

# Clinical Documentation New Features

## Document Recovery

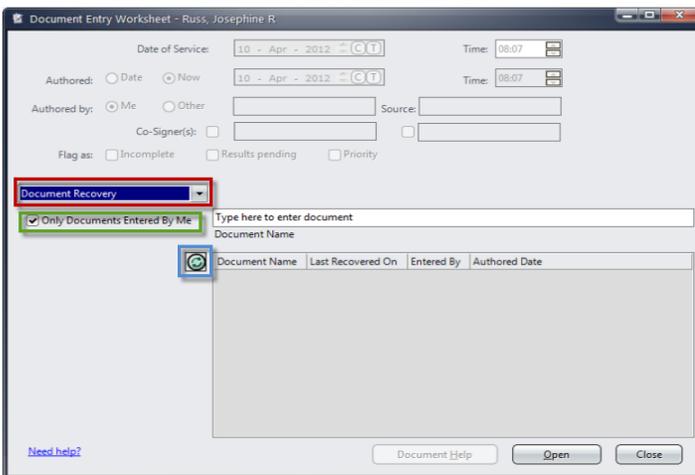
### What is Document Recovery?

**Document Recovery** is a method to ensure that a clinical note is not lost in the event of network failure, computer problem, or an unexpected shutdown of Healthbridge.

### Retrieving a Recovered (Draft) Document

In the event you need to retrieve a recovered document, access the via the following:

- From the **Document Entry Worksheet**, select the new **Document Recovery** filter from the drop-down.
  - The **Only Document Entered By Me** checkbox is selected by default displaying only recovered documents that have been entered by you. **Note:** Uncheck the box to see recovered documents entered by all users for the selected patient.
  - The **Refresh** button displays if the **Document Entry Worksheet** is left open for a period of time. Simply click the button to refresh the screen.



- From the **Document Entry Worksheet**, search and begin a new document.
- From the **Documents** tab, modify the existing version of the document.

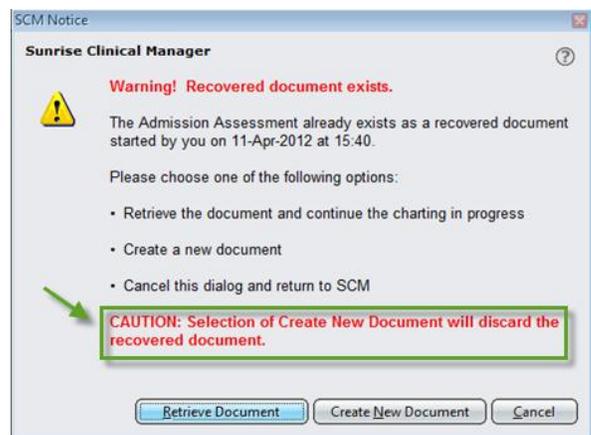
 **Note:** If you attempt to recover a document that was not originally authored by you, the only option to recover a document is from the **Document Entry Worksheet** and selecting the **Document Recovery** filter from the search filter drop-down.

 **Note:** If a note is recovered and the note contains a **Body Site** observation that you marked to indicate the body area of the patient condition, that section will NOT save in the recovered document.

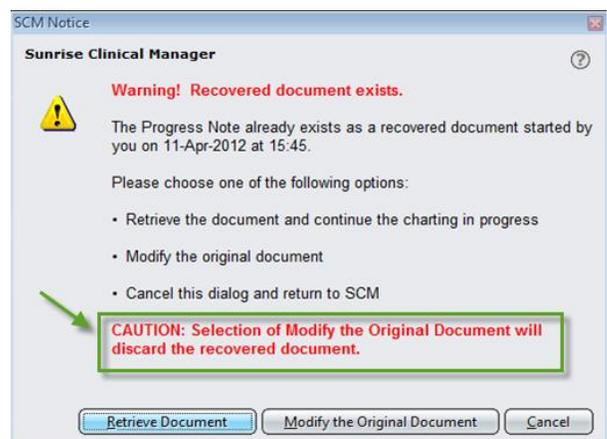
### Recovered Document in Progress Message

When attempting to modify or start a new document and a recovered document exists, a notification displays with an option to:

- Recover or Create a New Document** – This message indicates that the selected document already exists as a recovered document, and you have the option to either retrieve the existing document and complete charting (**Retrieve Document** button) or discard the recovered document and create a new version of the document (**Create New Document** button).



