Procedure Histories Additions for Providers and Clinical Staff

This document outlines the recommended workflow for documenting a patient's historical procedures. Historical procedures should be accurately documented with the correct code to ensure that it is recognized by all applications and systems as a documented procedure.

Procedure Histories Additions

Procedure Histories can be added from the Histories Component on the Ambulatory/AMB Workflow, the Histories section within an Intake form, or the Histories tab located on the dark blue PowerChart Menu.
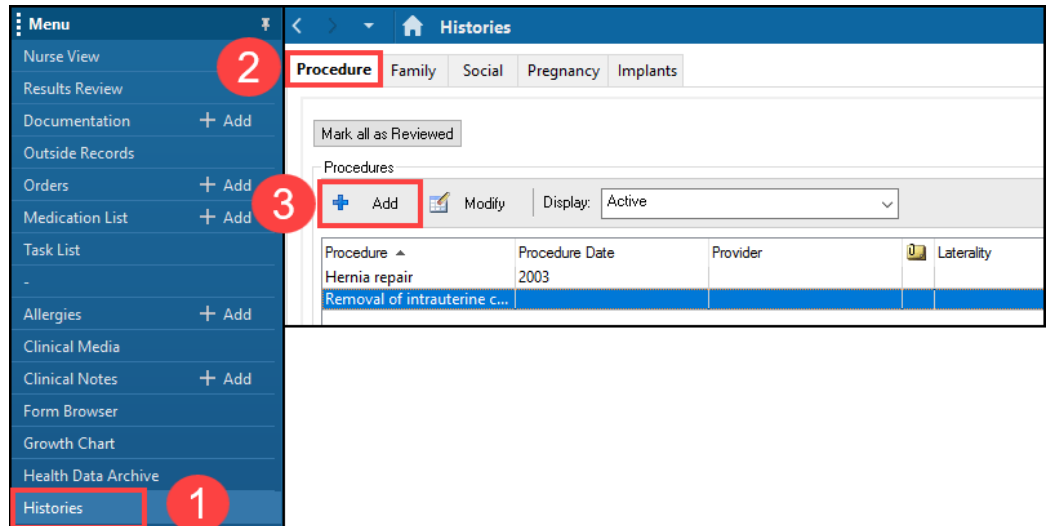
Common Procedure folders are available for quick access and proper documentation when adding from Histories within an Intake form or from the dark blue PowerChart Menu.
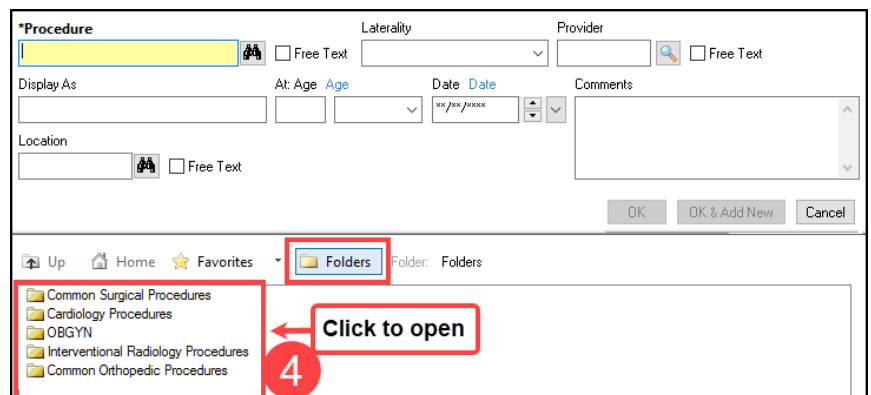
Adding Procedures:

From Histories:

> **Only add actual procedures** (not lab tests, DME, or other erroneous tests) and additionally add a date the procedure was performed.

1. Navigate to Histories by clicking the Histories hyperlink on the Ambulatory/AMB Workflow or the Histories section on the dark blue PowerChart Menu.
2. Select the Procedure tab.
3. Click Add.

4. View Common Procedure folders at the bottom of the Add Procedure screen. Click on a folder to open and view the available procedure selections.

