

Documentation **UPDATE TO SCREENS:** Web Ambulatory

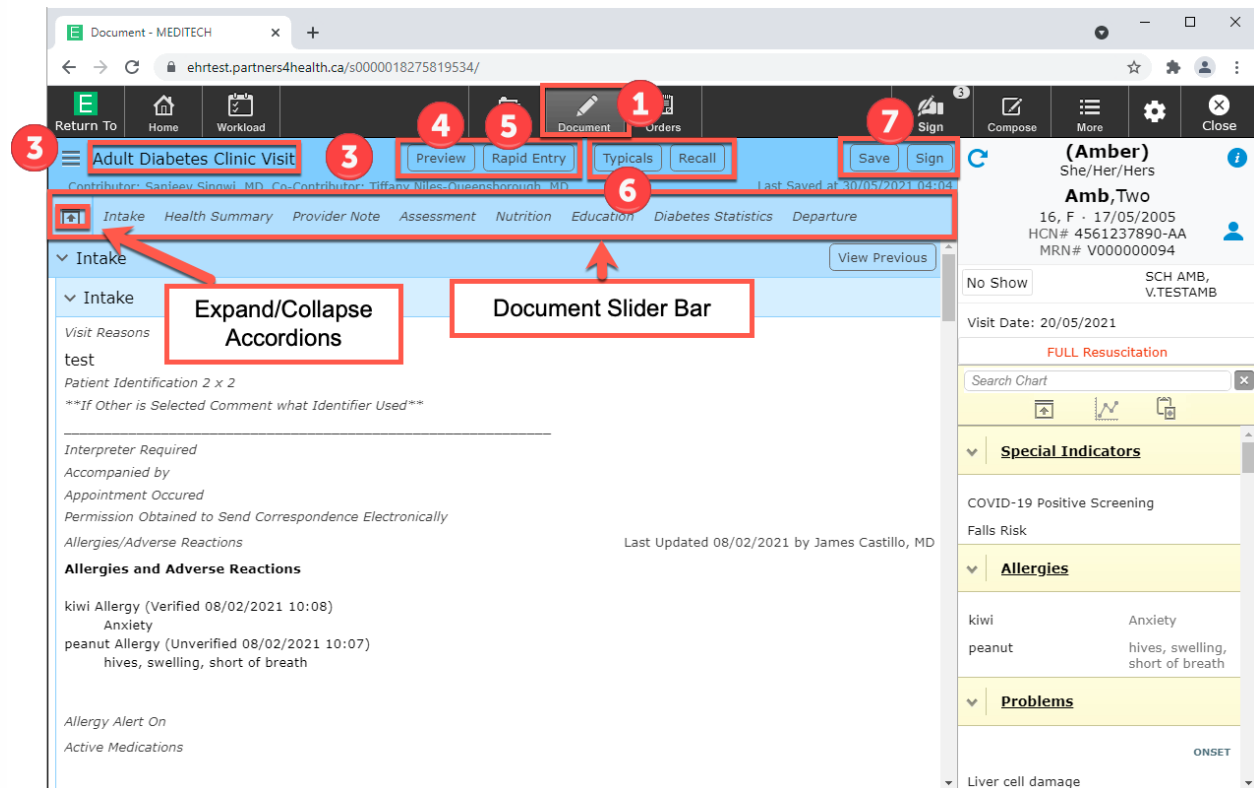
All Disciplines and Documentation Sections

