's name. Update the **Date/Time**.

STEP 4: Click **OK** to return to the Medication Administration Wizard.

STEP 5: Repeat for each additional medication, being sure to update the name, date and time for each one.

STEP 6: Click **Sign** to close the window. Each task will be credited to its selected nurse/respiratory therapist at the indicated date and time.

MAR (When Available)

> **IMPORTANT:** Areas using the Medication Administration Wizard will have access to charting from the MAR after extended planned downtime. Refer to pertinent directives for more information on downtime recovery documentation

STEP 1: Double-click the medication task. This opens the **Chart Details** window.

STEP 2: Enter the correct end-user's **name**. If needed, click the **Search** 🔍 icon. Update the **Date/Time**, if needed.

STEP 3: Click the green checkmark ✔ to **Sign**.

STEP 4: Repeat for each additional medication, being sure to update the name, date and time for each one.