

# Chart Note Templates

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## Introduction

This document is for use by a dental office running Datacon Dental Systems Practice Management software version 3.6D (7/23/14) or higher. Utilizing the current charting software also requires pcLink version 7/3/14 (Windows) or pcLink version 3/27/14 (Mac) or higher.

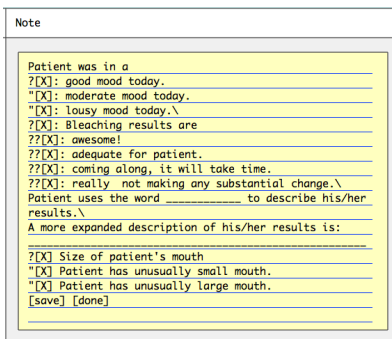
This document will guide you through the process of setting up Chart Note Templates.

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## Setting Up Templates

### The Body Design of the Template

1. Overview basic template types
2. Setting up a basic selection box
3. Nesting selection boxes within selection boxes
4. Setting up a singular selection from selection boxes using drop down windows
5. Creating a paragraph from your selections



Note

Patient was in a

?[X]: good mood today.

[X]: moderate mood today.

[X]: lousy mood today.

?[X]: Bleaching results are

??[X]: awesome!

?[X]: adequate for patient.

??[X]: coming along, it will take time.

??[X]: really not making any substantial change.

Patient uses the word \_\_\_\_\_ to describe his/her results.

A more expanded description of his/her results is:

\_\_\_\_\_

?[X] Size of patient's mouth

[X] Patient has unusually small mouth.

[X] Patient has unusually large mouth.

[save] [done]

## Overview - Basic Template Types

Chart Note Templates are located within the Procedure Code selection from your main menu, "Note Templates for Treatments." They are broken down into four categories:

1. Oral Exam and Visit Notes - These notes cover the visit in a general or broad overview. Detailing patient health status, current radiography history, Doctor's general oral evaluation, and general hygiene practices.
2. Diagnosis Notes - A template with all the selections that entail diagnosing your patient's oral complaint(s), current conditions (pain level, swelling, sensitivity, etc) designating the tooth(teeth) involved, condition of related teeth, areas affected by complaint, and your diagnosis. The diagnosis also includes your planned treatment for the patient's condition.
3. Treatment Notes - A template that details the steps taken during the process of treating your patient's mouth. Some examples include: name of anesthesia, tools used, quantity/type of product(s) used, how the area was accessed, prescriptions written, post appointment/operation instructions.
4. Clinical Task Notes - Templates can be setup that detail each individual task you perform in the back office. Some examples might include steps involved in: administering anesthesia, taking a single x-ray or complete series of images, prep work prior to a specific procedure. These are very specific templates, directed toward an individual task.

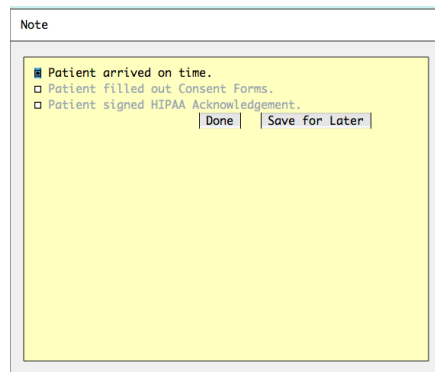
All Chart Note Templates have Procedure Codes attached to them causing the Note Template to become available for use when the procedure is Treatment Planned and subsequently the patient is treated.

## Setting up a Basic Selection Box

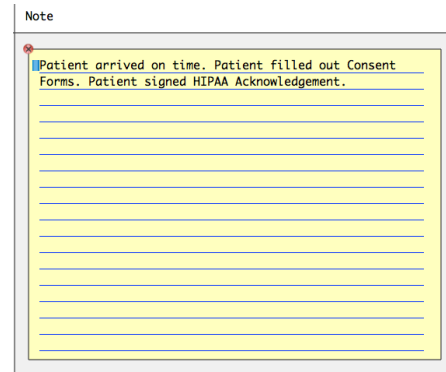
When setting up your template, optional words or phrases can be selected using a check box. Question marks flag the intent to provide the use with an option (include in your notes or the item doesn't apply to your notes.)

Optional lines look like this:

- ?[X]: Patient arrived on time.
- ?[X]: Patient filled out Consent Forms.
- ?[X]: Patient signed HIPAA Acknowledgement.



This template...



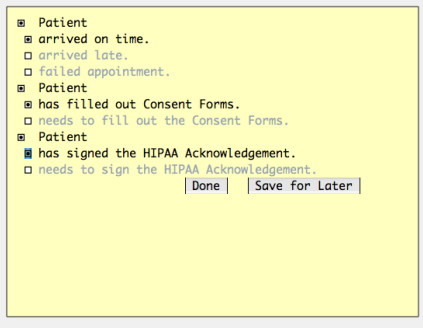
becomes this chart note.

## Nesting selection boxes within selection boxes

The number of question marks determines the level of nesting within the template.

- ?[X]: Patient
- ??[X]: arrived on time.
- ??[X]: arrived late.
- ??[X]: failed appointment.
- ?[X]: Patient
- ??[X]: has filled out Consent Forms.
- ??[X]: needs to fill out the Consent Forms.
- ?[X]: Patient
- ??[X]: has signed the HIPAA Acknowledgement.
- ??[X]: needs to sign the HIPAA Acknowledgement.

