EHR System Updates Production Release January 2023 Table of Contents

Patient Messages Mailbox*	1
Automatic Document Publishing	15
Patient Phone Numbers to Barcodes*	18
Patient Statements Option to display Date of Birth	21
XDocs Macro Management	23
FlexNote Updates	25

*If a setting is not available, please contact your Coach to enable the setting. Note: New features may not be available on all servers until the feature rollout is complete.

Patient Messages Mailbox

This new feature allows the practice the ability to be more transparent with patient communications internally as well as provide better patient experiences when interacting with the clinician outside the clinic setting. Practices are able to set up more general mailboxes such as for their billing department, scheduling questions, and/or any communications that may not be provider specific. This gives the practice more flexibility on how patients can communicate with them through messages.



To view the Patient Messages Mailbox:

- 1. Click on Workbench
- 2. Then click on Patient Messages Mailbox



Alternatively, this can also be accessed via the message icon in the dashboard ticker.

Mailbox Usage



To start a patient conversation within a mailbox:

- 1. Select the Mailbox
- 2. Click on + New Conversation
- 3. Type in the **Patient's name** on the search box

Select To begin a	Patient a new conversation please select a patient	×
Patient	t	
	Patient Test (Legal Name) - he/him/his	
8	Pat Rally (Chosen Name) - he/him/hisAmount Amount Am	

- 4. Select the Patient from the list
 - a. The search box will display relevant accounts that show the **Patient's Full name, Preferred pronoun, Date of Birth, and Account number** to ensure that the correct Patient is selected.

Welcome, SANDBOX DEMO Tue 07/2	20/21 10:48 PM Antarctica	a/Casey (Logout)					\$* ** ** ** ??
Schedule Billing and EHR Document and Bill V Home Mailbox 🗵	Vorkbench + Search +	Reports + Config + Files + Versions + Help +	 What's New? 				Tabs + 🗙 🧵
Mailbox 🛱 Design P	ractice 👻						
SELECT MAILBOX	Active 👻	CONVERSATIONS	Active 👻	Patient Test &? > Open Chart	 VRC75439 29 y/o, Male 	➡ Jan 01, 1993 ≌ sankeeta@espoc.com	 123456786 / 74839703 Street 12, Details 3
•		Patient Test No messages	7/24/22	CONVERSATION BETWEEN Patier	nt Test ←		
					Enter your mess	age below	
+ New Mailbox		+ New Conv	ersation	Start typing			@ >

Once selected, the user can send a message to the patient by typing in the **empty textbox** at the bottom of the page. Messages can either be via text format, or users can also send attachments when needed.

SET W	elcome, SANDBOX DEMO Tue 07/2	0/21 10:4	8 PM Antarcti	ca/Casey (Logout)							S+ ++ ++ P
Schedule Bil	ing and EHR Document and Bill W	/orkbench	Search	Reports - Config - F	Files - Versions - Help -	 What's New? 					Tabs - 🗙 🛛 ?
Mailt	DOX H ⁶ Dev Practice	e 234	. •								0
SELECT	MAILBOX	Ac	tive 👻	CONVERSAT	TIONS	Act	ve 👻	Mary Clare &? 7 Open Chart	 VRC75439 9 y/o, Female 	📩 Jan 01, 2019 ≌ sankeeta@espoc.com	📞 123456786 / 74839703 🏫 Street 12, Details 3
	P Alex Janes			Ph As	n illip Glare siuto34567GHJ	7/24/22	:	CONVERSATION BETWEEN Mary	Clare ← Bob Brown		
	Alex Jones	:	>		ary Clare	07/24/2022	:				
0	😤 Bob Brown	:	>	Ba Bio	ae Nilson bood test tesults	7/24/22	:		Supday, July	24 2022	
	📲 Dr Green	:	>		ona Lambert st message	07/24/2022	:		Sunday, Sury 2	-4, 2022	Helle Merry
	🕰 Dr Joe	:	>	Е ма	arie Clare	07/24/2022	:				Bob Brown 11:31 AM
	📽 Dr John	:	>		arie Clars	7/24/22	:				Here is your test results.
	📽 Dr Sandy	:	>	Pa Got	atient Test	7/24/22	:				Kor Cha 11:31 AM
	📲 Dr Test	:	>	Na Hel	ally Tally	7/24/22	:	Hello, Dr John 11:35 AM			
								Document.docx 👱			
								See you all then!			e >
	+ New Mailbox				+ New Conv	ersation					

When several mailboxes are set up, a **blue shading** will indicate the currently selected conversation.