Release

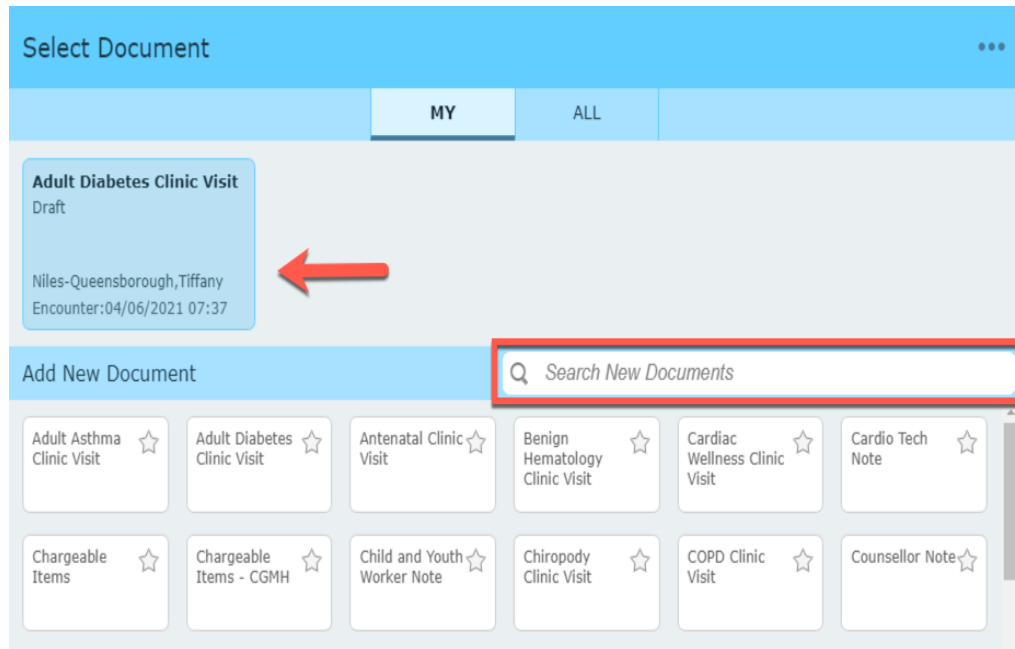
Expanse 2.1 pp 24+ Expanse 2.2 pp 11+

Overview

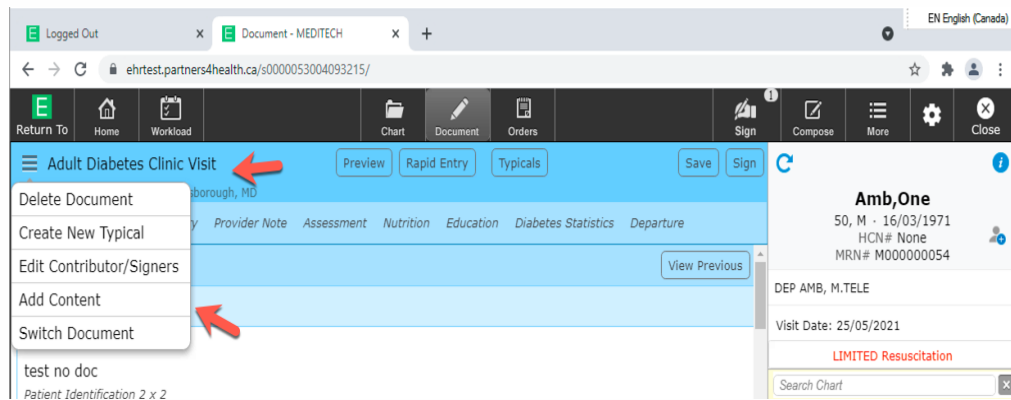
The Documentation templates in MEDITECH Expanse ambulatory are used for documenting a patient's visit. Below is an overview of the upgraded view (interface) of a document and the different regions of the screen. A high-level overview is provided of the different regions of the Documentation templates and their functions.



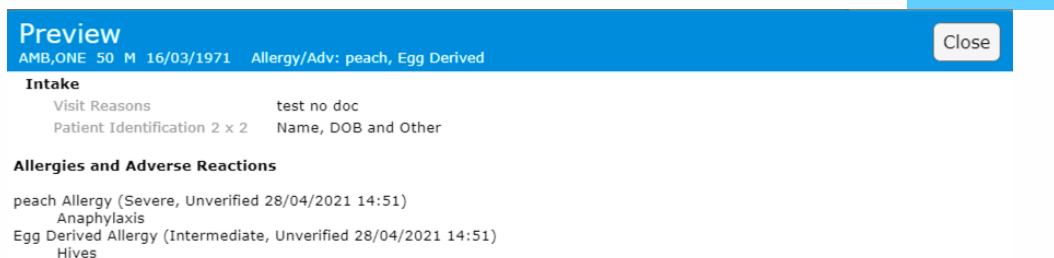
- 1. Document Button:** This button serves two purposes. First, this button serves as a launching point to the Documentation templates. Second, it launches the Select Document routine, which serves as a way to view all unsigned visit documentation and start additional documents for the visit.



2. Document Header & Menu Region: This region presents the current document template name and author. The menu (see image below) button next to the document name contains several options including: delete the document, create new typicals, add content, and switch document.