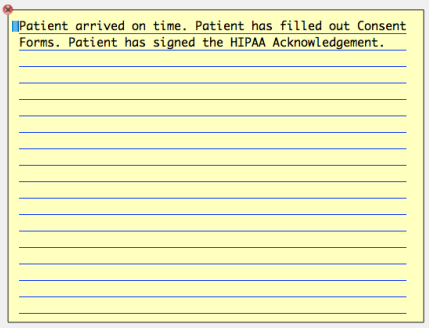
Note



A screenshot of a 'Note' window with a yellow background. It contains a list of nested checkboxes. The first level has three items: 'Patient', 'arrived on time.', and 'arrived late.'. The second level has three items: 'Patient', 'has filled out Consent Forms.', and 'needs to fill out the Consent Forms.'. The third level has two items: 'Patient' and 'has signed the HIPAA Acknowledgement.'. Below the list are two buttons: 'Done' and 'Save for Later'.

This template...

Note



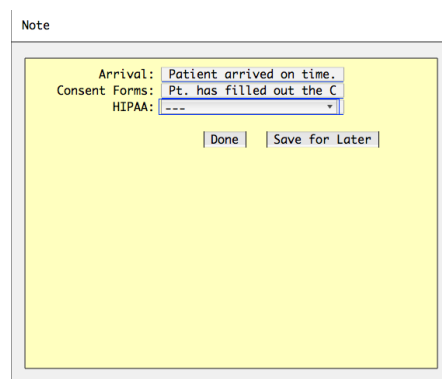
A screenshot of a 'Note' window with a yellow background. The text from the template is filled in: 'Patient arrived on time. Patient has filled out Consent Forms. Patient has signed the HIPAA Acknowledgement.'. Below the text are several horizontal lines for additional notes.

becomes this chart note.

## Setting up a singular selection from selection boxes using drop-down windows

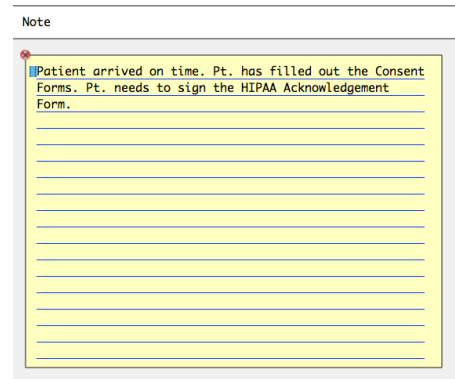
You can create a set of options that allow only a single item to be selected by preceding the additional options with quote marks instead of question marks.

?[X] Arrival *(Note: this spacing right-justifies text in template)*  
"[X] Patient arrived on time.  
"[X] Patient arrived late.  
"[X] Patient failed appointment.  
?[X] Consent Forms  
"[X] Pt. has filled out Consent Forms.  
"[X] Pt. needs to fill out the Consent Forms.  
?[X] HIPAA  
"[X] Pt. has signed the HIPAA Acknowledgement.  
"[X] Pt. needs to sign the HIPAA Acknowledgement.



A screenshot of a 'Note' form template. The form has a yellow background and a white border. It contains three dropdown menus: 'Arrival:' with 'Patient arrived on time.' selected, 'Consent Forms:' with 'Pt. has filled out the C' selected, and 'HIPAA:' with '---' selected. Below the dropdowns are two buttons: 'Done' and 'Save for Later'.

This template...



A screenshot of a 'Note' form with a yellow background and a white border. The form contains a single line of text: 'Patient arrived on time. Pt. has filled out the Consent Forms. Pt. needs to sign the HIPAA Acknowledgement Form.' Below the text are several horizontal lines for additional notes.

becomes this chart note.

## Creating a paragraph from your selections

The (above) options can be combined to create a complex template with many optional parts. After the choices are made, the text is formatted into a single paragraph. The results can be formatted into multiple paragraphs by including a backslash (\) at the spot where a new paragraph should begin.

\Appointment Intake:

?[X] Arrival

“[X] Patient arrived on time.

“[X] Patient arrived late.

“[X] Patient failed appointment.

?[X] Consent Form

“[X] Pt. has filled out the Consent Forms.

“[X] Pt. needs to fill out the Consent Forms.

?[X] HIPAA

“[X] Pt. has signed the HIPAA Acknowledgement Form.

“[X] Pt needs to sign the HIPAA Acknowledgement Form.

\Medical History:

?[X] Reviewed medical history on file with patient.

??[X] Additional medical history comments:

\Insurance:

?[X]:Coverage has not changed.

“[X]: New Carrier-

\Emergency Contact Info:

?[X]:Confirmed Emergency Contact Info on file.

?[X]:Reviewed and updated Emergency Contact Info.

Note

\Appointment Intake: \

Arrival: ---

Consent Forms: ---

HIPAA: ---

\Medical History:

Reviewed medical history on file with patient.

Additional Medical History comments:

\_\_\_\_\_

\Insurance:

Coverage has not changed.

New Carrier-

\_\_\_\_\_

\Emergency Contact Info:

Confirmed Emergency Contact Info on file.

Reviewed and updated Emergency Contact Info.

Note

\Appointment Intake:

Patient arrived on time. Pt. has filled out the Consent Forms. Pt. needs to sign the HIPAA Acknowledgement Form.

Medical History: Mr. Swift had a mild heart attack on 7/15/14.

Insurance: New Carrier- United Concordia

Emergency Contact Info: Reviewed and updated Emergency Contact Info.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

This template...

becomes this chart note.