

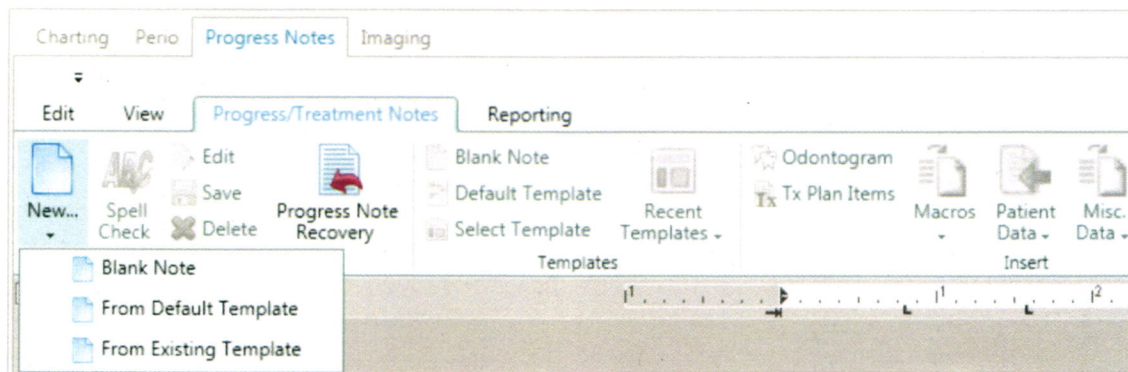


PROGRESS NOTE

Progress Note

Initially, use the New icon in the ribbon to determine what template you want to use (default, blank or choose an existing)

Once a template is selected, all other icons will be enabled and the template will load into the viewer.



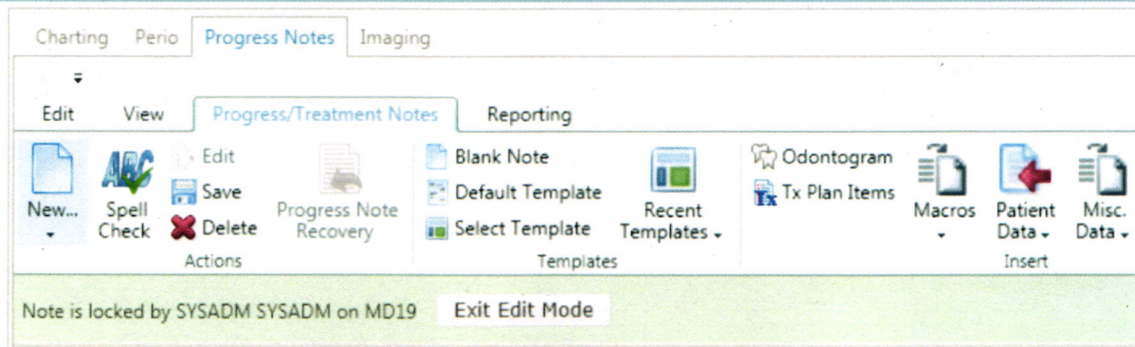
Edit Mode

If a user has selected a template, they are considered to be in EDIT mode.

While a user is in EDIT mode, others users can view the note, but they cannot edit.

Once the user in edit mode has saved the note, then others can edit the note.

A green label will appear to alert users if a note is in EDIT mode and what user has the note locked.



Switching Templates

Note is locked by SYSADM SYSADM on MD19

Save Changes

Discard Changes

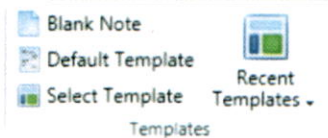
Once the user selects New to initially load a template, the New icon will disable.

If the user wishes to switch templates, use the applicable icons in the ribbon.

If there are unsaved edits, the user will be notified before the switch is made. Choose save changes to save and switch or choose discard to NOT save and switch

Select template – shows the user a list of all active templates to choose from

Recent templates – displays the most recent 10 templates used



Input fields

If the template selected has form fields that require the user input, a SINGLE input dialog will display. It will list all input fields.

Fields with a RED box indicate the field is required per configuration rules.


Once all required data (minimum) is complete, the user can hit insert data to close the dialog and insert the data in the note.

If the user wishes to trigger the dialog again, use the Data Input icon.

Data Input

Required fields are indicated in red.

