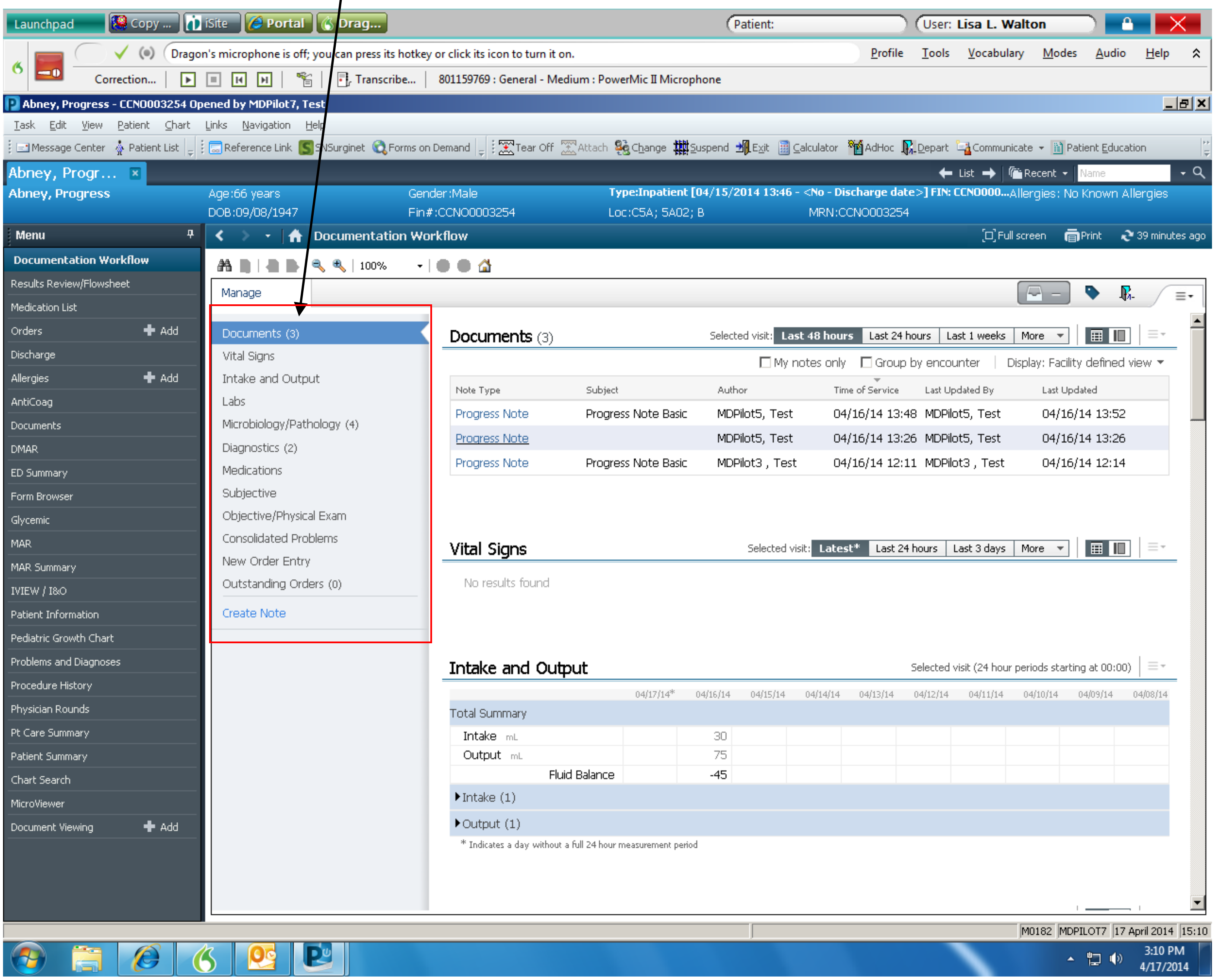
Documentation Workflow

The new Documentation workflow page will make the creation of your progress note a by-product of your normal workflow.

1. Launch Dragon before accessing a patient's chart, so that it may load while you are reviewing the chart.
2. From the patient list, open the patient's chart.
3. The **Documentation Workflow** will open.
4. On the left is the **Workflow**.



5. Click on each item to jump to that section. You can also scroll down the page to review each section in the workflow.

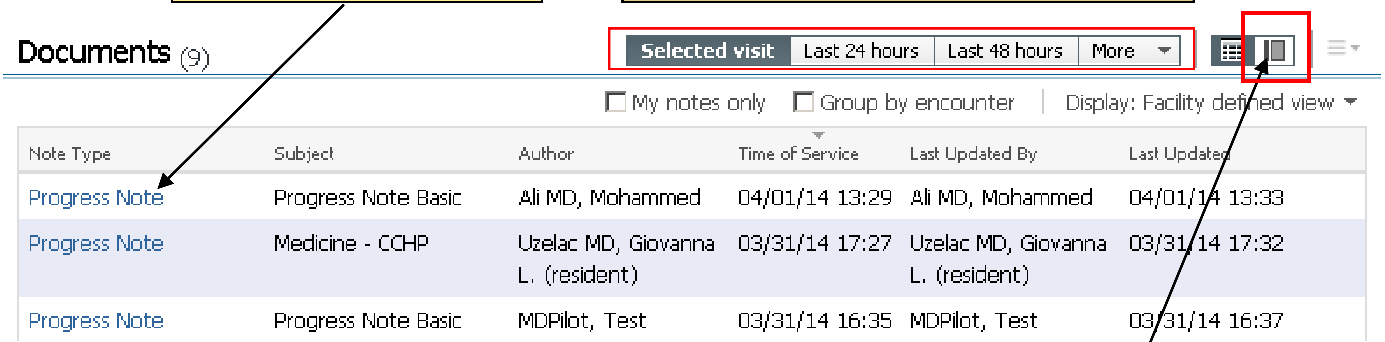
Sections in Documentation Workflow

Documents

Documents provides a list of previous signed electronic documents for this visit based on the timeframe selected.