By default, **all mailboxes will be visible** to the users. If they select a mailbox that they have not subscribed to, the user will be prompted to subscribe to the mailbox to see and interact with the conversation.

Mailbox Practice 234 -						
SELECT MAILBOX	Act	ive 👻				
Alex Jones	*	>				
Arhmand Traller		>				
🕑 🕾 Bob Brown	:	>				
🔲 📲 Dr Green		>				
🔲 📲 Dr Joe		>				
📮 📲 Dr John		>				
🔲 📲 Dr Sandy		>				
Dr Test		>				
+ New Mailbox						

The mailbox view can be filtered by using the **Show Subscribed Only** toggle at the top left corner of the screen.

SELECT MAILBOX	Active 👻		
A Show Subscribed Only			

This allows for less mailbox clutter and provides the option to view unsubscribed mailboxes only when necessary.

Note: In the Patient's Chart summary, users will be able to view and send patient messages even if they are not subscribed to the mailbox.

Active and Deactivated Mailboxes

Users can change their mailbox to show **Active** or **Deactivated** Mailboxes by clicking on the drop-down menu and selecting their preferred view.

Home Mailbox 🗵			
Mailbox	Dev Practice	234 ¬	•
SELECT MAILB	OX	Act	ive 🔺
Show Subscr	Active		
📮 👒 Ale	E Deactivated		
📮 📲 Arh	mand Traller	:	>
🙂 🗠 Bo	b Brown	:	>
🔲 🛥 Dr (Green	8 0 0	>
📮 🗠 Dr .	Joe	0 0 0	>
📮 🗠 Dr .	John	*	>
🔲 📲 Dr S	Sandy	0 0 0	>
📮 🗠 Dr 1	Test	0 0 0	>
📮 ×≌i Cal	vin	•	>
📮 😤 Dr 、	Jack	8 8 9	>
🔲 × 🖧 Ma	rtin Berry	8 8 9	>
	+ New Mailbox		

1. Only Mailbox Admins can Deactivate a mailbox by clicking on the **Deactivate** option from the three-dot menu.



When a mailbox is deactivated:

- It becomes unavailable for all subscribers
- Patients will no longer be able to message the mailbox.
- 2. Deactivated mailboxes will appear as grayed out. Only Mailbox Admins can Activate a deactivated mailbox by clicking on the **Activate** option from the three-dot menu.

SELECT MAILBOX	Deactivated 👻	
🗵 📽 Dr Lily	: >	
🗷 🙁 Dr Mary	• >	
🗵 😪 Dr Red	C Activate	



All subscribers have the option to **Archive** a conversation.

Archived conversations can be reactivated by:

- ➤ Sending a message to a patient.
- Receiving a message from a patient.
- Reactivating it from the archived conversations list.



If the user has access to multiple practices, they can easily switch mailbox views by clicking on the current practice. A dropdown will display all the available practices to easily switch between practice mailboxes.

Mailbox Admin Setup

Only Mailbox Admins will be able to set up the mailbox for their practice, the setup process will not be available to the rest of the users.

Practice Owners or Administrators are able to give account permissions to users.

Welcome, Dr. DEV PHYSICIAN 1 - Smith Fri 01/27/23 03:49 PM ES	T (Logout)	\$ + 115 + 521 + · · · · · Ø?
Schedule Document and Bill Billing - Workbench - Search - Reports	Config - Files - Versions - Apps Help - What's New?	Tabs 🗸 🛛 🕐
Home Access Control 🗷	My Profile/Change Password	
Access Control List 2	3rd Party Services	Reload 🕂 New 💽 🖶
Access Control Type Person	2 System 3 User Management Task Checklists	Control anted By

To do so:

- 1. Click on Config
- 2. Hover over System
- 3. Hover over User Management
- 4. Click on Access Control

A list of all users for the practice will then be displayed.

Welcome, Dr. DEV PHYSICIAN 1 - Smith	Thu 01/26/23 09:46 AM EST (Logout)			[] S • 114 • 521 • • • • •
Schedule Document and Bill Billing - Workbench - Home Access Control #	Search + Reports + Config + Files + Versions + A	pps Help - What's New?		Tabs 🗸 🕺 🔋
Access Control List @				C Reload + New 🚯 👼
Access Control Type	Person	Provider Id	Date Granted	Granted By
XDOC_DELETE	devtrainingtesting	123456789DEV	12/28/22	jpancoast
XDOC_DELETE	raymundo	123456789DEV	10/27/22	devphysician1
XDOC_DELETE	devuserjmadia	123456789DEV	10/27/22	devphysician1

Select the user that you wish to grant access as Mailbox Admin.