Form Field Input	Response
Input a date	<div></div>
	<div>Sinn</div>


Data Input

Insert Data

Cancel

Insert fields

Insert fields are also known as form fields that pull data into the note (such as patient demographic data or provider data)

If a form field is added to a note and the data is not available (i.e. patient email address is missing), the field will appear RED in the note so the user can decide to manually enter it or to delete it.

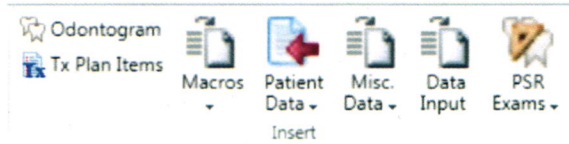
Insert Data pulls when the note is loaded so if data is added after the note is created, it will not pull for that visit.

This is to test input fields

6/8/2016
6/8/2016 1:26:35 PM

<<existingwork>>

Ribbon Tools



Odontogram - previously called Chart – will insert the most recent version of the Odontogram into the note

Tx Plan Items – will display a dialog to show any items in a Tx plan to insert into the note (existing feature)

Macros – previously called paragraph/remarks – gives the user to ability to pull in macros on the fly

Patient Data/Misc Data – allows the user to pull in patient data/provider data on the fly. If data is not available, it will be disabled in the list

PSR Exams – existing (no changes)

Review/Lock Notes

1/9/2017 12:00 AM

6/10/2016 5:14 PM

🟢🔒 6/10/2016 1:17 PM

User based Security introduced to determine what users can review, lock or edit notes after *lock*

New – For users with access, if a note is edited after *lock*, the *lock* will remain on the note. Edits after *lock* will be considered addenda data and can be reviewed in compare versions auditing.

New – If a note is edited after reviewed, the review status will drop so that a user can review the note again with the latest changes.

New – Review is not required to lock a note.

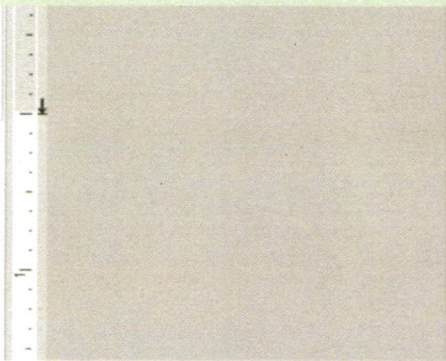
Reporting

By default, the reporting tab shows a list of all progress notes on the left side of the screen.

First select the notes you want generate the report for.

After they are selected, you must choose generate report from the ribbon BEFORE selecting an action such as print/email

1.
1/9/2017 1:
1/9/2017 12:00 AM
1/9/2017 12:00 AM
1/9/2017 12:00 AM
1/9/2017 12:00 AM
1/9/2017 12:00 AM
1/9/2017 12:00 AM
6/10/2016 5:14 PM
6/10/2016 1:17 PM
6/9/2016 12:00 AM
6/9/2016 12:00 AM

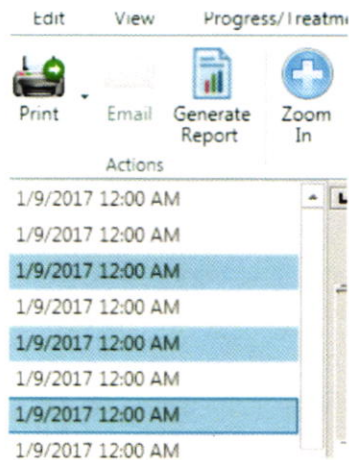


Reporting

Use *Shift* or *Control* to select multiple reports from the list

Now select *Generate report* to show the report on the right

After the report has been generated, the user can select *Print* or *Email*.



