

Apply Prior Encounter Notes and Messages to an Encounter Note

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Version 21.0

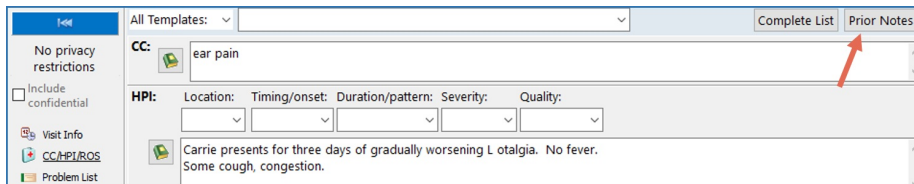
Overview

Just like you can [layer templates](#), you can layer previous data from a patient's chart into a note you're writing. This can potentially save you a lot of time when charting on complex patients. This article discusses how to quickly import pieces from previous encounter notes and/or messages into an encounter note.

Apply a Prior Encounter Note or Message to a Current Encounter

Select the Prior Encounter or Message to Import

1. From your current Encounter Note, in the **CC/HPI/ROS** tab, click the **Prior Notes** button.



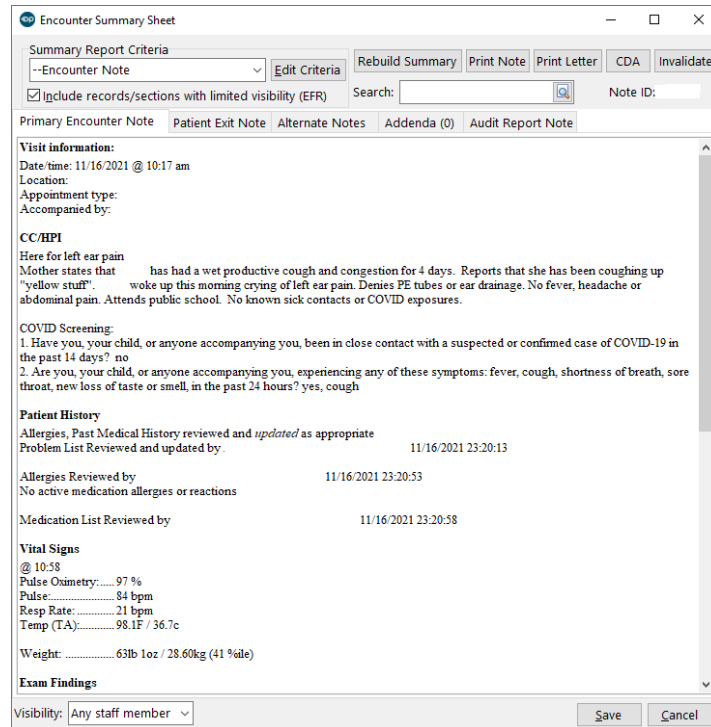
2. You will be presented with the patient's Prior Encounter Notes and Messages window. Some tips for this screen:
 - o Data shows in reverse chronological order.
 - o You can opt to see all prior data or the most recent data from a lookback period you specify by using the **radio buttons** in the upper left.
 - o You can identify the type of data shown based on the background color of the cells:
 - **Messages** (including portal messages) have a pale yellow background.
 - **Finalized Encounter Notes** have a white background.
 - **Currently open Encounter Notes**, if any (including the note you're working on today, if you have saved it at least once) are bright yellow.

The All or Latest radio buttons filter patient information for the desired timeframe you wish to view.

Prior Notes					
		Apply to Current Encounter		View / Edit Note & Addenda	
Date	Record Type	Provider	Description	Primary DX	
03/06/2023	Encounter	Suzanne			
11/08/2022	Message	Sirena M	on 10/26/22. Mom		
11/04/2022	Encounter	Robert J. Berman, MD	CCPR: Here for immunization. Assessment: Herd vaccination. DX 1: Z23 Encounter for immunization	Z23 Encounter for immunization	
10/26/2022	Encounter	Brooke K. Wright, CRNP	CCPR: Here for ST-16. Assessment: Visit URS. There's no otitis or signs of secondary infection and no wheezing/prolongation of expiratory phase. Rapid flu AB and COVID tests in office negative. Subject: cancel appt. Message: mom called stating child was feeling better & appt is no longer needed. Appt cancelled.	J06.9 URS	
02/09/2022	Message	Sharon B. McLatchy			
11/16/2021	Encounter	Katie L. Wattenbarger, CP	CCPR: left ear pain. Assessment: Left ACMI. DX 1: H66.92 Otitis media, unspecified, left ear. Subject: Cancel Appointment	H66.92 Otitis media, unspecified, left ear	
11/09/2021	Message	Shelia Smith	Message: Mom called to cancel TEST. COMPLEX. COVID Screening -- AKB recheck		

The Apply to Current Encounter and View/Edit Note & Agenda buttons allow you to apply content of a note to the current encounter, as well as edit the information contained.

