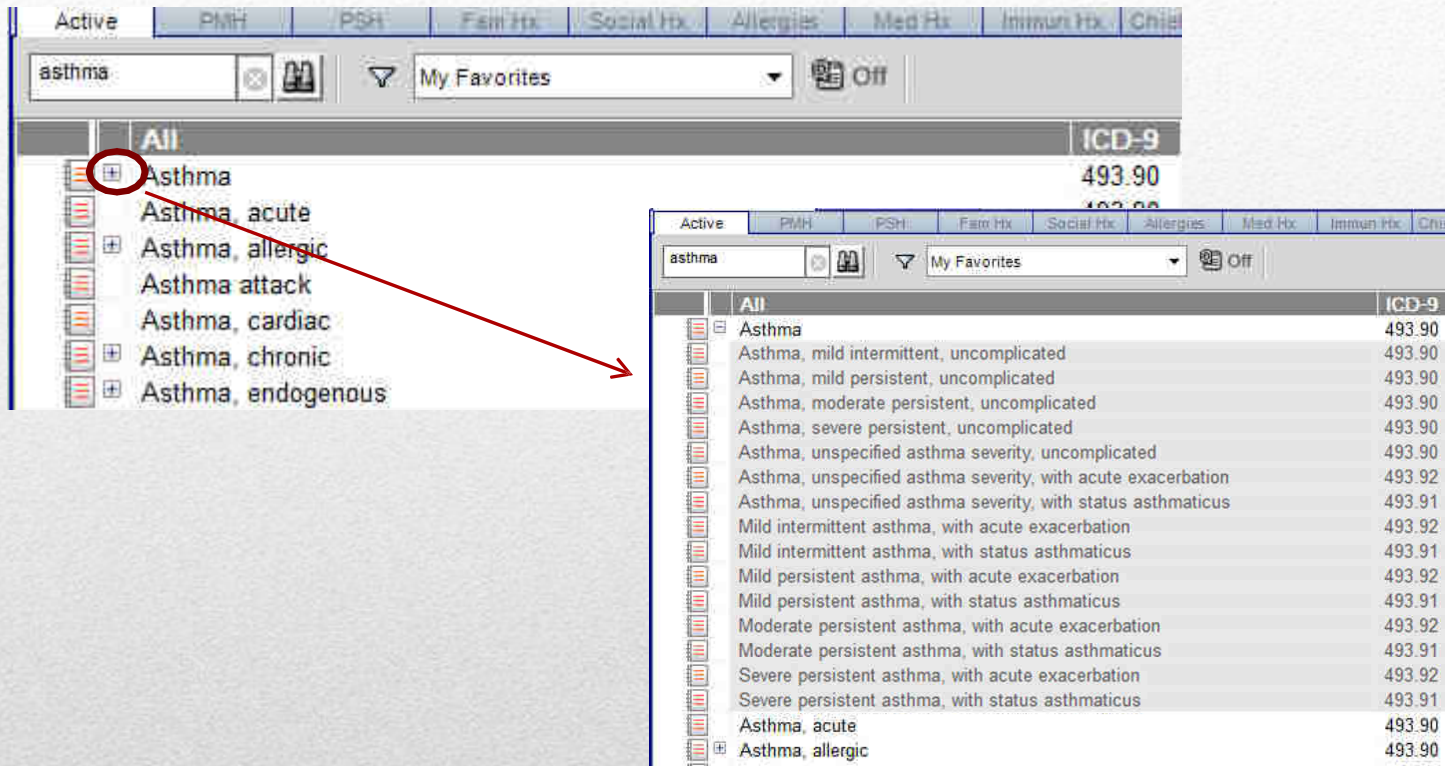


# **Notes on Notes**

## **Chart Documentation**



# Adding Problems

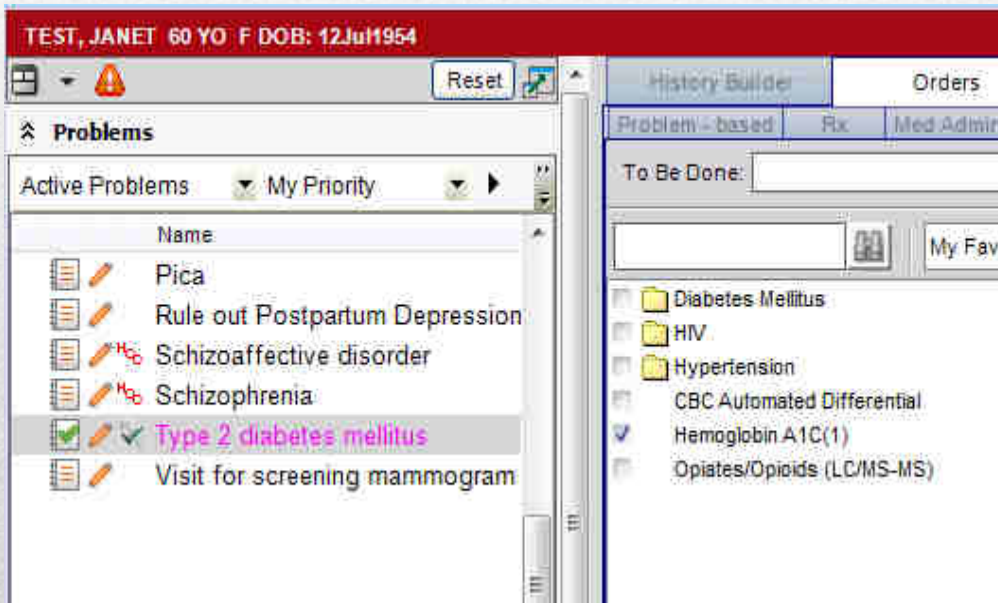


If you see a + sign next to a problem, you can expand it and choose a more specific code. Additionally, it will help you pull in the correct form so that your note documentation will match your billing codes.

