

PROVIDER DOCUMENTATION (PDOC)

You now have the ability to create notes directly into the patient chart.
Notes are immediately available for viewing/ proofreading and corrections.

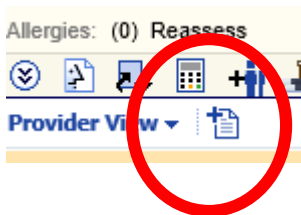
Where is PDOC located?

Step 1: Navigate to Clinical Summary Page

The screenshot displays the EHR interface for patient Acacianna, Rowena. The top navigation bar includes 'Patient Record', 'Clinical Summary', 'Charting', 'Plan of Care', 'Orders', and 'Visit'. The 'Clinical Summary' section is active, showing tabs for 'Summary', 'Lab', 'Radiology', 'Orders', 'Nursing', 'Cardiology', 'Respiratory', 'Case Management', 'Multidisciplinary', 'Rehab Services', 'Wound Care', 'Transcribed Reports', and 'AIS Viewer'. The 'All Labs' section is currently selected, displaying 'No data is available for the selected filter.' The 'Active Medications' section is also visible, showing a message: 'Orders cannot be displayed due to incomplete current orders and/or Clinical Summary preference settings. Please contact your IS administrator.'

Step 2: Add Note Tab

Left side of screen Next to word Provider View. Click Paper with plus sign “add note”



Step 3: List of Templates

List of templates opens up

The screenshot shows a web browser window titled "Add New Document -- Webpage Dialog". The patient information at the top is: **Acacianna, Rowena**, 51y, ♂, Second East-E228-A. Allergies: (0), Reassess, Diagnosis: (0), ACCT# 101647019, MR# 674066.

Below the patient info are two tabs: "Template Search" and "Personal Favorites (12)". The "Personal Favorites" tab is active. A checkbox labeled "Make This My Default Tab" is checked.

A table lists various templates, each with a checkbox in the first column:

Template Name	
<input type="checkbox"/>	Consult Initial (Free Text)
<input type="checkbox"/>	Consult Initial (Multi-Select)
<input type="checkbox"/>	Consult Subsequent (Free Text)
<input type="checkbox"/>	Consult Subsequent (Multi-Select)
<input type="checkbox"/>	Discharge Summary (Free Text)
<input type="checkbox"/>	Discharge Summary (Multi-Select)
<input type="checkbox"/>	Event Note
<input type="checkbox"/>	History and Physical Examination (Free Text)
<input type="checkbox"/>	History and Physical Examination (Multi-Select)
<input type="checkbox"/>	Procedure Note Text Only
<input type="checkbox"/>	Progress Note (Free Text)
<input type="checkbox"/>	Progress Note (Multi-Select)

At the bottom of the dialog are a help icon (?), an "OK" button, and a "Cancel" button.

As a consulting physician. You will typically chose from the below

<input type="checkbox"/>	Consult Initial (Free Text)
<input type="checkbox"/>	Consult Initial (Multi-Select)
<input type="checkbox"/>	Consult Subsequent (Free Text)
<input type="checkbox"/>	Consult Subsequent (Multi-Select)

STEP 4 : Choose Personal Favorites

Highlight the stars to left to set up your personal favorites

Template Name	Document Type
<input type="checkbox"/> Cardiology (SOAP, Consult)	Consultation Note
<input type="checkbox"/> Cardiology (SOAP, Progress Note)	Inpatient SOAP Note
<input checked="" type="checkbox"/> Consult Initial (Free Text)	Consultation Note
<input checked="" type="checkbox"/> Consult Initial (Multi-Select)	Consultation Note
<input checked="" type="checkbox"/> Consult Subsequent (Free Text)	Consultation Note
<input checked="" type="checkbox"/> Consult Subsequent (Multi-Select)	Consultation Note
<input type="checkbox"/> Discharge Summary (Free Text)	Discharge Summary
<input type="checkbox"/> Discharge Summary (Multi-Select)	Discharge Summary
<input checked="" type="checkbox"/> Event Note	Progress Note
<input type="checkbox"/> General Medical Pediatric (H&P)	Admission History and Physical
<input type="checkbox"/> General Medical Pediatric (Progress Note)	Inpatient SOAP Note
<input type="checkbox"/> History and Physical Examination (Free Text)	History and Physical Examination
<input type="checkbox"/> History and Physical Examination (Multi-Select)	History and Physical Examination
<input checked="" type="checkbox"/> Procedure Note Text Only	Provider Procedure Note
<input type="checkbox"/> Progress Note (Free Text)	Inpatient SOAP Note
<input type="checkbox"/> Progress Note (Multi-Select)	Progress Note

The starred items are recommended for all Consulting Providers

Step 5: Personal favorites

Click on personal favorites tab and MAKE THIS MY DEFAULT. This will limit personal view to templates pertinent to consulting services.

