From the Office of Health Informatics

Quick Reference Guide (QRG)
Dynamic Documentation

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This Quick Reference Guide (QRG) demonstrates the workflow for Dynamic Documentation.

Common Buttons & Icons

	Toggle Workspace icon
Tag	**Tag** button
	Tagged Items icon
	Vertical Dots icon
	Refresh Section icon
	Delete Section icon

	Refresh Component icon
40 minutes ago	**Refresh Chart** icon
	Plus icon
Modify	**Modify** button
	Mark In Error icon

Render a New Note

➢ **From the provider workflow tab:**

STEP 1: Click **Select Other Note**.

NOTE: **Click the other available note links as needed.**

STEP 2: In the **New Note** tab, select the appropriate type from the **Type** dropdown menu.

STEP 3: Click the **Search** field.

STEP 4: Enter the search criteria; then, click the desired note.

STEP 5: Click **OK**.

STEP 6: The note opens in a new tab.

Modifying an Unsigned Note

➢ **From a note:**

STEP 1: Hover over a section to modify. Icons display next to the title of the section.

NOTES: **Make the appropriate selection to modify.**

- **Use the Refresh Section icon to update the information, following the prompts.**
- **Use the Delete Section icon to remove the section from the note.**

Save a Note

➢ **From an In-Progress Note:**

NOTE: **A note can be saved before signing it and return to it later.**

STEP 1: Click **Save & Close**. The Save Note window displays.

STEP 2: Confirm the information in the window.

NOTE: **The Type and Title will populate based on the previous selections with the current date and time.**

STEP 3: Click **OK**.

NOTE: **The note can be returned to later using the Documents component in the workflow tab.**

Sign and Submit a Note

➢ **From an In-Progress Note:**

STEP 1: Click **Sign/Submit**. The Sign/Submit Note window displays.

NOTES: **Add a Provider to review or cosign the note using the following steps.**

- **Click the Provider Name field.**
- **Enter the provider's name.**
- **From the Recipients pane, select the appropriate Sign or Review/CC radio button.**

STEP 2: Click **Sign**.

Review Notes from the Notes Section

➢ **From the Provider Workflow tab:**

STEP 1: Click **Menu**.

STEP 2: Click **Notes**. The Notes page displays.

NOTES: **Update the timeframe as necessary using the following steps.**

- **Right-click the top gray bar.**
- **From the window, make the appropriate selections.**
- **Click OK.**

STEP 3: Double-click the appropriate folder.

STEP 4: Click the + icon for the appropriate subfolders.

STEP 5: Double-click the desired note.

Review Notes from Documents Component

➢ **From the Documents component of the Provider Workflow tab:**

STEP 1: Click the **Refresh Component** icon.

STEP 2: Click the desired note. The note opens in a view pane.

Modify a Signed Note

➢ **From the Documents component of the Workflow tab:**

STEP 1: Click the desired note to modify. The note displays in the view pane.

STEP 2: Click the **Modify** button.

STEP 3: Enter the necessary information in the **Addendum** section.

STEP 4: Click **Sign/Submit**.

NOTE: **Once signed, a modified note will display with a warning that it contains addenda.**

Enter Documentation using the Clinical Entry Workspace

➢ **From the Workflow tab:**

NOTE: **The Clinical Entry Workspace allows documentation of the History of Present Illness, Review of Systems, Objective/Physical Exam, and Assessment and Plan components while reviewing other components.**

STEP 1: Click the **Toggle Workspace** icon.

STEP 2: Enter any information for the component; then, click **Save**. Repeat as needed for all appropriate components.

STEP 3: Click the **Toggle Workspace** icon to close the Clinical Entry Workspace and return to normal view.

Document using Auto Text

➢ **From the workflow tab:**

STEP 1: Click the **Toggle Workspace** icon.

STEP 2: Click the free text field for the component to document.

STEP 3: Enter the abbreviation (such as **/pe**) for the desired auto text.

STEP 4: Double-click the desired template from the dropdown menu.

STEP 5: Use the dropdown arrows to document the necessary fields.

Tag Items

- **From any component:**

NOTE: **Tagging allows copying of specific information, such as lab results or text in previous notes or documentation, from one place in the patient's chart and place it in another section or note.**

NOTE: **Use the Toggle Workspace icon to open the Clinical Entry Workspace to view the History of Present Illness, Review of Systems, Objective/Physical Exam, and Assessment and Plan components.**

STEP 1: Click the lab results or highlight the desired text to tag.

STEP 2: Click the **Tag** button.

NOTE: **To view tagged items, click the Tagged Items icon.**

Use Tagged Items in Documentation

- **From the Workflow tab:**

NOTE: **Use the Toggle Workspace icon to open the Clinical Entry Workspace to view the History of Present Illness, Review of Systems, Objective/Physical Exam, and Assessment and Plan components.**

STEP 1: Click the component to document.

STEP 2: Click the **Tagged Items** icon.

STEP 3: Click the **Vertical Dots** icon for the desired tagged item; then, drag and drop into the field.

Add Tagged Items to a Note

- **From a new note:**

NOTE: **When creating a new note, any Tagged Text will automatically display in the left pane.**

STEP 1: Click the **Vertical Dots** icon for the desired item; then, drag and drop the item into the appropriate section.