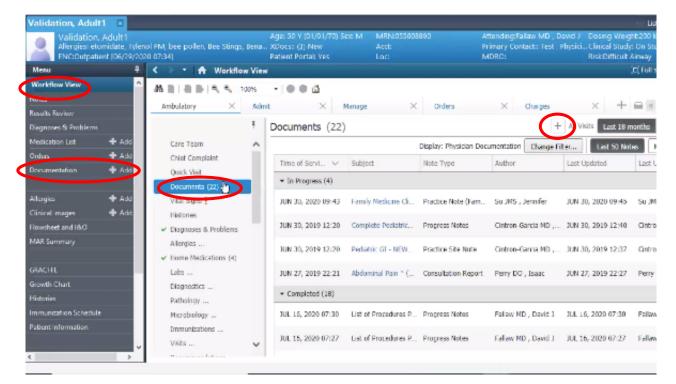
## Adding PowerNote Documentation to a Patient's Chart

## Navigation:

1. Start by selecting Workflow View in the main menu, clicking on Documents, and clicking on the + tab on the right side of the screen. You can also click on +Add next to Documentation in the main menu.



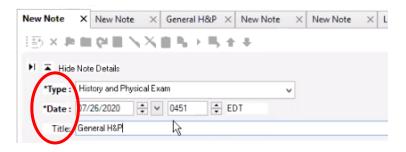
2. Click on the +Add button and change to PowerNote view.

| dation, Adult1                                   |             |   |        |
|--|-------------|---|--------|
| Validation, A<br>Allergies: etom<br>ENCOutpatien | idate, Tyle | Age: 50 Y (01/01/70) See<br>enol PM, bee pollen, Bee Stings, Bena., XDocst. (3) New<br>220 07:34] Patient Portal: Ves |        |
| enu  | +           | < > - A Documentation   |        |
| lankflaw View                                    | 2           | + Add - (R)   |        |
| otes   |             | Polychiote New Note × New Note  | ×      |
| usuits Review                                    |             | By an a bucumentation   | -      |
| legnoses & Problems                              |             | Note Type List Filter:  |        |
| Nedication List                                  | + Add       | Position V  |        |
| rders  | 🛨 A:68      | Тури:   | Note T |
| ocumentation                                     | 🕂 Add       |   | ÷.     |
|  |             |   | *      |
| lergies  | 🕈 Add       | Title   |        |
| nical images                                     | 🕈 Add       | Allergy Immunology Clinic Note - New  |        |
| owsheet and I&O                                  |             |   |        |
| IAR Summary                                      |             | "Date (mm/dd/yyyy):   |        |
|  |             | 7/26/2020 III 0451 EDT  | ŵ.     |
| RACHE  |             | 'Author:  |        |
| owth Chart                                       |             | Karihlia, Apama   | 10     |
| dories   |             |   |        |
| munication Schedule                              |             |   |        |
| dient information                                |             |   |        |



- 3. Add the type of note you are writing by clicking on the drop-down menu next to Type and selecting a category.
- 4. Next to Date, log the date and time you are writing the note.
- 5. Next to Title, add a title for your note.

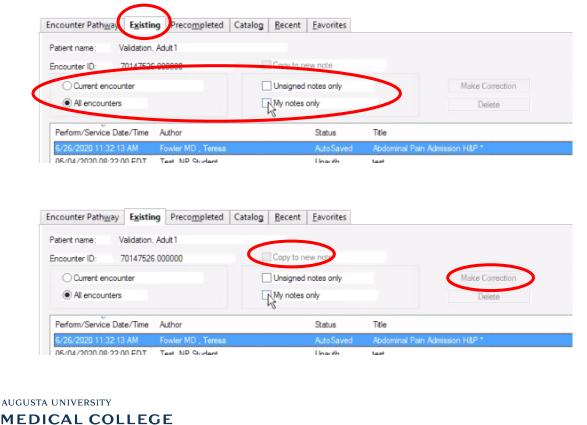
**OF GEORGIA** 



6. Under the Encounter Pathway tab, you can use the search function to search the type of note you are writing. Select the type of note you are writing and click OK, and a template will pull up to write a new note.

| earch: genual           |                                 | Contains  | ~ | Add to Favorites |  |  |
|-------------------------|---------------------------------|-----------|---|------------------|--|--|
|                         | Associated Diagnosis            | Note Type |   |                  |  |  |
| Name                    | Description                     |           |   |                  |  |  |
| General Admission H&P * | *2G Admission H&P General Admis | sion      |   |                  |  |  |
| General Complaint *     | *2G General Complaint           |           |   |                  |  |  |
| General Complaint MCG   | MCG *2G General Complaint       |           |   |                  |  |  |
| General Exam *          | *2G General Exam                |           |   |                  |  |  |
| - 15 HOO                | 1100 400 0 1 5                  |           |   |                  |  |  |

7. Under the Existing tab, you can view the patient's previous notes. You can filter these notes using the filters under Encounter ID. You can select an existing note and click Make Correction to edit that note. You can also copy the information from an existing note to a new note by clicking Copy to new note, then OK.



