MUNSON HEALTHCARE

Dynamic Documentation for Providers

Cerner Ambulatory, PowerChart, and FirstNet **EDUCATION**
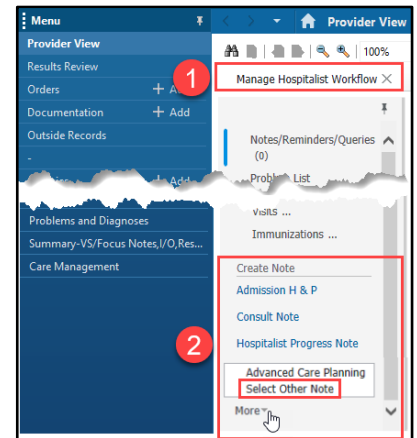
## How to Create a Dynamic Documentation Note

1. On the Provider View workflow MPage scroll to the bottom to create a note.
2. Click either the specialty progress notes to immediately begin creating a note or Select Other Note to view all note options.

> **Note:** If you have proceeded back to the patient's chart after already starting a note, you can get back to the note by clicking Select Other Note in the workflow or Documentation in the Menu. This will prevent you from creating a duplicate note.


Navigating a Dynamic Documentation Note

1. **Note and List tabs**: The Note tab shows the current Dynamic Documentation note, and the List tab shows a list of notes for the patient.
2. **Toolbar**: Use the toolbar to format text, copy, cut, and paste text, to undo and redo actions; or to manage Auto Text.
3. **Sections**: Sections are the areas of the note that contain information or allow for free text or Dragon entry. Assessment/Plan, Subjective and Physical Exam are examples.
4. **Subsections**: Subsections are additional groupings inside of sections that contain information or allow for free text entry.

5. **Auto Text**: Brings in created Auto Text into free text areas.
6. **Refresh/Insert Free Text/Remove**: The refresh button pulls in new data. The arrow adds a new free text line within each section. The remove button deletes the entire section. Utilize the toolbar to undo.
7. **Sign/Submit; Save; Save & Close; Cancel**: Buttons are in the bottom right of the note.

   a. Clicking Sign/Submit allows the provider to sign the note, this should be selected once the note is complete.
   b. Clicking Save saves the note and allows the provider to continue editing.
   c. Clicking Save and Close allows the provider to save the note and come back to complete it later and places the note in an "In Progress" status within the Documents tab in Workflow.
   d. Clicking Cancel allows the provider to discard the note.
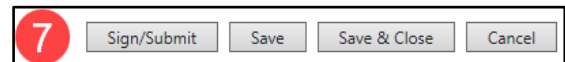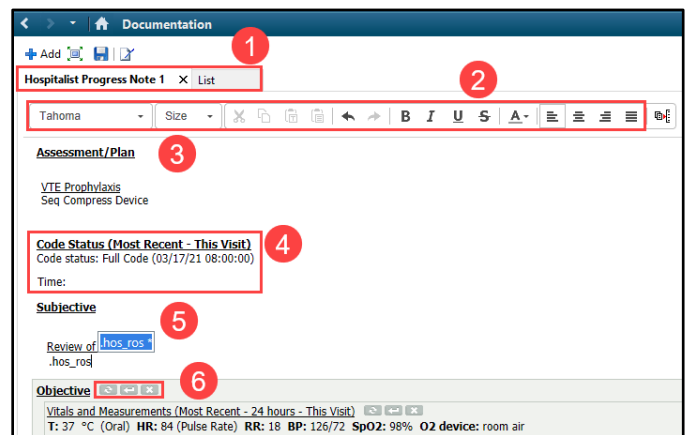
Forwarding a Note