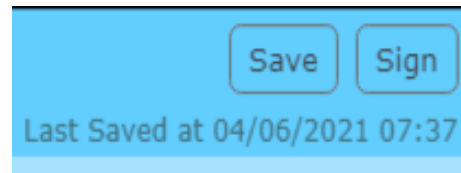


3. Preview & Edit Mode: The 'Preview' button allows the user to preview the output of the document.

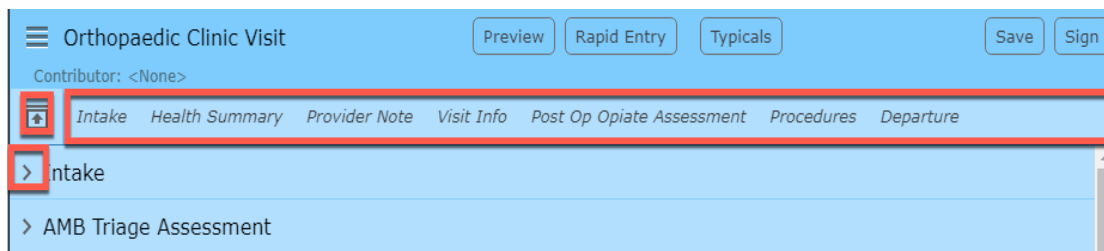


4. Typical & Recall: The 'Typicals' button allows providers to pull in Typical document responses to save them while performing documentation. **Note:** Detailed typical functionality is covered in a separate document. The 'Recall' button becomes available if there are past documentation instances and allows users to review previous documentation.

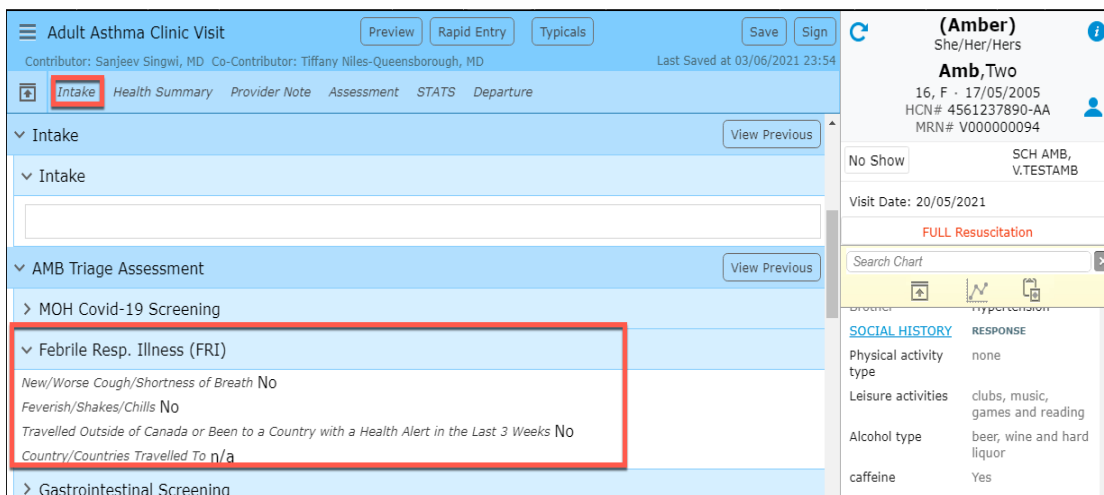
5. Save & Sign Region: Users can Save (Pending or Draft) or Sign the document. It also provides the user with the last saved date/time stamp.



6. Section Slider: This area of the tool allows users to quickly jump to the different sections of the document without having to scroll. The accordion on the far left of the bar allows users to collapse all of the sections of the template.



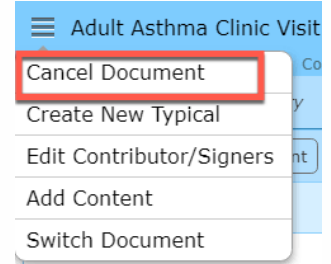
7. Documentation Region: This region of the Document Tool is where the users perform their documentation.



How to Delete a Document

Delete/Cancel Document: You can either delete or cancel a document depending on whether it is in a Pending or Draft status.

To delete the current document that is in Pending status, select Delete document from the menu list.



- A confirmation message displays telling the user that this Pending document will be deleted. Proceed? Select “Yes” or “No”.

