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.
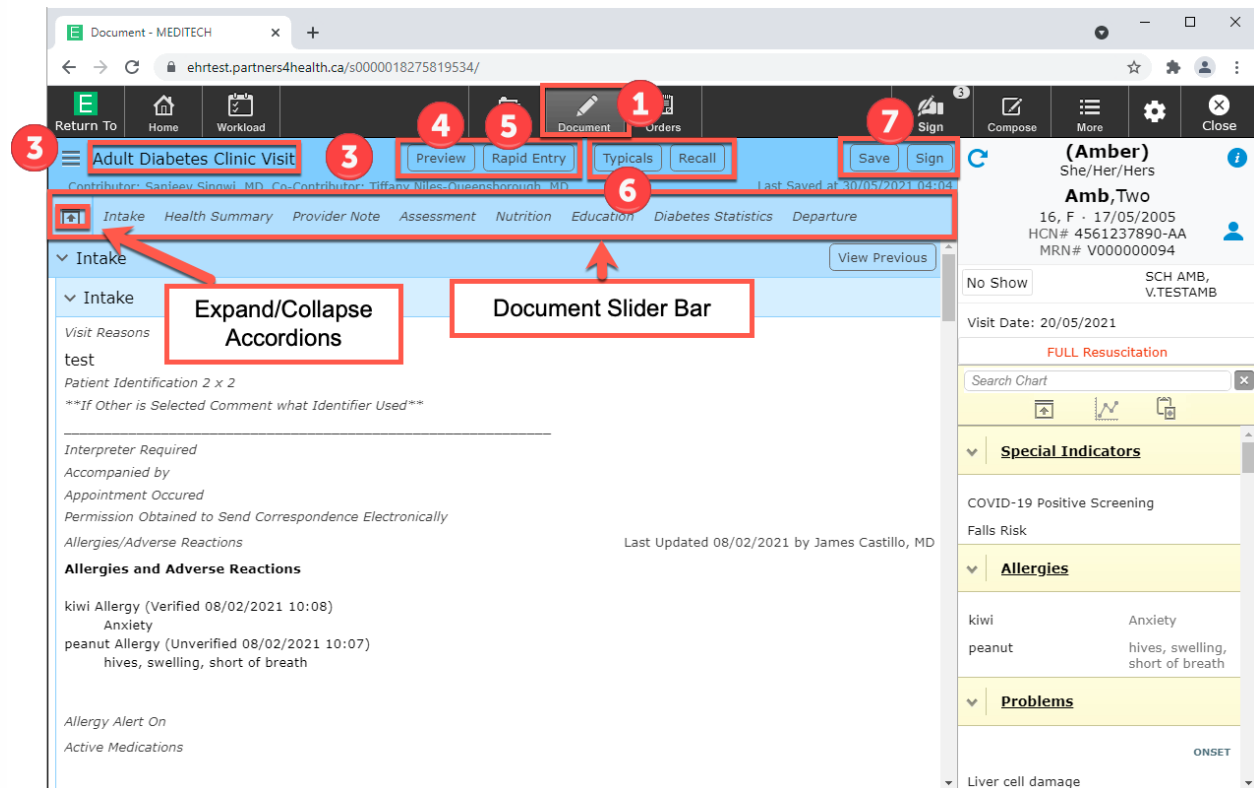