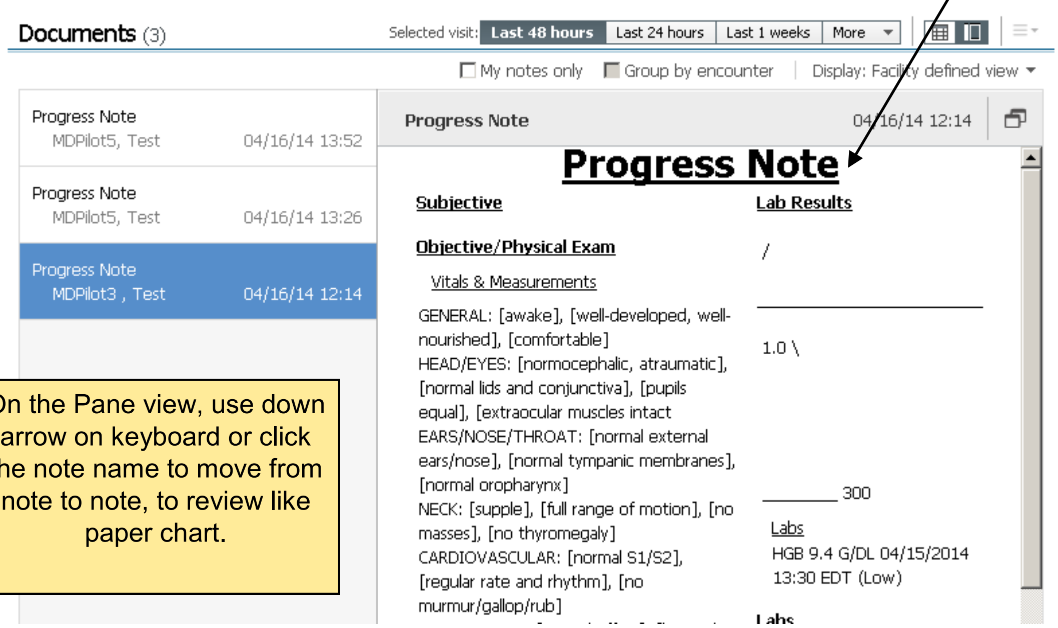
Click on the Note Type to open and view the document.

The list defaults to most recent document on top, but the timeframe can be changed.



Click on Pane Selector to view the documents like a paper chart.

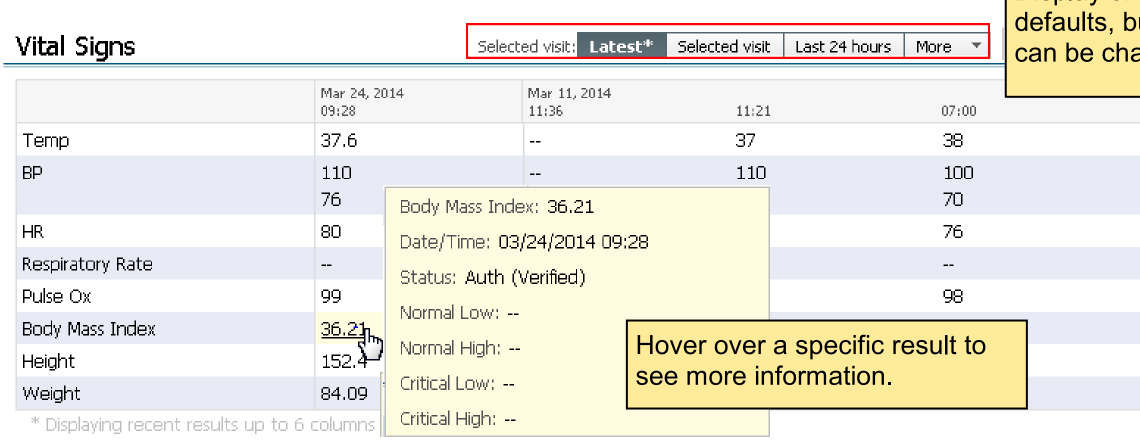
Pane View



On the Pane view, use down arrow on keyboard or click the note name to move from note to note, to review like paper chart.

Vital Signs

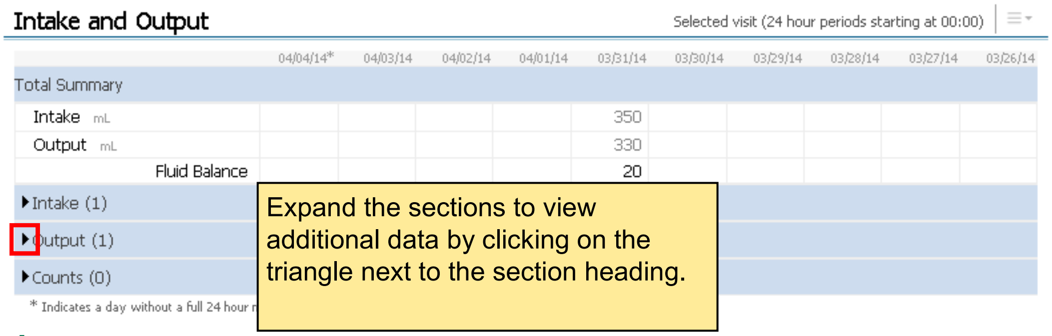
Display of most recent vitals defaults, but the timeframe can be changed.



Hover over a specific result to see more information.

Sections in Documentation Workflow

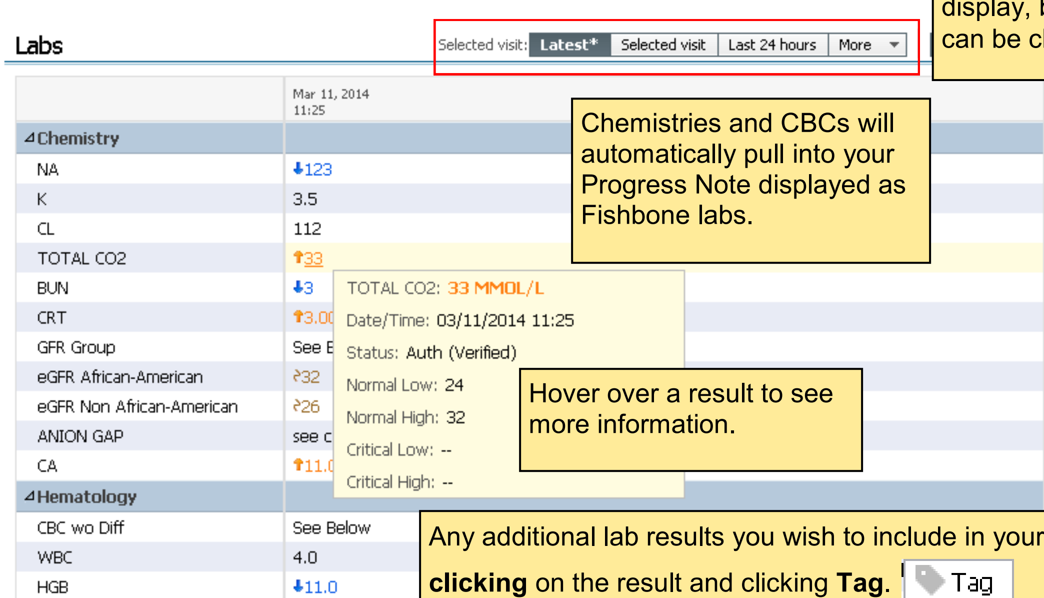
Intake and Output (I&Os)



Expand the sections to view additional data by clicking on the triangle next to the section heading.

Labs

Most recent resulted labs will display, but the timeframe can be changed.