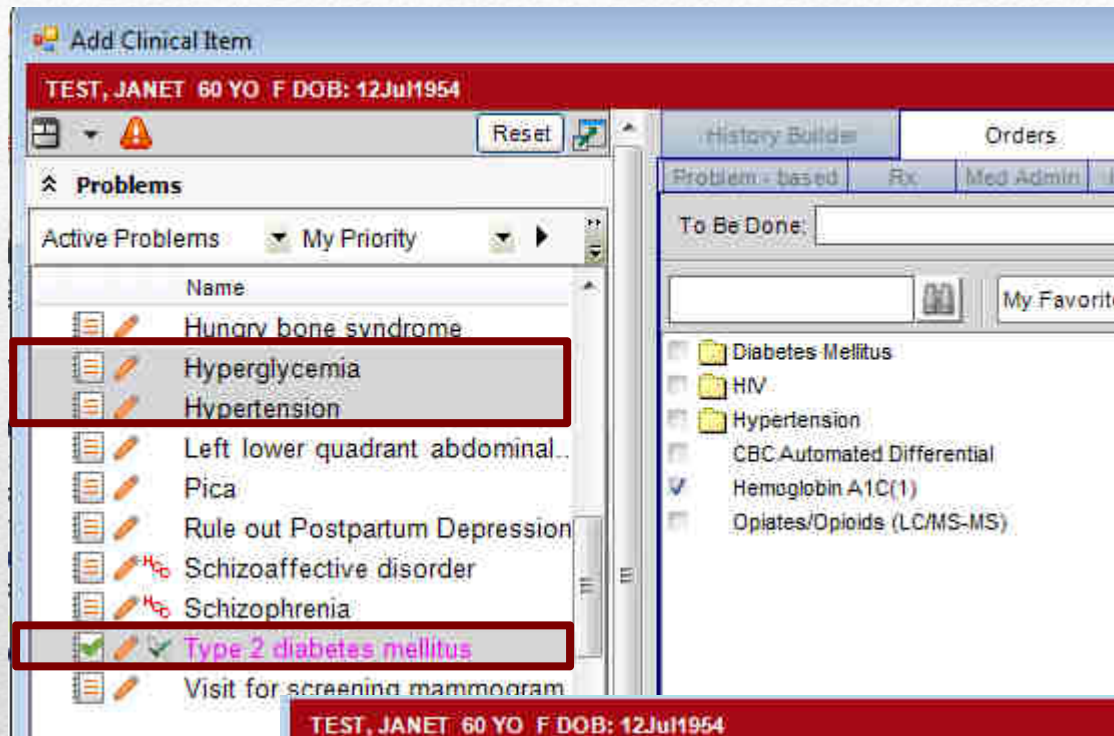


# Ordering / Auto-Linking

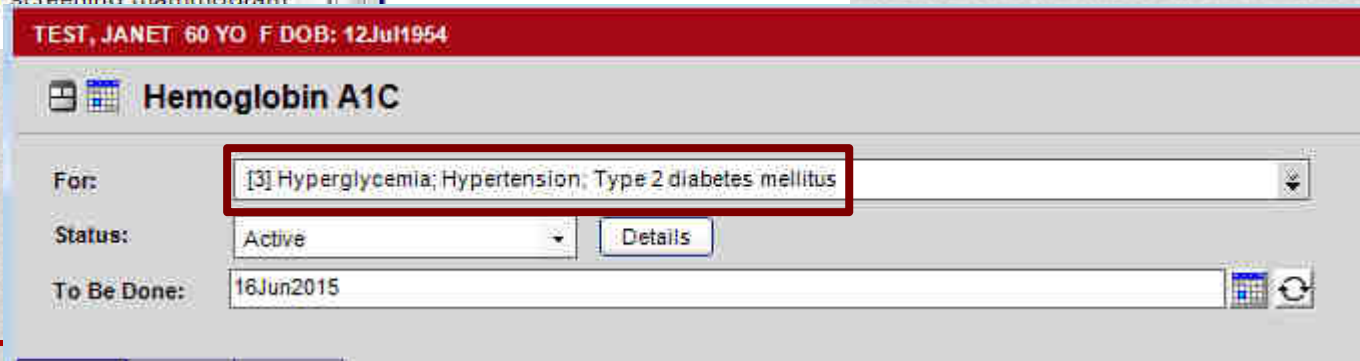
If you are ordering a lab/radiology/procedure, and you don't get the "details" box to ensure that it is linked appropriately, you most likely have a diagnosis highlighted in the Problems column. Any dx that is highlighted (has a gray box around it, i.e., has been "clicked upon") will automatically link to anything you order. If, when you check the box for the item you want to order, you do NOT get the detail box, but just get a (1) next to the item, it has auto linked to the dx that is highlighted on the left.



# Linking



To link an order to multiple diagnoses, highlight multiple items by holding down the Ctrl key and clicking each item, then check the box to order. If you double click the order (or right-click/edit), you can see what the order has been linked to.





# Oops! I didn't mean to link to THAT!



If you get to the Plan section, and you realize you've linked an order to something unintentionally, you can right-click and edit it (if you haven't committed it yet).

---

# Reordering Assessments

The screenshot shows a medical assessment interface. The main window is titled 'Assessment' and contains a table of conditions. The table is divided into two sections: 'Assessed' and 'Unassessed'. The 'Assessed' section lists conditions like Anxiety, Breast cancer, Depression, Asthma, Type 2 diabetes mellitus, Hypertension, and Hyperglycemia. The 'Unassessed' section lists conditions like Abnormal findings on prenatal..., Accumulation disease of the..., Alcohol Dependence..., Chronic pain, Diabetes mellitus, Drug-induced Gout Of Shoulder, Health Maintenance, and Female dyspareunia. A right-click context menu is open over the 'Assessed' section, showing various actions. The 'Make Tertiary' option is highlighted with a red box.

Name	ICD-9	ICD-10
<b>Assessed</b>		
Anxiety	300.00	F41.
Breast cancer	174.9	C50.
Depression	311	F32.
Asthma	493.90	J45.
Type 2 diabetes mellitus	250.00	E11.
Hypertension	401.9	I10.
Hyperglycemia	790.29	R73.
<b>Unassessed</b>		
Abnormal findings on prenatal...	796.5	Q28.
Accumulation disease of the...	495.8	J67.
Alcohol Dependence...	303.90	
Chronic pain	338.29	G89.
Diabetes mellitus	250.00	E11.
Drug-induced Gout Of Shoulder	274.02	
Health Maintenance	V70.0	Z00.
Female dyspareunia	625.0	N94.

Assessment

Discussion/Summary

Summary of Visit:

Plan

Recompile Sign Spell Check Copy Forward Security Codes

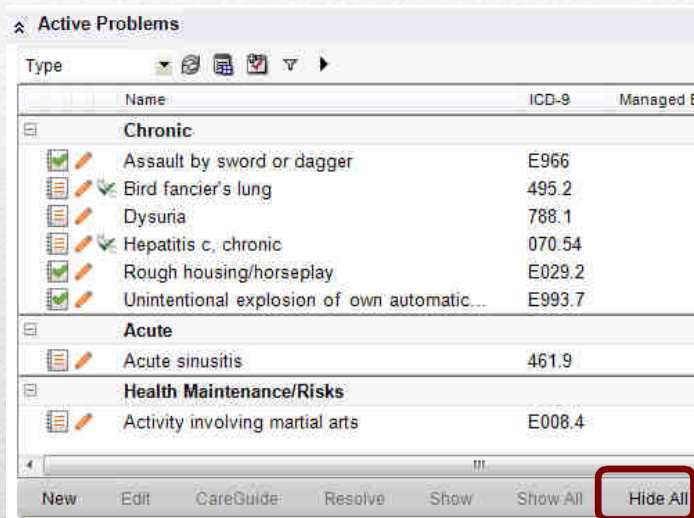
Change Type to  
Secondary to  
Transition to  
New Instance  
Duplicate Problem  
Unassess  
Assess And Resolve  
Assess/Resolve/Suppress  
Resolve  
Resolve and Suppress  
Resolve and Include in Active  
Change Status to  
Add to My Priority  
Hide Header Rows  
Include In PMH  
Verify and Add  
Remove  
Convert Selected  
Convert All  
CareGuide  
New Task  
Make Primary  
Make Secondary  
Make Tertiary

In order to make the order of the assessed items match the encounter form, right click, and scroll ALL the way down the form to the bottom. You can choose to make the items Primary, Secondary, or Tertiary.

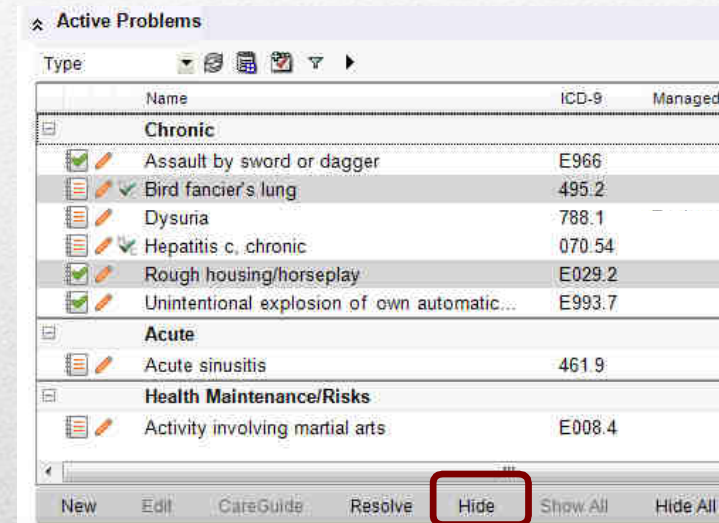


# Hiding Sections

You can choose to hide the pre-populated information that pulls automatically into your notes



To hide the entire section, click **Hide All**



To hide specific items in a section, highlight the items (Ctrl and click), and then click **Hide**

You can hide information in any of the pre-populated sections; active problems, past medical history, social history, family history, and surgical history.

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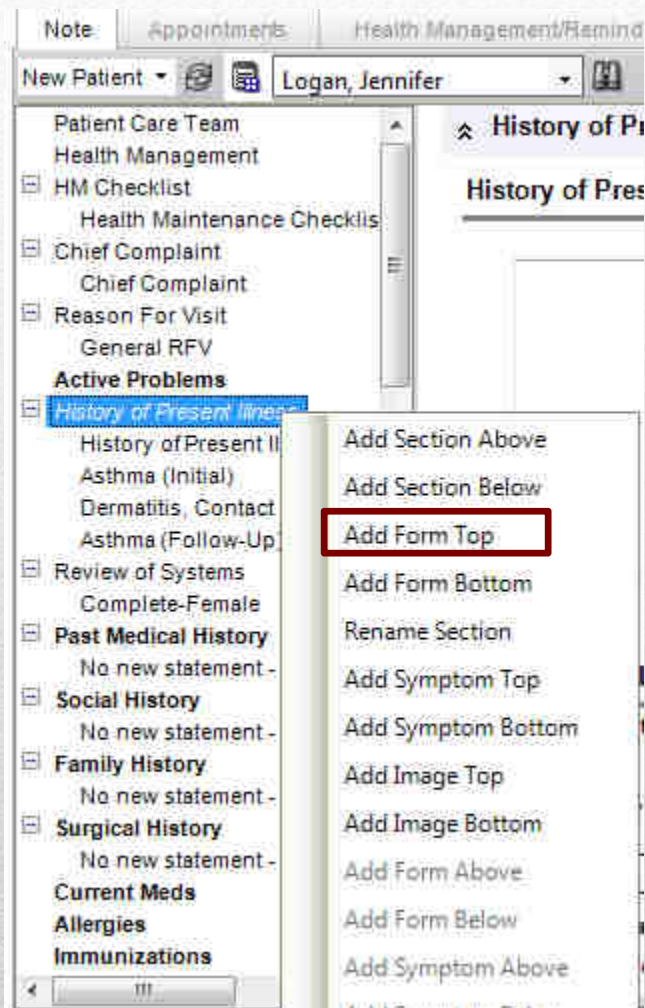
# History of Present Illness

The screenshot displays a medical software interface for a patient named Logan, Jennifer. The left sidebar shows a tree view of medical history categories, with 'History of Present Illness' selected. The main window is divided into two panes. The top pane shows a list of active problems, including 'Asthma, allergic', 'Hepatitis c, chronic', 'Poison ivy dermatitis', and 'Supervision of normal pregnancy in...'. The bottom pane shows a detailed form for 'Dermatitis, Contact (Brief)'. This form includes sections for 'Reason for Visit', 'Visit Type', 'Last Visit', 'Symptoms', 'Problem Details', 'Current Treatment', 'Pertinent History', and 'Evaluation and Treatment History'. The 'Symptoms' section is currently expanded, showing 'Local Edema', 'Urticaria', and 'Rash'. The 'Recompile' button is highlighted in the bottom toolbar.