1. **Document Button:** This button serves two purposes. First, this button serves as a launching point to the Documentation templates. Second, it launches the Select Document routine, which serves as a way to view all unsigned visit documentation and start additional documents for the visit.
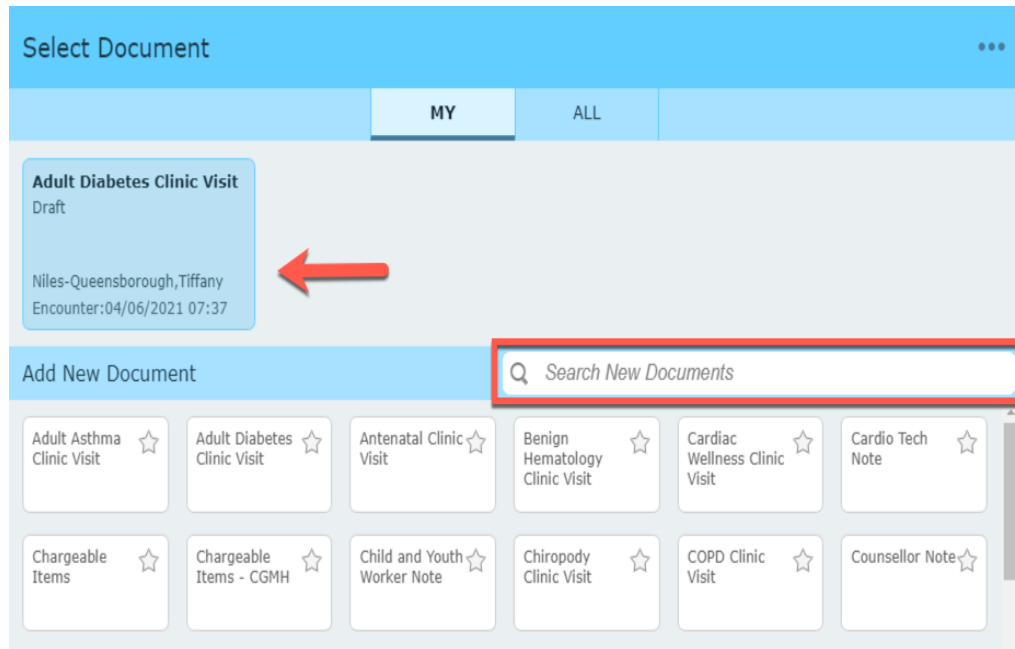
2. Document Header & Menu Region: This region presents the current document template name and author. The menu (see image below) button next to the document name contains several options including: delete the document, create new typicals, add content, and switch document.
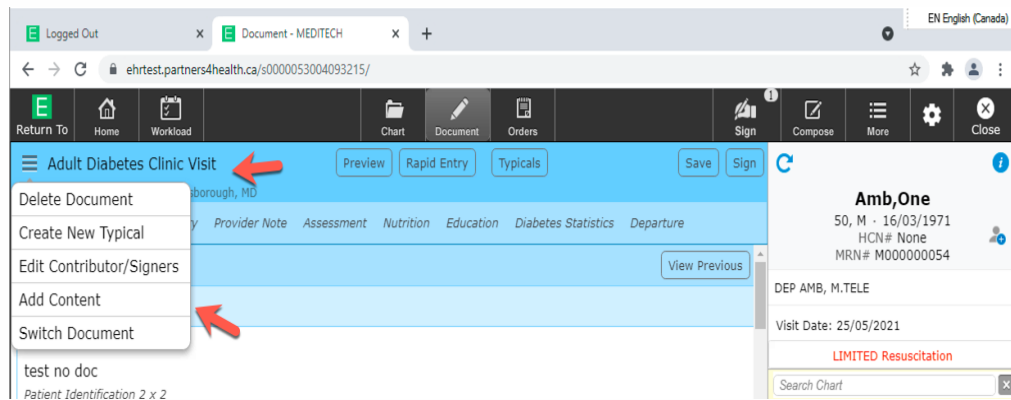