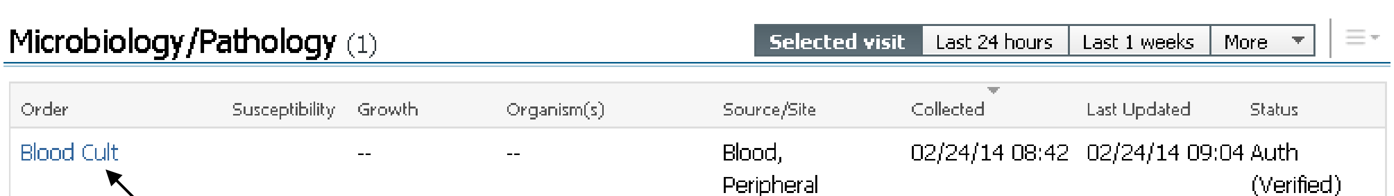
Chemistries and CBCs will automatically pull into your Progress Note displayed as Fishbone labs.

Hover over a result to see more information.

Any additional lab results you wish to include in your note can be Tagged by **right clicking** on the result and clicking **Tag**. Tag

The tag icon at the top of the Documentation workflow page turns blue, indicating a tagged result. These results will then pull into your note.

Microbiology/Pathology



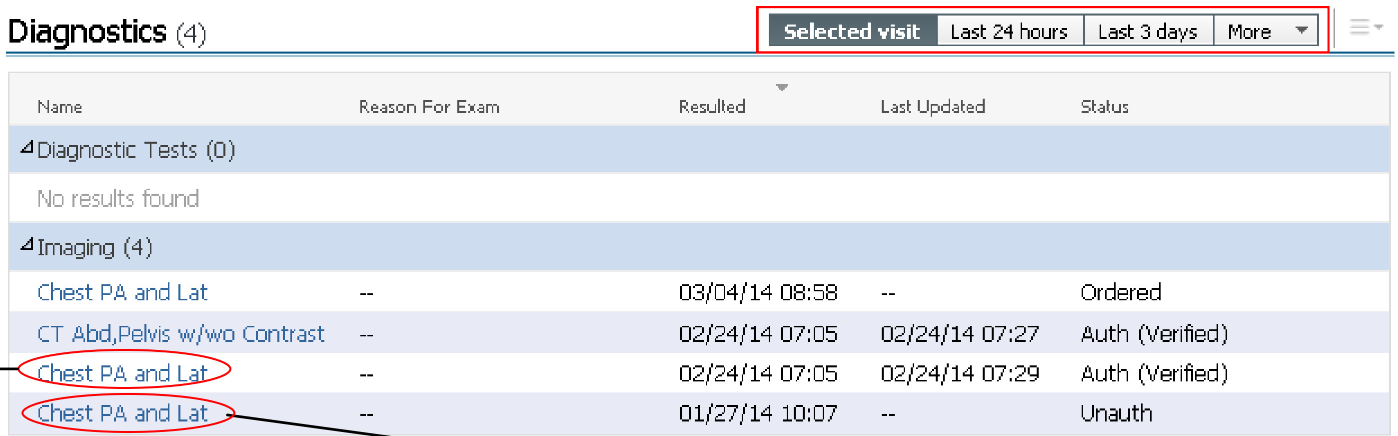
Click on the order name (in blue) to open the report.

Status	Meaning
Ordered	Order placed but not yet completed
In Progress	Order currently processing
Unauth	Order completed but not yet resulted
Auth (Verified)	Completed order with dictated report available

Sections in Documentation Workflow

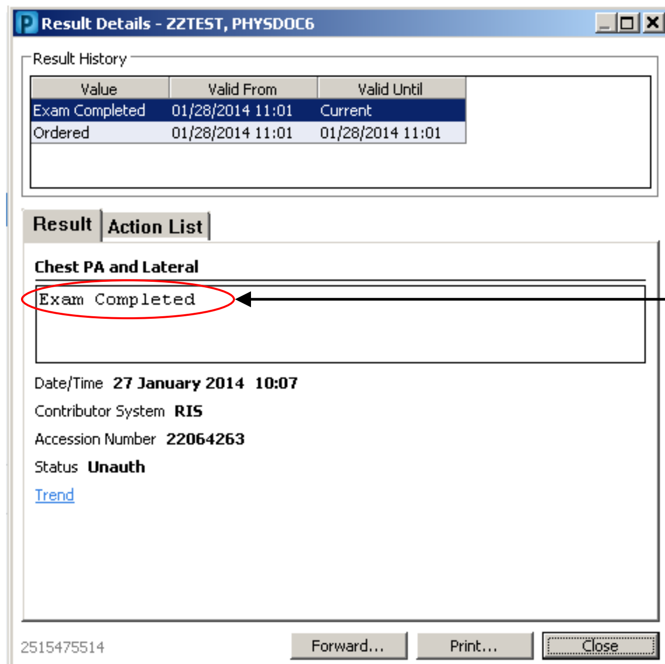
Diagnostics

The Diagnostic Tests and Imaging Orders for the selected visit will be displayed, but the timeframe can be changed.



Clicking an **Auth (Verified)** report opens the Final report.

Clicking an **Unauth** report opens the Result Details window with more information about the order.



Highlight any specific section of the report and click Tag to insert this information into your Progress note.

Tagging can be used in:

- Documents
- Diagnostics
- Lab Results

Sections in Documentation Workflow

Medications

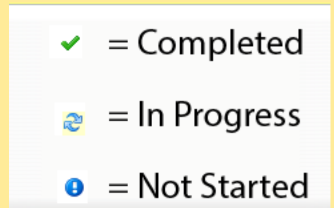
Medications for the selected visit are displayed in the following categories:

- Scheduled
- Continuous
- PRN/Unscheduled Available
- Administered in last 24 hours
- Discontinued in last 24 hours