- 8. Under the Precompleted tab, you will find notes completed by the provider for common procedures or disease processes. They are not for any particular patient. Similar to notes under the Existing tab, they can be filtered.
- 9. Under the Catalog tab, you will find that notes are categorized by specialty. Select your desired specialty under the Catalog drop-down menu, then click on the Procedures folder and double click on the procedure you wish to write a note for.

| Catalog | *2G Perioperative                 | <ul> <li>Add to Favorites</li> </ul>              |  |
|---------|-----------------------------------|---|--|
| Name    |                                   | Description                                       |  |
|         | Postanesthesia Evaluation         | *2G Postanesthesia Evaluation                     |  |
|         | Preanesthesia Evaluation          | *2G Preanesthesia Evaluation Note                 |  |
|         | SOAP Note: General                | *2G Admission SOAP Note: General                  |  |
| 0       | Procedures                        | Procedures  |  |
| -       |                                   | *2G Aterial Line Insettion Procedure              |  |
| -       | Central Line Insertion            | *2G Central Line Insertion Procedure              |  |
| -       | Central Line w/ PA Cath Insertion | *2G Central Line with PA Cath Insertion Procedure |  |
| -       | Endotracheal Intubation           | *2G Endotracheal Intubatid Procedure              |  |
| -       | Epidural Injection                | *2G Epidural Injection Procedure                  |  |
| - I-    | Lumbar Puncture                   | *2G Lumbar Puncture Procedure                     |  |
| . L     | Peripheral IV Insertion           | *2G Peripheral IV Insertion Procedure             |  |

10. You can add a note to Favorites by selecting the note and clicking on Add to Favorites. You can access these notes under the Favorites Tab. You can view recently accessed notes under the Recent tab.

| Catalog | *2G Perioperative                                     | Add to Favorites                                  |
|---------|---|---|
| Name    |   | Description                                       |
|         | Postanesthesia Evaluation                             | *2G Postanesthesia Evaluation                     |
|         | Preanesthesia Evaluation                              | *2G Preanesthesia Evaluation Note                 |
|         | SOAP Note: General                                    | *2G Admission SOAP Note: General                  |
| 8       | Procedures  | Procedures  |
| - T-    | Aterial Line Insertion                                | *2G Aterial Line Insertion Procedure              |
|         | Central Line Insertion                                | *2G Central Line Insetion Procedure               |
| -       | <ul> <li>Central Line w/ PA Cath Insertion</li> </ul> | *2G Central Line with PA Cath Insertion Procedure |
| -       | Endotracheal Intubation                               | *2G Endotracheal Intubation Procedure             |
| -       | Epidural Injection                                    | *2G Epidural Injection Procedure                  |
| -       | Lumbar Puncture                                       | *2G Lumbar Puncture Procedure                     |
|         | Perpheral IV Insertion                                | *2G Peripheral IV Insertion Procedure             |

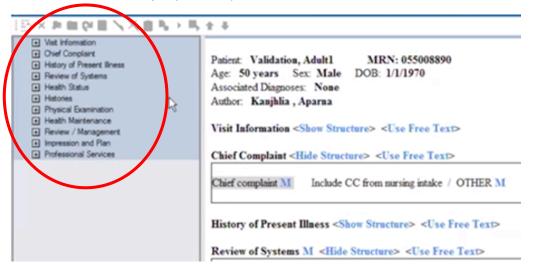
## Filling out a Note for a General Exam:

11. Create a new note by following steps 1-5. To access the template for a General Exam, search "General" under the Encounters pathway, select General Exam, and click OK.

| Search: general         |                          | Contains  | ~ | Add to Favorites |  |
|-------------------------|--------------------------|-----------|---|------------------|--|
| Restrict display by:    | Associated Diagnosis     | Note Type |   |                  |  |
| Name                    | Description              |           |   |                  |  |
| General Admission H&P * | *2G Admission H&P Genera | Admission |   |                  |  |
| General Complaint *     | *2G General Complaint    |           |   |                  |  |
| General completet MCG   | MCG *2G General Complain | t         |   |                  |  |
| General Exam *          | *2G General Exam         |           |   |                  |  |
| 1.00 110                | 1100 400 0 1 5           |           |   |                  |  |



12. You can keep track of filling out the note in its entirety by following the menu on the left-hand side. You can also click on a tab in the menu to jump to that particular section.



