

Add and View Visit Note Addenda

Last Modified on 11/05/2021 3:37 pm EDT



OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 20.14

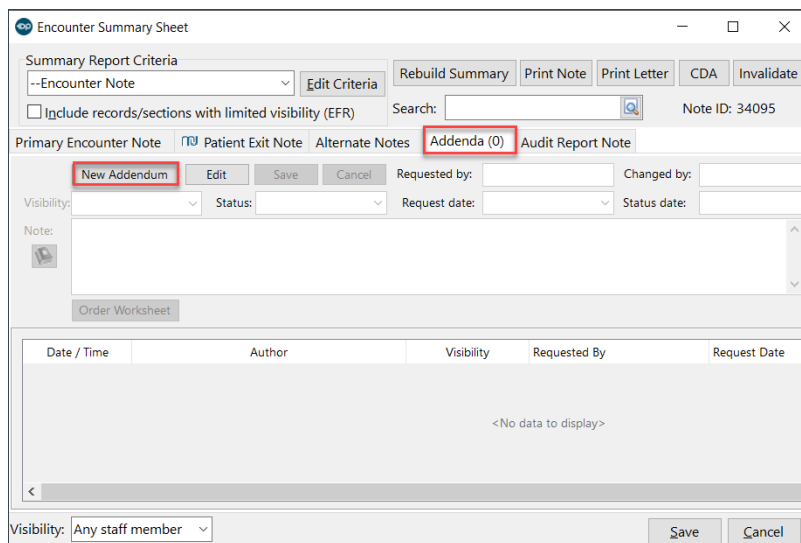
Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounters or Well Visits > Select and Open Note > Addenda tab

About

After a Note has been finalized, an addendum can be added and viewed under the **Addenda** tab of the finalized Note. Addenda are included in the Audit Report Note and are displayed respective of the Privacy Level set for the individual addendum.

Add an Addenda

1. Navigate to and open the finalized note.
2. Click the **Addenda** tab.
3. Click the **New Addendum** button.



Date / Time	Author	Visibility	Requested By	Request Date
<No data to display>				

4. Enter the Addenda information:

- a. **Visibility:** Default is Any Staff Member. To change, use the drop-down to select the appropriate Visibility level from the list. Addenda information is included in the Audit Report Note as long as the visibility level set here is not higher than Any Staff Member.
- b. **Status:** (*Optional*) Click the drop-down and select from the list.
- c. **Requested by:** (*Optional*) If a patient or parent wishes to add additional information to their Visit or challenge documentation in a Visit Note, you can enter this information in an addendum and distinguish it as a patient/parent annotation by entering 'Patient or Parent' in the **Requested by** field.
- d. **Note:** Type the reason for the Addenda.
- e. **Order Worksheet** button: (*Optional*) Click the button to add missing orders.

5. Click the **Save** button.

Note: The **Edit** button on the Addenda tab is used to edit the following fields of a saved Addenda: Status, Requested by, and Requested date. Once an Addenda is saved the Note and Visibility cannot be edited. If there was an error in the documentation, a new Addenda must be added.

View an Addendum

1. Navigate to and open the finalized note. Notes that include an Addendum have an Addenda count in parentheses.
2. Click the **Addenda** tab. All Addenda to that Note are displayed in the lower section of the window.

Note: The Addenda will print at the bottom of a Note when the **Print Note** button is selected. If printing a letter, follow the steps below.

1. Click the **Alternate Notes** tab.
2. Click **Rebuild Summary**.
3. Click **Print Letter**.

Version 20.13

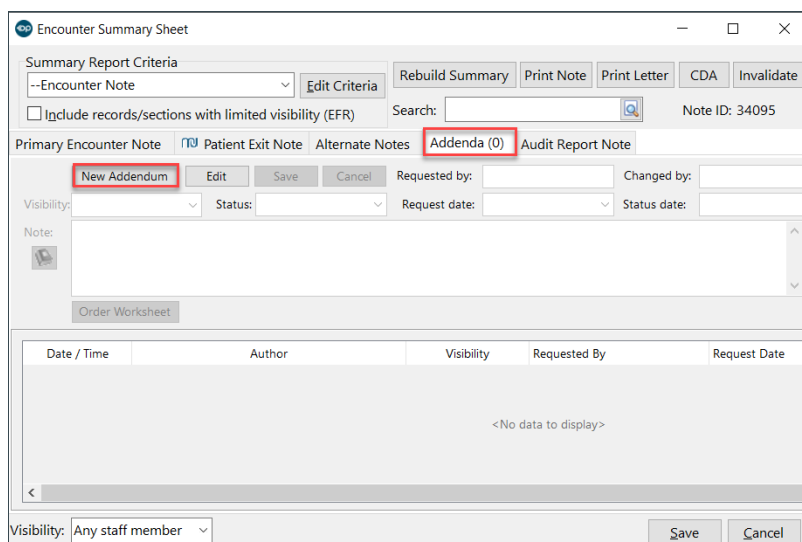
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Overview

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2. Click the **Addenda** tab.
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The screenshot shows the 'Encounter Summary Sheet' window. At the top, there are buttons for 'Rebuild Summary', 'Print Note', 'Print Letter', 'CDA', and 'Invalidate'. Below these are search and filter options. The 'Addenda (0)' tab is selected and highlighted with a red box. The 'New Addendum' button is also highlighted with a red box. Below the button are fields for 'Requested by', 'Request date', 'Status', and 'Visibility'. A table at the bottom shows columns for 'Date / Time', 'Author', 'Visibility', 'Requested By', and 'Request Date', with the message '<No data to display>' in the center.

4. Enter the Addenda information:
 - a. **Visibility:** Default is Any staff member. To change, use the drop-down to select the appropriate Visibility level from the list.
 - b. **Status:** (*Optional*) Click the drop-down and select from the list.

- c. **Requested by:** (*Optional*) If a patient or parent wishes to add additional information to their Visit or challenge documentation in a Visit Note, you can enter this information in an addendum and distinguish it as a patient/parent annotation by entering 'Patient or Parent' in the **Requested by** field.
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