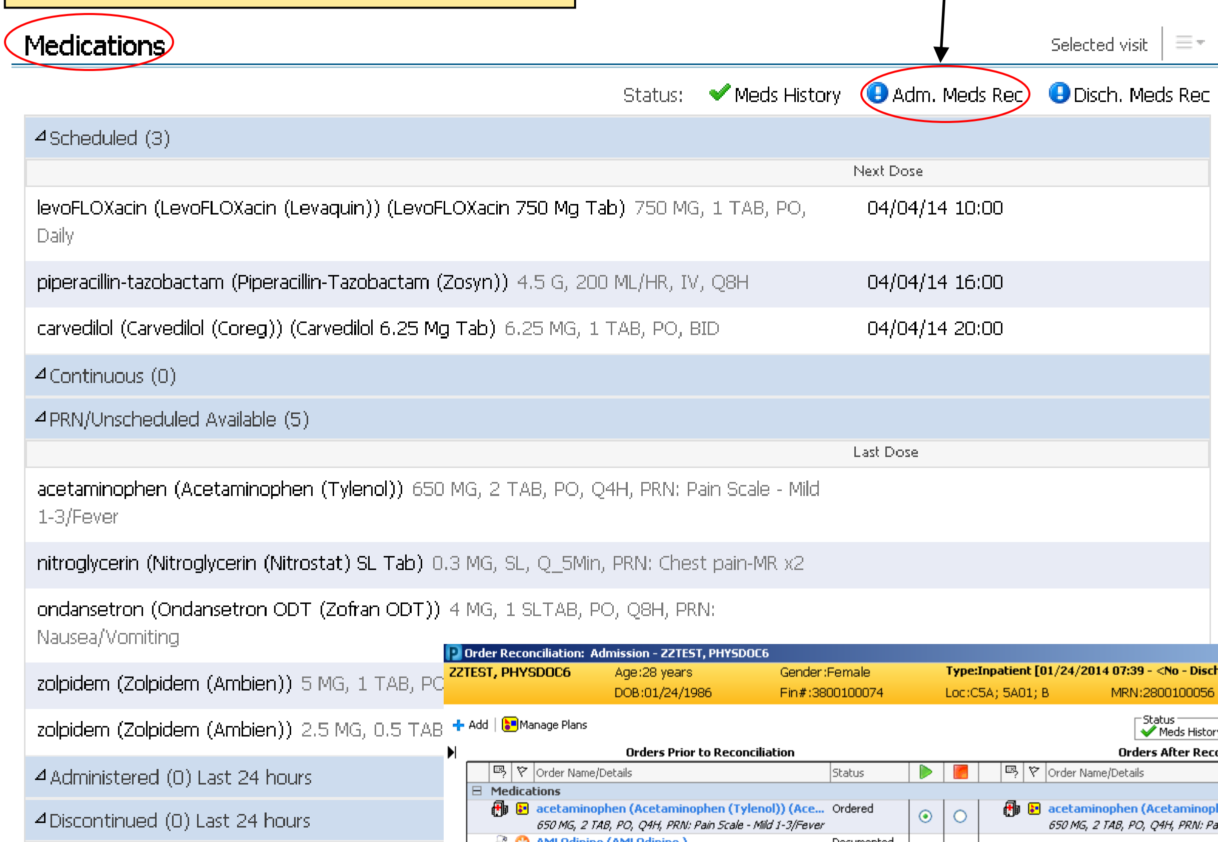
Click the Medications heading to view the MAR Summary screen.

Medication Reconciliation Status is easy to determine on the workflow.

- Meds History (Home Medications)
- Adm. Meds Rec
- Disch. Meds Rec

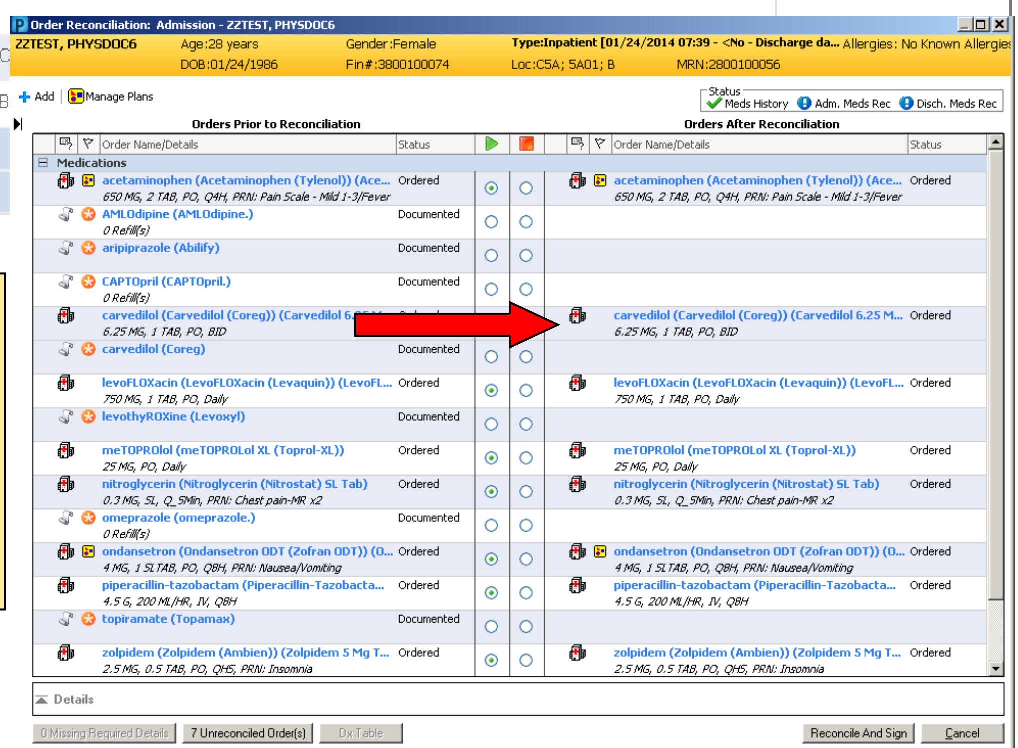


To complete reconciliation or view the med rec screens, click the status.



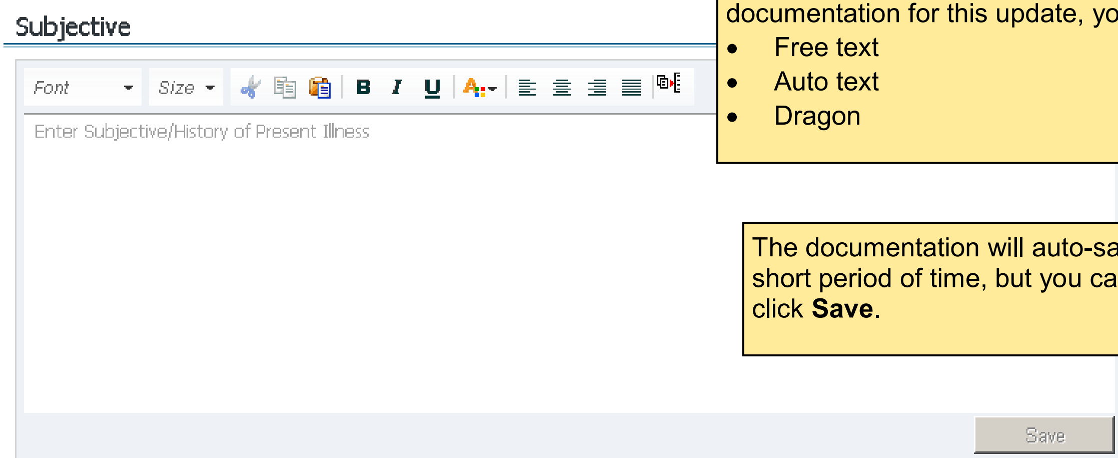
When performing Med Rec, confirm that the information on the right side is correct and that the order includes:

- Name
- Dosage
- Route
- Frequency



Sections in Documentation Workflow

Subjective

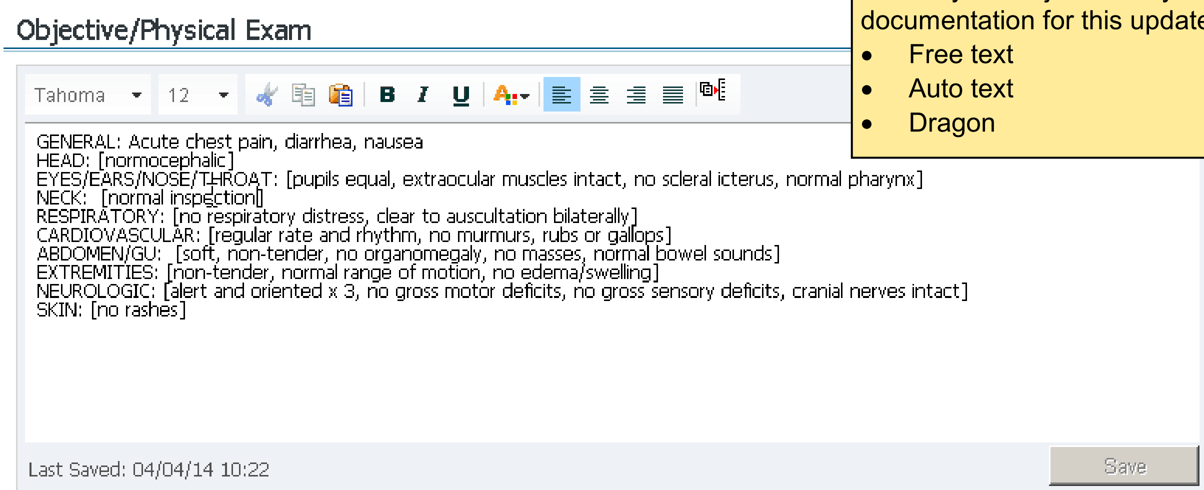


To add your Subjective/History of Present Illness documentation for this update, you can:

- Free text
- Auto text
- Dragon

The documentation will auto-save after a short period of time, but you can also click **Save**.

Objective/Physical Exam



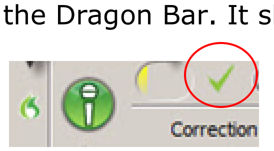
To add your Objective/Physical Exam documentation for this update, you can:

- Free text
- Auto text
- Dragon

1. Use Dragon commands to add:
   - a template of multi-system exam information (for example, say "**Normal Exam template**")
   - a macro of an individual system (for example, say " **General Macro**")
2. Use the Dragon **Tab Forward** key (or say "**Next field**") to move to each bracketed field and dictate your findings.
3. If you have to complete a selection field in the template or auto-text (by adding an X to select a choice), be sure to use a **capital X**.
4. When complete, press the **Accept Defaults** key on the Dragon mic to remove the brackets.

I'm using Dragon to dictate my Subjective and it's not working correctly. What's going on?

If commands are not working and the beginning of dictated sentences do not start with capital letters, check the **Full text indicator** in the Dragon Bar. It should be a green check mark.

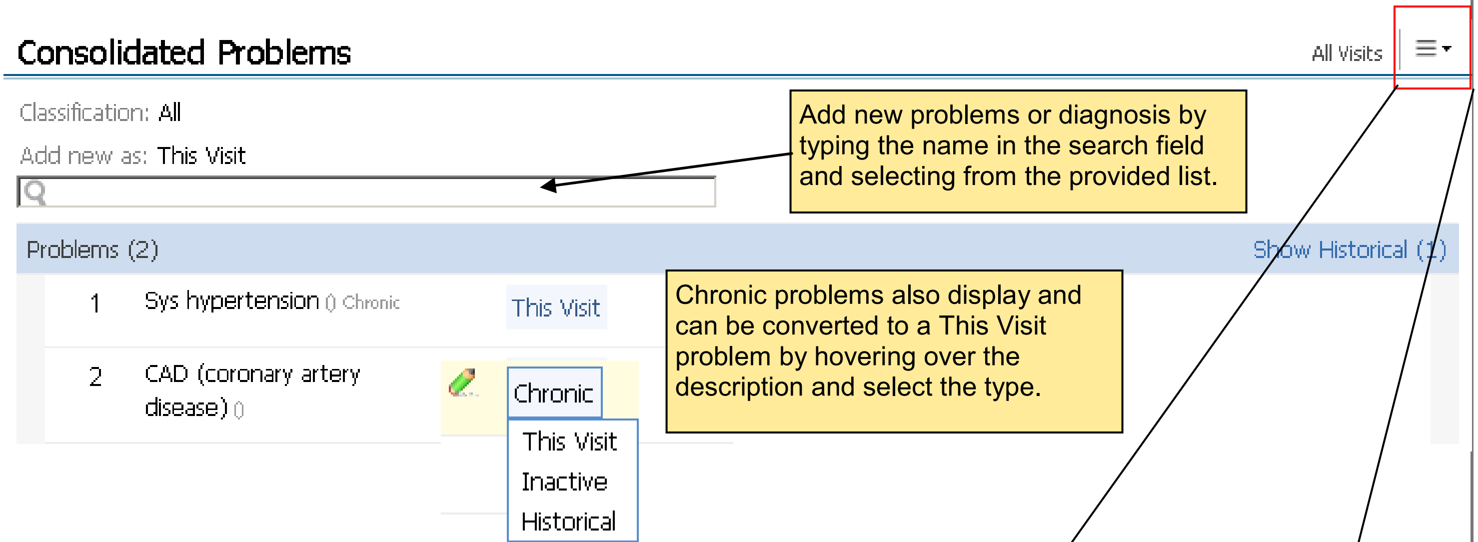


If it is a gray check mark, the VSync between Dragon and PowerChart is not working. Contact the help desk to check your settings.

Sections in Documentation Workflow

Consolidated Problems

Consolidated Problems list is a combined list of problems and diagnoses. Active Problems carry forward from day to day.

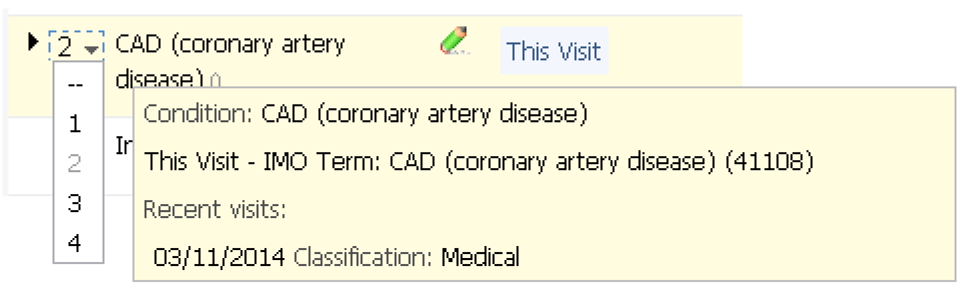


Add new problems or diagnosis by typing the name in the search field and selecting from the provided list.

