

This course will guide you through the use of the various tools included in the Expanse Documentation Template System.

Subtle on screen elements of the LIVE system may vary from what is shown within this course; however, the functionality is as shown.

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10:00	T-TEST, CLASSROOM35 Acid reflux	03/05/1965 54 M Shannon, D. MD	Arrived			T-TEST, JESSICA T-TEST, BARRY	03/13/19 03/13/19	
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In most Ambulatory situations, providers will pick up a document that has been started during the check in procedure. These documents will appear as 'Pending' on the office Schedule. Click on 'Pending' for T-TEST,JUNE.

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This will open the Document. Take a moment to identify the different elements of the template. At the top, you'll see the name of the Document Template. Note the drop down arrow. You can change to a different template if you prefer. To see how this is done, click on 'Primary Care Office Visit'.

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In the 'Select Document' overlay, you can either scroll through the available documents or perform a search. Since you will rarely need to do this, we'll stay with the current template. Click on the template name again to close the overlay.

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Across the top of the template are the various sections and headers within a document. This is referred to as the carousel. You can use this to jump to any section in a single click by clicking on the name of the section in the carousel. Looking at the document, you'll see that it is presented in a format that allows you to scroll through the entire template from top to bottom. We'll scroll down to the 'HPI' section for you.

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The HPI can be entered using several methods. We'll go through each. First, note the small blue pencil icon in brackets. Click once on the pencil.

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This area will now accept typed or voice recognition text. Options for text formatting appear in a toolbar across the top of this field. We'll type in, 'The pt has a 3 day history of ankle pain'.

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An optional alternative is to delve more into the HPI section. To see what this looks like, click the 'HPI' button in the header.

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This provides Free Text areas and options for a structure to the information. Click in the 'Details' field under HPI.

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This brings us into another text area. MEDITECH calls these fields 'Meditors', short for 'Medical Editor'. In this Meditor's toolbar, you'll notice an extra icon on the left. It is the Canned Text icon and can be used to bring Canned Text, Quick Text, Formatted Data, and Saved Data into a note. These topics are covered in another lesson. Below this Meditor space is a field to enter an onset date.

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There may be times when a Point and Click structure may be helpful for an HPI. MEDITECH has supplied a number of structured HPI sections to use. To add one to this document, click the ' + HPI' button.

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The cursor defaults to the Search field. We will type in 'headache'.

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Before we make a selection, note the stars to the right of the choices. As in other locations in Expanse, clicking a star will turn it yellow so it will appear as a Favorite in the future. For now, click on 'Headache'.

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Note that Expanse now offers Point and Click options for history typically associated with the Headache documentation. We will go into more detail about how to select items like this as 'positives' and 'negatives' in the Review of Systems portion of this lesson. If you pull in an HPI, but don't like it, you can easily remove it from your document. Click on the 'ellipsis' (the three dots) to the right of the Headache header.

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(night sweats =) (palpitations =) (rash =) (sleep disturbances =) (slurred speech =) (vertigo =) (weight loss =) (other =)	Resp	20
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Now, click on 'Remove Section'.

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This takes us out of the HPI section and back to the Full Document view. We'll scroll down to the 'Review of Systems' section for you.

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There are two optional ways to enter the Review of Systems, Free Text or Point and Click. Let's look first at Free Text. Beneath the Review of Systems header is a list of the various organ systems. At the top of this list is the 'Review of Systems'. To gain access to a Free Text Meditor, click on 'Review of Systems'.

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This is a Meditor with all the functions we've already discussed. It is possible to use Voice Recognition here, you can type, or you can use any of the documentation tools accessed from the 'Canned Text' icon. For now, we'll leave this area blank and explore the Point and Click options available to you.

'Typicals', which are covered in another lesson, are the fastest way to select these options, but you'll need to know how to select 'positives' and 'negatives'. Each organ system listed, has a number of options for items a patient may report during a Review of Systems. To see an example, click on 'Constitutional'.

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Here you can see a list of findings. For the Review of Systems, the items shown are abnormalities. Clicking or tapping on one of these will select it as a 'positive'. Click on 'fever'.

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This will indicate that the patient reports fever. Now let's select a 'negative'. Expanse will record the opposite of what the button says when you RIGHT click on it with the mouse. RIGHT click on 'weight loss'.

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Note the cross out line through the text. If the patient has a problem you wish to record that is not on the list you have two options for this. There is a Free Text field under 'Additional Comments' when you need to indicate one or several complaints. Another option is the 'problem reported' option. Click this now.

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The trio of horizontal lines on the right of each of these buttons is also referred to as the 'hamburger' icon. This allows for the entry of details that can go with each button. Click on the hamburger icon for problem reported.

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Now that there is text in this area, the horizontal lines are a bold green. This tells you there is content in the Comment for this item. Now, click on 'Respiratory'.

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Two things happen. The Constitutional section collapses, and the Respiratory section opens. Looking at the text from the Constitutional area, note that the fever is indicated as ' + fever'. There is also a ' + problem reported'. The comment about feeling hyper is in parentheses after 'problem reported'.

