

How to Log a Patient

Step-by-Step Guide

Step 1

Start a New Patient Log



- Go to Patient Logs
- Click + New Log
- View all logs for your rotation(s)

Patient Logs
View your patient logs for the current academic year. This includes logs for both current and past rotations for the year.

Current Rotation(s) Logs:
View your patient logs for the current academic year and current rotation(s). You can edit the logs until the end of rotation period or until they are finalized or submitted for review.

[+ New Log](#)

Log ID	Log Date	Discipline	Campus	Details
Rotation: Med Clerkship 12 Wk-Rotation 1				
Course: Family Medicine Clerkship				
Dates: 05/04/2026 - 07/24/2026				
Summary: Count = 18				
69	April 13, 2026 1:41 PM	Family Medicine	MetroHealth Medical Ctr	Details Edit
68	April 13, 2026 11:15 AM	Family Medicine	MetroHealth Medical Ctr	Details Edit
67	April 10, 2026 8:13 PM	Family Medicine	MetroHealth Medical Ctr	Details Edit
64	April 6, 2026 5:35 PM	Family Medicine	MetroHealth Medical Ctr	Details Edit
63	April 6, 2026 5:34 PM	Family Medicine	MetroHealth Medical Ctr	Details Edit

Step 2

Basic Information



- Choose your Rotation**
System auto-populates:
 - Discipline
 - Campus
 - Campus Location
 - Select Setting

- Select your setting**
 Rotation cannot be changed after this step

Click **Continue**

Basic Information

Rotation: S354 - Med Clerkship 12 Wk-Rotation 1 - Aging- University Hospitals
Select a rotation for this log. This cannot be changed later after saving.

Discipline: Aging
The discipline is determined by the selected rotation and cannot be changed.

Campus: University Hospitals
The campus is determined by the selected rotation and cannot be changed.

Campus Location: University Hospitals
The campus location is determined by the selected rotation and cannot be changed.

Setting: Emergency Room
Select the setting for this log.

[Continue](#)

Encounter Date & Preceptor

Encounter Date & Preceptor

Encounter Date: 5/4/2026
Select the date of the patient encounter. Must be within the dates of your rotation.

Preceptors: Select a preceptor...
Preceptors are filtered based on the selected session's discipline.

[Continue](#)

Save as Draft **Save & Finalize**

Step 3

Encounters & Preceptors



1. Select Encounter Date
2. Choose one or more Preceptors
3. Preceptors are filtered by rotation
4. Selected preceptors will be used for assessments

Click **Continue**

Encounter Date & Preceptor

Encounter Date: 5/4/2026
Select the date of the patient encounter. Must be within the dates of your rotation.

Preceptors: Select a preceptor...
Preceptors are filtered based on the selected session's discipline.

[Continue](#)

Save as Draft **Save & Finalize**

Step 4

Patient & Conditions



- Select:
- Age
- Gender
- Race
- Add Clinical Conditions
- Mark one as Primary
- Select an Observed Activity if required by discipline (note is none are required this field will not be visible)
- Add notes if needed

👉 Click **Continue**

Step 5

Your Role



- Indicate your level of involvement
- Helps track your clinical experience

👉 Click **Continue**

Step 6

Procedures



- Select Procedures performed
- Add additional notes if needed

👉 Click Save & Finish or Save as a Draft to work on it at a later stage

← All Logs	
Basic Information	1
Encounter Date & Preceptor	2
Patient Information & Conditions	3
My Role	4
Procedures	5

Procedures:

- ☐ Select All
- ☐ Glucose Fingertick
- ☐ Intradermal(IM/Sub Q) Injection
- ☐ Office Spirometry/Peak flow
- ☐ Rapid Strep Test
- ☐ Urinalysis
- ☐ Urine HCG

Select the clinical procedures you performed during this encounter.

Additional Notes:

Add any additional notes about this encounter that you would like to share with your preceptors.

My Role

Save as Draft Save & Finalize

Step 7

Finalize Patient Log



- Confirm to Finalize
- Finalized logs cannot be edited
- Used for assessments and progress tracking

✓ Finalize Patient Log

This patient log will be finalized and cannot be edited further. Do you want to proceed?

Yes, finalize No, take me back to the list

✓ Patient Log Saved

The patient log has been saved successfully. Do you want to view the log details now?

Yes, show me No, take me back to the list

Process Overview



Access Anywhere

Desktop, tablet, mobile



Support

For help contact casmeded@case.edu