To remove a document that is in Draft status, users must cancel the document. This ensures the document has an audit trail.

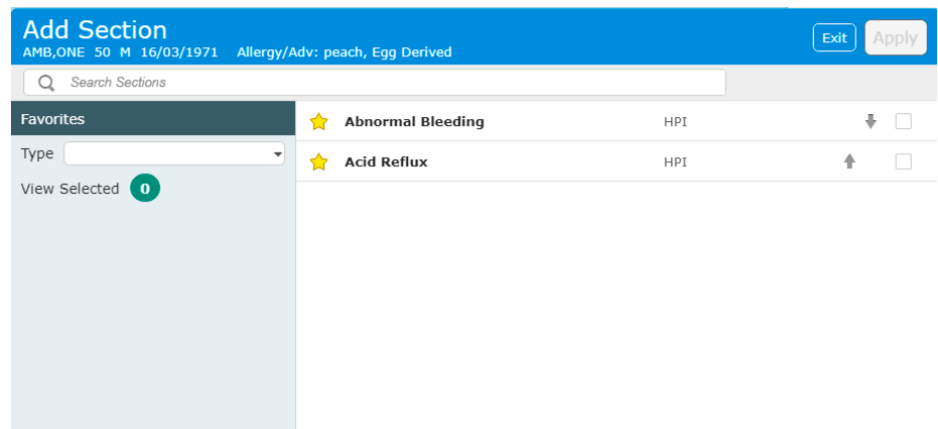
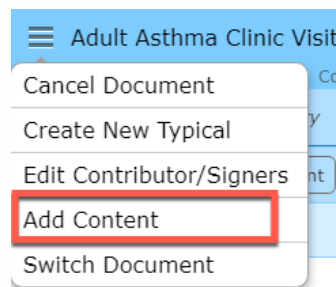
- A confirmation message displays asking whether the user wants to cancel the Draft document. Select “Yes” or “No”.

Create New Typical: Use this option to create a new Typical's list on the fly. *For addition detail on this topic, please see the Typical's Tip Sheet.

Add Content: Use this option to add documentation sections to the document.

How to “Add” a section

Select the “Add Content” option on the document menu.



Add Section Exit Apply

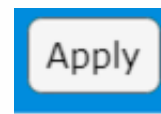
AMB, ONE 50 M 16/03/1971 Allergy/Adv: peach, Egg Derived

Q Search Sections

☆	6 Min Walk Test	Questionnaire	↓	<input type="checkbox"/>
☆	AAA Follow-Up - No Int.	HPI	↑	<input type="checkbox"/>
☆	ACHD Clinic (paediatric)	HPI		
☆	ACHD Pregnancy	HPI		
☆	ACOG Antepartum Record Form A	Questionnaire		
☆	ACOG Antepartum Record, Form B	Questionnaire		

☆	Diabetes (paediatric)	HPI		
☆	Diabetes Compreh. Eval.(paedi)	Questionnaire		

Then search for the section to add. For this example, the Diabetes Comprehension Evaluation is selected. Select the “Apply” button. This will add the section to the document.



Adult Diabetes Clinic Visit Preview Rapid Entry Typicals Save Sign

Contributor: Tiffany Niles-Queensborough, MD Last Saved at 04/06/2021 08:07

Summary Provider Note Assessment Nutrition Education Diabetes Statistics Departure **Diabetes Compreh. Eval.(paedi)**