This is a progress note that tests auto notes:

This shows existing auto notes:

<<existingwork>>

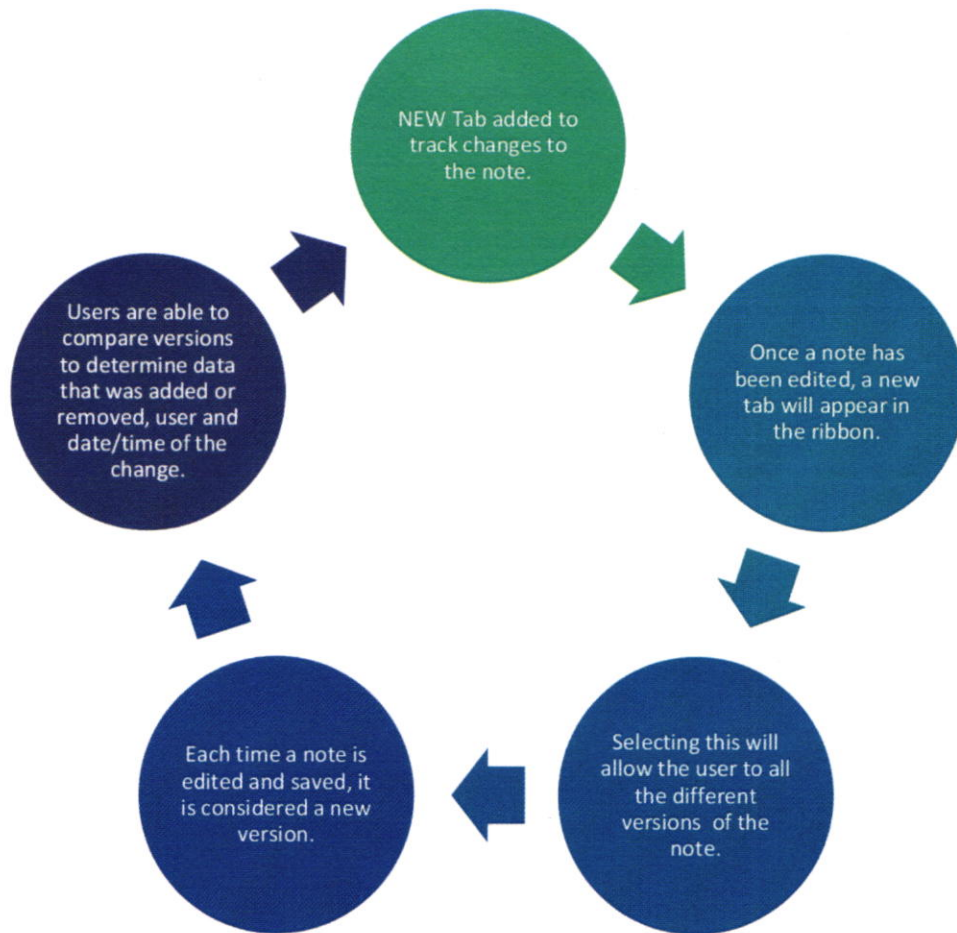
This shows completed auto notes:

<<completedwork>>

This shows planned auto notes:

<<plannedwork>>

Compare Versions



Compare Versions

Edit View Progress/Treatment Notes Reporting **Compare Versions**

1	2
Papillon Johnston 6/9/2016 02:19 PM	SYSADM SYSADM 6/13/2016 07:11 AM

This text was added.
~~This text was removed.~~

This is a progress note that tests auto notes:

This shows existing auto test notes to
~~<<existingwork>>~~ demo compare versions.

