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.

**Pane View**

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

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.

- **Intake (1)**
- **Output (1)**
- **Counts (0)**

**Labs**

Hover over a result to see more information.

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

Any additional lab results you wish to include in your note can be Tagged by right-clicking on the result and clicking Tag. These results will then pull into your note.

**Microbiology/Pathology**

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

**Status**

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordered</td>
<td>Order placed but not yet completed</td>
</tr>
<tr>
<td>In Progress</td>
<td>Order currently processing</td>
</tr>
<tr>
<td>Unauth</td>
<td>Order completed but not yet resulted</td>
</tr>
<tr>
<td>Auth (Verified)</td>
<td>Completed order with dictated report available</td>
</tr>
</tbody>
</table>
Sections in Documentation Workflow

**Diagnostics**

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Reason For Exam</th>
<th>Resulted</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Diagnostic Tests (0)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No results found</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Imaging (4)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chest PA and Lat</td>
<td>--</td>
<td>03/04/14</td>
<td>00:59</td>
<td>Ordered</td>
</tr>
<tr>
<td>CT Abd, Pelvis w/o Contrast</td>
<td>--</td>
<td>02/24/14</td>
<td>07:05</td>
<td>Auth (Verified)</td>
</tr>
<tr>
<td>Chest PA and Lat</td>
<td>--</td>
<td>02/24/14</td>
<td>07:05</td>
<td>Auth (Verified)</td>
</tr>
<tr>
<td>Chest PA and Lat</td>
<td>--</td>
<td>01/27/14</td>
<td>10:37</td>
<td>Unauth</td>
</tr>
</tbody>
</table>

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
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

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.

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 selecting 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.**

**Use caution!!**

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

**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.**

**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.

**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**.
Outstanding orders are orders which have not been completed yet.

### Outstanding Orders (1)

<table>
<thead>
<tr>
<th>CBC with diff</th>
<th>Ordered</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>04/03/14 11:00</td>
</tr>
</tbody>
</table>

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 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.

**Create Note**

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

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.

Documents (11) +

<table>
<thead>
<tr>
<th>Type</th>
<th>Subject</th>
<th>Author</th>
<th>Time of Service</th>
<th>Last Updated By</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress Note</td>
<td>Medicine</td>
<td>MDP123, Test</td>
<td>04/04/14 10:53</td>
<td>MDP123, Test</td>
<td>04/04/14 10:53</td>
</tr>
</tbody>
</table>