- Recover or Modify Original Document** - This message indicates that the selected document already exists as a recovered document, and you have the option to either retrieve the existing document and complete charting (**Retrieve Document** button) or discard the recovered document and modify the original document (**Modify the Original Document** button).



 **Note:** Recovered (draft) documents are removed based on the following events:

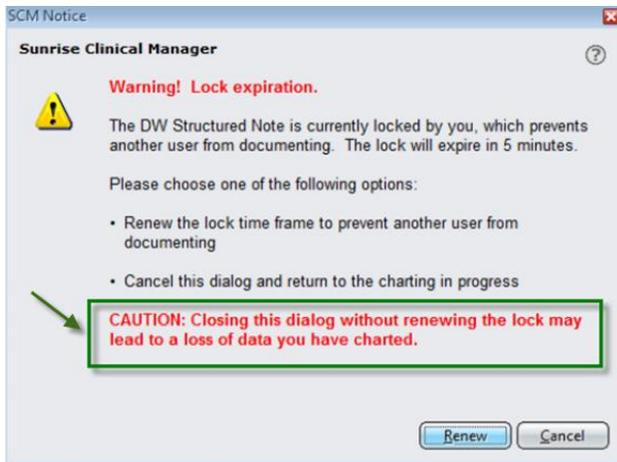
- Draft document is **automatically purged after 4 days**

- Draft document is **recovered + saved**
- Draft document is **recovered + cancelled**
- Draft document is **modified + saved**
- Draft document is **modified + cancelled**

## Lock Expiration

The **Lock Expiration** notification provides the ability to **renew** the lock and keep others from taking over a note you are currently charting. The interval warning message will display five minutes prior to the defined lock expiration time of **15** minutes.

- ▶ Click the **Renew** button to renew the lock expiration and continue charting.



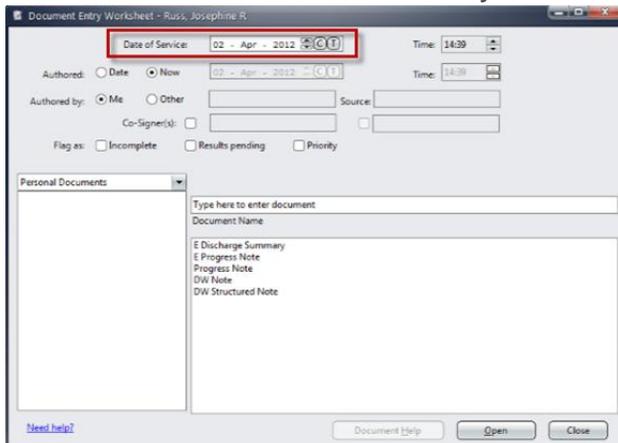
- ⚠ **Warning:** If you click **Cancel**, this will disregard the lock expiration and allow you to continue charting. However, not renewing the lock provides the ability for another user to chart the same note on the same patient and potentially lose your data if the other user saves the document first.

## Date of Service Field

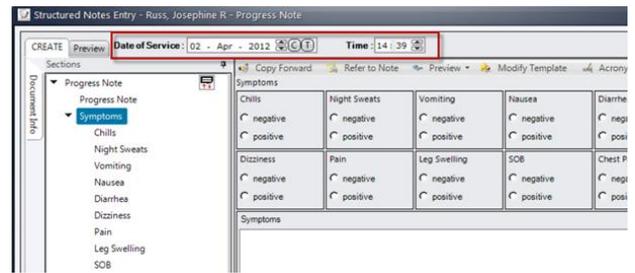
When you launch the **Document Entry Worksheet** or access a clinical document for charting (e.g., *Discharge Summary*), a field called **Date of Service** is available for adjusting the date of the document to the actual date the patient service was provided.

- ✍ **Note:** The default is the current date.

- **Date of Service** field on the **Document Entry Worksheet**



- **Date of Service** field in a clinical note.



## Significant and Mandatory Icon Changes

### Icon Changes

New Icons for **Significant** and **Mandatory** indicators have been changed to match the significant and mandatory icon styles across all screen components in Healthbridge.