3. Preview & Edit Mode: The 'Preview' button allows the user to preview the output of the document.
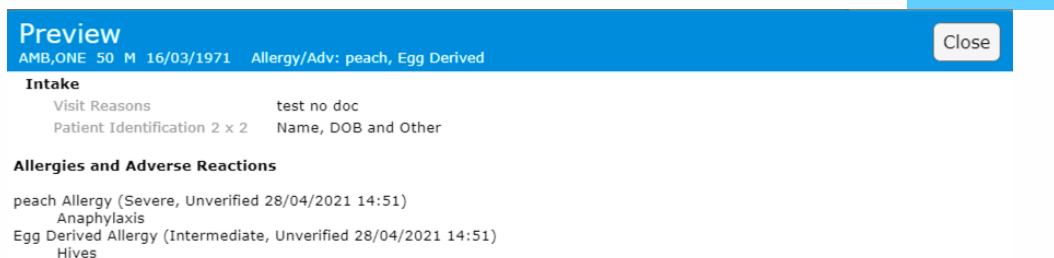
4. Typicals & Recall: The 'Typicals' button allows providers to pull in Typical document responses to save them while performing documentation. **Note:** Detailed typicals functionality is covered in a separate document. The 'Recall' button becomes available if there are past documentation instances 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.
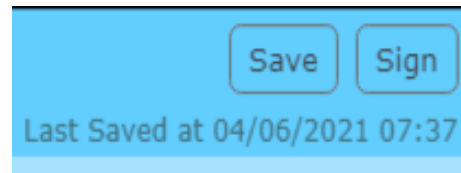
6. Section Slider: This area of the tool allows users to quickly jump to the different sections of the document without having to scroll. The accordion on the far left of the bar allows users to collapse all of the sections of the template.
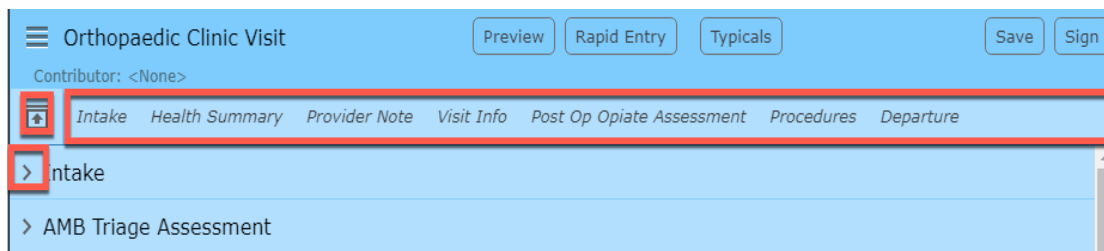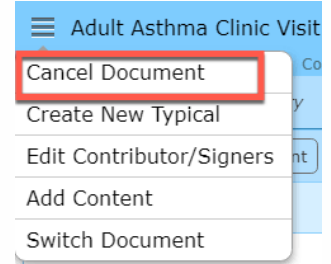
7. Documentation Region: This region of the Document Tool is where the users perform their documentation.
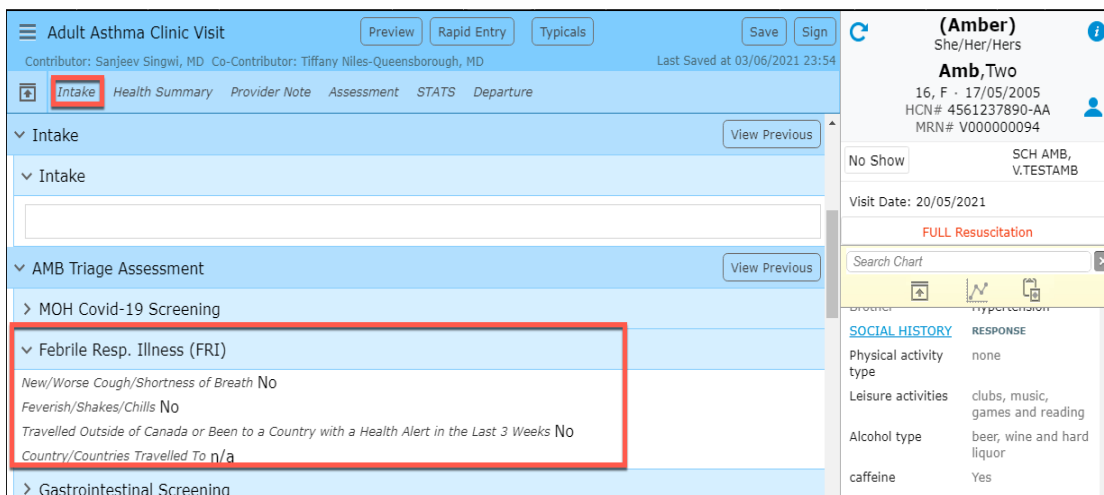
How to Delete a Document

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.

- o 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.