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The text indicates the patient reported no 'weight loss'. If you realize this is incorrect, you can fix this without re-opening the full Constitutional list. Remember that RIGHT clicking on something will give you the opposite of what you see. RIGHT click on the words 'weight loss'.

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Review of System     ···       Review of     ···
Review of Allergies
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Ear, Nose, Mouth, Throat
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(Female) Vital Signs
Integumentary
Neurologic 09:01
Endocrine BP 138/88
Hematologic / Lymphatic 75
Allergy / 20

Weight Loss has turned into a positive. The Respiratory section has closed down but we could reopen it easily if needed. At this point, you might be curious about how your documentation will look when viewed later. There is a 'Page Preview' icon just to the right of the template name. Click this now.

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For now, let's skip further down in the Document Template. We will scroll down to 'Physical Exam'.

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Just as with Review of Systems, you have an option for a Free Text entry of Physical Exam. To access this, click the 'Physical Exam' button in the sub-header.

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Once again, this provides access to a Free Text area which can be used for typing, Quick Text, Canned Text, or Voice Recognition. For the Point and Click option, the Physical Exam takes advantage of an Expanse feature called 'Tailored Documentation'. This makes it possible for the set up to show only the commonly used items by default.

Once again, we'll document on Constitutional. Click on 'Constitutional'.

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Key elements to notice here are that there are times when a left click means the finding is normal, and other times when the left click is abnormal. The same can also be said for RIGHT clicks. Let's look at some examples. Left click on 'well nourished'.

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Now, left click on 'acute distress'.

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You've indicated that the patient is well nourished, but is in acute distress. Let's try RIGHT clicking. Right click on 'altered mental status'.

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Next, RIGHT click on 'well hydrated'.

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		5ft 6.14in 156lb 8.451oz	BSA: 1.82m <sup>2</sup> BMI Percentile: 25.1%
Physical Exam Constitutional: well nourished and + acute distress; + not appropriately hydrated and no altered mental status		Visit Date: 03/15/	/19
Constitutional: Well nourisned and + acute discress; + not appropriately hydrated and no altered mental status		1000	e <mark>sus Status</mark> Io Hx Avail
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By convention, Mount Nittany has chosen to put a '+' sign in front of findings not considered to be normal. Through this series of left and RIGHT clicks, you've indicated that the patient is well nourished and in acute distress. The patient is not appropriately hydrated and there is no altered mental status. Let's return to the Edit Mode by clicking on the 'Edit Mode' icon.

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Physical Exam	5ft 6.14in 156lb 8.451oz	BSA: 1.82m <sup>2</sup> BMI Percentile: 25.1%	
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There is more to the Physical Exam for Constitutional. These are findings which are less frequently documented in your specialty. You can access these by clicking the 'Show More' button in the upper right. Let's try it now.

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🔶 Physical	Exam				T	0	Arrived	REG AMB, PG.BELIM
Physical Exam	WD/WN, vitals as below	1	)				5ft 6.14in 156lb 8.451oz	BSA: 1.82m <sup>2</sup> BMI Percentile: 25.1%
Constitutio	well developed	=	well nourished	=	acute distress	=)	Visit Date: 03/1	5/19
nal	(ill appearing	=	intoxicated appearing	H	well hydrated		1 C C C C C C C C C C C C C C C C C C C	Resus Status
Eyes	average body habitus	=	morbidly obese	H	obese	=)	Search Chart	No Hx Avail
ENMT	thin	=	cachectic		altered mental status			N G
Neck	behavioral limitations	-	physical limitations	III	language barrier	=	✓ <u>Allergies</u>	
Respiratory	healthy appearing	11	frail appearing	- Ht	well groomed			
Cardiovasc	disheveled	=	cooperative	-	comfortable	=	No Da	ata to Display
ular Chest	(in distress	III	combative	Ile	cushingoid		v <u>Problems</u>	
(Breasts) Gastrointes tinal	diaphoretic	=	lethargic	III	mechanically ventilated	=	No Data to Display	
	malnourished	=	overweight	=	underweight	=	• <u>Vital Signs</u>	
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You'll now notice more options available to you. The same left and RIGHT click rules apply. Left clicking on something will give you what you see there. RIGHT clicking will give you the opposite.

Other elements in Documentation, such as the 'Past Medical, Surgical, and Family History', the 'Assessment and Plan', and 'Departure and Coding' are covered in other lessons.

This concludes the lesson on Documenting Visit Notes.

In this course we learned how to:

- Pick up a Draft document started during check-in
- Enter text into a narrative section
- Optionally add or remove another HPI section to a template
- Use a Meditor text area
- Select Review of Systems and Physical Exam elements using a Point and Click method
- Use the Show More button to display more options in Physical Exam

MEDITECH best practice guidelines have been integrated into this lesson.

Please refer to your facility-specific workflows for process questions not covered in this course.