13. Visit Information: To fill out this section, click on Show Structure and select from the options provided next to each subsection. Click on an option to select it, and click on it again to negate it.

|                         | Patient: Validation, Adult1 MRN: 055008890<br>Age: 50 years Sex: Male DOB: 1/1/1970<br>Associated Diagnoses: None<br>Author: Kanjhlia , Aparna  |
|-------------------------|---|
|                         | Visit Information (Show Structure>) <use free="" text="">         Chief Complaint <hide structure="">) <use free="" text=""></use></hide></use> |
| Visit Information M <   | Hide Structure> <use free="" text=""></use>   |
| Visit type $M >>$ A     | nnual exam / General concerns / Increase in symptoms / New symptom / Scheduled follow-up / OTHER  |
| Accompanied by >> N     | To one / Family member / Spouse / Significant other / Medical personnel / OTHER   |
| Source of history > S   | elf / Family member / Spouse / Significant other / Medical record / OTHER   |
| Referral source >>> S   | elf / PROVIDER / ED / Health plan / Family member / Friend / OTHER M  |
| History limitation >> N | lone / Clinical condition / Hearing impaired / Language barrier / Family/Guardian not available / OTHER M                                       |

14. To add a comment under any option, right click on the option, select Comment, write the comment and select OK.

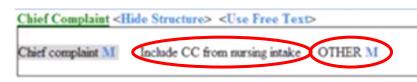


| e / Family m | mban / Smann / Similand ather      | "family member" comment |        |
|--------------|------------------------------------|-------------------------|--------|
| Family mem   | Copy<br>Paste<br>Clear 5<br>Negate | Daughted                | ^      |
| PROVIDER     | Normal H                           | Check Speling OK        | Cancel |

15. When you're done filling out the section, click on Hide Structure. All of the information you filled in will populate under that section, as seen below. A checkmark will appear on the left-hand side menu once a section is completed.



16. **Chief Complaint:** To fill out this section, you can fill it in from the nursing intake by clicking on Include CC from nursing intake and selecting the chief complaint. You can also click on OTHER and write your own.

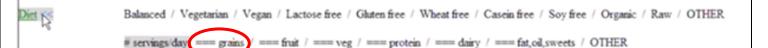


- 17. **History of Present Illness:** Fill out this section similar to how you would fill out the Visit Information section (see steps 13-15)
- 18. When filling out a section, some subsections will have >> next to it: by clicking on it, it will reveal more options to choose from when filling out that subsection. To hide the options, click on <<.

|     | History of Present I  | Iness M <hide structure=""> <use free="" text=""><br/>(General Exam)</use></hide>  |  |
|-----|-----------------------|--|--|
|     | Presents for          | General exam / OTHER   |  |
|     | General health status | Quality: good / fair / poor / unchanged / stable / OTHER<br>Additional ino: OTHER  |  |
|     | Diet R                | Balanced / OTHER<br># servings/day; === grains / === fruit / === veg / === protein / === dairy / === fat,oil,sweets / OTHER  |  |
| Dee | -                     | rian / Vegan / Lactose free / Gluten free / Wheat free / Casein free / Soy free / Organ<br>= grains / === fruit / === veg / === protein / === dairy / === fat,oil,sweets / OTHER |  |

19. If you see === next to an option, you can click on it to provide a numerical value (type in a number).





20. **Review of Systems:** To fill out this section, select Negative for a symptom if there is nothing wrong. If there are any abnormalities, you can selection the appropriate symptoms. You can also add comments for any of the symptoms by following step 14.

| Review of Systems | M <hide structure=""> <use free="" text=""></use></hide>   |
|-------------------|--|
| Constitutional    | Negative M / Negative except HPI / Fever / Chills / Sweats / Weakness / Fatigue / Decreased activity / OTHER                     |
| Eye               | Negative / Negative except HPI / Recent visual problem / Icterus / Discharge+ / Blurring / Double vision / Visual disturbances / |
| ENMT              | Negative / Negative except HPI / Decreased hearing+ / Ear pain+ / Nasal congestion / Sore throat / OTHER                         |

- 21. Health Status: Fill out this section similar to the previous sections.
- 22. If an option has (ST) next to it, that means there is a Smart Template available. By clicking on it, it will pull the relevant information from the patient's chart. To add any additional information, select Other and write it in.