- o 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 Typicals list on the fly. *For addition detail on this topic, please see the Typicals 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.
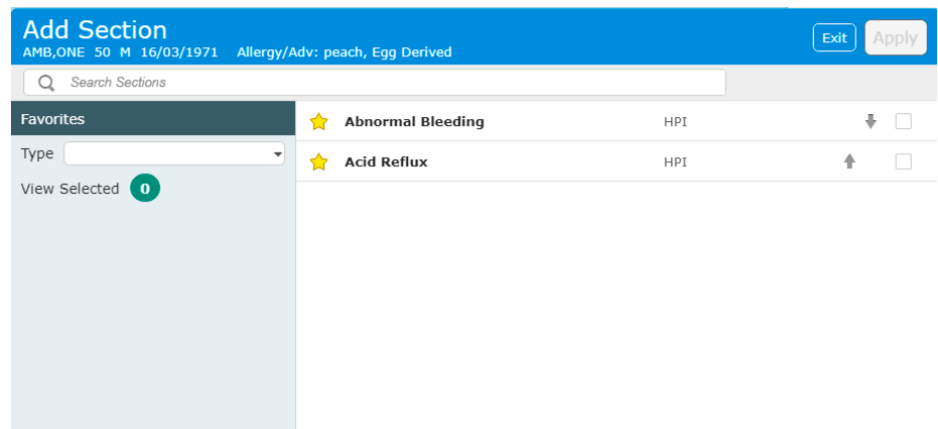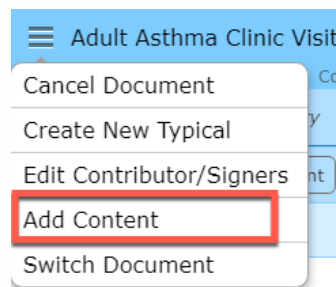
Add Section
AMB,ONE 50 M 16/03/1971   Allergy/Adv: peach, Egg Derived   Exit   Apply

🔍 | Search Sections

☆	**6 Min Walk Test**	Questionnaire
☆	**AAA Follow-Up - No Int.**	HPI
☆	**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.

Apply
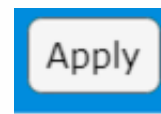
☰ Adult Diabetes Clinic Visit   Preview | Rapid Entry | Typicals   Save | Sign
Contributor: Tiffany Niles-Queensborough, MD   Last Saved at 04/06/2021 08:07

