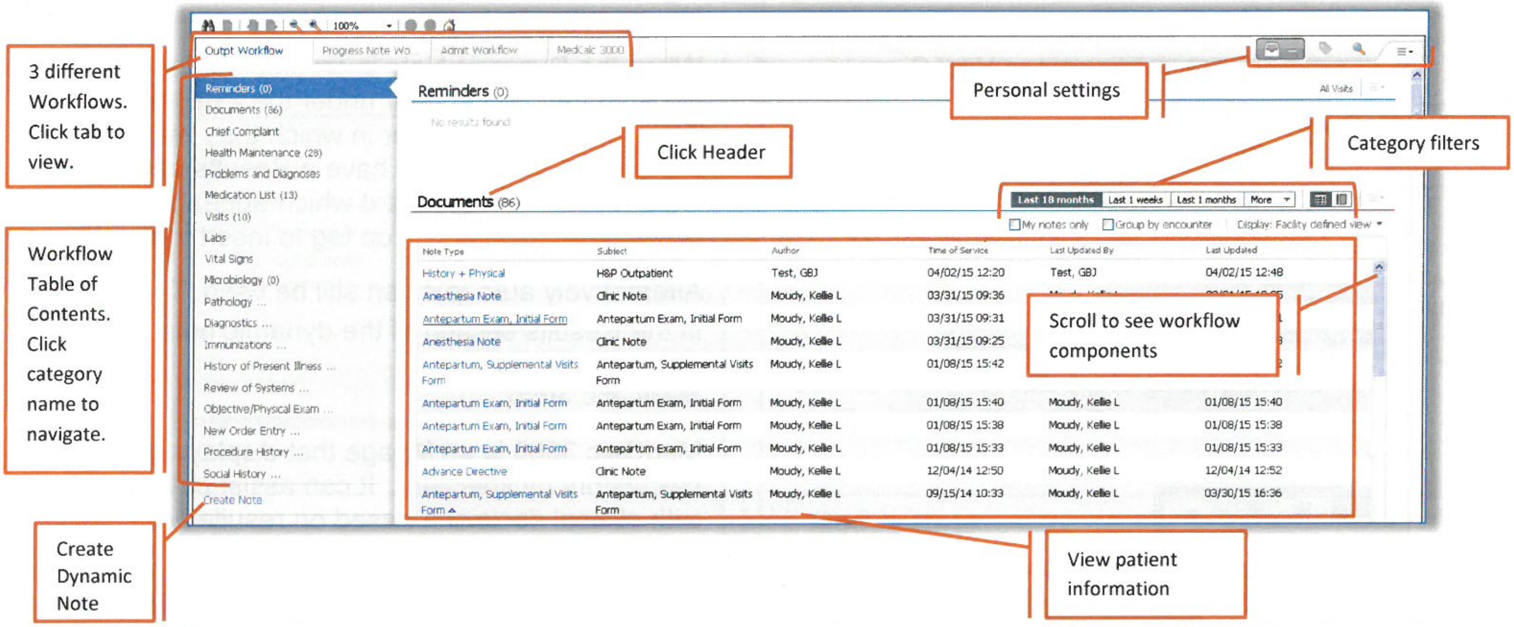
PowerChart SuperUser Workflow/ DynDoc Training

Workflow for Dynamic Documentation Overview



Workflow for Dynamic Documentation

Workflow lists components sequentially based on a physician's workflow. It helps to build your Dynamic Note.

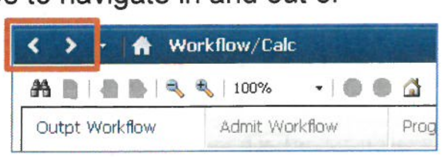
There are 3 workflows:

- **Outpt Workflow**
- **Progress Note Workflow**
- **Admit Workflow**

To locate, click **Workflow/Calc** on the Menu in PowerChart.