- After clicking Sign/Submit from the note another window will appear.
- At the top is where the note is titled and categorized into a note type.
  - Title can be changed if needed.
- In the middle is where the provider can forward the note to another provider.
  1. Search for the provider.
  2. By selecting the star, the provider can make the receiving provider a favorite contact.
  3. Select whether the receiving provider should Sign or Review/CC the note.
  4. Click Sign to finalize signing and forwarding the note.
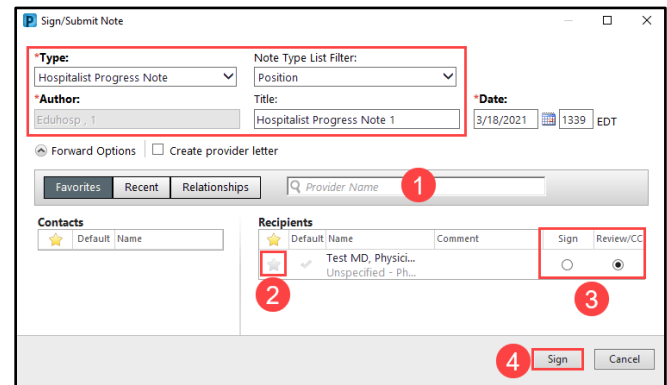
How to Modify an Existing Note

From the Specialty Workflow:

1. Go to the Documents component.
2. Single click to open an existing note.
3. Select Modify at the top of the document.
4. Select if you want to Addend Note or Revise Note. Then click OK.
   - Addend Note
     - You can only strikethrough the original document. This is done by selecting text and clicking the strikethrough button or clicking the X next to the documented text. This will put a line through the text and make it red.
     - Before the provider can sign newly modified document, an Addendum needs to be completed.
   - Revise Note
     - You can edit any content within the note.
5. Once you have made all necessary modifications, Sign the note.
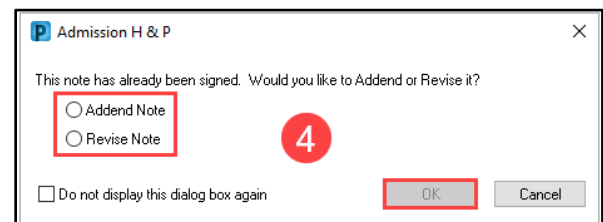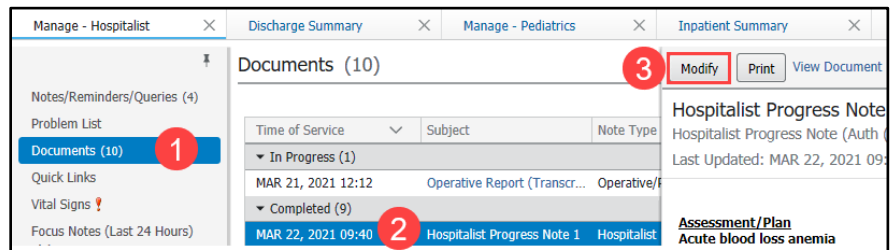
Note: If you select the Do not display this dialog box again option, this will preselect your original choice to Addend or Revise the note and will not prompt/pop up this question each time you modify a note.