| Allergies      | Allestics (ST) M / Include allergy profile / OTHER  |
|----------------|---|
| -              |   |
|                |   |
|                |   |
| Current medica | ions None / Include medication list / Home meds (ST)  |
| Current medica | tions None / Include medication list / <u>Home meds (ST)</u><br>Home Medications (4) Active   |
|                |   |
|                | Home Medications (4) Active   |
|                | Home Medications (4) Active<br>acetaminophen-butalbital 300 mg-50 mg oral tablet 1 tab, PRN, PO, Q4HR   |
|                | Home Medications (4) Active<br>acetaminophen-butalbital 300 mg-50 mg oral tablet 1 tab, PRN, PO, Q4HR<br>amLODIPine 2.5 mg oral tablet 5 mg = 2 tab, PO, Every Day  |
|                | Home Medications (4) Active<br>acetaminophen-butalbital 300 mg-50 mg oral tablet 1 tab, PRN, PO, Q4HR<br>amLODIPine 2.5 mg oral tablet 5 mg = 2 tab, PO, Every Day<br>Colace 50 mg oral capsule 50 mg = 1 cap, PRN, PO, BID |

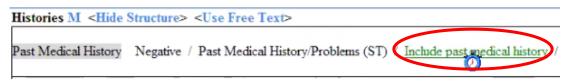
23. For the Problem List subsection, you can use the Smart Template to fill it out. You can also click on "Include problem list," select a diagnosis, and choose from a list of problems.

| Problem list)M | Include problem list (Problem (ST))<br>Anhythmia<br>Tobacco use |
|----------------|---|
|                | / OTHER   |