Add New Document -- Webpage Dialog

Acacianna, Rowena 51y ♂ Second East-E228-A
Allergies: (0) Reassess Diagnosis: (0) ACCT# 101647019 MR# 674066

Template Search | **Personal Favorites (6)**

Make This My Default Tab

Template Name	
<input type="checkbox"/>	Consult Initial (Free Text)
<input type="checkbox"/>	Consult Initial (Multi-Select)
<input type="checkbox"/>	Consult Subsequent (Free Text)
<input type="checkbox"/>	Consult Subsequent (Multi-Select)
<input type="checkbox"/>	Procedure Note Text Only
<input type="checkbox"/>	Event Note

? OK Cancel

STEP 6 Template Types

Chose your template type based on how you like to work:

FREE text template

FREE TEXT: Free text is mostly open boxes for typing and dictation

Composition

ROS

Last Known Normal
Neurological
Functioning

/ / 31 : [up/down] [lock]

Physical Examination

Vital Signs Last Twenty Four Hours 1 Occurrence
No data available at this time.

Laboratory Results

Multi-Select (most commonly used)

Choices: Right click to chose

Left click to cross out

You still have ability to type or dictate in any open box

ROS

E/M Requirements: Levels 1-3 (1 System), Level 4 (2 Systems), Level 5 (10+ Systems)

Review of System Note

Dropdown menu for Review of System Note

At Least 10 Organ Systems Reviewed and Negative Except as Indicated

Constitutional	Denies	Chills	Fever	Night Sweats	Weight Gain	Weight Loss	Other										
Eye	Denies	Drainage	Dryness	Eye Pain	Itching	Redness	Vision Change	Other									
Ear Nose Throat	Denies	Bleeding Gums	Congestion	Dental Pain	Dry Mucous Membranes	Dysphagia	Ear Drainage	Ear Pain	Epistaxis	Foreign Body Sensation	Hearing Impairment	Lesion	Rhinorrhea	Sinus Pain	Sore Throat	Tinnitus	Other
Cardiovascular	Denies	Chest Pain	Near Syncope	Orthopnea	Palpitations	Peripheral Edema	Syncope	Other									
Respiratory	Denies	Cough	Dyspnea	Dyspnea on Exertion	Hemoptysis	Sleep Apnea	Wheezing	Other									
Gastrointestinal	Denies	Abdominal Pain	Appetite Change	Constipation	Diarrhea	Hematemesis	Hematochezia	Melena	Nausea	Rectal Pain	Vomiting	Other					
Genitourinary	Denies	Discharge	Dysmenorrhea	Dysuria	Flank Pain	Hematuria	Oliguria	Urinary Frequency	Urinary Incontinence	Urinary Retention	Other						
Musculoskeletal	Denies	Arthralgia	Back Pain	Calf Tenderness	Joint Swelling	Myalgia	Neck Pain	Other									
Neurologic	Denies	Ataxia	Headache	Memory Deficit	Paralysis	Paresthesia	Seizure	Tremor	Vertigo	Weakness	Other						
Skin	Denies	Bruising	Diaphoretic	Discoloration	Jaundice	Lesion	Petechiae	Pruritus	Rash	Scaliness	Other						
Hematologic and Lymphatic	Denies	Anemia	Ecchymosis	Lymphadenopathy	Prolonged Bleeding	Other											
Allergic and Immunologic	Denies	Frequent Infection	Hives	Sneezing	Tongue Swelling	Other											
Endocrine	Denies	Nocturia	Polydipsia	Polyphagia	Polyuria	Temperature Intolerance	Other										
Psychiatric	Denies	Anxiety	Depression	Hallucination	Suicidal Thoughts	Thoughts of Harming Others	Other										

Last Known Normal Neurological Functioning // : [dropdown] [dropdown]

At least 10 organ system Reviewed

Physical Examination

Physical Examination Finding

Constitutional

Alert No Acute Distress Distressed Frail Appearing
Well Nourished

[Level of Consciousness](#) [Orientation](#) [More Findings](#)

Head and Face

E/M Requirements: Not Organ System

Normocephalic and Atraumatic Asymmetry

[More Findings](#)

Eye

Extraocular Movement Intact Conjunctival Injection
Pupils Equally Round Reactive to Light Scleral Icterus
Pupils Reactive to Accommodation

[Pupils](#) [Inspection](#) [Visual Acuity](#) [Slit Lamp and Fluorescein](#)
[Posterior and Fundoscopic Examination](#) [Intraocular Pressure](#)

Ear Nose Throat

Mucous Membranes Moist Dry Mucous Membranes
No Injury or Deformity Rhinorrhea
Oropharynx Clear

[Ears](#) [Nose](#) [Mouth and Throat](#) [Neck](#)

Cardiovascular

Capillary Refill Less than 2 Seconds Abnormal Rate or Rhythm
No Peripheral Edema Bruit
Normal S1, S2 Pulses Normal Chest Wall Tenderness
Regular Rate and Rhythm Delayed Capillary Refill
Jugular Vein Distention
Murmur

[Edema](#) [Heart Sounds](#) [Pulses](#)

Respiratory

FYI:

All blank boxes you can dictate and/or type.