Person sandboxdemo VERICLE/EHR - (SANDBOX) SANDBOX Access Control Types * Description

Scroll down to find **MAILBOX_ADMIN_PERMISSION** and select it.

PHI_EXPORT_SUMMARY_CONFIG_TIMEFRAME
PHI_EXPORT_SUMMARY_CREATE
MAILBOX_ADMIN_PERMISSION
TICKET_CATEGORY
POS_CFG_EDIT
OWNER

Click on **Save** and it should give the selected user access as a mailbox admin in order to set up and manage mailboxes.

Click on the dropdown below the username.

Mailbox Admin Management

Mailbox Admins can configure mailbox subscriptions for all users within the practice from the Logins configuration page.



To do so:

- 1. Click on **Config**
- 2. Hover over Practice
- 3. Click on Logins

Schedule Document and	Bill Workber	nch - Search -	Reports -	Config • Files • Versions • Apps Help • What's New?	Tabs 🕶	×	L
Home Logins 🗷							
Login Manager Reload L	ogins New L	ogin Reset	Office IP Add	esses Set Office Code Hide Inactive Logins ?			
Logins				drann - Active			
Print Cov Showing 0 of	0 -			Name DOC TORDAN			
Finit Csv Showing 9 of	9 •						
Login	Name	Role	Updat	Email kenneth@clinicmind.com			
				Phone			
drann	DOC TO	PHYSICIAN	01/26/23	Can Del Alerts 🗹			
Inaydn	JUSEPH	PHYSICIAN	10/12/23	Office Code 223445789			
daedalus test		PHYSICIAN	10/03/22	Role PHYSICIAN			
drmak	ASHLEY	PHYSICIAN	08/25/22	Physician ID DT12321 - DOC TORRAN			
cschumann	CLARA S	PHYSICIAN	08/15/22	Kiosk Banner			
rbuckley	ROBIN B	PHYSICIAN	08/10/22				
mbusby	MATT BU	OFFICE_M	08/02/22	Mailbox Access Configure			
mwheeler	MIKE WH	. EMPLOYE	07/07/22	User Settings IP Addresses Providers Access			
				Print Csv Showing 120 of 120 - Ø			
				Type A Value Default Description			
				feature_toggle.fix_xdoc_pdf3 T T			
				integration.bcws.clerk_key			
				integration.cash_practice.clerk_key			
				integration.medappz.person_key			
				integration.merchant_service.clerk_key			
				login.two_factor_auth_key_verified F F			
				login.two_factor_auth_shared_key			
				Iogin.two_factor_email_auth_enabled F F options: T and F. If it is T and	id normal 2f		
				messages.provider_app.pusn_notification_enabled F F Allow push notifications on	Provider m		
				nonicol, patient, referral, can crose_licket r r Setting to (1) rue allows this oauth expiration, time, seconds 1800 1900 Amount of time in accorde	before an O		
				oduri.expiration_time_seconds 1000 1800 Amount of time in seconds	beiore an O		_

From the Logins page, simply click on the user from the list on the left hand side of the screen, and click on **Configure** beside Mailbox Access.



A list of all practices the user has access to will be shown.

From here Mailbox Admins can subscribe the user to all mailboxes for the desired practice by clicking on the **practice toggle**.

 Dev Practice Dr John's Mailbox Dr Green's Mailbox Dr Green's Mailbox Dr Manson's Mailbox Dr Judy's Mailbox Dr Judy's Mailbox Dr Tompson's Mailbo	Mailbox	Access		×
Dr John's MailboxImage: Comparised of the	^ 曲□	Dev Practice	6 Select	ted
Dr Green's Mailbox<Dr Manson's Mailbox<Dr Judy's Mailbox<Dr Tompson's Mailbox<Dr Tompson's MailboxDr Red's MailboxDr Tale's Mailbox<Dr Tale's Mailbox<Dr Brown's Mailbox		Dr John's Mailbox		
Dr Manson's MailboxDr Judy's MailboxDr Tompson's MailboxDr Red's MailboxDr Tale's MailboxDr Tale's MailboxDr Brown's Mailbox		Dr Green's Mailbox		
Image: Dr Judy's MailboxImage: Image: Im		Dr Manson's Mailbox		
Dr Tompson's MailboxImage: Compare the second s		Dr Judy's Mailbox		
Dr Red's Mailbox Image: Comparison of the second of th		Dr Tompson's Mailbox		
Dr Tale's Mailbox Dr Brown's Mailbox		Dr Red's Mailbox		
Dr Brown's Mailbox		Dr Tale's Mailbox		
		Dr Brown's Mailbox		
Dr Stone's Mailbox		Dr Stone's Mailbox		
Cancel Save			Cancel	Save

Clicking on a specific practice brings down a list of all mailboxes within the selected practice.