3. You can review the contents of an Encounter or a Message before applying it.
 - o To review the contents of a particular encounter, highlight the encounter, then click **View / Edit Note & Addenda**. The Encounter Summary Sheet will appear:



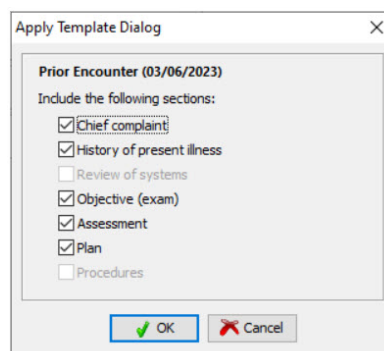
- o To review the contents of a phone message (before actually applying it), simply **hover your mouse** over the phone message. You can scroll down if needed:

02/09/2022	Message	Sharon B. McLatchy	Subject: cancel appt Message: mom called stating child was feeling better & appt is no longer needed. Appt canceled.
11/16/2021	-Encounter	Katie L. Wattenbarger, MD	CC/HPI: left ear pain Assessment: Left AOM DX: 1: H66.92 Otitis media, unspecified, left ear
11/09/2021	Message	Shelia Smith	Subject: Cancel Appointment Message: Mom called to cancel "EST. COMPLEX: COVID Screening -- AKB recheck HA" appointment. Stated child was all better.
11/02/2021	-Encounter	Lauren E. Fox-Bergvin, DO	media noted. Pressure from serous fluid can be painful. This could
09/20/2021	-Encounter	Not Available	Time of Call: 11/09/2021 10:43:47 AM Phone: 931.267.2724 From: Shelia Smith DX: 1: Z11.82 Encounter for screening for COVID-19

4. Once you have found the message or encounter you wish to apply, **highlight** the encounter or phone message.
5. Then click **Apply to Current Encounter**.

Importing a Prior Encounter Note - What Should I Import?

You now have the opportunity to select pieces of the note you want to import. Sections which are greyed out indicate that these sections were not part of the prior encounter note, and thus there is nothing to import. For example, this prior note had nothing in Review of Systems or Procedures, so those sections are greyed out.



1. Select the **checkboxes** for sections you want to import.
2. Click **OK**.
3. The selected original note components are **overlaid** across the existing note.

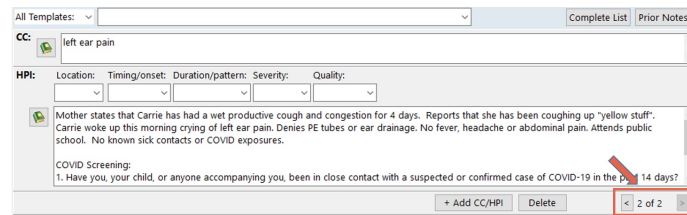


Note: Please read the next section carefully for more details on what each section imports.

Importing a Prior Encounter Note - How are prior note components overlaid?

CC and HPI

- The CC and HPI will be inserted as a subsequent CC/HPI set, similar to **adding an additional complaint**
- Your original CC/HPI for this note, if you inserted them, will be present as the first CC/HPI set.



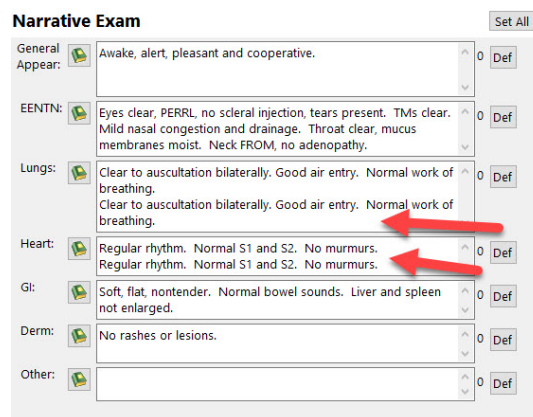
The screenshot shows a software interface for managing templates. At the top, there is a dropdown menu for 'All Templates' and buttons for 'Complete List' and 'Prior Notes'. Below this, there are sections for 'CC:' (Chief Complaint) and 'HPI:' (History of Present Illness). The 'HPI:' section contains a text area with a detailed medical history. At the bottom right of the HPI section, there is a red box highlighting the text '< 2 of 2', indicating the current position in a list of two items.

Review of Systems

- ROS questions are imported, along with color coding and Comments, **only for ROS questions which are not yet answered in the new note**. "Not yet answered" refers to questions in either a **Skip** and **N/A** state.
- **PMFS History Meds Reviewed:** Contents of the PMFS History / Meds reviewed box are imported as-is from the prior note (including the time/date stamp).