5. Double-click on a procedure to add it to the Procedure field.
   a. Note: Click on Folders to access all Common folders again.
6. Enter the Procedure date and other pertinent details.
   a. Enter the Provider using the Provider search, if possible (avoid using Comments for the Provider unless the provider is no longer listed in the Provider search).
7. Click OK if done adding procedures, or OK & Add New to add additional procedures.

From the Ambulatory/AMB Workflow:

1. Navigate to the Histories Component.
2. Select the Procedure tab.
3. Type to search for the correct procedure. **Do NOT select Add as free text**.
4. Enter the Procedure Date and click Save.
5. OR click on the Histories hyperlink to access Common Procedure folders (recommended), then follow the steps above for adding from Histories.

From an Intake PowerForm:

1. Navigate to the Procedure Histories section of the Intake PowerForm.
   a. Note: The location of the Procedure Histories varies based on the form being used.
2. Click **Add**.
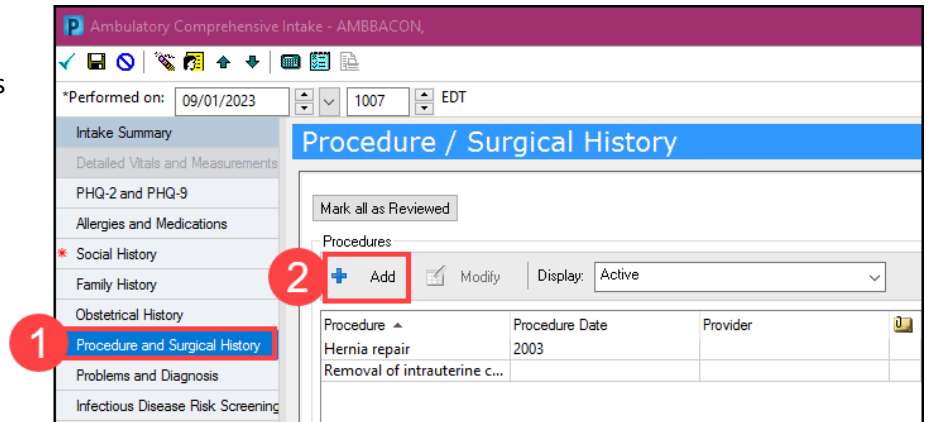
3. View Common Procedure folders at the bottom of the screen. Click on a folder to open and view the available procedure selections.
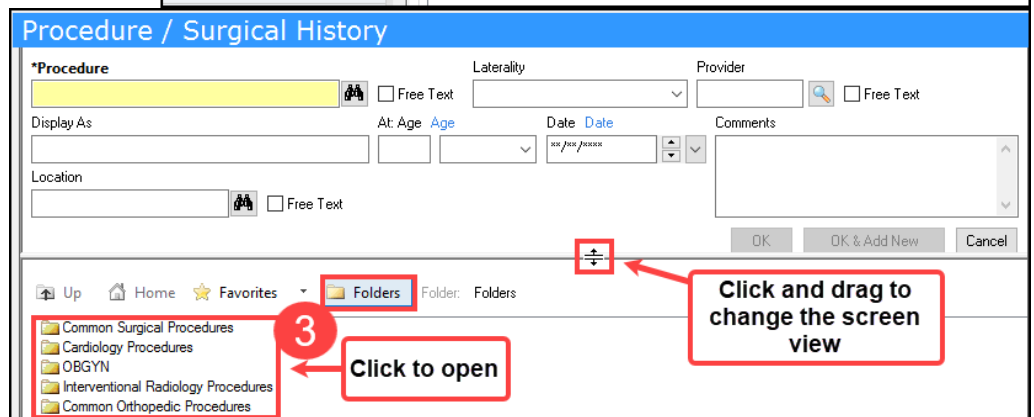
4. Double-click on a procedure to add it to the Procedure field.
   a. Note: Click on Folders to access all Common folders again.
5. Enter the Procedure date and other pertinent details.
   a. Enter the Provider using the Provider search, if possible (avoid using Comments for the Provider unless the provider is no longer listed in the Provider search).
6. Click OK if done adding procedures, or OK & Add New to add additional procedures.