From here, Mailbox Admins can manually toggle specific mailboxes that the current user can be subscribed to when the toggle for the mailbox is turned on.

This configuration allows for Mailbox Admins to easily set up user subscriptions to multiple mailboxes at once for new and existing users in the practice.

Creating Mailboxes

Initially, there are no default mailboxes set up. The Mailbox Admin will be responsible for initially setting up new mailboxes for the practice to use.

Viricome, SAKDBOX DEMO Tue 5/20/21 46:46 PM AntarcticaeCasey (Logout)	Se ee ee ee D
Scheduler_Stilling and ERR Decument and Bill Wold-bench - Search - Reports - Config - Files - Versions - Help - What's New?	Tabs + 🗙 📍
Atomic 2 Mathew 19	
Mailbox A Design Practice -	0
No mallboxes have been created for this practice. Please create a mallbox.	
+ New Mailbox	

To create a new mailbox, click on the **+ New Mailbox** icon.

Create New Mailbox		×
Mailbox Name Dr Smith		
	Cancel Cr	eate

Enter the desired name for the mailbox, this can either be for specific clinicians or workflow specific names that the practice uses.



Once the mailbox has been created, there are several options available in the menu:

- 1. **Subscribe/Unsubscribe** allows the user to subscribe or unsubscribe to the selected mailbox.
- 2. **Manage Subscribers** allows Mailbox Admins to manage the subscribers of the selected mailbox.

Manage Subscribers Mailbox: Bob Brown		×
Q Search a User		
Bob Brown		
User Test		
Alex Jones		
Assistant		
John Doe		
3 Users Selected Show Selected Only	Cancel	Save

- 3. **Rename** allows Mailbox Admins to rename the selected mailbox.
- 4. **Deactivate** allows Mailbox Admins to deactivate the selected mailbox.
- Delete allows Mailbox Admins to delete the selected mailbox.
 Note: Mailboxes can only be deleted if there are no active or archived conversations.

Mailbox Access	×
A 🛱 Dev Practice	6 Selected
Dr John's Mailbox	
Dr Green's Mailbox	
Dr Manson's Mailbox	
Dr Judy's Mailbox	
Dr Tompson's Mailbox	
Dr Red's Mailbox	
Dr Tale's Mailbox	
Dr Brown's Mailbox	
Dr Stone's Mailbox	
	Cancel Save

Clicking on the dropdown allows you to toggle access of users to the selected mailbox.

Note: At least one clinician must be configured to have mailboxes to count as patient messaging for Meaningful Use purposes.

Welcome, Dr. D	DEV PHYSICIAN 1	l - Smith Mon 01/30/2	23 08:54 AM E	ST (I	(Logout)						\$	• 115 ◆ 521 •	• • •	• •		8?
Schedule Document and B	ill Billing - Wo	orkbench - Search -	Reports 1	Conf	fig 🔹 Files 🔹 Versions 🗸	- Ap	ps	Help - What's Ne	ew?					Tabs 🕶	x	?
Home Schedule 🗷					My Profile/Change Passwo	ord										
- Acct # / Barcode -	Patient Month	Week Day (Office) Main Office		3rd Party Services	Þ	y 🔊	Today's Practitic	oner 🕶	Log	▼ 0-1-0-0	1-1	?			
- Last/Nick Name -	ALEX JONES (D	P)			Payer	•	HE	ALTH (DP)	_	[DR. JOHN (DP)					
- First/Nick Name -	7:00a			2	Practice			Attachments			7:00a					
- Date of Birth -	7:15a			1	System	₽		Billing	•		7:15a					1
- Phone 1 -	7:30a							Contacts	•		7:30a					
- Phone 2 -	7:45a							Careplans			7:45a					
- Email -	8:00a							Decumentation			8:00a					
- Assigned Phys -	8:15a							Documentation			8:15a					
Clear Create More	8:30a							EHR Connections			8:30a					
	8:45a							Front Desk			8:45a					
😫 Popup On 🕟	9:00a							Logins			9:00a	Out of Of	fice			
Date 🔻 Patient	9:15a							Patient Portal			9:15a					
	9:30a							PHI			9:30a					
	9:45a							Fru -			9:45a					
	10:00a						11	Reports			10:00a					
	10:15a						1 (3	Settings			10:15a					
	10:30a						10:3	30a			10:30a					
	10.455						10.4	155			10.455					

To enable this feature:

- 1. Go to **Config**
- 2. Hover over **Practice**
- 3. Then click Settings

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:56 AM EST (Logout)				\$ ◆ 115	• 5 21 • • •	• • •	8?
Schedule Document and Bill Billing • Workbench • Search • Reports • Config • Files •	Versions - Apps	Help - What	at's New?			Tabs 🕶	8 ?
Home Settings 🗷							
PROV PRACTITIONER SVCFAC PINMAP LOG CP CPTS SETTINGS INVOICE	POS PATCALI	. NDC (Contract Proc	РүмтТүре	Consents	Signatu	JRE TYPE
0							?
Basic Advanced User Defaults							
Print Csv Showing 223 of 223 • 🔹 Save							
Туре 🔺	Value	Default	Description				
billing_sheet.auto_populate_service_facility	F	F	If T, when creating a p	atient on the Bill	ling Sheet, the	e service fa	cility 🔺
billing_sheet.enable_hover_message	F	F	If T, a popup of the ful	I date for the row	v your mouse	cursor is ho	overi
billing_sheet.require_dob_new_or_activate_patient	F	F	if set to T, requires Da	te of Birth when	creating/activ	ating a pati	ient i
care_to_me.provider_availability.enable	Т	F	If set to T, enable prov	vider availability f	feature in Car	e To Me po	rtal

From within the settings page:

- 1. Click Settings
- 2. Click Advanced

Inside the advanced settings:

- 1. Type *patient_portal.use_mailbox_messaging* on the respective field and hit enter
- 2. Set the value to **T**
- 3. Type *ui.pat_messages_mailbox.enable* on the respective field and hit enter
- 4. Set the value to **T**
- 5. Click on Save

Note*: This is a Coach enabled setting.

Automatic Document Publishing

This new feature allows the practice to set up documents that can be automatically published based on the appointment.

BETP Welcome,	Dr. DEV PHY	SICIAN 1	- Smith The	u 01/26/23 09:18 AM ES	T (L	ogout)					\$• 114 •	521 • •	• ••	87
Schedule Document a	nd Bill Billin	g 🗸 Wa	orkbench 🗸	Search - Reports	Config	g ∓ Files ∓ Vei	rsions 🗸 🖌	pps	Help - What's Nev	v?			Tabs 🗸	X ?
Home Schedule Co	nfig 🗷			5	1	My Profile/Change 3rd Party Services	Password							
1 Test	Set Default	Delete	Set InActive	APPT TYPES TYPE PAYE		Payer								
2nd Exam		Delete	Set Active		2	Practice			Attachments					
5 min appointment Acupuncture		Delete	e Set Active Set Active		:	System			Billing					
Adjust		Delete	Set Active						Contacts					
Adjustment & Exam	Set Default	Delete	Set InActive						Careplans					
Adjustments	Set Default	Delete	Set InActive						Documentation					
Armand Appt		Delete	Set Active						EHR Connections					
Cash patient	Set Default	Delete	Set InActive					3	Front Desk		Kiosk Customizations			
Checklist Test		Delete	Set Active						Logins		Point of Sale			
Closed-Do Not Book	Set Default	Delete	Set In Active						Patient Portal		Schedule Config			
Decompression	Set Default	Delete	Set InActive						PHI					
Default		Delete	Set Active						Reports					
Discharge Follow Up	Set Default	Delete Delete	Set Active Set InActive						Settings					

To configure Automatic Document Publishing:

- 1. Click on **Config**
- 2. Hover over **Practice**
- 3. Hover over **Front Desk**
- 4. Click on Schedule Config

Inside the Schedule Config, click on the Appt Types tab.

Schedule Docur	ment and Bill	Workb	ench 👻 Sear	rch ▼ Reports ▼ Config ▼ Files ▼ V	ersions - Apps Help -	Wha
Home Schedu	ıle Config 🖲	Docu	ument Library	×		
GENERAL CHECKIN	NOTIFICATION	IS SELE	CTION NOTIFICA	TIONS APPT TYPES TYPE PAYER MAP PRO	VIDER TODO TYPES OFFICE	
Family Therapy	Set Default	Delete	Set InActive	Туре:	Initial Visit]?
Follow Up	Set Default	Delete	Set InActive	Description:	Initial Visit	í
Individual Therapy	Set Default	Delete	Set InActive	Symbol	Int Vet	í
Initial Visit	Set Default	Delete	Set InActive	Symbol.		J
MASSAGE (default)		Delete	Set InActive	Def Appt Len:	60 🗸	_
Massage	Set Default	Delete	Set InActive	Color: 🌮	#F787FF	
reexam	Set Default	Delete	Set InActive	Open No Show Task?		
No Default				Available in Patient Portal		
				Allow to Request for Reschedule in Patient Portal		
Publsih/Import				Documents to Auto-Publish	3 documents Configure	
				Save Reset		

Once a new appointment type is created, or an existing appointment type is selected, click on **Configure**.

