

July 15 - Stop Rewriting: Automate Your Clinical Documentation

This webinar covers updates to clinic administration tools and demonstrates how practitioners can streamline their documentation through chart note macros and letter templates. Recent System Updates

- **Patient Chat Enhancements:** Updates to appointment confirmation responses have been streamlined. When a client replies "C" to confirm an appointment, the confirmation message and the subsequent autoresponder are now hidden within the patient chat to reduce clutter. Reminders remain visible, and the appointment status is updated on the schedule.

Feature Title: Patient Chat Confirmation Filtering

Problem Solved: Clinics using the Patient Chat feature experienced chat inbox clutter due to high volumes of incoming "C" response messages and outgoing confirmation auto-responders.

Core Functionality: System updates automatically hide "C" confirmation reply messages and their subsequent auto-responder acknowledgments from the main Patient Chat view while maintaining appointment status updates on the schedule and logging responses in the patient's individual profile.

Technical Implementation / Config:

- No manual configuration required; feature behavior is managed by the system backend.
- **System Actions:**
 - Appointment Status automatically updates to "Confirmed" on the schedule upon receiving "C".
 - Hides response and auto-responder threads in the global Patient Chat dashboard.
 - Preserves full message history under individual Patient Profile chat logs.

Best Practices

Encouraged for high-volume clinics to streamline daily morning administrative workflows without manual message management.

Keywords: Patient Chat, Appointment Confirmation, Automated Messaging, Inbox Filtering, Workflow Efficiency

Feature Title: Practitioner Charting Defaults & Visibility Controls

Problem Solved: Practitioners with multiple clinical charts assigned to their profile had all charts render in the observation section simultaneously. This triggered mandatory field validations for charts irrelevant to the specific patient encounter.

Core Functionality: Practitioners and admins can set default and enabled chart views under practitioner profiles. Only defaulted templates render upon creating a new chart note, while other enabled charts remain manually selectable.

Technical Implementation / Config:

1. Navigate to **User Profile > Charts**.
2. Designate primary templates using the **Default** toggle.
3. Check off supplementary charts using the **Enabled** toggle.

User Profile → Charts → [Toggle: Default] / [Check: Enabled]

Caveats & Limitations:

Once an enabled supplementary chart is selected/added during a live charting session, it cannot currently be deselected/removed without refreshing or clearing the un-saved session.

Missing Technical Detail: The speaker referenced upcoming deselect functionality for selected charts but did not explain implementation steps.

Best Practices

Set universally required templates (e.g., standard SOAP Notes) as the Default, keeping specialized assessments set to Enabled to prevent missing mandatory fields during chart audits.

Feature Title: Dynamic Letter Generation via Chart Note Integration

Problem Solved: Standard static Letter Templates provided limited customization capabilities and did not allow saving mid-draft progress or extracting rich text dynamic details directly from clinical charts.

Core Functionality: Users can populate Letter Templates dynamically using a specialized `chart_note` Go-Code tag that extracts content exclusively from the **Notes** tab of an active clinical chart. This allows practitioners to draft, save, edit, and layer rich text macro content prior to generating non-editable PDF letters.

Technical Implementation / Config:

1. Letter Template Setup:

- Navigate to **System Settings > Letters**.
- Insert dynamic tags alongside text (e.g., patient/practitioner tags and the chart extraction tag): `[chart_note]`

2. Chart Note Macro Creation:

- Navigate to **User Profile > Chart Notes**.
- Click **New Note Template**.
- Configure macro details:
 - **Data Type:** Select `Rich Text` (Recommended).
 - **Code Key:** Assign a short code (up to 7-8 characters max).
 - **Category:** Assign to a specific category for optimal drop-down filtering.

3. Execution Workflow:

- Create or open a patient chart and navigate specifically to the **Notes** tab.
- Input macros manually or type `[Code]` + `Ctrl` + `Space` (Note: Code triggers are case-sensitive).
- Go to Dashboard or Patient Record > Generate Letter > Select letter template and relate the target chart.

Caveats & Limitations:

The `chart_note` Go-Code tag strictly extracts data from the **Notes** tab of a chart; data entered into the *Observations* or other tabs will not pull into the letter.

Macro shortcodes are case-sensitive during expansion.

Single-line text macro fields are hard-capped at 250 characters.

Once a letter is finalized/generated, it cannot be edited inline; the letter document must be deleted and re-generated if corrections are needed.

Best Practices

Always utilize **Rich Text** format for macros to retain bulleting, bolding, and structural formatting capabilities.

Assign categories when creating macros to prevent UI list clutter.

Always preview generated letters before saving, sending, or e-Faxing to ensure the correct chart reference was selected.

Keywords: Letter Templates, Go-Codes, Chart Macros, Document Generation, e-Fax Integration

Revision #2

Created 2026-07-27 14:43:07 UTC by Admin

Updated 2026-07-27 15:24:30 UTC by Admin