▼ Diabetes Compreh. Eval.(paedi) Add Content

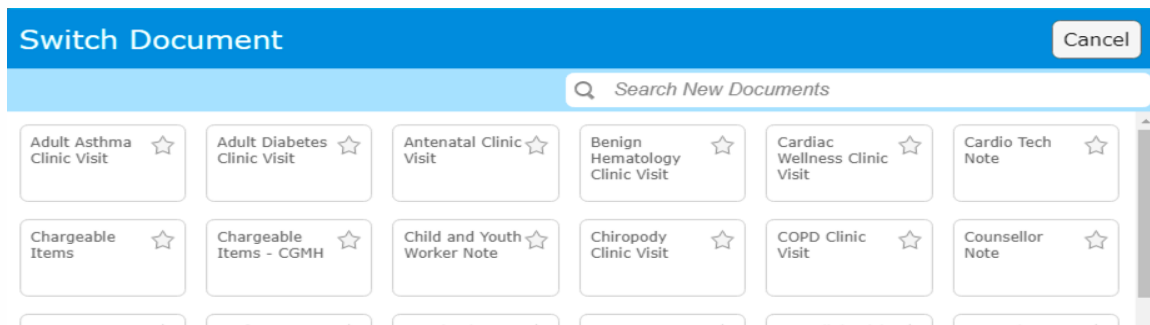
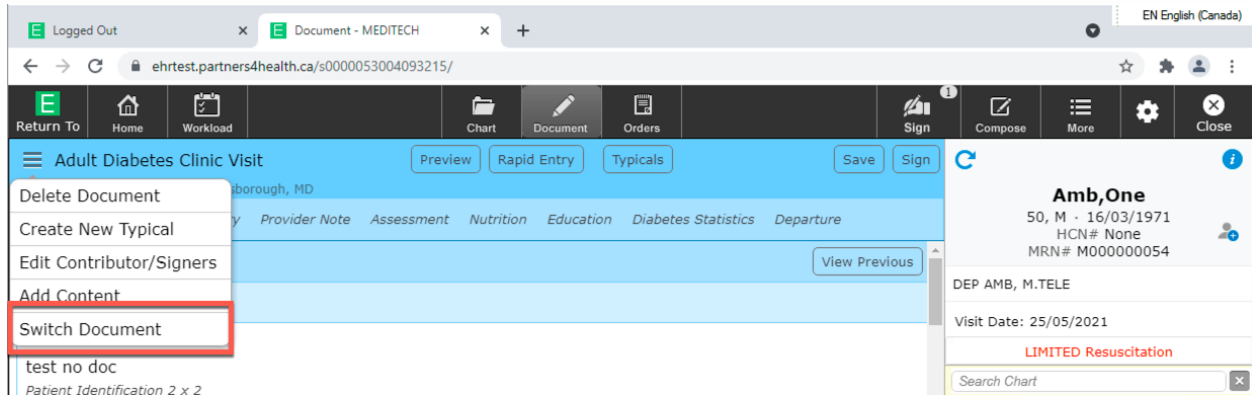
- ▼ Pedi Diabetes Comprehensive Eval

Age at diagnosis
 Current grade
 Number of school days missed due to diabetes
 Have you been to the emergency department or admitted to the hospital since diagnosis

 Best learning method for the patient/family
 Does the patient/family have difficulty with any communication methods
 Do any religious or cultural beliefs play a role in diabetes care
 Does the patient/family have concerns that diabetes will interfere with everyday life
 Does the patient/family feel good about the patient's general health
 What is most concerning for the patient/family in caring for diabetes
 Last eye exam
 Last dental exam
 When were annual labs last done
 Has the patient had an annual flu vaccination

How to switch documents

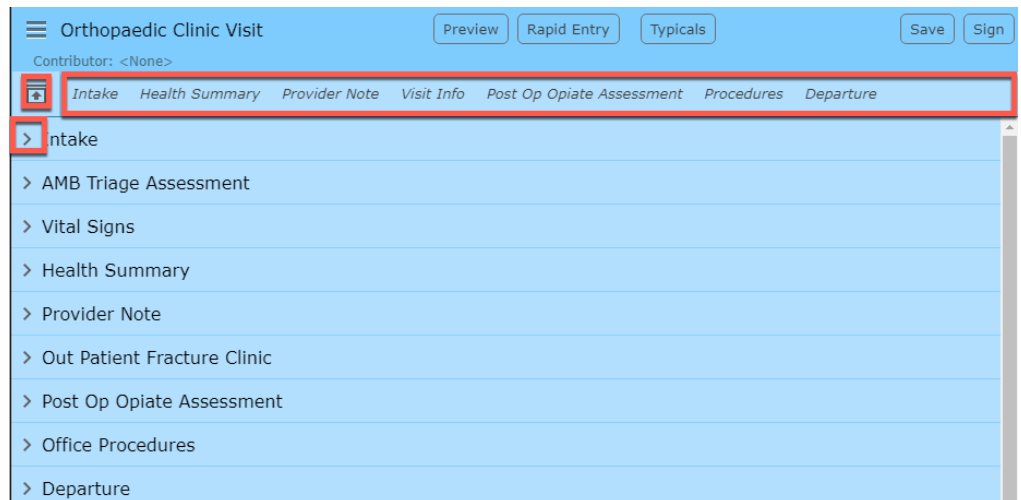
Select the Switch Document on the Menu. This will present the Switch Document overlay screen.