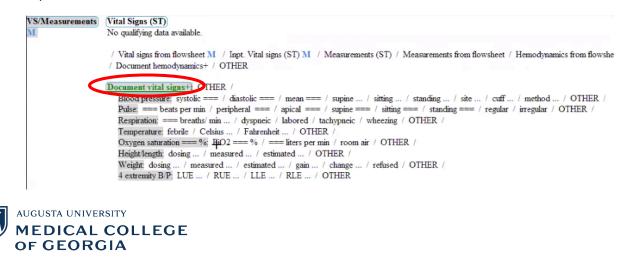


|           |   |  | Pro  | oblem List fo   | or Validatio  | on, Adult1   |  |   | - × |
|-----------|---|--|--|---|---|--|--|---|-----|
| C P       | roblen  | n  |  |   |   |  |  |   |     |
| 2         | 0 min   | utes ago   |  |   |   |  |  |   |     |
|           |   |  |  |   |   |  |  |   |     |
| _         |   |  |  |   |   |  |  |   |     |
| Diag      | inosis (F   | Problem) being Ardresse  | ed this Visit  |   |   |  |  |   |     |
| +         | Add   | l 🔟 Modify 🖆   | Convert Display:   | Active  |   | v 🔎 IMO  |  |   |     |
| 1         |   |  | 1  |   |   |  |  |   |     |
|           | P   | nority Annotated D   | Display Clinical D   | )x  | Code  | Vocabula   | iry  | Dx Type   |     |
| 6         | 1   | - Arrhythmia   | a, vagal Syncope   | e and collapse  | R55   | ICD-10-  | CM   | Discharge   |     |
|           | <b>O</b>  | <ul> <li>Hypertensi</li> </ul>   | ion Essentia   | l (primary) hyp   | pert  110   | ICD-10-  | СМ   | Billing Dia   |     |
|           |   |  |  |   |   |  |  |   |     |
| ۲         |   |  |  |   |   |  |  |   | >   |
| -         | lems  |  |  |   |   |  |  |   | >   |
| -         |   | Modity 1   | Convert 🛃 No CP  | nronic Problems   | Display:  | All  | ~  | <b>ρ</b> Μα   | >   |
| Prob      | Add   | Modify   | Convert 🐼 No CP  | nranic Problems<br>Code   | Display: Vocabulary   | All<br>Last Updated By   | ↓<br>Life Cycle Sta  |   | >   |
| Prob      | Add   |  |  |   | · · · ·   |  |  |   |     |
| Prob      | Add<br>A<br>A XQ<br>A XQ  | Innotated Display  | Name of Problem A  | Code<br>36112013  | Vocabulary<br>SNOMED-CT   | Last Updated By  | Life Cycle Sta.,<br>Canceled   | . Last Updated  |     |
| Prob      | Add<br>A<br>A<br>A<br>A<br>A<br>A<br>A                                    | Innotated Display  | Name of Problem A<br>Abdominal pain<br>Abdominal wind pain   | Code<br>36112013<br>494400015<br>4 2794587                                    | Vocabulary<br>SNOMED-CT<br>SNOMED-CT<br>SNOMED-CT                     | Last Updated By<br>SYSTEM  | Life Cycle Sta<br>Canceled<br>Canceled   | Last Updated<br>7/30/2014<br>7/7/2011<br>4/4/2016                                       |     |
| Prob<br>4 | Add<br>A<br>A<br>A<br>A<br>A<br>A<br>A                                    | Annotated Display<br>Abdomina Pain2<br>Abdominal wind pain<br>High grade squamo<br>Accident involving i  | Name of Problem A<br>Abdominal pain<br>Abdominal wind pain<br>Abnormal anal Papanico<br>Accident involving ice ya  | Code<br>36112013<br>494400015<br>1 2794587<br>1 328376012                     | Vocabulary<br>SNOMED CT<br>SNOMED CT<br>SNOMED CT<br>SNOMED CT        | Last Updated By<br>SYSTEM<br>Test , Physician - Radiolo<br>Test , Physician - Residen<br>Test , Physician - Internal   | Life Cycle Sta<br>Canceled<br>Canceled<br>Canceled<br>Canceled                                     | Last Updated<br>7/30/2014<br>7/7/2011<br>4/4/2016<br>4/6/2017                           |     |
| Prob      |   | viniotated Display<br>Viddomina Pain2<br>Viddominal wind pain<br>digh grade squamo<br>Viccident involving i<br>Viccident involving i<br>Vicciabular labrum t | Name of Problem A<br>Abdominal pain<br>Abdominal wind pain<br>Abnormal anal Papanico<br>Accident involving ice ya<br>Acetabular labrum tear                      | Code<br>36112013<br>494400015<br>4 2794587<br>4 328376012<br>1054856          | Vocabulary<br>SNOMED_CT<br>SNOMED_CT<br>SNOMED_CT<br>SNOMED_CT<br>IMQ | Last Updated By<br>SVSTEM<br>Test, Physician - Radiolo<br>Test, Physician - Residen<br>Test, Physician - Internal<br>Fallaw MD, David J                          | Life Cycle Sta<br>Canceled<br>Canceled<br>Canceled<br>Canceled<br>Canceled<br>Canceled             | Last Updated<br>7/30/2014<br>7/7/2011<br>4/4/2016<br>4/6/2017<br>7/30/2014              |     |
| Prob      |   | Annotated Display<br>Abdomina Pain2<br>Abdominal wind pain<br>High grade squamo<br>Accident involving i<br>Accident involving i<br>Actinic keratosis         | Name of Problem A<br>Abdominal pain<br>Abdominal wind pain<br>Abnormal anal Papanico<br>Accident involving ice ya<br>Acetabular labrum tear<br>Actinic keratosis | Code<br>36112013<br>494400015<br>4 2794587<br>328376012<br>1054856<br>1208677 | Vocabulary<br>SNOMED-CT<br>SNOMED-CT<br>SNOMED-CT<br>IMO<br>SNOMED-CT | Last Updated By<br>SVSTEM<br>Test, Physician - Radiolo<br>Test, Physician - Residen<br>Test, Physician - Internal<br>Fallaw MD, David J<br>Dellsperger MD, Kevin | Life Cycle Sta<br>Canceled<br>Canceled<br>Canceled<br>Canceled<br>Canceled<br>Canceled<br>Canceled | Last Updated<br>7/30/2014<br>7/7/2011<br>4/4/2016<br>4/6/2017<br>7/30/2014<br>7/30/2014 |     |
| Prob      | Add<br>A X<br>A X<br>A X<br>A X<br>A X<br>A X<br>A X<br>A X<br>A X<br>A X | viniotated Display<br>Viddomina Pain2<br>Viddominal wind pain<br>digh grade squamo<br>Viccident involving i<br>Viccident involving i<br>Vicciabular labrum t | Name of Problem A<br>Abdominal pain<br>Abdominal wind pain<br>Abnormal anal Papanico<br>Accident involving ice ya<br>Acetabular labrum tear                      | Code<br>36112013<br>494400015<br>   | Vocabulary<br>SNOMED_CT<br>SNOMED_CT<br>SNOMED_CT<br>SNOMED_CT<br>IMQ | Last Updated By<br>SYSTEM<br>Test, Physician - Radiolo<br>Test, Physician - Residen<br>Fallaw-MD, David-J<br>Dellsperger MD, Kevin<br>Murphy RN, Raymond         | Life Cycle Sta<br>Canceled<br>Canceled<br>Canceled<br>Canceled<br>Canceled<br>Canceled             | Last Updated<br>7/30/2014<br>7/7/2011<br>4/4/2016<br>4/6/2017<br>7/30/2014              |     |

- 24. **Histories:** Fill out this section similar to the previous ones. You can also utilize the Smart Template function in this section.
- 25. Under the Past Medical History subsection, you can click on "Include past medical history" and select from the list. The same can be done for family history and procedure history.



