






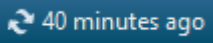

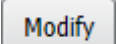



Dynamic Documentation pulls data from the patient chart (for example: allergies, chief complaint, diagnosis, medications, measurements, orders, problems, and vital signs) and allows the ability to create free-text entries, alongside chart data, for flexible and efficient clinical documentation.

Common Buttons & Icons

	Toggle Workspace 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

Creating a Dynamic Document

Dynamic Documents are created using a Workflow MPage view of a patient's chart and pulls the data into the specific templates. Templates are connected to the note type and are available for selection under the **Create Note** section of a Workflow MPage.

➤ Creating a Note – with Template

STEP 1: Enter the patient information, as applicable, using the workspace components.

- Information entered within workspace components will pull to a dynamic documentation template.

STEP 2: Render the note by selecting the applicable **Create Note** hyperlink, located at the bottom of the MPage.

- Use **More** to access additional hyperlinks associated to the MPage.

STEP 3: Review the in-progress dynamic documentation and ensure all information is complete.

- Components that are left blank will not appear on the final note.

STEP 4: Select **Sign/Submit**. The Sign/Submit window displays.

STEP 5: Confirm all the information is correct, the note type and the note title will be dependent on the hyperlink that was selected, update, as necessary.

NOTE: Add a provider to review or cosign the note using the following steps.



- Select the Provider Name field.
- Enter the provider's name.
- From the Recipient's pane, select the appropriate action for the receiving provider, sign, or review.

STEP 6: Select **Sign**.

➤ **Creating a Note – Using Another Template**

STEP 1: Render the note by selecting **More** within Create Note, located at the bottom of the MPage.

STEP 2: Locate and Select **Other Note**.

STEP 3: Within the **New Note** tab, select the appropriate Note Type and ensure that the note title, date, and time are accurate.

STEP 4: Locate the appropriate note template within the Note template column to the right.

- Use the star icon to favorite a template that is used frequently.

STEP 5: Select **OK**.

STEP 6: Enter the necessary information on to the template. Based on the template, some information may still automatically populate from the patient's record.

- Enter patient information using tagged text or auto text.

STEP 7: Select **Sign/Submit**. The Sign/Submit window displays.

STEP 8: Confirm all the information is correct, the note type and the note title will be dependent on the hyperlink that was selected.

NOTE: Add a provider to review or cosign the note using the following steps.

- Select the Provider Name field.
- Enter the provider's name.
- From the Recipient's pane, select the appropriate action for the receiving provider, sign, or review.

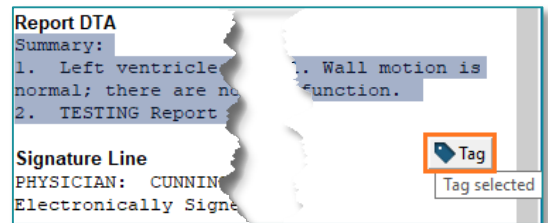
STEP 6: Select **Sign**.

Tagging

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.

➤ How to tag

- STEP 1:** Click the lab results or highlight the text to tag.
- Multiple lab values can be tagged at one time.
 - Hold down the **CTRL** key and left-click additional values within multiple groups.
 - Hold down the **Shift** key and left-click the first value and the last value to include within a group.

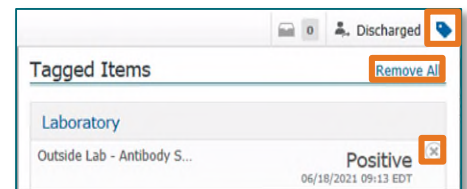


- STEP 2:** Click the **Tag** button.

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



NOTE: To remove tagged values, click the Remove All button or hover over an individual tagged value and left-click the X to remove.



➤ Entering the tagged information

When creating a new note from the MPage, any tagged text will populate on the left margin of the note template in the **Tagged Text** section, where it can be dragged and dropped into Dynamic Documentation.

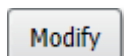
- When hovering over a value on the side of the note, the Tagged Items icon will display.
- Click the **Vertical Dots** icon for the desired item; then, drag and drop the item into the appropriate section.
- Lab values will auto populate in the Lab Results grid within your Dynamic Documentation. The **Laboratory** section in the left margin of the note can also be used to drag and drop lab values. The drag and drop function will not allow Lab Results to be in multiple places within the same note; therefore, remove the Lab Results grid first to drag and drop from the Laboratory section.

Modify a Signed Note

➤ From the Documents component of the workflow tab:

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

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



STEP 3: In the **Open Signed Note** pop-up window, select **Addend Note** or **Revise Note**.

- Addend Note adds necessary information at the end of the document.
- Revise Note enables revisions directly within the document.

NOTE: Notes can be revised for up to 14 days.

STEP 4: Enter the necessary information in the **Addendum** section or make changes directly in the note.

STEP 5: Click **Sign**.

NOTE: Once signed, a modified note will display with a warning that it contains addenda when opened or has been revised.

Revision History

➤ From the Documents component of the Workflow tab:

STEP 1: Select the note to review. The note displays in the view pane.

STEP 2: Click **View Document**.

STEP 3: Click **Show Tracked Changes** button (pencil with dropdown carat) in the toolbar.

- Provider's revisions will be highlighted, and the name of the provider displays at the top of the window with date/time stamps.