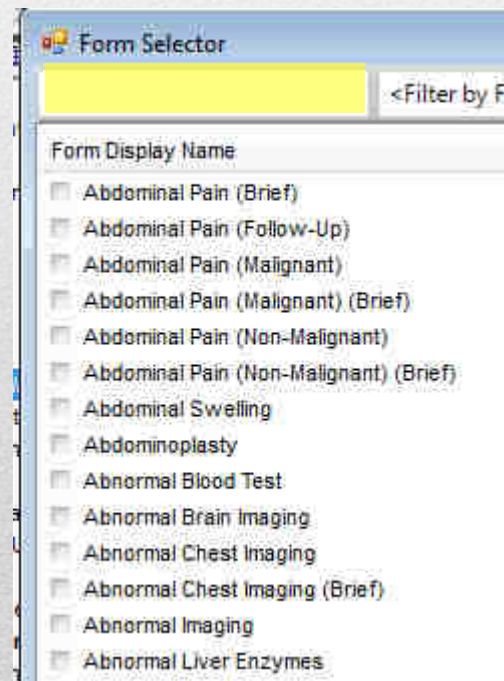
The HPI can be free texted, but there are forms available to help speed up documentation. Once you have added/clicked to assess a problem on the Active Problems tab on the right, you can click the Recompile button to pull in forms for documentation.



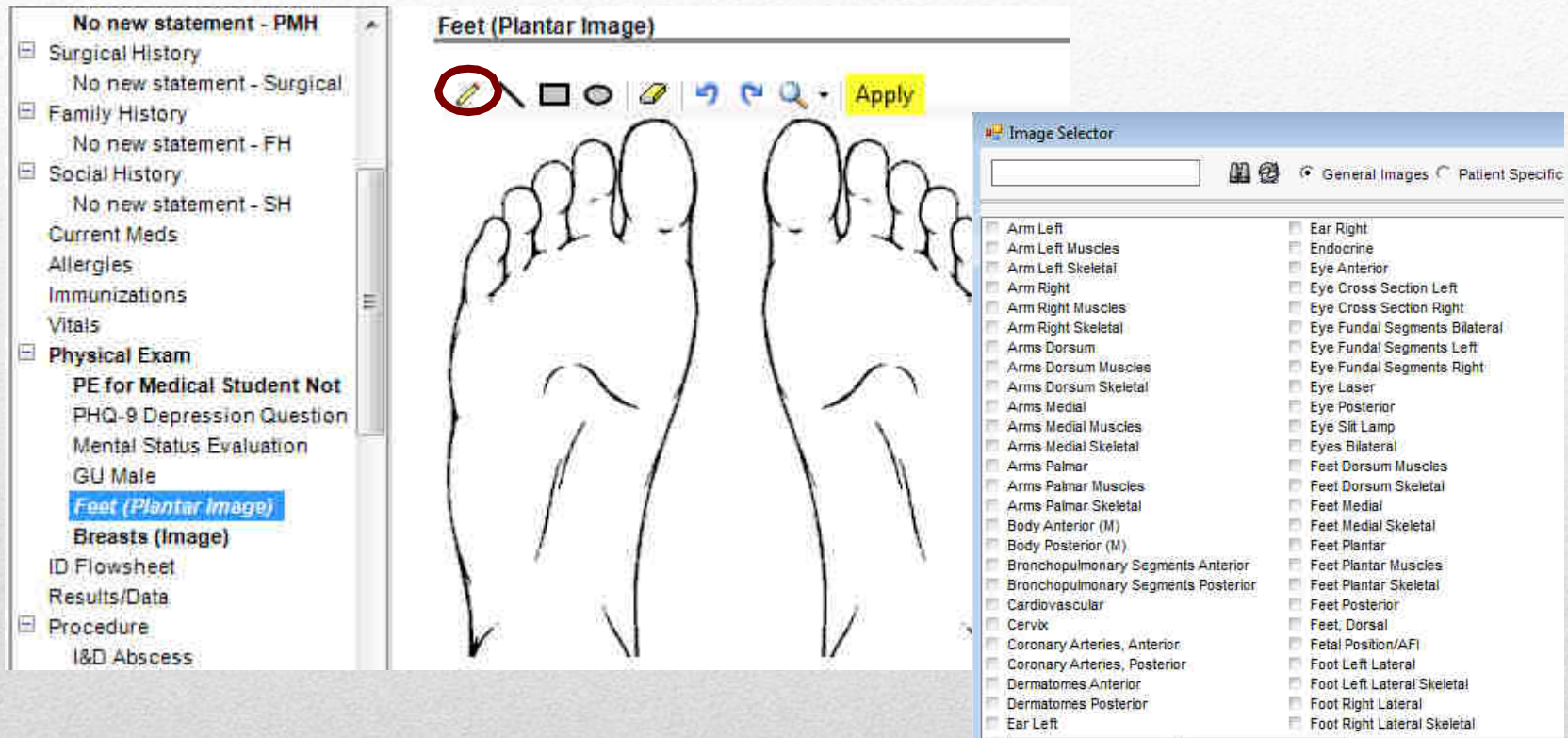
# Adding Forms



You can also pull in forms simply by searching: Right click on the section header where you want a form added, and choose Add Form Top. Type in the form you want (or just scroll through the available forms), check the box, then click OK.



# Adding Images to Notes



You can also pull in images into your note. Right click on the Physical Exam heading, and choose Add Image Top. Search for an image, check the box, and click OK. You can click the pencil icon to draw on the image, and then click Apply to pull it into your note.



# Text Boxes vs Note Accumulator

The image shows two versions of a medical form titled "History of Present Illness". The top version features a large, empty text box with a blue border and a vertical scrollbar on the right. The text "The patient returns today for acute exacerbation of cough" is entered at the top of this box. A red label "Free text box" is placed over the center of the text box. The bottom version of the form shows the same title, but the text is entered into a series of small, stacked input fields. The first field contains "History of Present Illness:", the second contains "Asthma (Initial):", the third contains "Dermatitis, Contact (Brief):", and the fourth contains "Asthma (Follow-Up):". A red label "Note Accumulator section" is placed over the right side of these fields.

History of Present Illness

The patient returns today for acute exacerbation of cough

Free text box

History of Present Illness

History of Present Illness:  
Asthma (Initial):  
Dermatitis, Contact (Brief):  
Asthma (Follow-Up):

Note Accumulator section

*Note: If you do type in a text box, make sure to Tab when you are finished typing, so the text comes into the Note Accumulator*

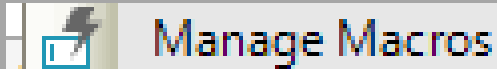
While you can type in the Note Accumulator section, wherever you see the gray line, this section tends to be temperamental, so if there is a text box available as a form, we recommend you type in this section. If you have a section where you do a lot of free texting, and you would like us to add a text box, you may request that one be added.

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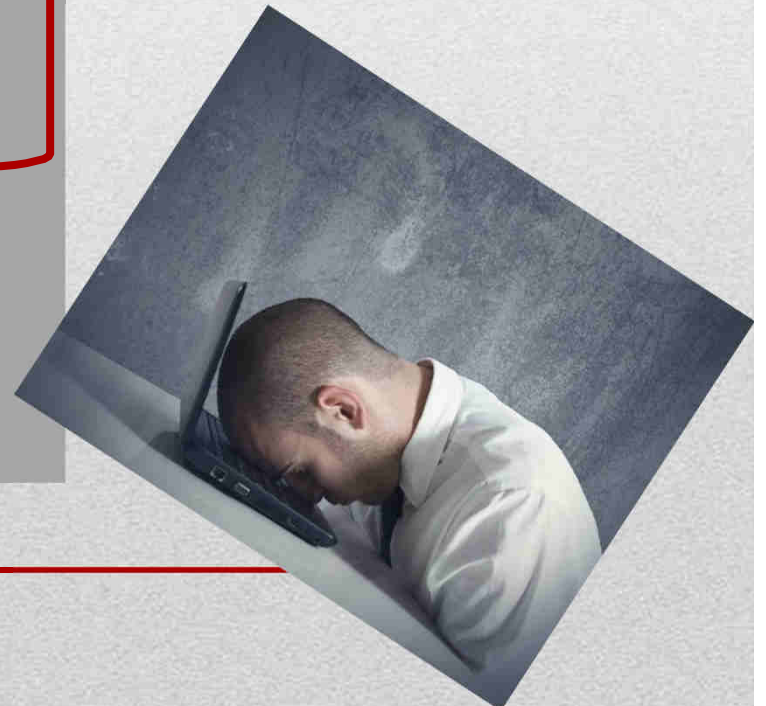
# This all takes too long!