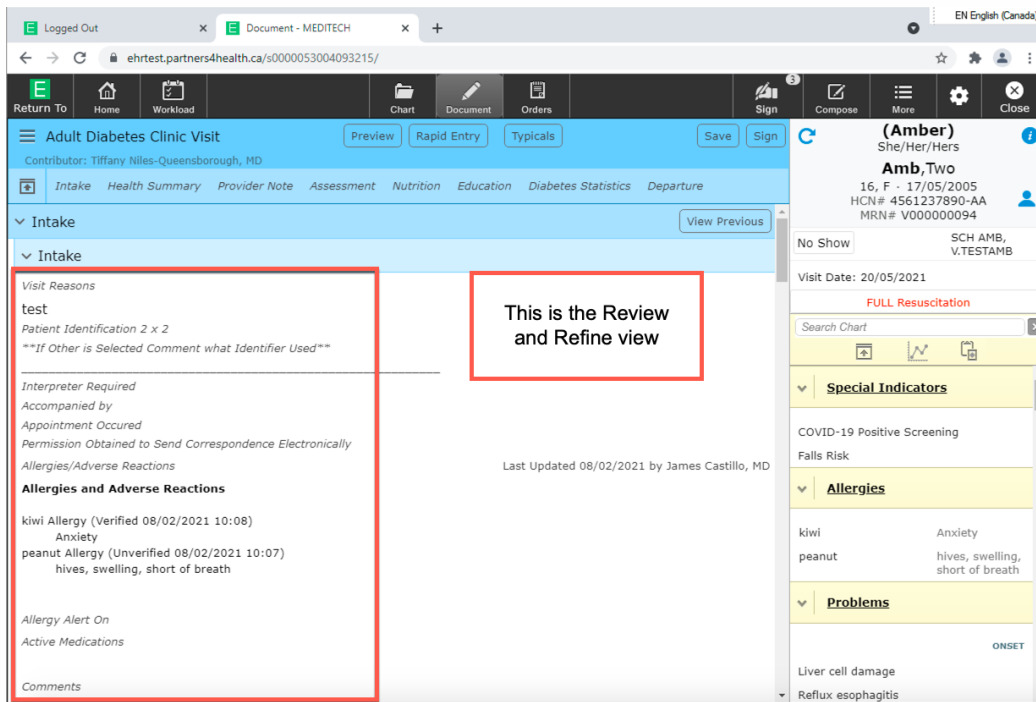
Section Slider and Section Accordions:

Use the arrow in a box to expand and collapse the accordions.

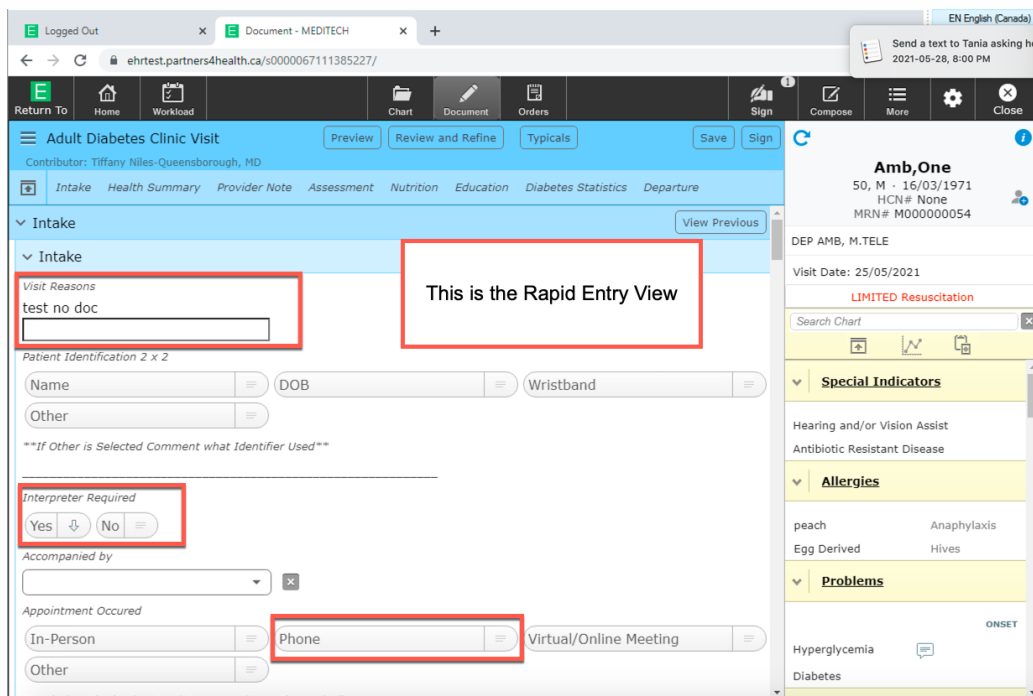
Click on the Slider Bar to access the various document sections