Chronic problems also display and can be converted to a This Visit problem by hovering over the description and select the type.

If a problem is no longer applicable, it can be removed from this visit.
Select the menu option in the right corner of the Consolidated Problems section.
Then select **Remove from This Visit**.

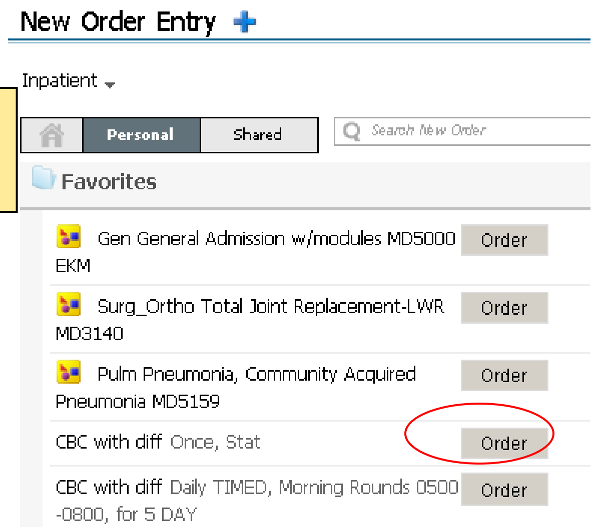
Prioritize the problems.
These will pull into your note under the Assessment/Plan section.
1. Hover over the problem's number.
2. Click the dropdown arrow.
3. From the list, select the new priority.
4. The problem will move on the list to the new assigned priority.



Sections in Documentation Workflow

New Order Entry

New Order Entry allows you to quickly add an order from the workflow.

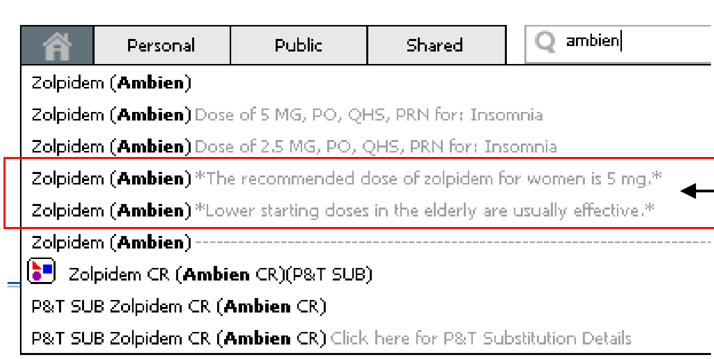


Orders may be displayed by a list of your favorites. To order, simply click the Order button next to the order name. The button turns dark gray.

New Order Entry

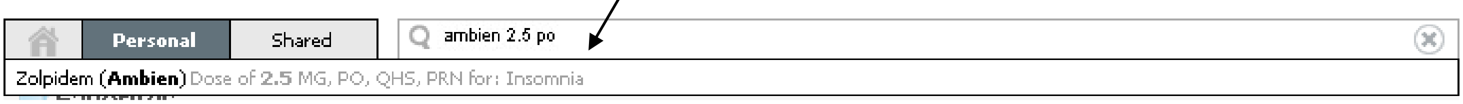
Inpatient

You can also search for an order. Type the order details into the search field.

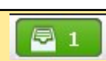


Use caution!!
Order sentences that begin with an * are not real orders.
Do not select these orders on this screen.

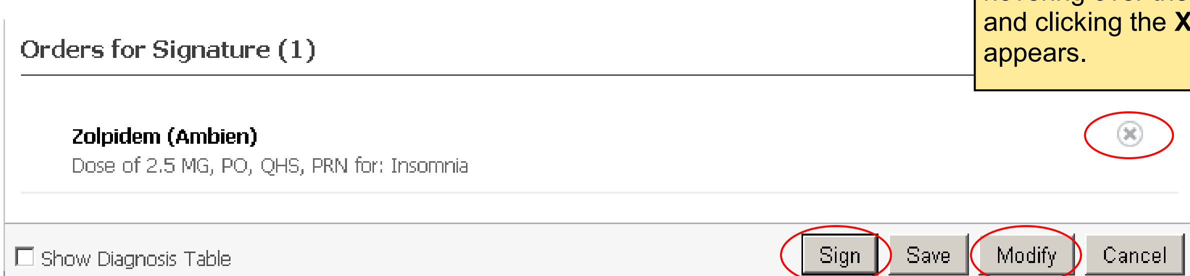
Being as specific as possible will return the most correct order:
1. Type the order, dosage, route and frequency.
2. Select the correct order from the list.



As you make your selections, the Order Inbox in the upper right of the Workflow page turns green and counts the number of orders.
Click the **Order inbox.**
The **Orders for Signature window** appears.



Remove the order by hovering over the order and clicking the **X** that appears.



Click **Sign** to complete the order.

Change order information by clicking **Modify.**

Sections in Documentation Workflow

Outstanding Orders

Outstanding orders are orders which have not been completed yet.

Outstanding Orders (1) Last 24 hours for the selected visit

	Status	Ordered
CBC with diff	Ordered	04/03/14 11:00

Order: CBC with diff
Order Details: Once, Stat 04/07/2014 09:42, Lab Draw
Order Comments:
3 ml Purple top - Adult
Purple top tubes (EDTA) must contain a minimum of two (2) ml blood and not be clotted or hemolyzed.
0.3 ml Purple microtainer - Pediatric/Neonate
Fill peds microtainer to 1st line. Prefer 2nd line.
Order Date/Time: 04/07/2014 09:42
Start Date/Time: 04/07/2014 09:42
Status: Ordered
Ordered by: Shiuh MD, Timothy Y.

Hover over the order for more information, like who placed the order.