*How can we speed up the documentation process?*

1. **Copy & Paste** – if you have templates that you use, you can copy and paste from WordPad or other word processing programs
2. **Copy Forward** – you can copy text and form information from a previous note
3. **All Normal/Previous History buttons** – you can use the All Normal buttons on both the Review of Systems and the Physical Exam, and then simply uncheck the items that are not normal for that day's visit
4. **Dictate** - Dragon Naturally Speaking is compatible with Allscripts.
5. **Forms** - Utilize the forms in the HPI section
6. **Macros** – Create short cut phrases using the



**Use wisely – this could trigger a Federal Audit!**





# Copy and Paste from WordPad

## History of Present Illness

[Previous History](#)

History of Present Illness: Patient was attacked by pit-bull grandpa.  
Target Symptoms:  
Target Symptoms/Problems/Observations: alcohol use, anorexia, divorced/separated has recently started after Dad came home from prison  
Substance Abuse:  
Caffeine: None, per patient, Amount:  
Marijuana: None, per patient  
Opiates/Narcotics: None, per patient

You can copy and paste into Allscripts; however, copying from Word tends to be “glitchy” because of all the background formatting that exists in Word documents. It is suggested that if you do choose to copy and paste, that you copy from a program that contains fewer formatting marks, such as WordPad or NotePad.

Also, if possible, paste into a text box, NOT the note accumulator.

---

# Copy and Paste from ChartViewer

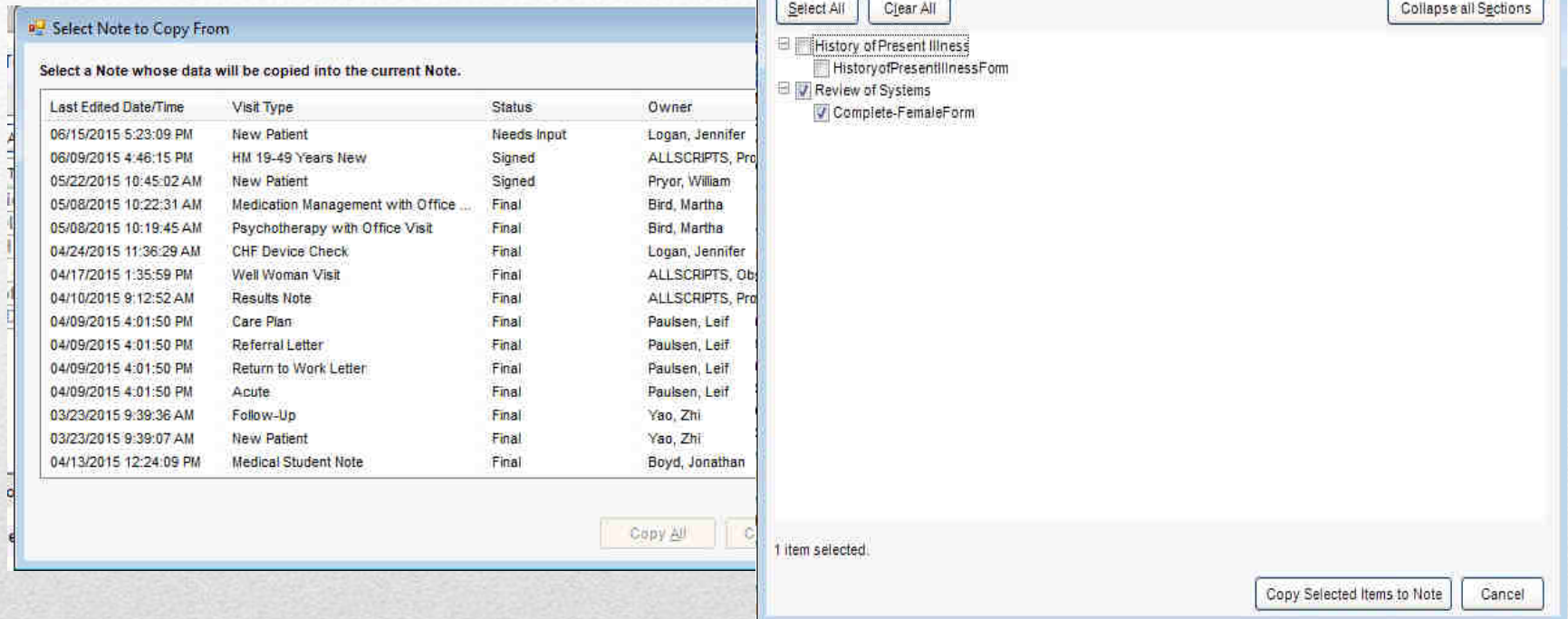
The screenshot displays the ChartViewer interface for a patient named JANET, 60 years old, female, born 12/Jul/1954. The interface is divided into several sections:

- Left Panel:** Contains a navigation menu with options like "am", "ment", "t", "it", "Visit - IM", "s", "ent Illness", "ent Illness", "ms", "male", "story", "ment - PMH", "ment - SH", "ment - FH", "ment - Surgical", "System Exam", "Injection (Gene", "is", "te", and "CC".
- Top Panel:** Shows the patient's name and date of birth, along with a "Note View" dropdown and a "Commit" button.
- Central Panel:** Displays the "Initial Evaluation - Psych" note. It includes sections for "Active Problems" (Alcohol Dependence Uncomplicated 303.90), "History of Present Illness" (Patient was attacked by pit-bull granpa), "Target Symptoms", "Substance Abuse", "Past Medical History" (Asthma, Atherosclerosis, Breast Cancer, Dysmenorrhea, Ovarian Cyst, Reported Pap Smear), "Past Psychiatric History", and "Current Meds".
- Right Panel:** Shows a list of "Notes" under the "Office Notes" section, including "Results Note (JCFM) (Results N", "Follow-Up (Follow-Up) - ALLSC", "New Patient (New Patient) - ALL", "TMS Treatment Note (TMS Trea", "Follow Up - Surgical Oncology", "Follow Up - Breast (Follow Up -", "New Patient - Breast (New Patie", "New Patient - Colon Cancer (Ne", "New Patient - Skin Cancer (New", "New Patient - Skin Cancer (New", and "Post Op - Surgical Oncology (P".

If you are viewing your previous note from the ChartViewer tab, you can copy and paste by highlighting and copying using **Ctrl C**. Click in the text box in your new note, and paste it using **Ctrl V** on your keyboard.



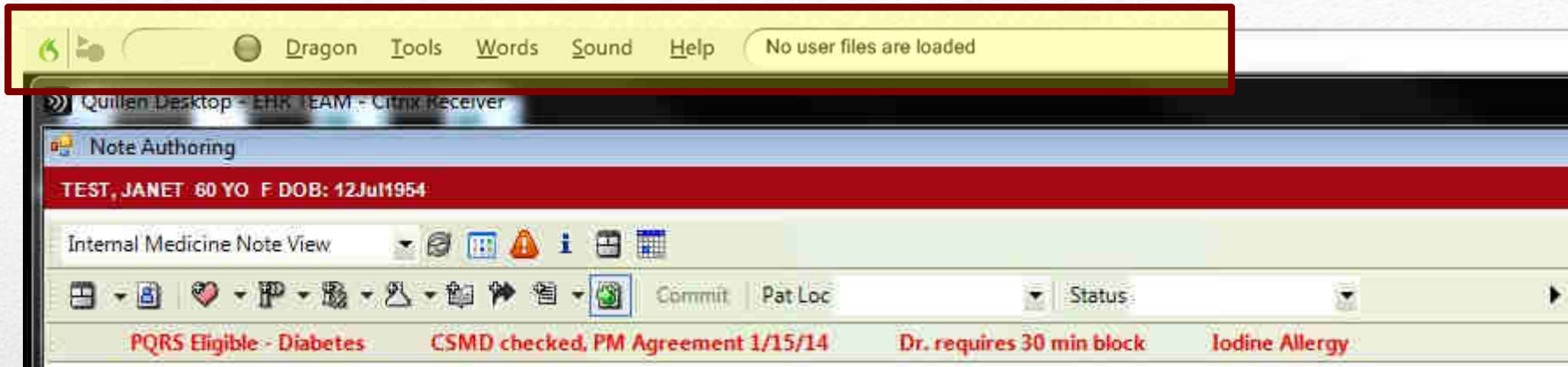
# Copy Forward



Another option for transferring text from another document is to use the Copy Forward option. Click the Copy Forward button on the toolbar, and then choose the note from which you want to copy. Highlight the note to copy, and choose Copy Select. Choose the sections/forms, then click Copy Selected Items to Note. This may be a little slower, but you avoid the glitchy issues that we sometimes see with straight copy and paste.