Note: Items in green
were added in that
version of the note

Items in pink were
removed in that
version of the note

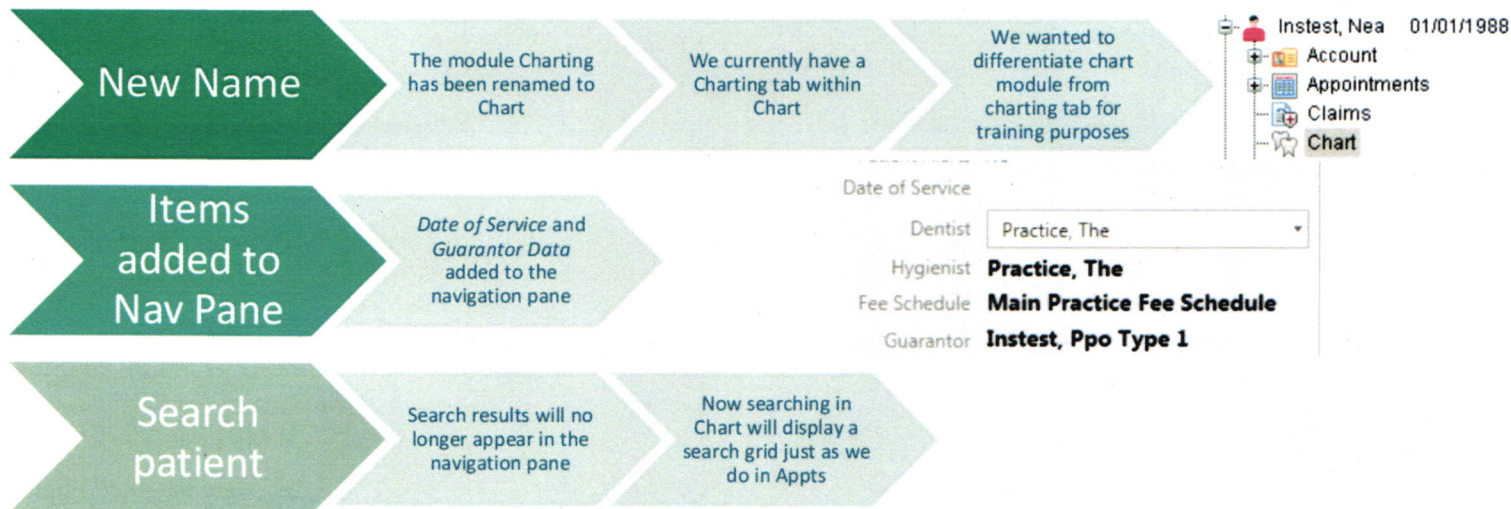
This shows completed auto notes:

~~<<completedwork>>~~

This shows planned auto notes:

~~<<plannedwork>>~~

Chart



Patient Search

Chart

Include Patient Types:

☐ Transferred ☐ Non-Patients

Search: hancock

ID	Name	DOB	S.Sec.	Ext. ID	Pat. ID	Home Phone
Name	Hancock, Jennifer	7/14/1972	25 68 24		40896	205 4436
DOB	Hancock, Jerry	5/9/1922	25122861		40839	(205) 449-4727
Sex	Hancock, Lisa	7/11/1958	25174521		50669	(205) 449-8076
Premedications	Hancock, Misty	11/7/1972	25739595		40241	(205) 497-5470
Medical Alerts	Hancock, Rita	8/5/1955	25213769		45536	(205) 670-4535
Patient Alerts						
Date of Service						
Dentist						

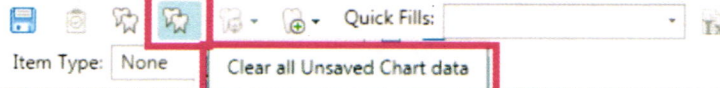
Hygienist **Practice, The**

Fee Schedule **Main Practice Fee Schedule**

Guarantor **Instest, Ppo Type 1**

Chart

Odontogram



New – *Clear all Unsaved Chart Data* icon added to Charting tab above the Odontogram

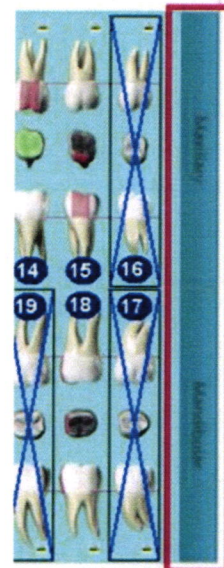
Selecting this will clear all data entered in chart that has not been saved

Undo function

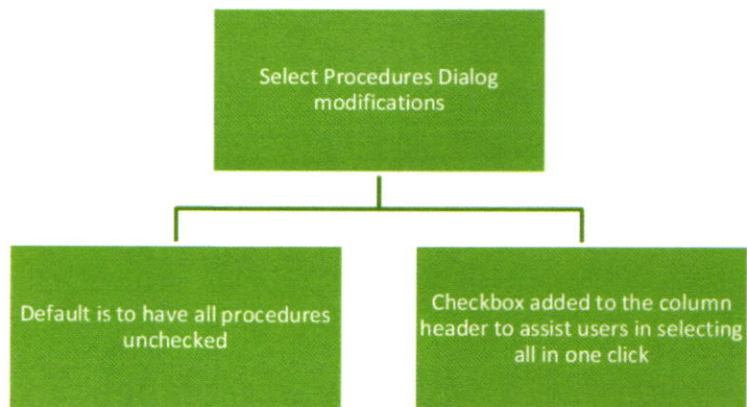
Select all Maxillary or Mandibular teeth

Single click the blue bars to select or deselect all teeth at once

Once all teeth are selected, the materials/pathologies/ tools can be used.