▣ mmary   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

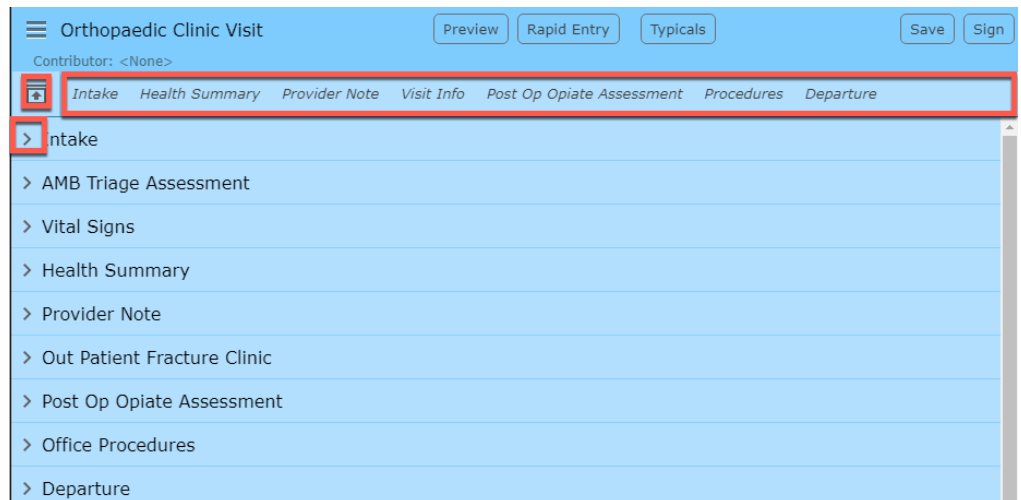CARE4

How to switch documents

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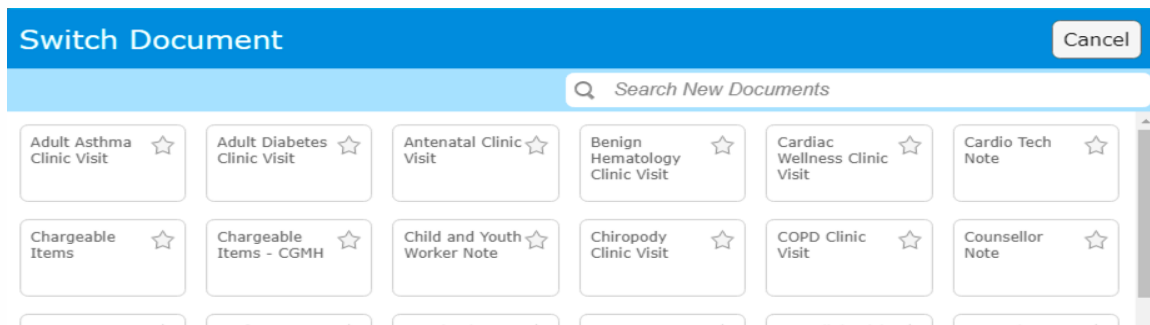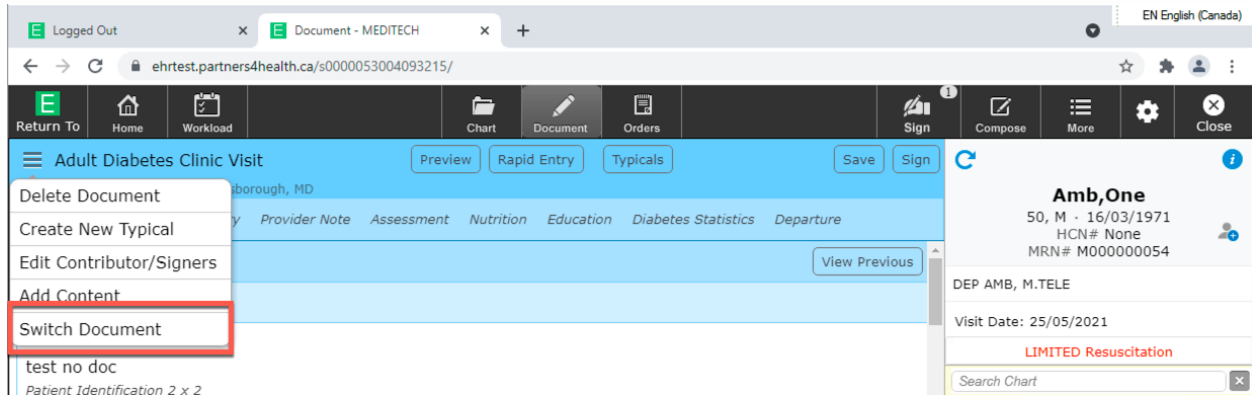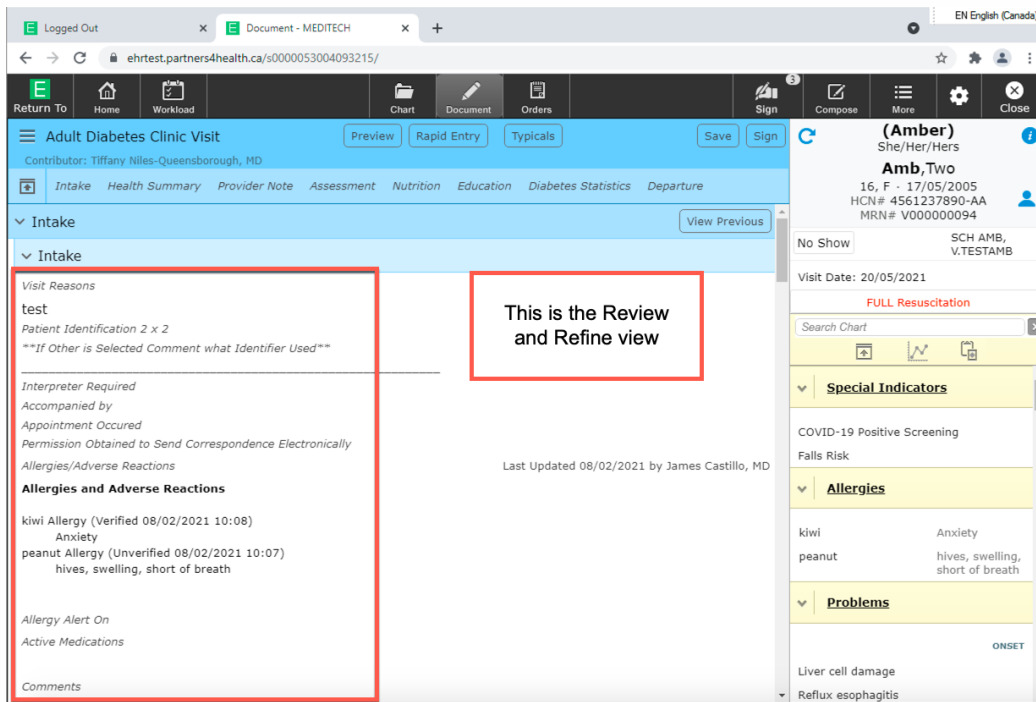