Objective Exam

- **Narrative:** Narrative exam notes will copy into each of the narrative exam components (e.g. General Appearance, EENTN, Lungs). They will appear **after** the narrative exam notes that already exist in each section, if any. This may cause duplication or potentially even contradiction. Be sure to double check the results of an imported exam.
- **Detailed:** Detailed exam notes, along with color coding and Comments, are imported **only for exam notes which are not yet present in the new note**. "Not yet present" refers to exam details in either a **Skip** and **N/A** state.



The screenshot shows the 'Narrative Exam' section of the software. It is titled 'Narrative Exam' and has a 'Set All' button in the top right corner. Below the title, there is a list of exam components, each with a description and a 'Def' button. The components are: General Appearance (Awake, alert, pleasant and cooperative.), EENTN (Eyes clear, PERRL, no scleral injection, tears present. TMs clear. Mild nasal congestion and drainage. Throat clear, mucus membranes moist. Neck FROM, no adenopathy.), Lungs (Clear to auscultation bilaterally. Good air entry. Normal work of breathing.), Heart (Regular rhythm. Normal S1 and S2. No murmurs.), GI (Soft, flat, nontender. Normal bowel sounds. Liver and spleen not enlarged.), Derm (No rashes or lesions.), and Other. Red arrows point to the 'Def' buttons for the 'Heart' and 'GI' sections.

Assessment

- This imports **all the Diagnoses from the prior note** as well as the Assessment tab contents from the prior note.
- Both the Diagnoses and the Assessment will appear **after** any Diagnoses and Assessment already in your new note (if any).

Plan

- This imports the **Plan from the prior note**
- The copied Plan appears **after** the Plan already in your new note (if any).

Procedures

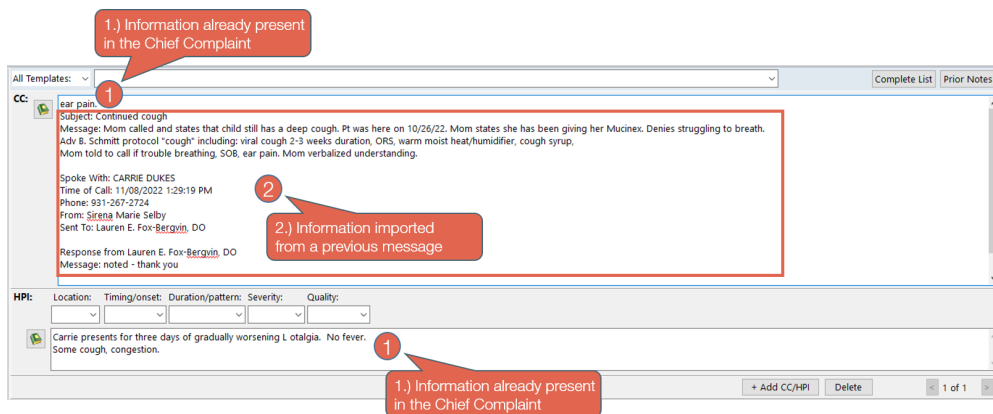
- This imports **any CPT codes** (e.g. 99213) attached to the prior note and attaches them to this note.
- It also imports **any previous diagnoses attached to the prior CPT codes** and adds them, under Assessment.
- Because coding should be individualized to the care you provided at each visit **apply a previous note's Procedures section cautiously!**

Importing a Prior Message

If you apply a previous message, the entire contents of the message (including the metadata) appear in the Chief Complaint of the note:



Note: Importing a Message, unlike importing a prior Encounter Note, **does not create a new/subsequent CC/HPI combination**. The prior Message appears, in its entirety, in the existing CC.



The screenshot shows a medical software interface with the following elements:

- CC:** ear pain. Subject: Continued cough. Message: Mom called and states that child still has a deep cough. Pt was here on 10/26/22. Mom states she has been giving her Mucinex. Denies struggling to breathe. Adv B. Schmitt protocol "cough" including: viral cough 2-3 weeks duration, ORS, warm moist heat/humidifier, cough syrup. Mom told to call if trouble breathing, SOB, ear pain. Mom verbalized understanding.
- Spoke With:** CARRIE DUKES
- Time of Call:** 11/08/2022 1:29:19 PM
- Phone:** 931-267-2724
- From:** Sirena Marie Selby
- Sent To:** Lauren E. Fox-Bergvin, DO
- Response from:** Lauren E. Fox-Bergvin, DO
- Message:** noted - thank you

Red callouts indicate:

- 1.) Information already present in the Chief Complaint (pointing to the CC header and the message content).
- 2.) Information imported from a previous message (pointing to the message content).

The HPI section contains:

Carrie presents for three days of gradually worsening L otalgia. No fever. Some cough, congestion.

Buttons at the bottom include: + Add CC/HPI, Delete, and a page indicator 1 of 1.