ChartMaker® Clinical Quick Reference Card

CHART NOTES

Create a New Note

- Open a Patient's Chart.
- Click the **Note** tab.
- Click **New Note**.
- Click the **Template** for the Chart Note.
- In the Chart Header, modify the **Date**, **Exam Name**, and **Case** as needed.
- Configure other **Chart Information** as needed.
- Click the **Save** button.
- **Close** the Chart.

Add Templates to Instant Note List

- Open a Patient Chart.
- Click the **Note** tab.
- Click **New Note.**
- Click the **Edit New Note List**.
- Locate the **Template** in the All Templates list.
- Highlight the template, and then click the **Add** button.
- Repeat the previous two steps as needed.
- When finished, click the **OK** button.

Add a Diagnosis

- Open a patient's chart note.
- Click the **+** next to the Diagnosis in the Diagnosis checklist, or click the **Other** button.
- Select the **CDC Status**, if applicable.
- Check the **Work-up Planned** box, if you are using the template for Evaluation and Management help, and you are planning a work-up.
- Uncheck the **Use Order Set** option, if needed.
- Modify the **Onset Date** as needed, or right-click in the Onset field and then click **Unknown** if this was a previously existing diagnosis.
- Enter any **Comments** for the diagnosis if needed.
- Click the **OK** button. If an order set was attached to this diagnosis the system will open any applicable medication dialogs and attach any applicable Labs, Tests, Imaging Procedures.

Update Status/Inactivate a Diagnosis

- Open a patient's chart note.
- Click the **+** next to the diagnosis in the Diagnosis checklist.
- Select an **Action**, if applicable.
- Check any applicable **Observation Noted** as needed.
- Check the **Inactive** option and configure the applicable **Date**, if you would like to inactivate this diagnosis.
- Enter any **Comments** for the diagnosis if needed.
- Click the **OK** button. The updated information will appear in the chart note and will also be tracked in the History tab. If inactivating a diagnosis that diagnosis will be removed from the active Problem/Diagnosis List and now appear in the Inactive Diagnosis List in the patient's face sheet.

Reactivate a Diagnosis

- Open a patient's chart note.
- Click the **+** next to the diagnosis in the Diagnosis checklist.
- Select an **Action**, if applicable.
- Check any applicable **Observation Noted** as needed.
- Check the **Reactivate** option and configure the applicable **Date** of reactivation.
- Enter any **Comments** for the diagnosis if needed.
- Click the **OK** button. The diagnosis will be transferred from the Inactive Diagnosis List to the active Problem/Diagnosis List in the patient's Face Sheet. Likewise, the diagnostic event will be tracked in the History tab.

Resolve a Diagnosis

- Open a patient's chart note.
- Click the **-** next to the diagnosis in the Diagnosis checklist.
- Select the **Reason** for ending/removing the diagnosis.
- Modify the **End Date** as needed.
- Enter any **Comments** for the diagnosis if needed.
- Click the **OK** button. The diagnosis will then be removed from the patient's face sheet and a diagnostic event will be tracked in the History tab.

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Add an Allergy

- Open a patient's chart note.
- Click the **ALRG** button.
- Select **No Known Allergies**, **No Known Drug Allergies**, or **Add/Modify Allergies**.

  NOTE: When the **No Known Allergies** or **No Known Drug Allergies** option is selected the system will automatically update the Face Sheet with a "No Known Allergies" or "No Known Drug Allergies" entry, the history tab and the audit trail will also list applicable entries for this event, and the chart note will indicate that there are no known allergies. You can skip the following steps if either the No Known Allergies or No Known Drug Allergies is selected.

- In the Active Allergy dialog, click the **Add** button.
- Type at least 3 letters of the allergy you want to add, and then click the **Search** button.
- Highlight the **Allergy**, click the **Select** button.
- Click the **OK** button if there are any interactions.
- Enter any **Reaction** to the allergen.
- Check **Note Alg** box to print allergy in chart note.
- Check **Note Rx** box to print reaction in chart note.
- Click the **Reviewed** button if applicable.
- Click the **OK** button.

Review/Update an Allergy

- Open a patient's chart note.
- Click the **ALRG** button, and select **Add/Modify Allergies**.
- In the Active Allergy dialog, enter any **Reaction** to the applicable allergen.
- Check **Note Alg** option next to the corresponding allergen to print in chart note.
- Check **Note Rx** option next to the corresponding allergen to print reaction in chart note.
- Click the **Reviewed** button, if applicable.

  NOTE: When allergies are reviewed the review date appears in the Face Sheet beside the allergy and the History tab is updated with this information.

- Click the **OK** button.

Remove an Allergy

- Open a patient's chart note.
- Click the **ALRG** button, and select **Add/Modify Allergies**.
- In the Active Allergy dialog, check the **Remove** box next to the allergy.
- Enter any **Reason** for removing the allergy.
- Click the **OK** button.

Transfer Chart Note to Another User

- Open a patient's chart from your To-Do List.
- Click the **Transfer Note** button, or click **Note > Owner:(Your User Name)**.
- Highlight the **User** you want to pass the chart note to, and then click the **OK** button.

Send Charges to Practice Manager

- While in the patient's note, click **Note > Charge Items**.
- If the Practice is incorrect, you will need to **modify the applicable practice in the Chart Header** of the applicable chart note prior to sending the applicable charges.
- Modify the **Billable Units** as needed.
- Click the **Send Charge** button.

Sign a Chart Note

- Open a Chart Note.
- Enter and modify any information in the Chart Note.
- To sign the note, click the **Sign** button in the toolbar, or click **Note > Sign**.

Unsign a Chart Note

- Access the Signed Chart Note.
- Click **Note > Unsign**. The note will revert back to the original format with the template choices.

NOTE: Only the user who signed the note originally can unsign the note.

Annotate a Signed Chart Note

- Access the Signed Chart Note.
- Click the **Annotate** button, or click **Note > Annotate**.
- In the Annotation for signed note dialog, enter the **Annotation**.
- Click the **OK** button.