Create Note

- Documents (0)
- Vital Signs
- Intake and Output
- Labs
- Microbiology/Pathology (1)
- Diagnostics (0)
- Medications
- Subjective
- Objective/Physical Exam
- Consolidated Problems
- New Order Entry
- Outstanding Orders (0)
- Create Note

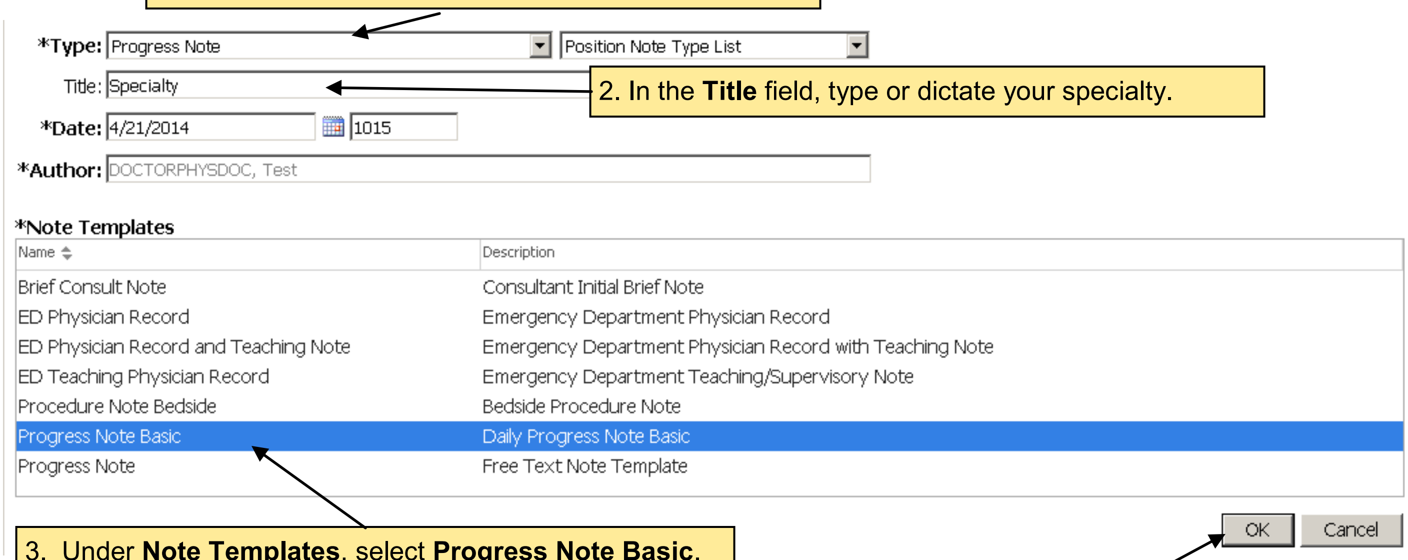
Now that your review and documentation are complete, click **Create Note**.

Progress Note

To create your Progress Note, complete the following:

1. From the **Type** dropdown list, select **Progress Note**.

2. In the **Title** field, type or dictate your specialty.



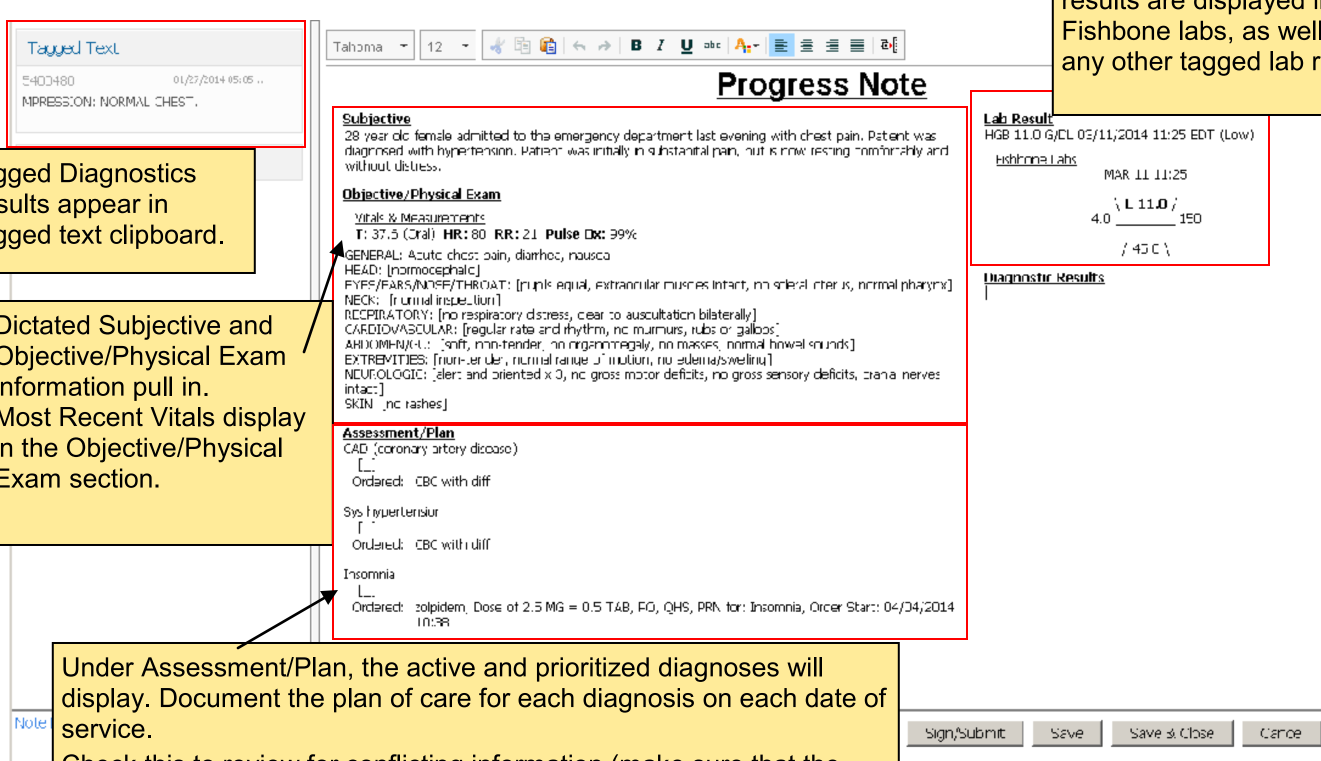
3. Under **Note Templates**, select **Progress Note Basic**. Other types may be available, depending on your specialty.

4. Click **OK**.

The Progress Note displays.

To be compliant, your Progress Note must be different on each Date of Service.
While the assessment/plan may not change much from day to today, the vitals and labs will be different.

Chemistries and CBC results are displayed in Fishbone labs, as well as any other tagged lab results.



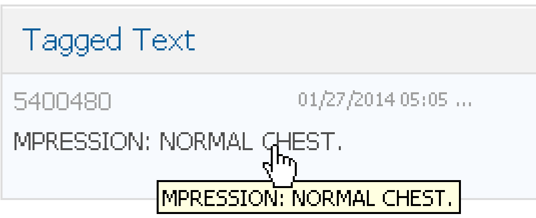
Tagged Diagnostics Results appear in Tagged text clipboard.