All orange lines open up more details about fields.

The word OTHER gives you a blank text box for added info

Step 7 : Creating a Note

Highlight the template name you wish to open. Click ok

Template will open

Step 8 Opening Split Screen



The screenshot displays a medical software interface for a patient named Sunny Test. The top section shows patient details: DOB: 11/01/2007(12y) ♀, Third West-W361-B, Telemetry, and Attending: Richard Clouse, MD. Below this, there are fields for Allergies (1 ⚠️ Reassess), Diagnosis (0), Height (121.92 cm), Weight (78 kg), ACCT# (101647092), MR# (674061), Medical, Admit Date (02/20/2020 (13)), IP, and Checked in. A navigation bar includes icons for Patient Record, Clinical Summary, Charting, Plan of Care, Orders, and Visit. The bottom section shows a 'Recent Documents' list with 'General Medical Pediatric (H&P)' selected, collected on 01/16/2020 at 13:03, and authored by 'Fourteen Doctor'. A red circle highlights the 'Split Screen' icon in the bottom right corner, which is labeled 'Back to Editing'.

Click on Split screen Icon

Right side of screen is your Note that you are creating.

You are able to view labs or other notes in middle column while documenting on right side of page simultaneously



List of Notes this visit



Display documents while creating.



The note you are creating.

The screenshot displays a medical software interface with three main panels:

- Left Panel (Recent Documents):** A sidebar menu showing a list of notes for the current visit. The selected note is "Consult Initial (Free Text)" dated 03/04/2020 14:28 by Thirteen Doctor.
- Middle Panel (Document Preview):** A preview of the selected document, titled "General Medical Pediatric (H&P)". It shows patient information, allergies (NKFA), home medications, exam findings (Temperature: 102.3HC, Height: 48 inch, Weight: 22kg), and assessment/plan notes.
- Right Panel (Form):** A form for creating a new "Consult Initial (Free Text)" note. It includes fields for admission date, encounter date, reason for encounter, primary care provider (Fisher, Eric MD), and HPI. It also features sections for orders, medication history, allergies, and medical/surgical history.

Step 9 Confirm Imported Data:

Doc: W. Chung |

Author: Thirteen Doctor | Last Saved: 03/04/2020 14:30

Confirm Data | Refresh Data | Save Answers | Collected: 03/04/2020 14:30 | Permissions | History | Print | Go To

Consult Initial (Free Text)

Encounter Information

Confirm dates, without modification, for inclusion in your documentation

Admission Date: / / 31

Encounter Date: / / 31 : :

Reason for Encounter:

Primary Care Provider: Fisher, Eric MD (80171)

Referred by:

HPI

Chief Complaint in Patient's Own Words:

HPI:

A complete HPI and ROS are unobtainable secondary to [Clinical Condition](#) [Cognitive Impairment](#) [Language Barrier](#) [Other](#)

Orders

Orders

The patient orders list is complete with either no orders or none within the filter criteria.

Medication History

Allergies

- NKFA
- Dilaudid

Allergy List Reviewed

Medical and Surgical History

E/M Requirements: History Elements (Medical, Social, Family)- Levels 1-3 (None), Level 4 (1 Element), Level 5 (2 or more Elements).

Medical and Surgical History

Medical	None	Anxiety Disorder	Asthma	Bipolar Disorder	CAD	Cerebrovascular Accident	CHF	Chronic Kidney Disease	Chronic Pain Disorder		
	COPD	Deep Vein Thrombosis	Depression Disorder	Diabetes Mellitus	Dyslipidemia	GERD	Hypertension	Malignancy	MI	PE	PTSD
		Respiratory Device Dependence	Schizophrenia	Seizure Disorder	Not Known	Other					

Respiratory Device Dependence Detail

Reason	Apnea of Prematurity	Sleep Apnea	Other	
Device	Bi Phasic Positive Airway Pressure	Continuous Positive Airway Pressure	Ventilator	Other
Detail	<input type="text"/>			

Surgical	None	Appendectomy	Automatic Implantable Cardioverter Defibrillator	CABG	Cesarean Section	Cholecystectomy	Hernia Repair
	Hysterectomy	Lumpectomy	Mastectomy	Pacemaker	Prostatectomy	Not Known	Other

Additional Medical and Surgical History:

Items in Yellow are imported from H&P or Nursing Documentation.