Section Slider and Section Accordions:

Use the arrow in a box to expand and collapse the accordions.
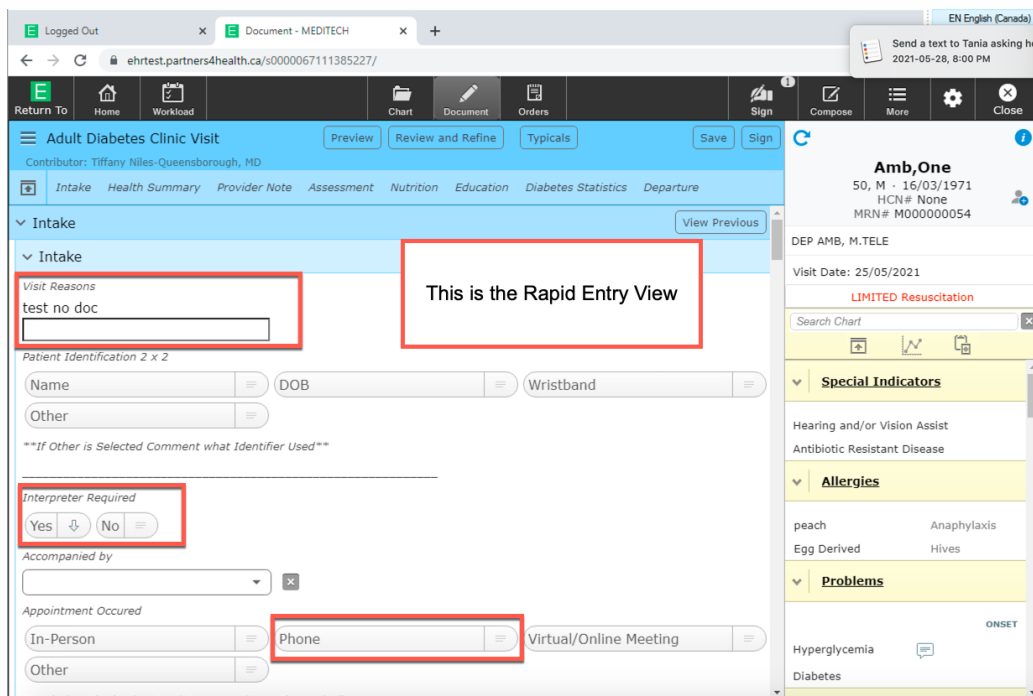
Click on the Slider Bar to access the various document sections

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

Vital Signs

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

How to Document PMFSH

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

- o Social History screen contains queries and text fields

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

History of appendectomy

Family History [Reviewed] [View By Problem]

Onset Date

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

Brother
Daughter
Family Other
Father
Grandfather
Grandmother
Mother
Sister
Son
Unknown

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] ↻   **Amb,One**

Search Results

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

[Exit] [Save]

diabete

>Add New Family Member

Gender Identity   Female   Hyperglycemia

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.

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.

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.