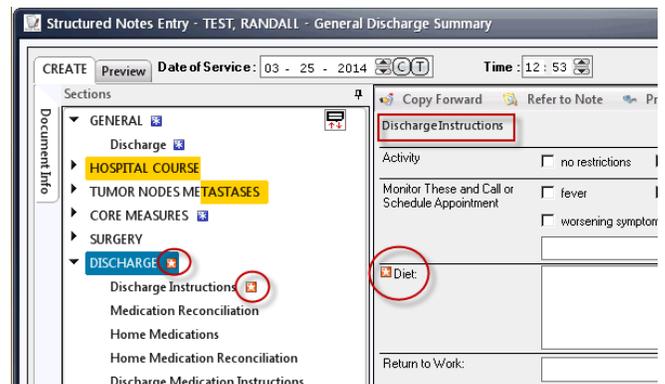
**Mandatory** observation



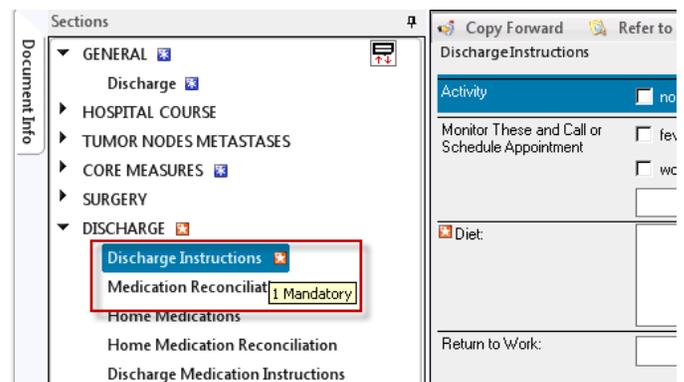
**Significant** observation

### Icon Display in Observation Sections

The respective icons are present at each section level to easily identify **significant** and **mandatory** sections.

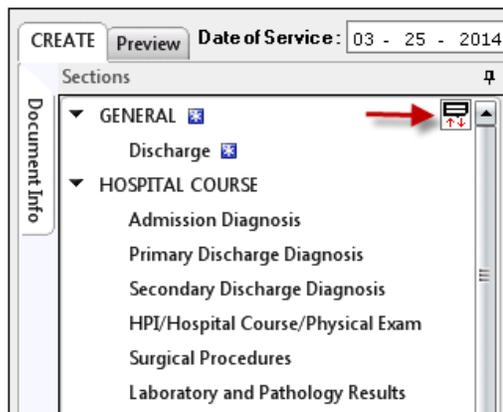


Hovering over the icon will provide a count of the number of **significant** or **mandatory** observations exist within the observation group.



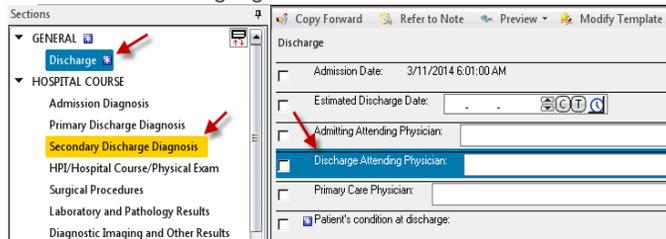
## Expand/Collapse Sections Icon

A new icon is available in the **Sections** panel of a clinical document enabling you to **Expand/Collapse** all sections at once.



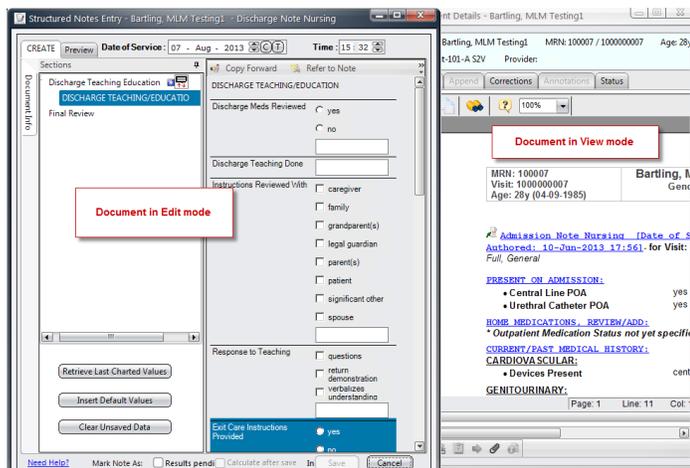
## Navigation Highlighting

- The selection of an item in the **Sections** panel will highlight blue.
- Mouse hovering over an item in the **Sections** panel will highlight yellow.
- When charting an observation in the **Note** section, the selection will highlight blue.



## Modeless Documents

Displayed documents in **edit** or **view** mode are modeless enabling you to minimize the document and view other components of the patient's chart without having to close the open document.



The minimized edit or view document mode window will display as an icon on the taskbar.