In order to keep as part of your note you must CONFIRM DATA. I recommend doing this immediately upon opening.

Step 10: Begin Your Documentation

Navigate through each section Documenting your findings.

FYI:

Consult Initial: Meds and allergies are imported

All templates:

- Last Vitals, Including Pain, Height and weight auto populate
- Labs for last 24 hours auto populates
- Radiology results for last 24 hours auto populates



After completing note: Recommend to Save Note first


This will allow time to review and add more notations or results if needed.

Once you chose the COMPLETE button. Your document is now locked and would require an addendum to add more notations.

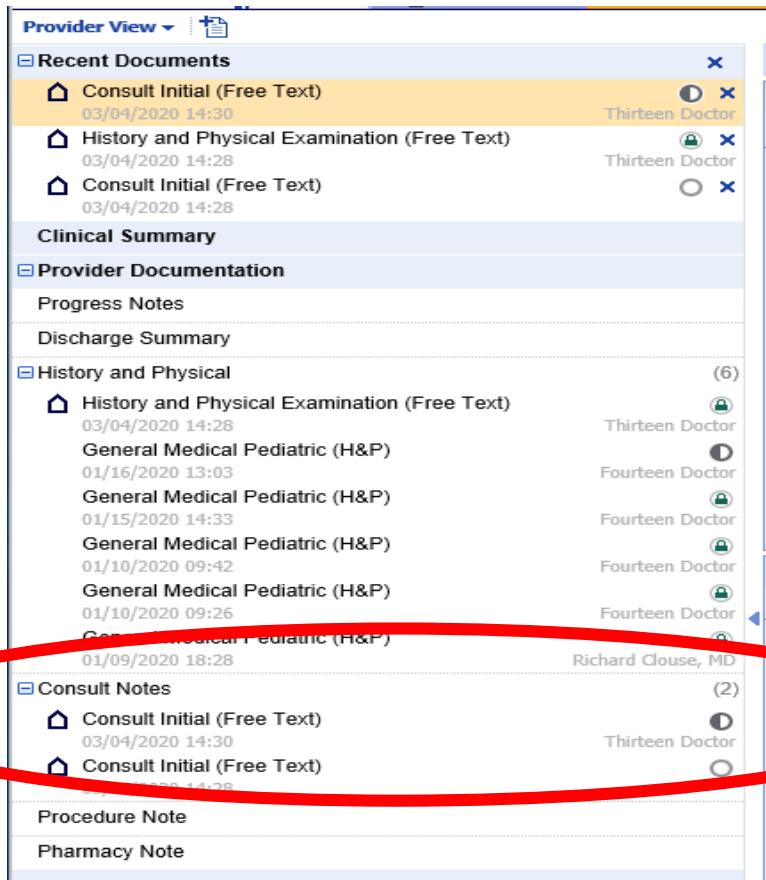
Step 11: I have saved my note. Where is it?

On the Clinical Summary Page, Left side column, all notes that have been created. Double click any note to view.

Any note with the half moon  shape indicates it is in Progress/ Saved.

Any note with a lock icon  represents a completed FINAL note which is uneditable.

AN addendum would have to be created to add documentation to any note that is locked



The screenshot displays the 'Provider View' interface with a list of documents. The 'Consult Notes' section is circled in red. The list includes:

- Recent Documents**
 - Consult Initial (Free Text) (03/04/2020 14:30) - Thirteen Doctor (Progress icon)
 - History and Physical Examination (Free Text) (03/04/2020 14:28) - Thirteen Doctor (Lock icon)
 - Consult Initial (Free Text) (03/04/2020 14:28) - Thirteen Doctor (Progress icon)
- Clinical Summary**
- Provider Documentation**
 - Progress Notes
 - Discharge Summary
- History and Physical** (6)
 - History and Physical Examination (Free Text) (03/04/2020 14:28) - Thirteen Doctor (Lock icon)
 - General Medical Pediatric (H&P) (01/16/2020 13:03) - Fourteen Doctor (Progress icon)
 - General Medical Pediatric (H&P) (01/15/2020 14:33) - Fourteen Doctor (Lock icon)
 - General Medical Pediatric (H&P) (01/10/2020 09:42) - Fourteen Doctor (Lock icon)
 - General Medical Pediatric (H&P) (01/10/2020 09:26) - Fourteen Doctor (Lock icon)
 - General Medical Pediatric (H&P) (01/09/2020 18:28) - Richard Clouse, MD (Progress icon)
- Consult Notes** (2)
 - Consult Initial (Free Text) (03/04/2020 14:30) - Thirteen Doctor (Progress icon)
 - Consult Initial (Free Text) (03/04/2020 14:28) - Thirteen Doctor (Progress icon)
- Procedure Note
- Pharmacy Note