---

# Dragon



Dragon Medical does work within Allscripts, and for those providers that do a lot of free-texting, or wish to utilize Dragon macros, it is another option for charting.

Pros– Can set up macros for commonly used templates, which can be populated into your note with a simple key phrase; can be used to dictate the portions of your note which are generally typed.

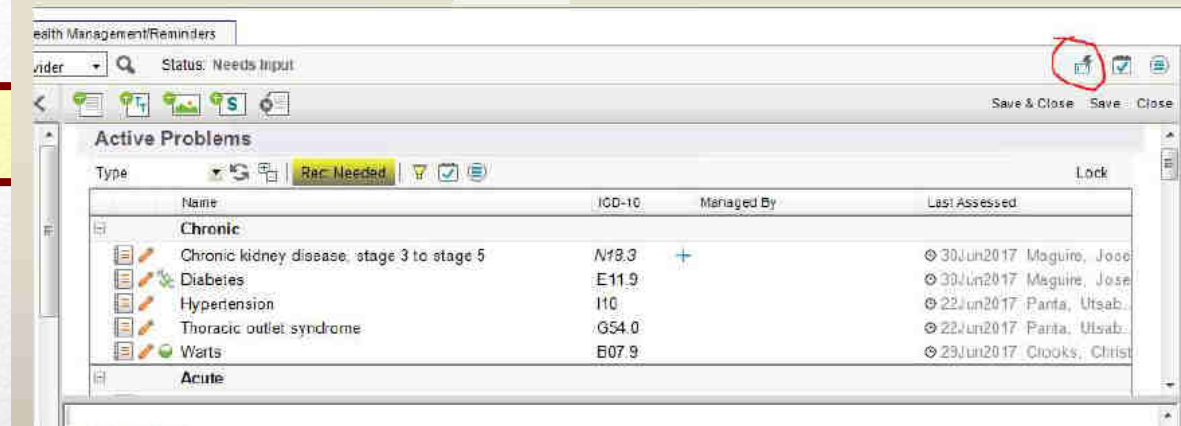
Cons – Time-consuming to train system; voice files are only accessible from the hard drive of the computer (not accessible from the network); text often requires editing; not officially supported by IT or the EHR Team. Some end users report more success when dictating into a Word document and Copy and Pasting into Allscripts.

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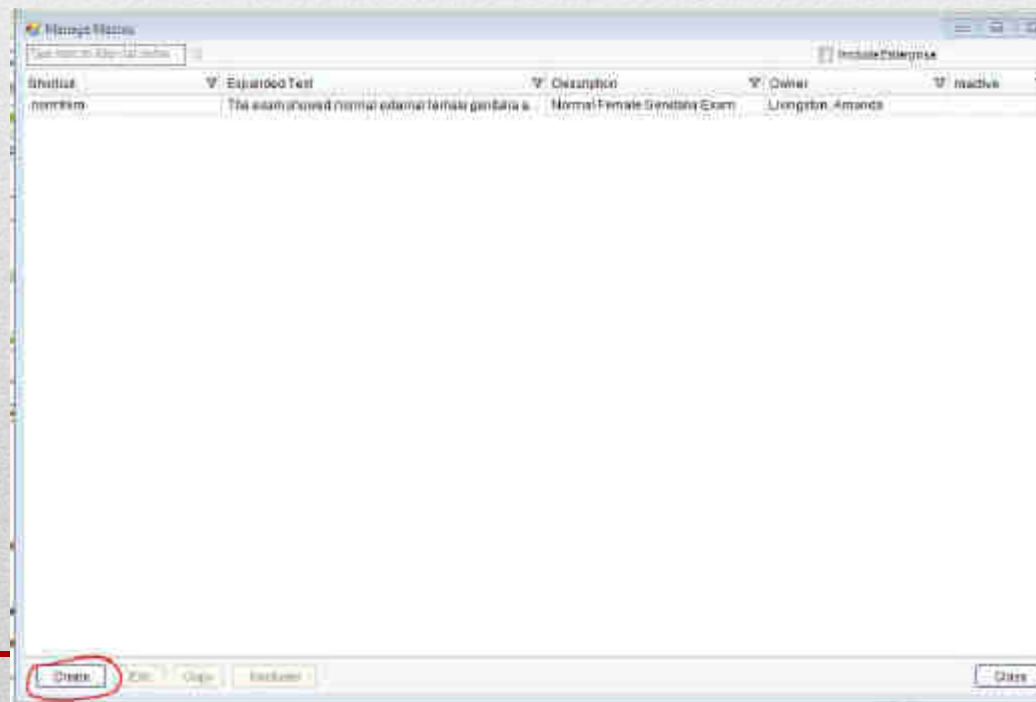


# Macros

Click the macro button.



A Manage Macros box will appear for you to begin creating. Click Create.



# Macros

The screenshot shows the 'Create New Macro' dialog box. It has three main input fields: 'Owner', 'Shortcut', and 'Description'. The 'Owner' field contains 'Livingston, Amanda' and is marked with a starburst containing the number 1. The 'Shortcut' field contains 'rx' and is marked with a starburst containing the number 2. The 'Description' field contains 'Med review/refill' and is marked with a starburst containing the number 3. Below the 'Description' field is a large text area containing the text 'Medications were reviewed and refills given as needed.' and is marked with a starburst containing the number 3. At the bottom of the dialog box are buttons for 'Verify Merge Fields', 'Spell Check', 'Save', and 'Cancel'.

1. **Shortcut** will allow you to put in your short phrase for your macro.

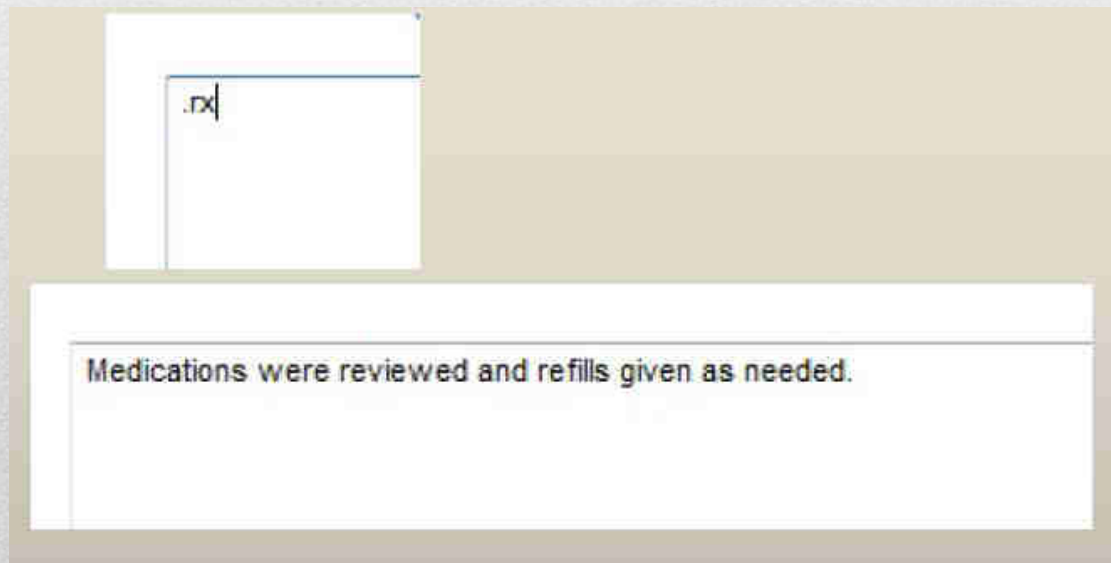
2. **Description** will explain what the macro is for.

3. Information placed into the text field will be distributed in the area your macro is placed.



# Macros

- Save your macro.
- The new macro will be added to your Manage Macros list.
- From this window, you can Create, Edit, and Inactivate.
- They are not easily removed from the system.
- To use, just type whatever your shortcut name is wherever you want your macro to populate. Then click the enter key on your keyboard.