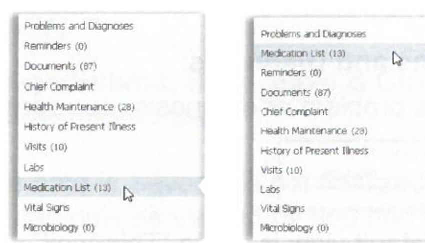
Within each Workflow:

- Use the Table of Contents to navigate.
- Categories can be viewed for example, Documents, Vitals, Health Maintenance, etc.
- A Dynamic Note can be created using the Workflow content.
- Click **Create Note** to pull the information from the Workflow into a Dynamic Note.
- Click category header to navigate to that section in PowerChart.
- Click arrows to navigate in and out of Workflow.



Customizing the Workflow

To reorder the Table of Contents, click category and drag and drop to desired location.



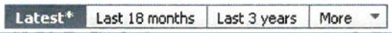
To Add/Hide Table of Contents items:

1. Click Personal Settings Filter.
2. Click **Components**.
3. Click on item(s) to uncheck and hide or check item to add.

Workflow Components

Each category within the Workflow will have its own setting preferences.

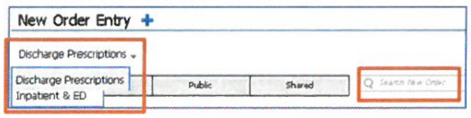
- Click date range option if needed.



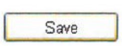
- Click View icon to change display. 
- Click Settings Filter to add or hide items. 

- To access Family History Form or Outpt Assessment, click arrow next to Vital Signs.

- To order new medications/inpt orders use Search box. Click arrow to change order type.

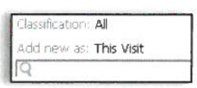


- When ordering using steps above, items can be signed from personal settings. Click green Sign box.

- Auto text, free text and Dragon can be used in free text fields. ie History and Present Illness or Review of Systems.
- Click  after entering text into the Workflow. For example, after documenting History of Present Illness, click **Save**.

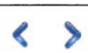
Problems and Diagnosis:

To add a problem or diagnosis, use search box.



Note: Default view is set to "This Visit" which is a diagnosis. To change to a problem, click **This Visit,** then click "Chronic".

Problems and Diagnosis Functions:

	"Chronic" is an active problem. To modify status click **Chronic**. Select **This Visit (to make diagnosis)**, **Inactive** or **Historical.**
	"This Visit" means an active diagnosis. To modify status click **This Visit.** Click **Chronic** (to make problem) or **Historical**.
	Click pencil to modify details.
	Rest mouse on icon to read comment.
	Click arrow to move to next page of problems and diagnosis.

Tagging Labs

Labs can be tagged and added to the note This only can be done through the Workflow.

1. Click **Labs** on the Table of Contents within the Workflow.
2. Right-click on value.
3. Click **Tag**.

Note: Labs can be tagged one after another without having to paste.

When the Dynamic Note is created the tagged labs will automatically appear under the Results section. They display in the order in which they were tagged. If the template does not have a Results section they will pull in as a tagged text which appears on the left of the note. Drag and drop tag to insert into note.

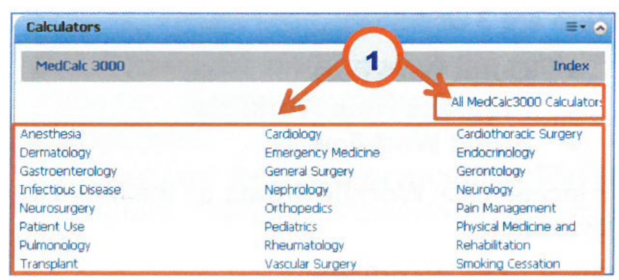
Alternatively auto text can still be used. Type **=lab** in the Results section of the dynamic note.

MedCalc 3000

MedCalc 3000 is an Mpage that displays clinical calculators by specialty. It can assist physicians with clinical decisions based on resulted calculations.

The calculators encompass Medical Equations, Clinical Criteria, Decision Trees and Unit and Dose Converters.

