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).
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.
History of Present Illness

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

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.

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.
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 "Manage Macros" button.

Use wisely – this could trigger a Federal Audit!
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.
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.
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 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.
A Manage Macros box will appear for you to begin creating. Click Create.
Macros

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.
Manually Pulling in Labs

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.

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.
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.

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.
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

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.
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.