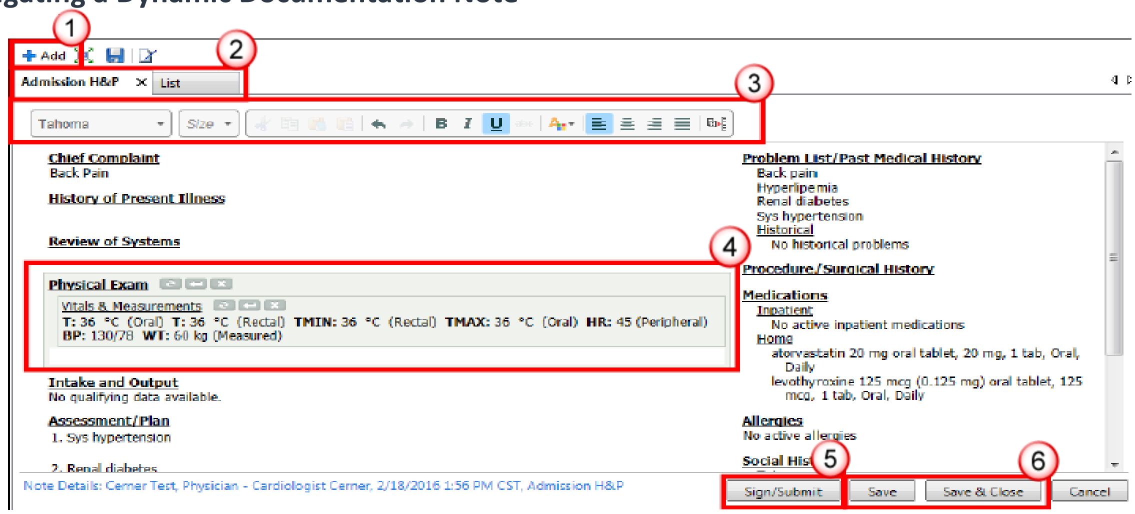
DYNAMIC DOCUMENTATION
HOSPITAL INFORMATION SYSTEM (HIS)

PRESCRIBERS AND ANCILLARY STAFF

Navigating a Dynamic Documentation Note



1. **Add Button:** Opens a new Dynamic Documentation note.
2. **Note and List Tabs:** The Note tab displays the current Dynamic Documentation note. The List tab displays a list of notes for the patient.
3. **Toolbar**: Formats the Dynamic Documentation note. Use the toolbar to format free text; copy, cut, and paste free text; undo and redo actions; and manage Auto Text.
4. **Section and Subsection:** Sections are the areas of notes that contain patient information or allow for free-text entry. Chief Complaints and Physical Exams are examples of sections. Subsections are additional groupings inside of a section that contain information or allow for free-text entry. Vitals & Measurements is an example of a subsection.
   Position your pointer over a section or subsection to display the following buttons and take action in the section or subsection.

	Refresh Button: Refreshes data in the section or subsection.
	Insert Free Text Button: Inserts a free-text box at the bottom of the section or subsection, if one does not already exist; if one exists then the cursor is placed in that free-text box.
	Delete Button: Deletes a section or subsection. Deleting a section removes all data including any subsections therein. To remove a free-text box, click the delete button to the right of the note, in the free-text box.

5. **Sign/Submit:** Signs your note or submits it for review and publishes it to the patient's chart.
6. **Save:** Saves your changes. If the note has not been saved before, you are prompted to confirm the name of the note.

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Starting a Note

1. From the Documents component, click +, or from the Documentation section of the chart, select + Add.
2. From the Type list, select a note type.
3. From the Title box, enter a title.
4. From the Date box, define the service date and time.
5. Double-click a reference template from the Note Templates list or select a reference template and click OK.

Creating an Auto Text Phrase

1. Click from the toolbar from any documentation component.
2. Click +.
3. Enter the exact abbreviation you want to use and a description of the abbreviation.
4. Enter the text that will replace the Auto Text phrase.
5. Optional, to add a drop list to an Auto Text phrase:
    a. In the Manage Auto Text window, click .
    b. Click Add List Item.
    c. From the New List Item box, enter text and press ENTER.
    d. If needed, select the Use Blank Default box to insert an underscore at the top of the item list.
    e. Click Create.
6. Optional, to insert a template and token into an Auto Text phrase:
    a. From the Manage Auto Text window, click .
    b. Search for and select the template or a token you want to include in your auto text.
    c. Click Insert.
7. Click Save.

Modifying an Auto Text Phrase

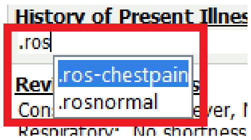
1. From any documentation component or within a note, click from the toolbar.
2. Select the My Phrases tab.
3. Double-click the Auto Text phrase.
4. From the text box, edit the text that will replace the Auto Text phrase.
5. Click Save.

Inserting an Auto Text Phrase or Smart Template from the Workflow View

1. From any documentation component, enter the Auto Text or smart template abbreviation.
2. Double-click the Auto Text or smart template abbreviation or press ENTER.

Inserting an Auto Text Phrase or Smart Template from a Note

1. Within the note, position the pointer over the section or subsection you want to enter Auto Text or a smart template, and then click the insert text button.
2. From the free-text box, enter the Auto Text or smart template abbreviation and press ENTER.

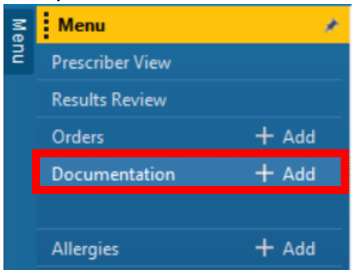


Sending a Note for Review or Cosignature

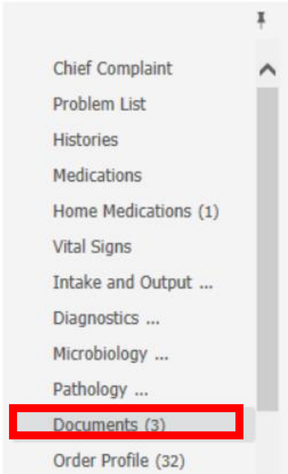
1. Click Sign/Submit in the lower-right corner of the note.
2. Click Add or double-click the provider's name to add them to the Recipients list.
3. Optional, add a comment to the request.
4. Click Sign Request or Review/CC for each recipient.
5. Click Sign or Submit.

Opening a Note

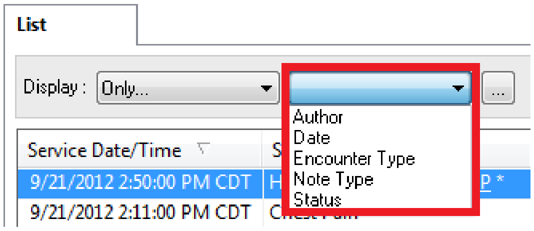
1. Select Documentation on the TOC (table of contents) or select Documents on the component list.



Or



2. To narrow or change the filter for displayed documents, select Only in the Display box and in the second box, select a filter.



3. Select the appropriate descriptors for any other boxes displayed.
4. Double-click the note you want to open in the list of displayed documents.

Modifying an Existing Note

1. Select Documentation on the TOC (table of contents) or select Documents on the component list.
2. Select a note from the list.
3. Click Modify or right-click the preview pane and select Modify.

4. In the Insert Addendum Here text box, enter your addendum.
5. Modify the note as needed.
6. Click Sign/Submit.