# Documenting Quickly AND Accurately

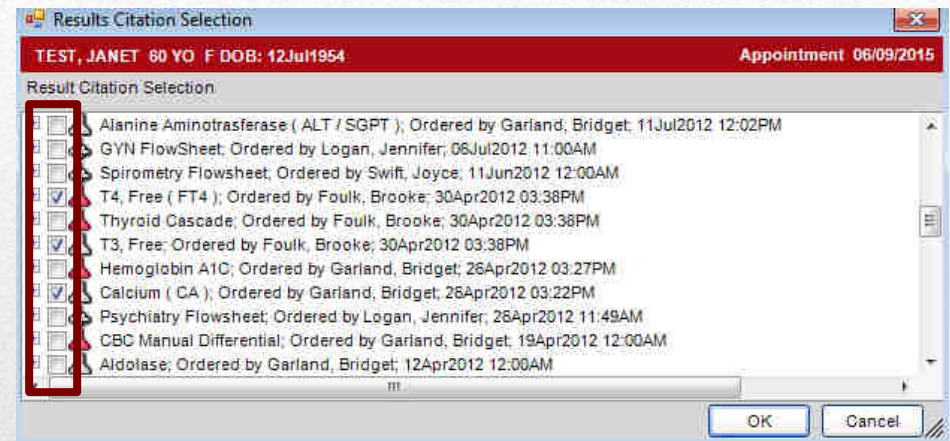
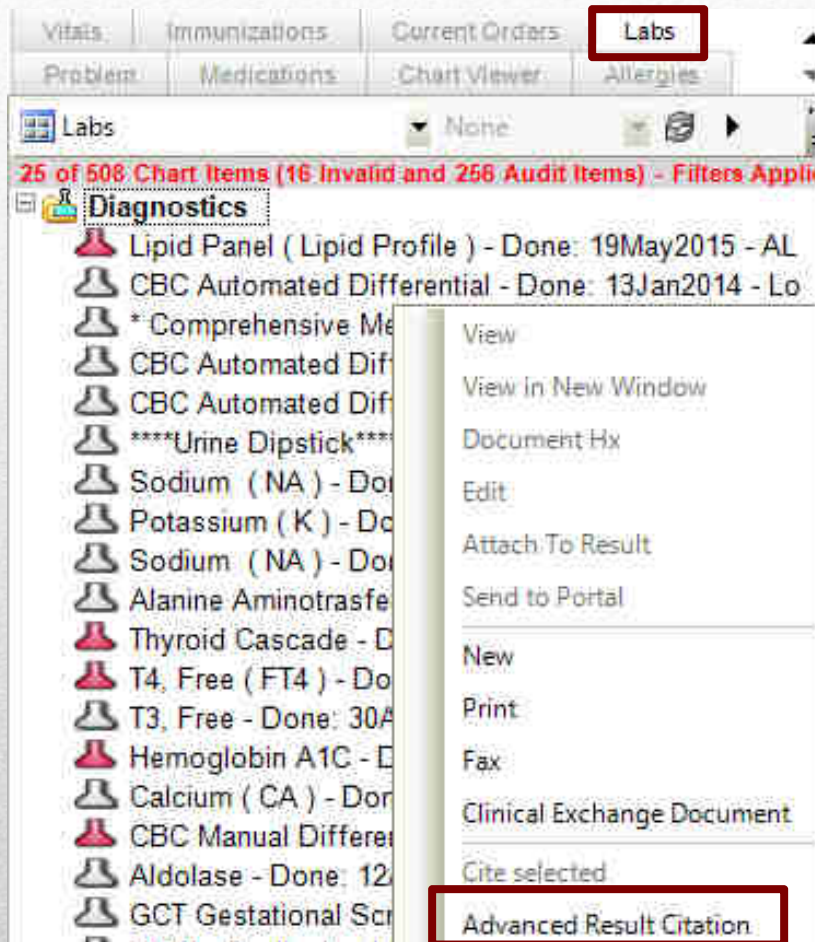
Using the above-mentioned shortcuts (Copy & Paste/Copy Forward/All Normal & Previous History Buttons/Macros) are acceptable shortcuts to completing your notes; HOWEVER, be aware that it is important, when using these options that you update the information so that it reflects the current visit.

**According to the Office of Inspector General:** Copy-pasting, also known as cloning, enables users to select information from one source and replicate it in another location. When doctors, nurses, or other clinicians copy-paste information but fail to update it or ensure accuracy, inaccurate information may enter the patient's medical record and inappropriate charges may be billed to patients and third-party health care payers. Furthermore, inappropriate copy-pasting could facilitate attempts to inflate claims and duplicate or create fraudulent claims.

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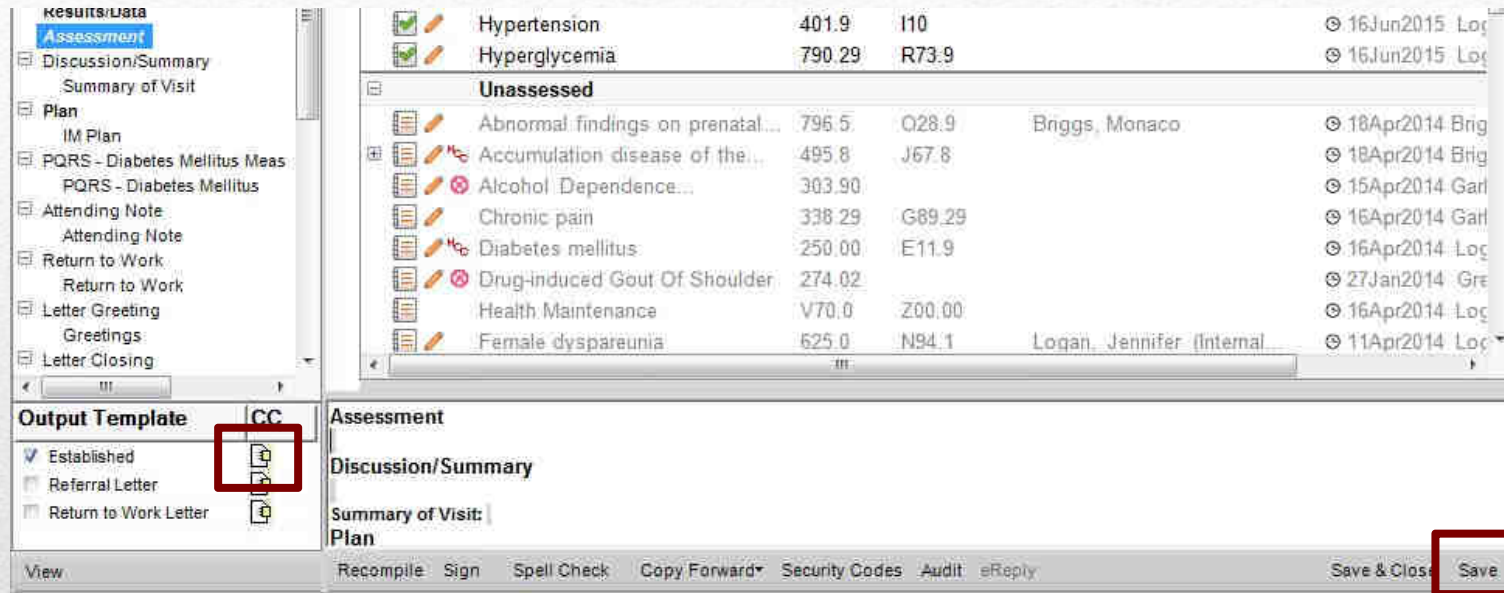
# Manually Pulling in Labs



The Results/Data section is set to pull in the last month's worth of labs. You can, however, pull in any previously resulted lab.

1. Click on the **Labs** tab in the Clinical Desktop section
2. Right-click anywhere in the section and choose **Advanced Result Citation**
3. Check the boxes next to the labs you want to pull into the note. Click OK.

# Carbon Copy



You can easily send a carbon copy of your note to a referring/consulting provider.

1. Once you are done with your note, click the **Save** button, to save the final changes.
2. Then, click the **CC** button in the lower left-hand corner.

## Tips:

1. You MUST hit the Save button, or you will not be able to click the Carbon Copy icon.
2. Make sure you click the CC button next to the note type you want to send (i.e., don't accidentally click the button next to the Return to Work letter, if you want to send the office note)



# Carbon Copy, cont.

The screenshot shows the 'Carbon Copies' window for patient TEST, JANET, 60 YO, F, DOB: 12Jul1954, with an appointment on 06/09/2015. The 'Established' tab is active, showing details for CLARITY MD (QETSU) GREG, (Review Task). The 'Likely Recipients' tab is also visible. The 'Patient Care Team' section displays a table of care team members.

	Care Team Member	Role	Relationship	Specialty
<input type="checkbox"/>	JONES FNP, TREVOR			
<input type="checkbox"/>	Garland, Bridget	Care Giver	Daughter	
<input type="checkbox"/>	KIMBROUGH MD...			Ophthalmology
<input checked="" type="checkbox"/>	CLARITY MD (QETSU),...			
<input type="checkbox"/>	Jones, Tracy	Care Giver	Cousin	Party

Buttons at the bottom include Edit, Delete, Resubmit, Advanced Printing, Add Patient, AdHoc, Show, OK, and Cancel.

