

Chart Note Notes

by Buddy Kurz

As more and more of you are transitioning from keeping chart notes on paper to utilizing electronic charting, we have been getting great feedback about what we are doing and suggestions for improvement. We are releasing some of those improvements with the June 2013 software update. The Exam Data Outline edit screen used to enter Additional Exam Data on perio exams and other clinical records has been updated to highlight the areas where text can be entered. We have also added some new capabilities to the editor used to edit chart notes using outline templates.

Chart Note Overview - Most chart notes entered into the Datacon system are created using outline templates. An outline template includes optional blocks of text that can be included by checking a box. A block of text may in turn contain smaller blocks of text that can be optionally included. There may also be areas reserved in a template where you can type in specific details. Templates may also include merge fields that will insert existing patient information into the note. Examples include using a merge field to insert the patient's first name into a chart note or adding a date & time stamp with the user initials at the end of a note.

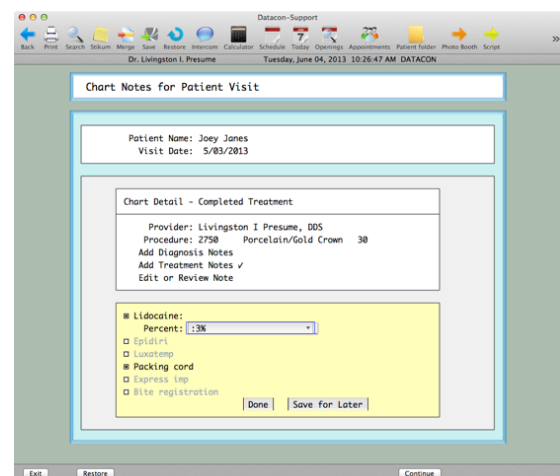
There are a number of ways outline templates can be defined and accessed. Each chart note procedure can have it's own template. There are a number of diagnosis templates that can be assigned to procedures that should have diagnosis notes entered when treatment plans are entered. There are also a number of treatment templates that can be assigned to procedures that require detailed treatment notes. Visit notes describe the overall patient visit and usually include information that is not specific to procedures on individual teeth or areas. Visit notes might contain information such as patient demeanor, oral hygiene, anesthetics used, post-op instructions, etc. For each procedure, times can be assigned to each task to allow the scheduler to automatically calculate the time requirement for a visit. Outline templates can also be assigned to each Clinical Task. At the end of the visit, the software automatically creates an outline template with just the parts needed to document the patient visit based on the treatments performed. If the templates are carefully designed, little or no editing will be required to document the visit thoroughly.

Chart Note Update - When editing notes using templates in earlier software releases, you could only type into spaces that were reserved for text. If there was a possibility that multiple lines of text might be typed into the template, the template required space to be reserved for each additional line of text.

The new software makes it possible to expand the text area while it is being filled in. You can insert or remove lines in a text area and when you are typing the software will automatically wrap and expand the text box when the cursor reaches the end of the field. This change simplifies the design of the outline template and reduces the amount of space that must be reserved on the screen for text boxes.

Outline templates frequently are designed to provide an assortment of choices of adjectives that describe some condition or treatment. In the past, these might have been shown as a series of checkboxes titled with options like "Early, Moderate, Severe" or "Light, Moderate, Heavy". With this new software these can be set up in a way that shows these choices in a pop-down menu instead of next to check-boxes. These two changes allow more of your choices and text to be visible at the same time and simplify data entry.

After an outline template has been filled in the software automatically builds a paragraph using your various choices. Our users have indicated that there are many times when it would be useful to save a partially completed outline to be finished later or by someone else. The software now includes an option to save a partially completed template.



When this is enabled, a pair of buttons is displayed at the bottom of the template offering the choices "Done" or "Save for Later". An attempt to exit from the template without making a choice will lead to questions about your intent. A template may be edited as many times as needed but once you are done and it is converted to a note there is no going back.

I Mail, You Mail , We All Mail with Email...

Since 2000, Datacon's software has included the option to "print" to email. This capability is most often used for sending email appointment confirmations to patients. In recent years many of you have also begun using the option to send text messages to patient's phones.

We have had frequent requests for the option to send more than just plain text in confirmation emails and we are pleased to announce that this is now possible with the June 2013 update to the Dental software and the Mac server software. This free update provides several new capabilities and simplifies the steps we must take to setup mail on your server.

HTML email - With this update it is now possible to format your email using HTML. Most commercial email is formatted using HTML (HyperText Markup Language). This is the same language that is used to create web pages and there are all sorts of tools available for creating content. Our software allows Datacon merge fields to be mixed in with HTML commands that control layout, fonts, color, and images.

Attachments - Email sent by your Datacon server can now include attachments. They can be things like reports or images that the recipient might wish to save or they can be hidden attachments such as a logo or other image to be inserted into an HTML email.

Multiple "From" addresses - Before this update, we usually only used a single "From" address for the entire practice. Now we can configure the server and our documents to automatically send email from several individual as well.

Attachment Creation - Any of Datacon's print merge fields can be used to create JPEG email attachments. Our support staff has years of experience using these commands to create recall cards, route slips, and other documents and this drawing capability can be used to create images that can be included in email. An example of this is our calendar which marks a patient appointment date. This can easily be converted to an image and included in an HTML email

Hi Allison!

Here's a reminder about your next appointment at our office.
Be there or be square!

Livingston I Presume

Dr. Livingston I. Presume
Appointment at 10:30 AM
June 28, 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

PDF Reports - Does your accountant need a report? No problem. When you print the report, choose email as your printer choice and the report will automatically be converted into a PDF document and sent in an email. You are presented with a form where you can enter the subject and recipient's email address along with a short note.

We have repeatedly said that the upgrade to a Mac server will allow our clients to benefit from our ability to leverage the sophisticated capabilities offered by a modern system. We are excited to offer this email update as another example of what can be done.

Do Not Venture Into The U-Verse Without A Guide

AT&T has been promoting a transition to their U-Verse product with a letter to existing customers offering a free "upgrade" plus a \$50 AT&T Reward Prepaid VISA Card. Our IT partner, dmi, has informed us that this upgrade is not compatible with network devices used by many of our offices and that two of our mutual clients have had to have AT&T come out and revert them back to the old service. We would strongly suggest that anyone contemplating changes to their network check in with dmi or their favorite IT professional before

Classes and Events

Classes

New User Training *
Scheduling *
Recall *
Paperless Training
Power User Training *
Doctor's Only Training

* Qualifies for CE Credits

Call today to schedule
your training!

Schedule

Thursday, 7/4
Independence Day
Office Closed

Events

CDA Scientific Session
San Francisco
August 15-17, 2013



committing to any changes. This is particularly important if you are using Datacon Mobile, accessing your system from home, or using a single system to serve multiple office locations. We are continuing to add Internet related features to the software and recommend that all of our clients invest in quality high speed internet connectivity with a fixed IP address and the option to allow incoming connections using arbitrary port numbers. This type of network access allows us to provide the best possible service and allows you to get the most out of your Datacon software.