Workbench • Data Entry • Search • Reports •	Config • Files • Ver	sions - Apps Help - What's New?					Tabs 🗸 🗙	?
Home Schedule Config (*) Settings (*)								
GENERAL CHECKIN NOTIFICATIONS SELECTION NOTIFICA	TIONS APPT TYPES TYPE	PAYER MAP PROVIDER TODO TYPES OFFICE						
Adjustment Set Default Delete Set InActive In potent Visit Set Default Delete Set InActive Massage Therapy Set Default Delete Set InActive New Patient (Initial) Set Default Delete Set InActive Our Patient Visit Set Default Delete Set InActive Set Default Delete Set InActive Set Default Delete Set InActive	Type: Description: Symbol: Def Appt Len:	New Patient (initial) New Patient (initial) New Patient (initial) New Patient (initial)				×		
Soap Note Set Default Delete Set InActive Test Set Default Delete Set InActive Walk in methods Set Default Delete Set InActive	Open No Show Task? Available in Patient Portal Allow to Request for Resct	Appointment Type: New Patient (Initial)						
Publish/Import	Portal Documents to Auto-Publish Save Reset	Document	Portal Action		When to Create Document	Ĺ		
		(ABN) Advance Beneficiary Notice of Noncoverage - English	Portal - To Fill & Sign	•	Upon Scheduling			
		***Alpha - FlexNote	Portal - To Read	•	Upon Scheduling			
		T***Beta - Clinical Consents	Portal - To Read	*	Upon Scheduling			
		***Beta - MHD WHODAS Assessment	Portal - To Read	•	Upon Scheduling			
		Adult ADHD Assessment	Portal - To Read	•	Upon Scheduling			
		Claim #1.pdf	Portal - To Sign	•	Upon Scheduling 👻			
		No Documents Selected Show Selected Only			Cancel Save			

From the Auto-Publish settings popup allows the user to set when the document will be published.

Auto-Publish settings				>
Appointment Type: New Patient (Initial)				
Document	Portal Action		When to Create Document	
(ABN) Advance Beneficiary Notice of Noncoverage - English		*	Upon Scheduling	
🔲 ***Alpha - FlexNote	Portal - To Read	•	48 Hrs Prior to Appointment	
***Beta - Clinical Consents	Portal - To Fill & Sign	•	Upon Scheduling -	
+***Beta - MHD WHODAS Assessment	Portal - To Read	•	Upon Scheduling 👻	
Adult ADHD Assessment	Portal - To Read	•	Upon Scheduling 👻	
Claim #1.pdf	Portal - To Sign	*	Upon Scheduling *	
No Documents Selected Show Selected Only			Cancel Save	

The auto-publish option is based on a preconfigured automated schedule which include:

- Upon Scheduling the selected document will automatically be published to the patient portal upon scheduling.
- 48 Hrs Prior to Appointment the selected document will automatically be published at 5pm two(2) days prior to the scheduled appointment.

Note: Available documents for auto-publish will be based on the current document library.

lome Document Library 🗵 Document and E	341 💌		
Document Libra		SANDBOX) SANDBOX	
Name	Category	Portal Action (Default)	
(ABN) Advance Beneficiary Notice of Noncoverage - English	Clinical Documents		~
***Alpha - FlexNote	Clinical Documents	Portal - To Read	•
***Beta - Clinical Consents	Clinical Documents	Portal - To Fill & Sign	~
***Beta - MHD WHODAS Assessment	Clinical Documents	Portal - To Read	•
Adult ADHD Assessment	Clinical Documents	Portal - To Read	~
Claim #1.pdf	Clinical Documents	Portal - To Sign	•
FlexNote	Clinical Documents	Portal - To Read	•
Functional Rating Index (FRI)	Clinical Documents	Portal - To Read	•
Male Sexual Health Questionnaire	Clinical Documents	Portal - To Read	•
Metabolic Assessment		Divid Tribini	
Add a Document to Library: Select X	Doc Upload Document		