1. To use calculators, click one of the following:
    - By Specialty
    - **All MedCalc3000 Calculators**



2. Search for and click appropriate calculator to use.
3. Enter information in the Input section. Result will automatically appear in the Result section

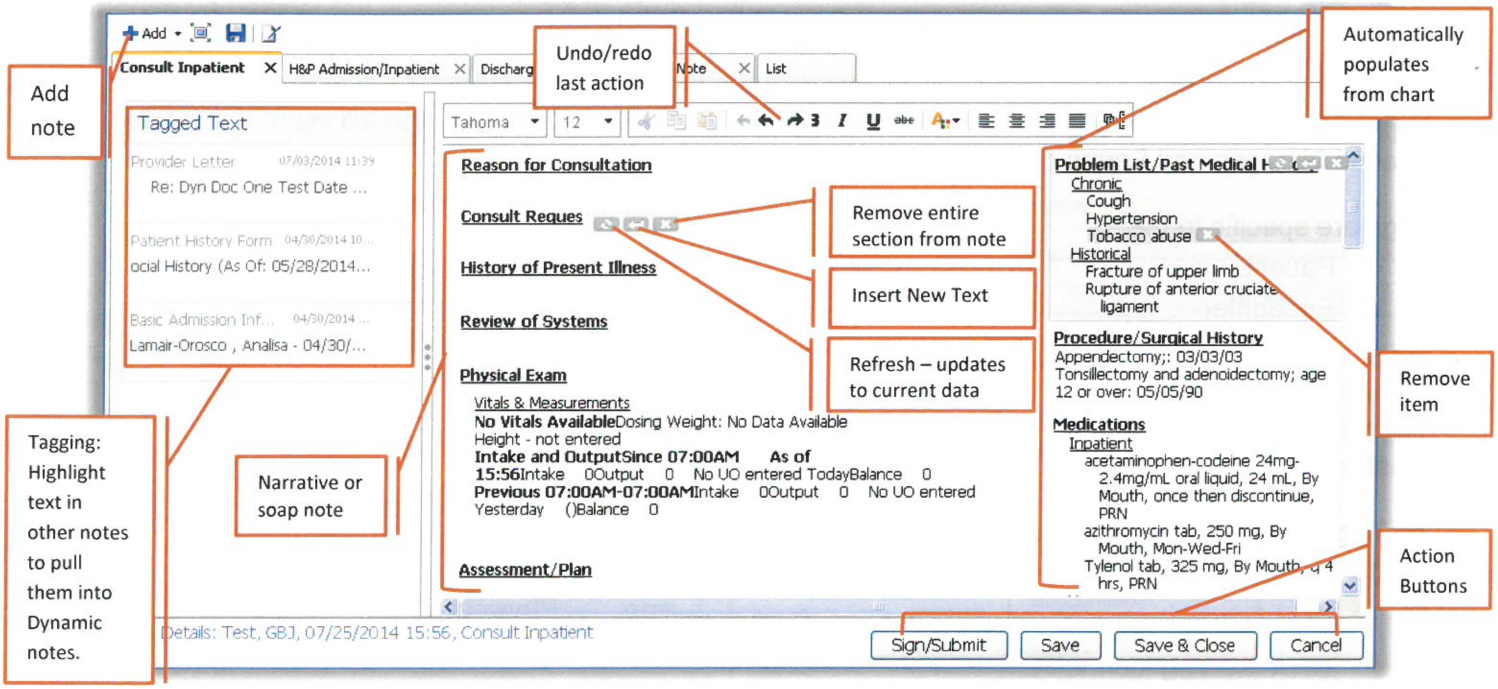
Note: Use the Labs and Vital Signs to the left of the calculator to assist completing details.

Note: Click  next to dates range to adjust.

4. ***Optional:*** Click **Copy to Clipboard** to paste Results into Workflow, Dynamic Note or Clinical Note. To paste items, right-click within the note and click **Paste**.