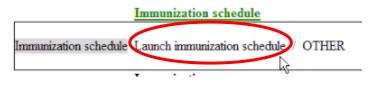
- 26. **Physical Examination:** Fill out similar to previous sections. You can also utilize the Smart Template function in this section.
- 27. If an option is indicated with a +, there will be additional information to fill in. Fill in numerical values as outlined in step 19.



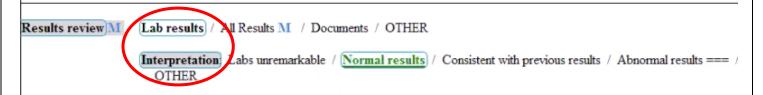
- 28. Health Maintenance: Fill out this section similar to previous ones.
- 29. To fill out the Diagnosis, select "Dx Code Search." You can select a pre-existing diagnosis and/or add a new one by clicking on the Add button under Problem.

|   |  | Diagnosis  | List for Validation, Ad   | J+1  |   |   |   | 1         |
|---|--|--|---|--|---|---|---|-----------|
| Clinical Diagnosis Probler  | m  | Diagnosis  | List for validation, Ad   | aici   |   |   |   | -         |
| minutes ago   |  |  |   |  |   |   |   |           |
|   |  |  |   |  |   |   |   |           |
| Mark all as Reviewed  |  |  |   |  |   |   |   |           |
| iagnosis (Problem) being Addres   | ed this Visi   |  |   |  |   |   |   |           |
| 🕂 Add 🛒 Modify  | 🖙 Consat 🛛 Display: Active   |  | 🖌 🛄 🎾 IMO   |  |   |   |   |           |
| Priority Annotated  | Display Clinical Dx  | Code   | Vocabula  |  | Dx Type   | Date                                    |   | R         |
|   |  |  | ICD-10-   |  | Discharge                                       |   | 0/2020  | S         |
| O     I     Arrhythm     Hyperten   |  | imary) hypert  10  | ICD-10-   | CM   | Billing Diagno                                  | osis 7/26                               | 5/2020  |           |
| 1/2   |  |  |   |  |   |   |   |           |
|   |  |  |   |  |   |   |   |           |
|   |  |  |   |  |   |   |   |           |
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| C   |  |  | _   |  |   |   |   | >         |
| roblems   |  |  | -   |  |   |   |   | >         |
|   | 🖙 Convert 🔀 No Chronic   | : Problems Display: A  | и   | v  |   |   |   | >         |
| roblems<br>🕂 Add 🔀 Modify   |  |  |   |  | ] <b>(</b> MO                                   |   |   | >         |
| roblems<br>Add 🖄 Modify<br>Annotated Display  | Name of Problem A  | Code Vocabulary  | Last Updated By   | Life Cycle Sta L   | ast Updated                                     | Responsible Provid                      |   | ^         |
| roblems<br>Add 🖄 Modify<br>Annotated Display  | Name of Problem A C<br>Abdominal pain 3  | Code Vocabulary<br>6112013 SNOMED-CT   | Last Updated By<br>SYSTEM   | Life Cycle Sta L<br>Canceled 7   | ast Updated<br>//30/2014                        | Responsible Provid<br>Test-MD-, Resider | nt Test MD,   | R         |
| roblems<br>Add 🖄 Modify<br>Annotated Display  | Name of Problem A C<br>Abdominal pain 3<br>Abdominal wind pain 4   | Code Vocabulary<br>16112013 SNOMED CT<br>194400015 SNOMED CT   | Last Updated By<br>SYSTEM<br>Test , Physician - Radiolo                             | Life Cycle Sta L<br>Canceled 7<br>Canceled 7                             | ast Updated<br>//30/2014<br>//7/2011            |   | nt Test-MD-,<br>Test , Mer                                    | R 44      |
| roblems<br>Add 🖄 Modify<br>Annotated Display  | Name of Problem A C<br>Abdominal pain 3<br>Abdominal wind pain 4<br>Abnormal anal Papanicol 2                            | Code         Vocabulary           16112013         SNOMED_CT           194400015         SNOMED_CT           1794587         SNOMED_CT | Last Updated By<br>SYSTEM   | Life Cycle Sta L<br>Canceled 7<br>Canceled 7<br>Canceled 4               | ast Updated<br>//30/2014                        |   | nt Test-MD-,<br>Test , Mer<br>Raghaver                        | * # # *   |
| Add Modfy<br>Anotated Display<br>Abdomina Pain2<br>Abdomina Pain2<br>Migh grade cquamo. | Name of Problem A C<br>Abdominal pain 3<br>Abdominal wind pain<br>Abnormal anal Papanicol<br>Accident involving ice ya 3 | Code         Vocabulary           16112013         SNOMED_CT           194400015         SNOMED_CT           1794587         SNOMED_CT | Last Updated By<br>SYSTEM<br>Test, Physician - Radiolo<br>Test, Physician - Residen | Life Cycle Sta L<br>Canceled 7<br>Canceled 7<br>Canceled 4<br>Canceled 4 | ast Updated<br>//30/2014<br>///2011<br>//4/2016 | Test MD , Resider                       | nt Test-MD-,<br>Test , Mei<br>Raghaver<br>Internal Test , Phy | * # # # # |