Welcome, Dr. I	DEV PHYSICIAN 1	- Smith Mon 01/3	0/23 08:54 AM E	ST (L	Logout)						\$•	115 • 521 •	• • •	•	0	?
Schedule Document and E	iill Billing - Wo	orkbench - Search	- Reports	Confi	fig - Files - Versions	• Ap	ps	Help - What's N	ew?				Та	abs 🕶	×	?
Home Schedule 🛎					My Profile/Change Passw	ord										
- Acct # / Barcode -	Patient Month	Week Day (Off	ice) Main Office	:	3rd Party Services	₽	y »	Today's Practitio	oner 🗸	Lo	g ▼ 0-1-0-0	1-1 ?				
- Last/Nick Name -	ALEX JONES (D	P)			Payer	×.	HEA	ITH (DP)	_		DR. JOHN (DP)					
- First/Nick Name -	7:00a			2	Practice	•		Attachments			7:00a					-
- Date of Birth -	7:15a			:	System	Þ		Billing			7:15a					
- Phone 1 -	7:30a						1	Contacts	•		7:30a					
- Phone 2 -	7:45a							Careplans			7:45a					
- Email -	8:00a							Decumentation			8:00a					
- Assigned Phys -	8:15a							Documentation			8:15a					
Clear Create More	8:30a							EHR Connections			8:30a					
	8:45a							Front Desk			8:45a					
😫 Popup On 🕨 🕨	9:00a							Logins			9:00a	Out of Office				
Date 🔻 Patient	9:15a							Patient Portal			9:15a					
· · · · ·	9:30a							DHI			9:30a					
	9:45a							-			9:45a				_	
	10:00a							Reports	•		10:00a					
	10:15a						13	Settings			10:15a					
	10.30a						10.3	0a			10.30a					

To enable this feature:

- 1. Go to **Config**
- 2. Hover over **Practice**
- 3. Then click **Settings**

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:56 AM EST (Logout) \$• 115 • 521 • • •	••										
Schedule Document and Bill Billing Vorkbench Search Reports Config Files Versions Apps Help What's New?	Tabs 🗸 🛛 🕐										
Home Settings ®											
PROV PRACTITIONER SVCFAC PINMAP LOG CP CPTS SETTINGS INVOICE POS PATCALL NDC CONTRACT PROC PYMTTYPE CONSENTS	SIGNATURE TYPE										
0	?										
Basic Advanced User Defaults											
Print Csv Showing 223 of 223 • 😰 Save	Print Csv Showing 223 of 223 • 😰 Save										
Type - Value Default Description											
billing_sheet.auto_populate_service_facility F F If T, when creating a patient on the Billing Sheet, the service facility											
billing_sheet.enable_hover_message F F If T, a popup of the full date for the row your mouse c	irsor is hoveri										

From within the settings page 1. Click **Settings**

- 2. Click Advanced

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:59 AM EST (Logout)	\$• 115 • 521 • • • • • • • •								
Schedule Document and Bill Billing • Workbench • Search • Reports • Config • Files • Versions • Apps Help • What's New?	Tabs 🗸 🛛 🍞								
Home Settings (#)									
Prov Practitioner SvcFac PinMap Log CP CPTS Settings Invoice POS PatCall NDC Contract	PROC PYMTTYPE CONSENTS SIGNATURE TYPE								
	?								
Basic Advanced User Defaults									
Print Csv Showing 1 of 223 + 😰 Save 3									
Type A Value Default Descript	lion								
ui.appt.auto_publish_document.enable									
	ocument auto publish conliguration in Schedule Conlig -> A								

Inside the advanced settings:

- 1. Type *ui.appt.auto_publish_document.enable* on the respective field and hit enter
- 2. Set the value to T
- 3. Click on **Save**

Patient Phone Numbers to Barcodes

This new feature allows the practice to automatically add the patient's phone number as a barcode. This feature helps patients to easily remember their barcode when using check-in kiosks.