Review and Refine vs Rapid Entry Document View:



Users can toggle to the Rapid Entry Mode, by selecting the 'Rapid Entry' button at the top of the document. In the Rapid Entry mode, users see all of the question sets and responses available to select.



Patient Documentation

How to Document

- Selecting queries will turn the query button green. This indicates that the query is selected for documentation.
- In Comment Text Fields enter free text comments

Medications

Medications Reviewed

Yes No **Yes and No Queries**

Medication Comments

Comments **Comment Text Fields**

Blood Sugar Monitoring

Monitoring

Yes ↓ No ≡

Re:

Frequency

L Daily ≡ BID ≡ TID ≡

C QID ≡ Irreg ≡

Vital Signs

Select the white space to enter a value. Use the calculator to enter the values.

Vital Signs

	29/10/2020 09:37 EDT	10/03/2021 14:33 EST	21/04/2021 11:24 EDT	28/04/2021 14:52 EDT	New
Height				1.68 m	
Weight		75 kg		75 kg	
BMI				26.6	
Temperature	45 C H		37.5 C	36.5 C	<input type="text"/>
Temp Source	Axillary		Oral	Tympanic	

Vital Signs

04/06/2021 08:27

Height

Weight

BMI

Temperature (36.4 C-37.5 C)

Temp Source

Pulse Location

Pulse Location Modifier

Pulse Rate

Rhythm

Cancel Save

7 8 9 C

4 5 6 ←

1 2 3 -

0 . Enter

Fahrenheit Centigrade

How to Document PMFSH

- Document on PMFSH screen on Review and Refine view or the Rapid Entry View
- Providers can select 'Reviewed' for PMFSH data that was already entered

Adult Diabetes Clinic Visit | Preview | **Review and Refine** | Typical | Save | Sign

Contributor: Tiffany Niles-Queensborough, MD | Last Saved at 04/06/2021 08:17

Intake | Health Summary | Provider Note | Assessment | Nutrition | Education | Diabetes Statistics | Departure | Diabetes Co

Health Summary | Reviewed All | Add Content

PMFSH

Medical History | Reviewed | Last Reviewed 28/04/2021 @ 08:36 by Paul Matos, MD
Onset Date

Cardiac abnormality
Hyperglycemia
Patient having difficulty managing glucose levels.
Hypertension

Surgical History | Reviewed | Last Reviewed 28/04/2021 @ 14:54 by Paul Matos, MD
Onset Date

History of appendectomy

Family History | Reviewed | View By Problem | Last Reviewed 28/04/2021 @ 14:54 by Paul Matos, MD
Onset Age

Social History | Reviewed | Last Reviewed 28/04/2021 @ 14:54 by Paul Matos, MD

Gender Identity
Are you now married, widowed, divorced, separated, never married or living with a partner?
Female married

- Social History screen contains queries and text fields

Social History | Cancel | Save

Gender Identity

Gender Identity

Male | **Female** | Trans Female-to-Male | Trans Male-to-Female | Neither Exclusively Male nor Female

Decline to Answer | Other

Gender Identity Comment

Living Situation

Interpreter Required

Yes | No

Usual Living Arrangement

- Family History – document by problem, enter a family member, enter the problem, then select save.