1. If your office is populating the **Patient Care Team** section, the patient's other providers will be available in this section. Check the box next to the correct provider.
2. Click OK and sign the note. As soon as the note is finalized, a fax (or task for internal providers) will be sent.

# Carbon Copy - Searching

The screenshot shows the 'Carbon Copies' application window. At the top, a red header bar displays 'TEST, JANET 60 YO F DOB: 12Jul1954' on the left and 'Appointment 06/09/2015' on the right. Below the header, there are two tabs: 'Acute' and 'Manual'. The 'Manual' tab is selected and highlighted with a red box. To the left of the 'Manual' tab, there is a text area containing the following information: 'Referring Provider - BERTOTTI MD,MARIAN(Fax)', 'Type: Referring Provider', 'Destination: Any Print Center[(423) 794-1824]', 'Address: 301 MED TECH PKWY SUITE 140 JOHNSON CITY TN 37604-2364', and 'Specialty: Not Specified'. To the right of the 'Manual' tab, there is a search area with a text box containing 'Bertotti' and a dropdown menu set to 'Both'. Below the search area is a table with the following columns: 'Name', 'Role', and 'LinkedProvidername'. The table contains one entry: 'BERTOTTI MD,MARIAN' with the role 'Referring Provider'. The entry is checked with a blue checkmark. At the bottom of the window, there is a toolbar with buttons: 'Edit', 'Delete', 'Resubmit', 'Advanced Printing', 'Add Patient', and 'AdHoc'. On the far right, there are 'OK' and 'Cancel' buttons.

Carbon Copies

TEST, JANET 60 YO F DOB: 12Jul1954 Appointment 06/09/2015

Acute Manual

Referring Provider - BERTOTTI MD,MARIAN(Fax)  
Type: Referring Provider  
Destination: Any Print Center[(423) 794-1824]  
Address: 301 MED TECH PKWY SUITE 140  
JOHNSON CITY  
TN  
37604-2364  
Specialty: Not Specified.

Bertotti Both

Name	Role	LinkedProvidername
<input checked="" type="checkbox"/> BERTOTTI MD,MARIAN	Referring Provider	

Edit Delete Resubmit Advanced Printing Add Patient AdHoc

OK Cancel

If the doctor is NOT available in the Patient CareTeam section:

1. Click the Manual tab
  2. Search by last name. Enter (or click binoculars)
  3. Check the box next to the provider's name.
  4. Click OK and sign note.
-



# Quick Appointments Icon

The screenshot shows a medical software interface. In the top toolbar, the 'Quick Appointments' icon (a calendar) is highlighted with a red box. The main window is titled 'Quick Appointments' and displays patient information: 'TEST, JANET 60 YO F DOB: 12Jul1954'. Below this, a section titled 'Patient Appointments' contains a table of appointments. The table has columns for 'Appt Date', 'Status', and 'Provider'. The appointments are listed in descending order of date. The first appointment is on 06/09/2015 at 02:00 PM, with a status of 'Arr' and provider 'ALLSCRIPTS, Provider'. The last appointment is on 04/18/2014 at 02:00 PM, with a status of 'Arr' and provider 'Jernigan, Thomas'. At the bottom of the window, there is a button labeled 'Appt Details...'. On the left side of the interface, there is a 'Patient Care Team' section with a list of providers: JONES FNP, Garland, KIMBROUGH, CLARITY MD, and Jones, Tracy. There are also buttons for 'Add Provider/Agency' and 'Add P...'. At the bottom left, there is a 'Health Management' section with buttons for 'Task', 'Hide', 'Show All', and 'Hide All'.

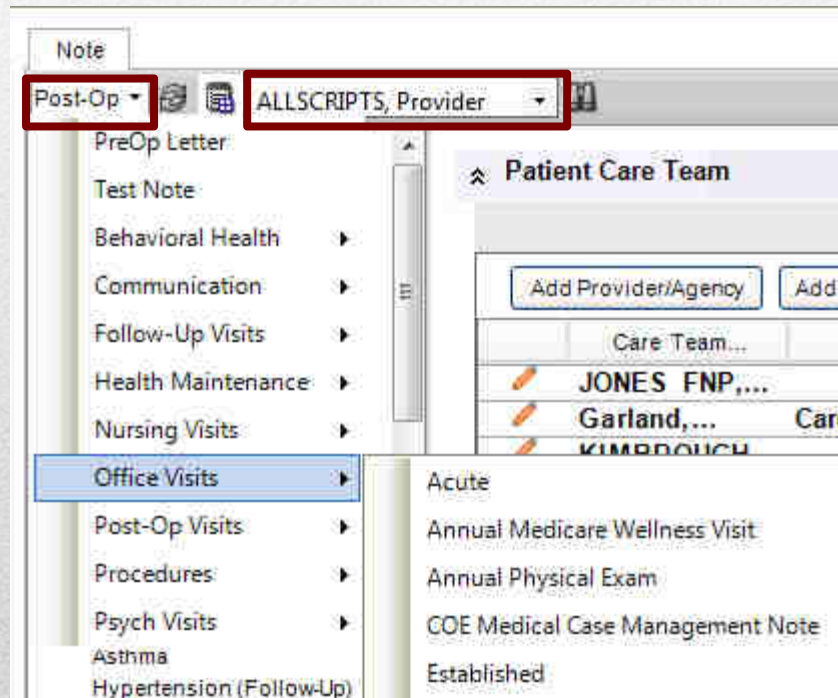
Appt Date	Status	Provider
06/09/2015 02:00 PM	Arr	ALLSCRIPTS, Provider
05/22/2015 08:30 AM	Arr	ALLSCRIPTS, Provider
07/29/2014 01:30 PM	Arr	ALLSCRIPTS, Provider
06/26/2014 10:30 AM	Arr	ALLSCRIPTS, Provider
06/26/2014 03:00 PM	Arr	ALLSCRIPTS, Provider
06/26/2014 08:45 AM	Arr	ALLSCRIPTS, Provider
06/17/2014 02:30 PM	Arr	ALLSCRIPTS, Provider
05/23/2014 01:30 PM	Arr	ALLSCRIPTS, Provider
05/15/2014 09:00 AM	Arr	ALLSCRIPTS, Provider
04/26/2014 09:00 AM	Pen	ALLSCRIPTS, Midlevel Pro...
04/24/2014 09:00 AM	Pen	ALLSCRIPTS, Midlevel Pro...
04/23/2014 09:00 AM	Pen	ALLSCRIPTS, Midlevel Pro...
04/22/2014 09:00 AM	Pen	ALLSCRIPTS, Midlevel Pro...
04/21/2014 09:30 AM	Pen	ALLSCRIPTS, Resident
04/21/2014 09:00 AM	Pen	ALLSCRIPTS, Provider
04/18/2014 02:00 PM	Arr	Jernigan, Thomas

Have you ever been in the chart and wanted to know when the patient's next appointment is scheduled? Or if they are already scheduled to see another provider?

The Quick Appointments icon will open their appointments screen.

# Changing Note Type & Owner

**Changing Note Type:** If the note has not yet been saved, you can change the note type. (You will lose whatever has been typed in the note)



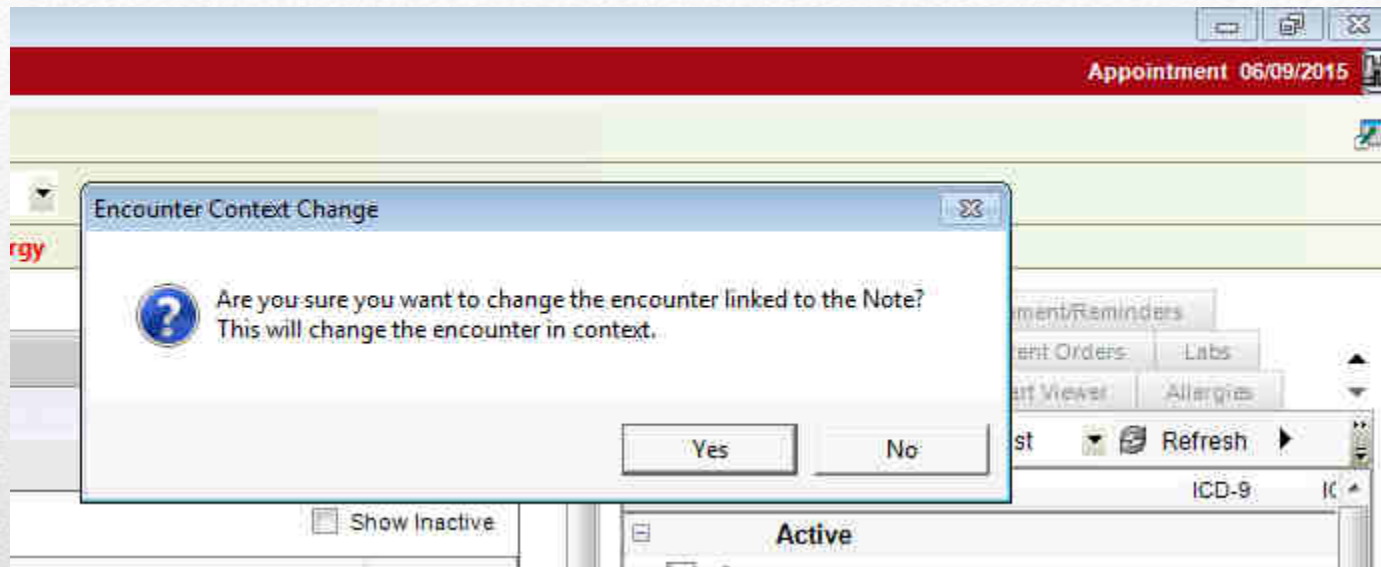
**Changing Owner:** You can also change the owner (even after it has been saved).