30. To fill out the immunization schedule, click on "Launch immunization schedule" to include previous immunizations.

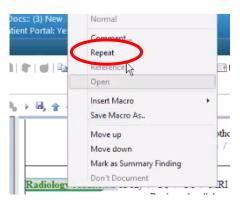


31. **Review/Management:** Fill out similar to previous sections. You can add lab results by clicking on Lab Results and selecting the ones you want to add, as well as add interpretations.



32. You can only add radiology results one at a time. If you have multiple radiology results to add, right-click on "Radiology results" and select Repeat.





- 33. **Impression and Plan:** If you indicate the Course as "Unchanged" (under the Health Maintenance tab), then you do not need to fill out this section. Otherwise, you will fill it out similar to previous sections.
- 34. Professional Services: Fill out similar to previous sections.
- 35. Once you have continued filling out the note, select the Documentation tab at the top and click on Save as Precompleted Note. This way, you can use this template for future patients.

| P   |  | Validation, Adult1                                   |  |  |
|---|--|--|--|--|
| Task Edit View Patient  | Chart Links Notifications  | Documentation Term Tools Help                        |  |  |
| 🗄 Home  🎍 Patient List 🖃 Me   | Add >  |  |  |  |
| 👷 New Sticky Note 🔧 View Stic   | Insert Encounter Pathway   |  |  |  |
| Validation, Adult1 ×<br>Validation, Adult1<br>Allergies: etomidate, T<br>ENC:Outpatient [06/29, | Insert Precompleted Note<br>Sign/Submit Ctrl+G<br>Submit for Transcription Ctrl+M<br>Succ Ctrl+S |  |  |  |
| Menu  | 🕂 < > - 者 Doci   | Save as Precompleted Note                            |  |  |
| Workflow View<br>Notes  | Add ▼ (□) (□) (□)<br>General H&P × List  | Close Notes<br>Recover Deleted Notes<br>Note Details |  |  |
| Results Review  | 15 × 1 = 0   | <b>\ X    ħ → ħ ☆</b> +                              |  |  |

36. Click on Sign/Submit to submit the completed note. Review the type, title, and date. To add someone to review/sign your note (ex: an attending), select "Request endorsement," search for your endorser, and select the type of endorsement you are seeking. You can also include a due date by which they need to review/sign the note, and any comments. Once you are done, click Submit.

| Notes                   | NOTES                     |             |
|-------------------------|---------------------------|-------------|
| Canjhlia , Aparna, 07/2 | 6/2020 04:57, General H&P | Sign/Submit |



| *Type:       | History and Physical Exam                  | ~          |    |               |
|--------------|--|------------|----|---------------|
| Title:       |  | *          |    |               |
|              | General H&P                                |            |    | Default Title |
| *Date:       | 07/26/2020 🔹 🗸 0457 🔹 EDT                  |            |    | Current Date  |
| Endorsere    | endorsement Remove Endorser                | 1          | Ma | nage Defaults |
| Endorser     | endorsement Remove Endorser<br>Type Due By | Comment    |    |               |
|              | ilbe pas of                                | Contractor |    |               |
| Kanji I.a. 4 | sign V                                     |            |    |               |
| Nation       | sign V                                     |            |    |               |
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| Naty         | sign V                                     |            |    |               |
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| Kanji        | sign V                                     |            |    |               |
| Kanje        | sign V                                     |            |    |               |
| Other Actio  | sign<br>review                             |            |    |               |
|              | sign<br>sign<br>review                     |            |    |               |

## **Reviewing the Note and Other Functions:**

37. After you submit the note, it will appear in the Documentation list. You can preview the note, modify it, or forward it.