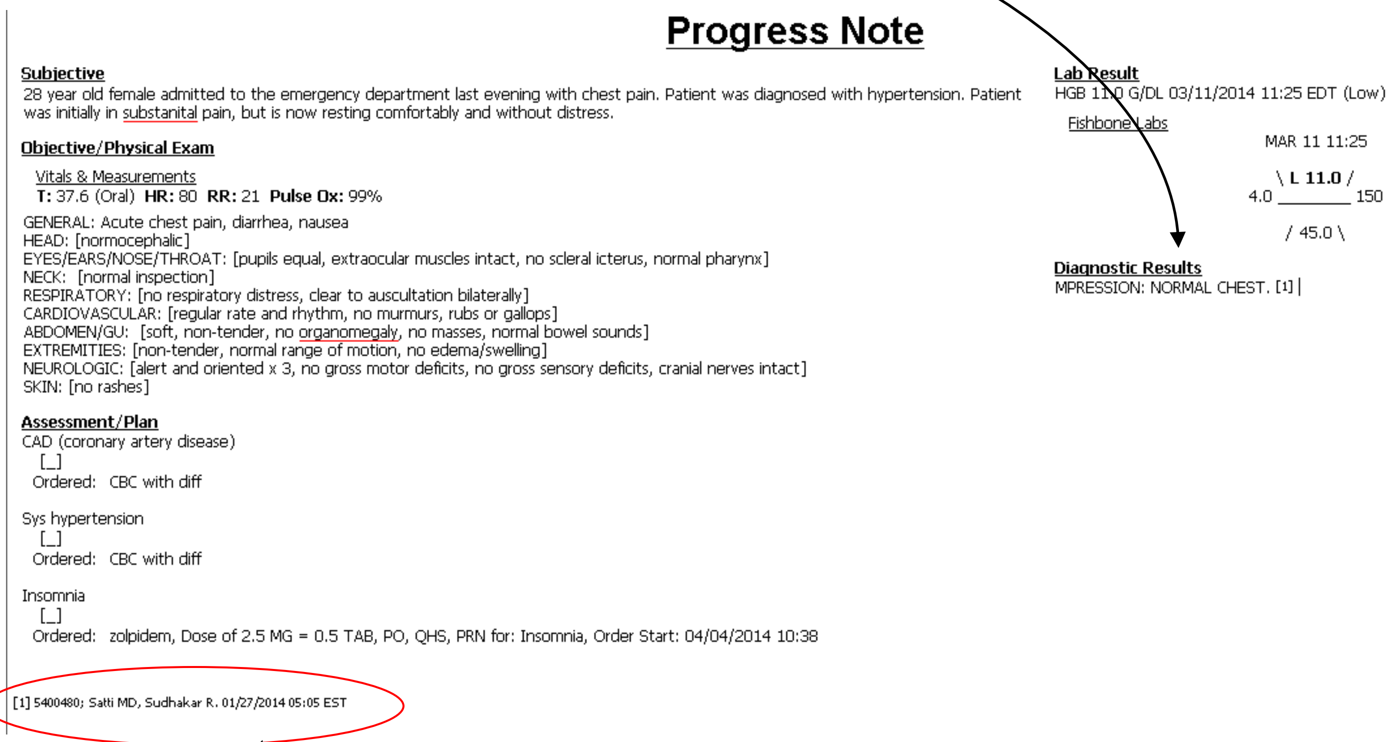
Dictated Subjective and Objective/Physical Exam information pull in.
Most Recent Vitals display in the Objective/Physical Exam section.

Under Assessment/Plan, the active and prioritized diagnoses will display. Document the plan of care for each diagnosis on each date of service.
Check this to review for conflicting information (make sure that the chief complaint and history of present illness is recognized in the Review of Systems and supported by the information documented here). Any new orders will also be displayed here.

Progress Note– Adding tagged text

1. To add the Tagged Text to the Progress Note, click and hold the Tagged Text.
2. Then drag it to the desired section of the note.





Progress Note

Subjective
28 year old female admitted to the emergency department last evening with chest pain. Patient was diagnosed with hypertension. Patient was initially in substanital pain, but is now resting comfortably and without distress.

Objective/Physical Exam
Vitals & Measurements
T: 37.6 (Oral) **HR:** 80 **RR:** 21 **Pulse Ox:** 99%

GENERAL: Acute chest pain, diarrhea, nausea
HEAD: [normocephalic]
EYES/EARS/NOSE/THROAT: [pupils equal, extraocular muscles intact, no scleral icterus, normal pharynx]
NECK: [normal inspection]
RESPIRATORY: [no respiratory distress, clear to auscultation bilaterally]
CARDIOVASCULAR: [regular rate and rhythm, no murmurs, rubs or gallops]
ABDOMEN/GU: [soft, non-tender, no organomegaly, no masses, normal bowel sounds]
EXTREMITIES: [non-tender, normal range of motion, no edema/swelling]
NEUROLOGIC: [alert and oriented x 3, no gross motor deficits, no gross sensory deficits, cranial nerves intact]
SKIN: [no rashes]

Assessment/Plan
CAD (coronary artery disease)
[_]
Ordered: CBC with diff

Sys hypertension
[_]
Ordered: CBC with diff

Insomnia
[_]
Ordered: zolpidem, Dose of 2.5 MG = 0.5 TAB, PO, QHS, PRN for: Insomnia, Order Start: 04/04/2014 10:38

Lab Result
HGB 11.0 G/DL 03/11/2014 11:25 EDT (Low)
Fishbone Labs
MAR 11 11:25
\ **L 11.0** /
4.0 ______ 150
/ 45.0 \

Diagnostic Results
MPRESSION: NORMAL CHEST. [1]

[1] 5400480; Satti MD, Sudhakar R. 01/27/2014 05:05 EST

3. A footnote appears, attributing the tagged information to the original document.

Progress Note—Refreshing/Free text fields/Deleting

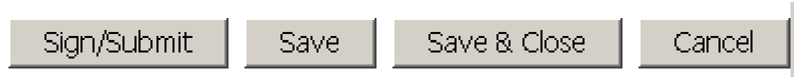
Parts of the Progress Note, like Lab Result can be refreshed to import the most recent information.
Hover over the title and click the **Refresh** icon that displays.

Add a free text field to document additional information.
Hover over the title and click the **Insert Free Text field** icon.
Information added here does not update on the Documentation Workflow.

Sections can be deleted if that information is not pertinent to your progress note.
Hover over the title and click the **Delete** icon that displays.

If you are consulting on a patient and do not need to document plan of care for each diagnosis in your note, hover over the diagnosis name and click the X to remove it from your note.

Progress Note– Completing your note



1. Once you have completed your note, click **Sign & Submit. No more changes can be made.**
- To save the information without closing or signing, click **Save**.
- To save the information and close the note without signing, click **Save & Close**.
- Click **Cancel** to discontinue the note.
2. The Signed and Saved note will display in the patient's chart under Documents.
3. If you had Saved and Closed, the note would indicate (In Progress) and could be opened and modified.