See steps below on how to restore the prompt.
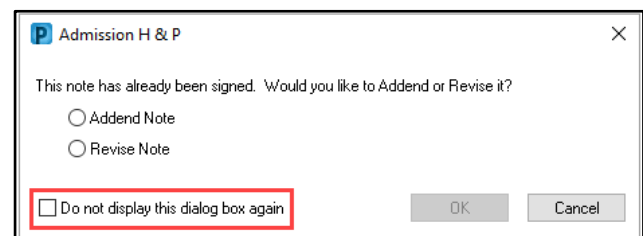
**To Restore Addend/Revise Prompt:**
1. Click on the Documentation section in the Menu.
2. Click View in the toolbar.
3. Click Customize in the View drop-down.
4. Click the Open signed note behavior drop-down and select Prompt.
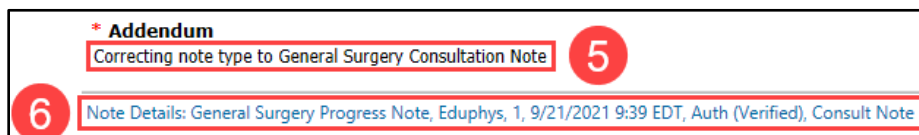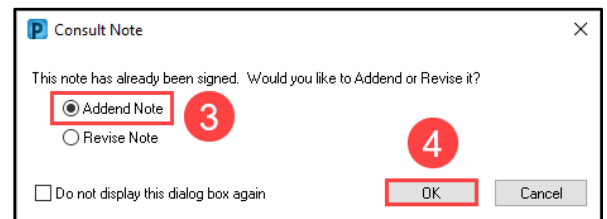5. Click OK.
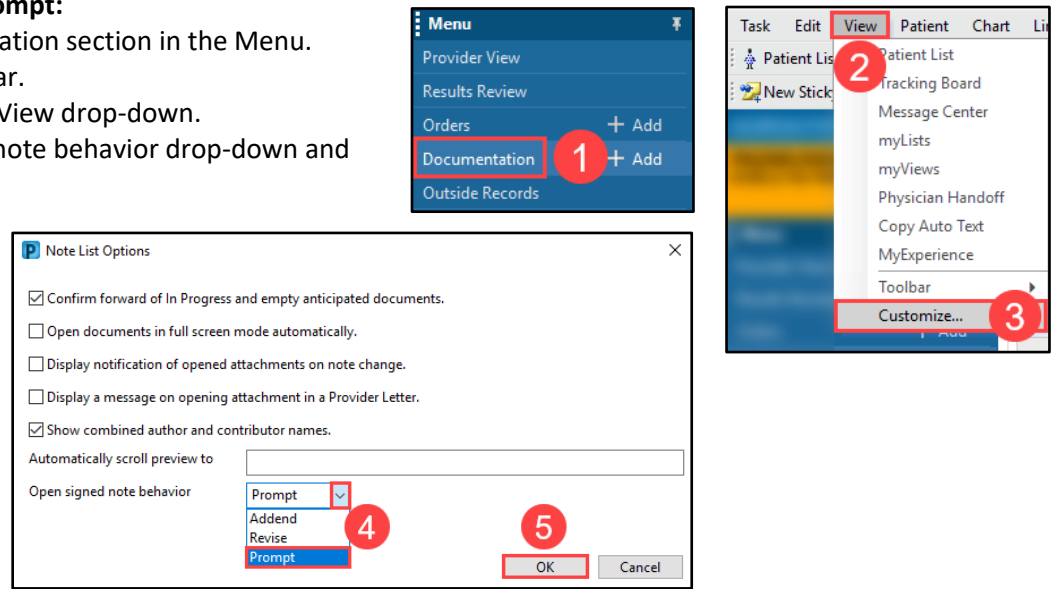
The next time you modify a note, the Addend/Revise prompt will appear.

## Correcting a Document Created on the Wrong Note Type

1. On the Manage Workflow in the Documents component, single click on the note that was created under the wrong note type.
2. Click Modify.
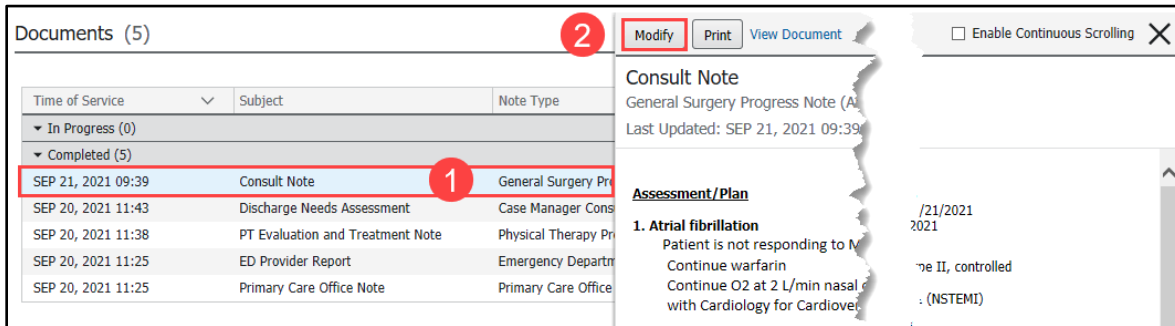
3. Select Addend Note.
4. Click OK.
5. In the addendum, indicate what the new Note Type will be.
6. Click the blue hyperlink, Note Details.