If the note has been saved, the note will need to be invalidated. The attending providers have the security rights to do this; or you can call the Help Desk/send a task to Allscripts Help.

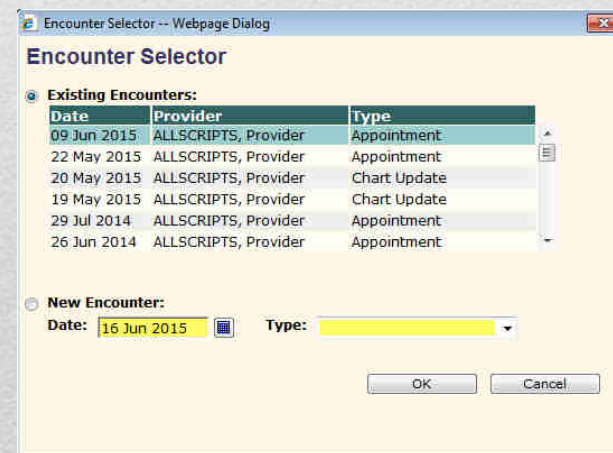
If you have already documented in the note, the information can be copied forward BEFORE it is invalidated.



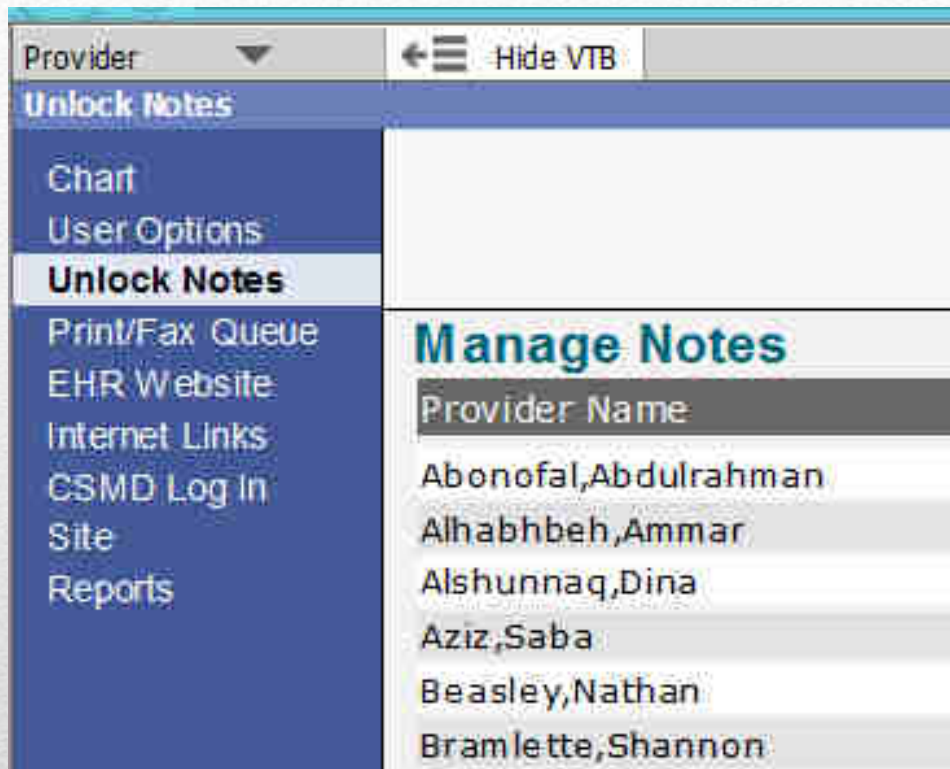
# Changing Note Date



If the note is automatically linked to the wrong date, you can change the date by clicking the binoculars in the upper right-hand corner. Click Yes, and when the Encounter Selector box comes up, choose the correct date. Click OK.



# Unlock Notes

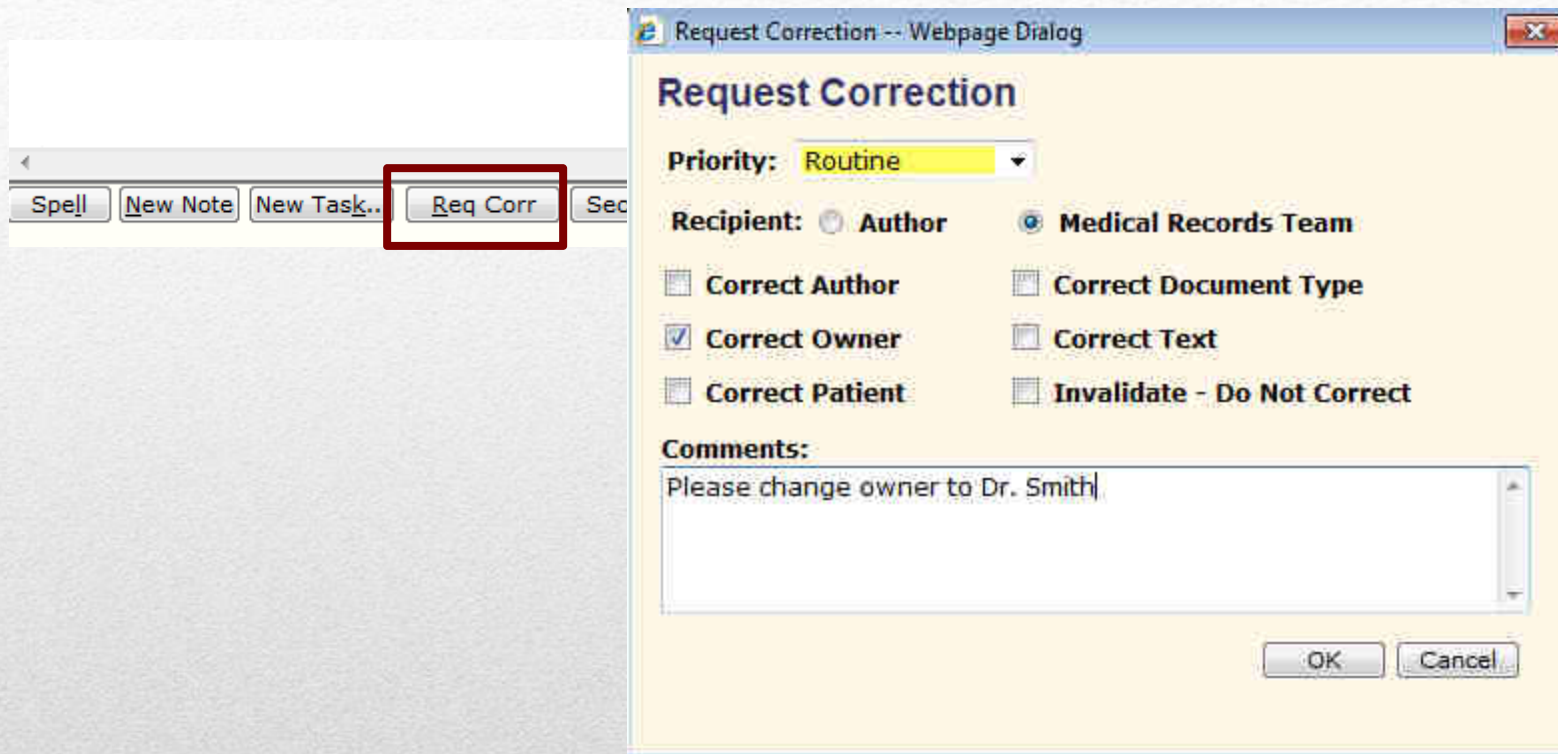


Providers have the ability to unlock notes. Click on the Unlock Notes link on the Vertical Toolbar, find the correct note, and click Unlock Note.

---



# Invalidating/Correct Unstructured Notes



To invalidate or request correction for an unstructured note, click the **Req Corr** button at the bottom of the note, and tell us what you want us to do with the note. Once you click OK, it goes to a task list that we monitor. We will make the requested corrections within a day or two. If the note has been signed, we can not add additional text, but we can change the owner, patient, date of service.

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