| Menu                 | Ą     | < > * 🛉 Doc      | umentation                              |                       | [D] Full s                                 | creen 🝙 Print |
|----------------------|-------|------------------|---|-----------------------|--|---------------|
| Workflow View        | ^     | Add - Submit     | 🗟 🔄 Forward 🐠 Message   🦿 Modify        | 🐚   🗶 🌳   📰 🚉 in Erre | Preview                                    |               |
| Notes                |       | List             | Ma Change ( 1 manual )                  |                       |  |               |
| Results Review       |       | List             |   |                       |  |               |
| Diagnoses & Problems |       | Display : All    | ¥                                       |                       |  | Previou       |
| Medication List      | 🕂 Add |                  |   |                       |  |               |
| Orders               | 🕂 Add | Service Date/Ti  | Subject                                 | Type:                 | History and Physical Exam                  |               |
| Documentation        | + Add | 07/26/2020 04:57 | General H&P<br>General H&P              | Date:                 | July 26, 2020 04:57 EDT                    |               |
| Documentation        | - Add | 07/26/2020 03:44 |   | Status:               | Unauth                                     |               |
|                      |       | 06/30/2019 12:20 | Pediatric GI - NEW pt by NP- malabsorpt | Title:                | General H&P                                |               |
| Allergies            | 🕈 Add | 07/19/2020 15:53 | Pediatric Clinic Note                   | Performed By:         | Kanjhlia, Apana on July 26, 2020 05:12 EDT |               |
| Clinical Images      | 🕂 Add | 07/16/2020 12:13 | test note template                      | Account Info:         | AU MEDICAL CENTER, Outpatient, 6/29/2020 - |               |
| clinical images      | T Add | 07/16/2020 07:30 | List of Procedures Performed            |                       | * Droliminon: Donort                       |               |
| lowsheet and I&O     |       | 07/16/2020 07:27 | List of Procedures Performed            | C                     | * Preliminary Report                       |               |
| MAR Summary          |       | 07/10/2020 12:02 | TEST Research Note GCC                  | General H&P           |  |               |
|                      |       | 07/10/2020 09:46 | RN1 Visit 1 MoraB                       |                       |  |               |
|                      |       | 07/09/2020 10:13 | enrollement note 2                      | Patient: Validation,  |  |               |
| GRACHIE              |       | 07/09/2020 10:05 | test for eMR research note 7/9/20       | Age: 50 years S       | ex: Male DOB: 1/1/1970                     |               |
| Growth Chart         |       | 07/01/2020 14:37 | Internal Medicine Clinic Note           | Associated Diagnose   | s: None                                    |               |
|                      |       | 07/01/2020 11:43 | Research note visit 2                   | Author: Kanjhlia,     | Aparna                                     |               |
| listories            |       | 07/01/2020 09:42 | Screening Enrollment Note Smart-MSP     |                       |  |               |
| mmunization Schedul  | e     | 07/01/2020 09:39 | Internal Medicine Clinic Note           | Visit Information     |  |               |
| Patient Information  |       | 06/30/2020 23:50 | Visit Note                              | Visit type: Annua     | al exam.                                   |               |
| ratient information  |       | 4                |   | <                     |  |               |

- 38. If the note was made in error, select the In Error button and write the error that was made. The note will update as "In Error Report."
- 39. When filling out the note, the M next to many of the sections, subsections, and options stands for Macros. By clicking on it, you can select the appropriate Macro to add precompleted information to your note, and it will auto-populate. To remove an option that was selected by the Macro, just click on the option again.





40. To create a Macro for a section/subsection, select the desired options for that section, then right click on the section and select "Save Macro As." Name the Macro, and you can share it with others if desired.

|    |                         | 1                       | P   | Sav    | e As            |             | × |
|----|-------------------------|-------------------------|---|--------|-----------------|-------------|---|
|    |                         |                         | Title: Normal Eyes  | ROS    |                 |             |   |
|    |                         | Review of Systems \ Eye |   |        |                 |             |   |
|    |                         |                         | <ul> <li>Include shared macros</li> <li>My macros only</li> </ul> |        |                 | Delete      |   |
|    |                         |                         | Name  | Shared | Last changed by | Last change |   |
| R  | Save Macro As           | ure                     |   |        |                 |             |   |
| C  | Move up                 | Ne                      |   |        |                 |             |   |
|    | Move down               |                         |   |        |                 |             |   |
|    | Mark as Summary Finding |                         | <   |        |                 | _           | > |
| E. | Don't Document          |                         | Create as share   | d      |                 |             |   |
| 1  | Visual disturb          | ances                   | Create New  | Up     | pdate           | Cancel      |   |