Addendum
Correcting note type to General Surgery Consultation Note

Note Details: General Surgery Progress Note, Eduphys, 1, 9/21/2021 9:39 EDT, Auth (Verified), Consult Note

7. The Notes Details window will pop up. In the Type drop down, select the correct Note Type.
8. Click OK.
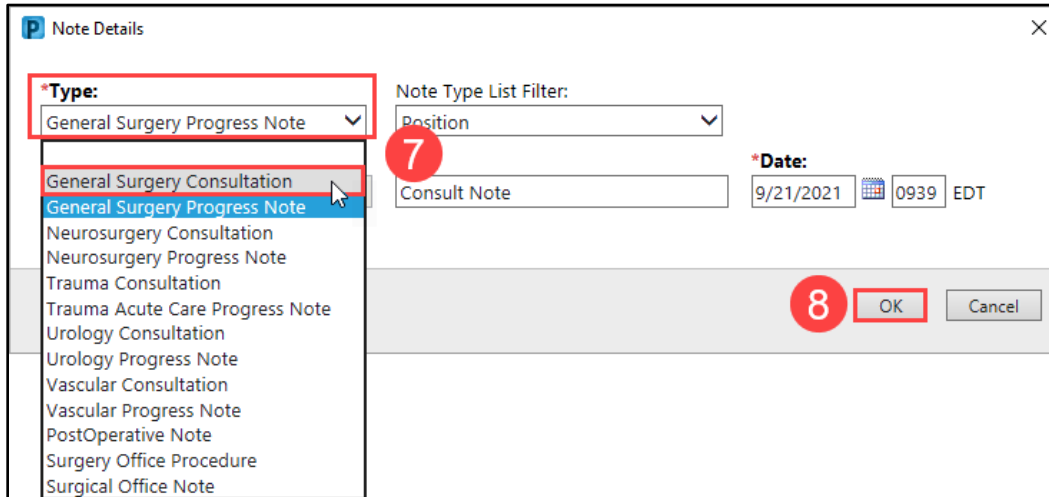
9. The Change in Note Details Detected question will pop up. Click Yes.
10. Click Sign to sign the addendum and save the Note Type change.
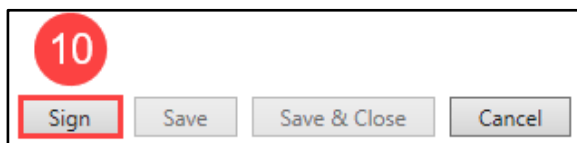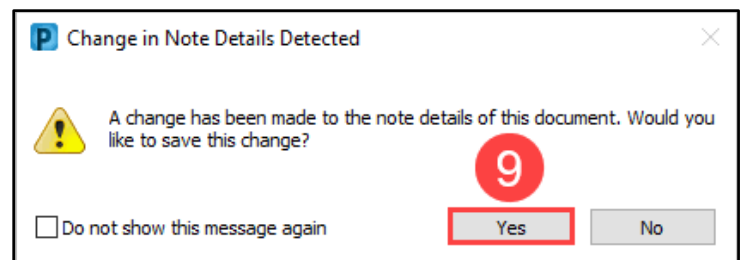
How to In Error a Note

From Clinical Notes:

1. Double click to open note.
2. Click the In Error button.
3. Type the required In Error Comment.
4. Click OK.