











This Quick Reference Guide (QRG) reviews the workflows for dynamic documentation.

Common Buttons & Icons

	Contextual View icon
	Tag button
	Tagged Items icon
	Vertical Dots icon
	Refresh Section icon

	Delete Section icon
	Refresh Component icon
	Refresh Chart icon
	Plus icon
	Modify button
	Mark In Error icon

Render a New Note

➤ **From the provider workflow tab:**

STEP 1: Click Select Other Note.

NOTE: You can also click the other available note links as needed.

STEP 2: In the New Note tab, select the appropriate type from the **Type** drop-down 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 you wish to modify. Icons display next to the title of the section.

NOTE: 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: You can save a note 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 your previous selections with the current date and time.

STEP 3: Click **OK**.

NOTE: You can return to the note from 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.

NOTE: 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.

NOTE: 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 **Plus** 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 note you need 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 when opened.

Enter Documentation using Contextual View

➤ **From the workflow tab:**

NOTE: Contextual View allows you to document in one component as you review other components.

STEP 1: Click the component you need to document.

STEP 2: Click the **Contextual View** icon in the upper right corner of the component.

STEP 3: Enter any information for the component; then, click **Save**.

STEP 4: Click the **Contextual View** icon to return to normal view.

Document using Auto Text

➤ **From the workflow tab:**

STEP 1: Click the free-text field for the component you need to document.

STEP 2: Enter the abbreviation (such as /pe) for the desired auto text.

STEP 3: Double-click the desired template from the drop-down menu.

STEP 4: Use the drop-down arrows to document the necessary fields.

Tag Items

➤ From any component:

NOTE: Tagging allows you to copy 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.

STEP 1: Click the lab results or highlight the text you wish 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:

STEP 1: Click the component you need 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 the item 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.