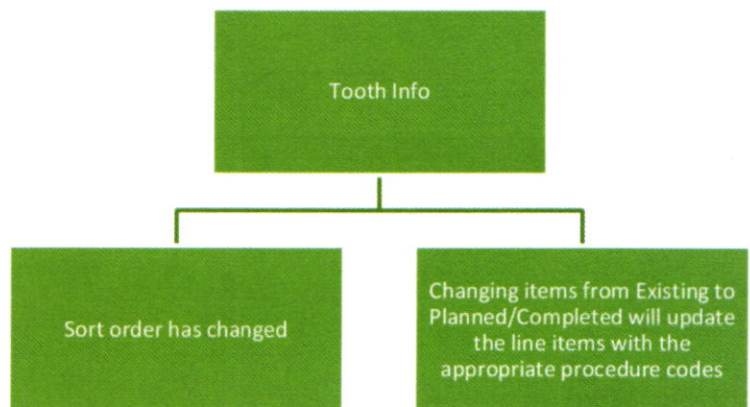
Chart



Select procedures to use.

Select	Procedure
<input type="checkbox"/>	02752.00 - CROWN - PORCELAIN FUSED TO NOBLE METAL
<input type="checkbox"/>	02750.00 - CROWN - PORCELAIN FUSED TO HIGH NOBLE METAL

OK Cancel



Primary teeth (A-T) will be sorted as the corresponding Adult tooth number and will display before the adult tooth. For example, a primary/adult sort for the first six teeth will display in order as 1, 2, 3, A, 4, B, 5, C, 6.

Chart - Perio

Keyboard mode
will auto advance

- After entering the value, users will automatically move to the next field
- To enter a double digit, users must select *
- Default is to enter single digit value

The screenshot shows a user interface with two radio buttons: 'Keyboard' (selected) and 'Mouse'. To the right is a text input field. A 'Perio Tips' dialog box is open, displaying the following text: 'You will be prompted to the next field automatically without hitting 'Enter' after every digit. If you need to enter double digit, please press * on your keypad.'

Chart – Perio

Clicking the *all bleeding* button will indicate all teeth are bleeding

Choose the diamond associated to a certain section to mark a particular section bleeding

Chart

Lab Work has been moved to chart (previously known as patient lab case)

- The top row will default blank in order to add a new lab
- Data on this tab is auto saved
- Appt data will only display if Lab work is tied to an Appt
- Lab Cases have been removed from Heritage

Chart

Include Patient Type: ☐ Transferred ☐ Non-Patients

Search:

67970
Name: Student, Neta
DOB: 1/15/1988 Age: 28 years
Sex: Male
Medical Alerts: None
Patient Alerts: None
Current Status: Pending
Practitioner: The Main Practice Fee Schedule
Insurance: Patient, Ppo Type 1

Lab Work

Line to Appt	Lab	Description	Date Sent	Due Date	Estimated Cost	Received	Received By	Actual Cost
<input type="checkbox"/>	<input type="checkbox"/>	REMARKS FOR ANOTHER L.	04/05/2016	04/05/2016				
<input type="checkbox"/>	<input type="checkbox"/>	MAAD-DYS	04/05/2016	04/05/2016				
<input type="checkbox"/>	<input type="checkbox"/>	SH-EPH	04/05/2016	04/05/2016	\$0.00	05/10/2016	Pharm	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>	MAAD-DYS	04/05/2016	04/05/2016				
<input type="checkbox"/>	<input type="checkbox"/>	MAAD-DYS	05/02/2016	05/02/2016				
<input type="checkbox"/>	<input type="checkbox"/>	MAAD-DYS	04/04/2016	04/04/2016	\$10.00			
<input type="checkbox"/>	<input type="checkbox"/>	TEST LAB	04/05/2016	04/05/2016				
<input type="checkbox"/>	<input type="checkbox"/>	MAAD-DYS	04/05/2016	04/05/2016	\$100.00			
<input type="checkbox"/>	<input type="checkbox"/>	MAAD-DYS	04/05/2016	04/05/2016	\$100.00	04/21/2016	Pharm	