Documentation Tip Sheet

Document Templates

1. Select the Document button from the navigation bar.
2. The documentation screen will open. Any documents that have been started but not completed for the patient will display. Select **My** to see your documents or **All** to see documents by other providers.

3. The available documentation types are visible under the **Add New Document** section. Use the Search New Documents box to search and select your favorites.

> **Note:** To select your favorites, click the next to the documents pertinent to you. This will populate the document section with only what you need.

4. Click on the desired document and the template will open.

Documentation Symbols/Buttons

- View a preview of the document
- Return to document edit screen
- SAVE — Save the document in draft status
- SIGN — Sign the document
- Access additional options
- Use Typicals
- View previous entries for a section
- Launch Patient History, Allergies or Home Medications
- Insert formatted data or canned text
- Opens comment field
- Opens further data options for that field
- Search for more images
- Spellcheck

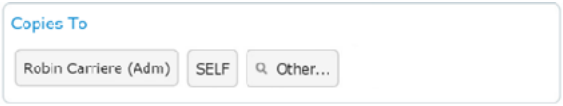
Sign Documents

1. Click Sign
2. Select the document on the left to open it in the document viewer.
3. If needed, click **Edit** or **Edit Signers/CC's**.
4. Once you are ready to sign, click Submit. Type in your PIN. Press enter.

Add Copies To

Use "Copies To" to send the report to additional physicians/locations.

Providers who already have a documented relationship with the patient will display. Click Other... to search for other providers not listed.



If the provider does not exist in the dictionary, it allows you to **Add Recipient**. Enter all required information for the provider, including name, complete address and fax number. Click Save.

Add Addendum to a Signed Document

Once a document is signed it can no longer be edited. If a correction is needed, an addendum can be used to add information to the signed document.

1. Select the Document button from the navigation bar.
2. Choose the document to amend.
3. Enter your notes in the addendum section.
4. Click SIGN to save and view your addendum.

Edit a Document

1. Select the Document button.
2. Click the document to edit.
3. Complete the required edits.
4. Click SAVE to save in draft status or SIGN to sign the document.

Delete a Document in Draft Status

1. Click the Document button.
2. Select the document you would like to delete.
3. Click and then **Delete Document**
4. A confirmation screen will display. Click Yes to delete the document.

Add Formatted Data

Use Formatted Data to add pre-built collections of patient information, such as demographics, clinical, and recent laboratory information.

1. From a text box within a document, click A and select **Formatted Data**.
2. Select the data to add and click **Insert**.

Note: Use ⭐ the to select favor-

Add Canned Text

Use Canned Text to …

1. From a text box within a document, click A and select **Canned Text**.
2. Select the text to add and click **Insert**.

Note: Use ⭐ the to select favor-

Add Quick Text

Use Quick Text to …

1. From a text box within a document, click A and select **Quick Text**.
2. Select the text to add and click **Insert**.

Note: Use ⭐ the to select favor-

Recall Data

Use Formatted Data to add pre-built collections of patient information, such as demographics, clinical, and recent laboratory information.

1. Click the R button from within the Edit or Preview mode of a document.
2. The Recall screen will display. Use the Mine drop down to access responses from your own documents, nursing assessments, progress notes or other documents pertaining to the patient's current visit.
3. Check off the data to recall and click APPLY to insert it into to the documentation.

Create Typicals

Typicals are used to create sets of personal normal responses using the responses on the document as a building block. You can create typicals specific to a patient's age, sex and condition.

Create Typicals

1. To create typicals for a specific section, first select your own normal responses for the documentation questions.
2. Click the gear icon and select **Create New Typical**.
3. Enter a Name for your typical.
4. Edit and confirm the responses.
5. Click **Save**.

Use Typicals

1. Open a new document.
2. Click on the T··· icon.
3. Select the one you would like to use and click APPLY

Adding Sections

1. Click on the ⚙ button and select **Add Content.**
2. Search the available sections and select the section to add.
3. Once you have added all sections click APPLY
4. The new section will display.

Proofread before Signing

- Check numbers to ensure lab values and medication doses are correct (e.g. 15 vs. 50).
- Look for patient gender errors (e.g. he vs. she).
- Check for nonsensical words. Mumbling/poor pronunciation can lead to added words not intended for the report.
- Include punctuation when dictating, as this will cut down editing time.
- Always use the spellcheck A✓ button.