History of appendectomy

Onset Date

Family History Reviewed View By Problem

Last Reviewed 28/04/2021 @ 14:54 by Paul Matos, MD

Onset Age

Family History By Problem By Family Member Exit Save

▼ Add New Family Member ✕

▼ Detail

*Family Member

Name

Date of Birth

Race/Ethnicity

Deceased

Twin

Problem Noted No

Add

► Add New Family Member

- Add the problem to the list for the family member chosen

Adult Diabetes Clinic Visit Preview Rapid Entry Typicals Save Sign

Search Results

★ Diabetes		
★ Diabetes 1.5, managed as type 1	E10.9	
★ Diabetes 1.5, managed as type 2	E10.9	
★ Diabetes education, encounter for	E14.9	
★ Diabetes in pregnancy	O24.803	
★ Diabetes in undelivered pregnancy	O24.803	
★ Diabetes insipidus	E23.2	
★ Diabetes insipidus secondary to vasopressin deficiency	E23.2	
★ Diabetes insipidus, nephrogenic	N25.1	
★ Diabetes insipidus, neurohypophyseal	E23.2	
★ Diabetes mellitus affecting pregnancy	O24.803	
★ Diabetes mellitus affecting pregnancy, antepartum	O24.803	
★ Diabetes mellitus and insipidus with optic atrophy and deafness	E14.38	
★ Diabetes mellitus arising in pregnancy	O24.803	
★ Diabetes mellitus associated with genetic syndrome	E13.9	
★ Diabetes mellitus associated with hormonal aetiology	E14.68	

diabete

► Add New Family Member

Gender Identity Female Hyperglycemia

Amb,One Exit Save

Signing a Document

Once you have finished documentation for your patient's visit, sign the document. From the document, click the Sign button (currently low-lit) and the Submit overlay displays.

Adult Diabetes Clinic Visit Preview Rapid Entry Typicals Save **Sign**

Contributor: Tiffany Niles-Queensborough, MD

Intake Health Summary Provider Note Assessment Nutrition Education Diabetes Statistics Departure

Intake View Previous

Intake

Visit Reasons

Submit Cancel Sign

AMB,ONE 50 M 16/03/1971 Allergy/Adv: peach, Egg Derived

Signers 1

Q Other...

Visit Date/Time 2

04/06/2021 04:40

* Document Specialty 3

Ambulatory Clinic Nursing Q Other...

Additional Copies To 4

Kerry Mccartney (Attend) Paul Matos (Ref) Q Other...

1. Signers section: Add any additional signers for this document.
2. Encounter Date/Time section: Change the encounter date/time for this document using the calendar.
3. Document Specialty section: Your default specialty displays highlighted in green. If you want to change your specialty select Other and add the specialty.
4. Additional Copies To section: If you want another provider to receive this document, add the provider here.

Adding an Addendum

After a document is signed by the provider, the provider may want to add additional information such as a document section or comments to addend the existing document. This can be done from the patient's chart in the Provider Notes Tab, Activity Tab, or Summary Tab. An Addendum can also be added to a document while viewing that document from the chart.

On the right side of the screen, see the output of the document you have chosen. To add an addendum to this document, select the Addendum button at the top of this section.

The screenshot shows a 'Documents' interface. At the top, there is a header with 'Documents' and a 'Sign' button. Below the header, there is a list of documents. The first document is 'AMB Orthopedics Office Visit' with a date of '25/05/2021 13:00'. The second document is 'OTN Clinic Visit' with a date of '25/05/2021 16:11'. The 'Addendum' button is highlighted in red. To the right of the document list, there is a preview of the selected document. The preview shows the following information:

Collingwood General and Marine Hospital
Health Records Department
459 Hume Street
Collingwood, ON L9Y 1W9
(705)445-2550
OTN Clinic Visit
Report Status: Signed

Patient: AMB,ONE
DOB/Age: 16/03/19 71 / 50 / M
Visit Date: 25/05/21

MRN: M000000 054
Acct: MB00002 39/21
HCN:

Documentation can be added to the template by typing within the text box field. Once the document has been updated, sign the document to add this new section.

The screenshot shows the 'OTN Clinic Visit' document editor interface. At the top, there is a header with 'OTN Clinic Visit' and a 'Sign' button. Below the header, there is a contributor field: 'Contributor: Kerry Mccartney, RN'. Below the contributor field, there is a toolbar with 'Addendum' and 'View Document' buttons. Below the toolbar, there is a section titled 'Addendum'. The 'Addendum' section contains the following text: 'Addendum entered and electronically signed by Tiffany Niles-Queensborough, MD 04/06/2021 04:31:'. Below the text, there is a rich text editor toolbar with icons for bold, italic, underline, and a right arrow.