Warning: Pasted item will be last item copied to the clipboard 

Dynamic Documentation Note Overview



New Note

1. On the Menu, click **Add** next to **Documentation.**
2. Select Note Type.

Note: The "Personal Note Type List" will default if one has been created.

3. Select appropriate Note Template.
4. Click **OK**.
5. Complete each section using either free text or auto text.

Warning: If auto text is used, an auto text Conversion Notification window may open. Check the box and click **OK** to bypass.

6. Click **Sign/Submit** to finalize.

Note: If you click **Save**, then click **OK**.

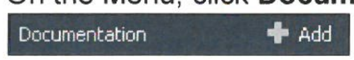
Note: If the note is *Saved* it is not finalized. The document can only be viewed by you and is not technically part of the chart.

Dynamic Note Functions:

	Refresh - Pulls in the most current info
	Insert Free Text - Type additional info
	Delete - Remove from Note
	Undo - Reverses last action

Modify Note

1. On the Menu, click **Documentation.**



2. Locate and double-click note.

Note: If the note has been Signed, only an addendum can be added.

3. Make edits.
4. Click **Sign/Submit, Save, Save & Close, Cancel** as appropriate.

Note: If the note is *Saved* it is not finalized. The document can only be viewed by you and is not technically part of the chart.

To Forward Note

1. Right-click on the note.
2. Click **Forward**.
3. Select forward action.
4. Enter last name in To field, then press <**Enter**>.

Note: Click to assist in finding a name.

5. Enter Comments (optional)
6. Click **OK.**

Continue to next column for more options

Tagging Text

Tagging is a feature that allows one to copy text items and place them into a Dynamic note.

Unlike copy and paste, Tagging can be done consecutively and all tagged items will be stored. Scanned images and Forms cannot be tagged.

Tags are specific to the:

- Patient
- Encounter
- Your Account

Tagging can be performed before or during a note creation.

To Tag Items:

1. Locate and highlight the content you wish to tag.
2. Click the **Tag** icon. 

Note: The tag icon will automatically appear near the highlighted text.

Continue to Tag text as needed until done.

3. Open Dynamic note.
4. The Tags will appear to the left of the note. Drag and drop tags into desired section.

Note: To remove tag from the note, click the Undo icon 

Note: Tagged items will remain in the patients chart/note until the note is Signed. Tags are Encounter specific.

Tracking of Tags:

Tags are footnoted automatically. A footnote will appear at the bottom of the note indicating where the tag came from.

Viewing Pending Tags:

View tags associated to the patient and encounter before opening a note.

Located at the top of the note, click  to view tags in the Dynamic Documentation window.

Global Auto Text

Auto text can be used in each section of the note. Auto text abbreviations are labeled by department and/or type.

Type "=" to access the full list of auto texts.

Examples of global Auto text:

=fm	Family Medicine
=im	Internal Medicine
=ob	OB/OBGYN
=nb	Newborn
=ped	Pediatric
=rad	Radiology
=su	Surgery
=med	Medication List
=ros	Review of Systems
=lab	Labs
=pe	Physical Exam
=vitals	Vital's and I & O's

Double-click abbreviation to insert the auto text into note.

For more options and info see tipsheet *Auto Text Abbreviations and Descriptions* on the **How To ?** page on your Powerchart toolbar.

Create Departmental Auto Text

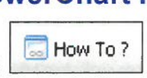
If your department would like to request specific auto text to be created, follow the steps below:

1. Open the **UNMH Intranet**.
2. Click **SynergyE3** link located on the right.
3. At the top, click **Request changes to PowerChart**.
4. Click **Request for a new or modified Clinical Document, Template, Powerform, or Auto text**.
5. Login with HSC Net ID.
6. Complete form and click **Submit** at the bottom.

Precyse

ICD10 training resources
https://hospitals.health.unm.edu/intranet/synerge3/index.shtml

Additional PowerChart Help

- Locate 

 on your toolbar
- Email PowerChartSynergy@salud.unm.edu
- Call 321-6709 Monday - Friday, 8-5pm
- After hours call the UH help desk 272-3282