Welcome, Dr. I	EV PHYSICIAN 1 - Smith Wed 01/25/23 10:12 AM ES	T (Logout)			S16,204 ◆ 7,792 113 ◆ 521 ◆ 983 7,792 ◆ 7,792 ◆ 6,559 10	J0% • 100% • 84%	87
Schedule Document and E	ill Billing - Workbench - Search - Reports -	Config • Files • Versions •	Apps Help - What's New?			Tabs 🗸	8 ?
Home Schedule 🗷							
Account is missing critical information. Click to fix.	Patient Month Week Day (Office) Main Office	Wed 01/25/2023	Today 💓 Today's Practitione	• Log • 0-0-0-0 0-0 ?			
VRC9406229	INFO CLAIMS TRANS CASH FIN NOTES SCHED	VERIFY DOC CP FILES RE	FERRAL CLM MERGE TASK FIE	DS Statement JAYSON TEST Acct#: VRC9406229			
Test	PATIENT INFO PRIMARY SECONDARY TERTIARY GUAR	ANTOR EMERGENCY Batch					^
Jayson	Save Print Edit Payer History	Close Window	Delete				?
07/30/1997	Account Number *	Birth Date	Pronoun	Sex 🗙 Sex at Birth Patient SSN	Medical Record #		
123456789	VRC9406229	07/30/1997			MR - 123 Deceased?		
- Phone 2 -	Last Name 🗙 First Name 🛠	Middle Name			PRM Monitoring?		
jestacio@espoc.com	TEST			9	Max & Bill Pt (no default) Eachille new alloc process?		
- Assigned Phys -	Marital Status * Employment Status * U - Unknown • 9 - Unknown •		One of the second states and				
Clear Create More	Address (No, Street)*		Scan a barcode to ad	d it to this patient	Max % Bill Pt (no default) Enable Copay Monitor?		
* 0 or fewer fut appt	ADDRESS			Add	Appt Reminder Call?		
 Needs appt 	City + State +	Zin Code 🕊			Contact Preference?		
	CITY OF SAN JOSE DEL MONTE PH	3023	Barcode ¢	Date Updated	PHONE1 V		
	Advanced T		0 123456789	01/25/2023	Use Default - Don't Sent V		
😤 Popun On 🕞	Previous Address				Manage Barcodes		
	Referred By	Patient Followup Note					
Tue lan 2	Dr. Notes						
Tue Jan 2 J Agar	NOTES						
Tue Jan 2 J.Agar	Insurance Info						
Tue Jan 2 J.Agar							
Tue Jan 2 L.Agar							
Tue Jan 2 L.Agar	Provider Tax ID: 123456789DEVService Facility						
Tue Jan 2 L.Agar	DEVELOPER PRACTICE						
Tue Jan 2 L.Agar	Accident Date Current Illness Date	Deflt Diag1 Diag2					
Tue Jan 2 P.Agar	ll			Close			
Tue Jan 2 P.Agar	Hospitalization From To	Condition Emp. Auto Related to:			•		
Tue Jan 2 P.Agar	Date of similar illness Last X-Ray Date Last Seen Date Is F	ip? Discharged? Date discharged	Discharge reason				
Tue Jan 2 P.Agar	12/14/2022						
Tue Jan 2 P.Agar	Last Statement On	Statement # [Davs	Next Statement Has COB issue?			
Tue Jan 2 P.Agar				01/25/2023			
Mon Jan 2 P.Velu	Collection letter Sent On	Template	Days	Interval Days Grace Period	Min Pat. Pmt (Default \$30)		
Mon Jan 2 P.Velu			Aet Max Benefit?				
Mon Jan 2 P.Velu	Reset Max Ben on Date	Max Ben Last Reset on					
			_				

Enabling this new feature automatically adds the **Phone 1** from the patient's demographics into their barcode.

Welcome, Dr. DEV PHYSICIAN 1 - Smith Fri 01/27/23 0	3:26 PM EST (Logout)		\$• 115 • 521 • • • • •	2
Schedule Document and Bill Billing + Workbench + Search +	Reports - Config - Files - Versions	s - Apps Help - What's New?	Tabs 🗸 🗙	?
Home Schedule 🗵				
VRC8905919 Patient Month Week Day (Office)	Main Office 💙 🔣 Fri 01/27/2023	Today 💓 Today's Practitioner 🕶 Log 🕶 2-0-2-0 4-	4 ?	
Tester	TES SCHED VERIFY DOC CP FILES	REFERRAL CLM MERGE TASK FIELDS Statement PATIENT T	ESTER Acct#: VRC8905919	
Patient (Jumi) Patient INFO PRIMARY SECONDARY TE	RTIARY GUARANTOR EMERGENCY Batch			
08/16/1997	History Close Window	Delete	2	
+639614591904	Dist Octo	Denote Overholder	Defeet 20N Martinel Decord #	
- Phone 2 - Account Number * VRC8905919 전	08/16/1997	Age he / him V M V	Patient SSN Medical Record # Deceased?	
jumilandelapenaece@gma	Middle Norro	- ZS - Chrone Defense News	Email PRM Monitoring?	
- Assigned Phys - TESTER PATIENT	THE	Previous Name Sumx Chosen/Preferred Name I PATIENT JUMI	jumilandelapenaece@gmail.com	
Clear Create More Marital Status* Employment S S-Single Marital Status* S-Single I - Employed Address (No. Street)* City* City* State*	tatus★ Full Time ✓	ASA Class First Visit Date Phone Max Days Between Visits 1 122456789 2 Upcoming Visit Window 3 Default Appt Type	Call Patient? Use Default - Call Variation - State - Call Variation VariatioNariatioVariatio VariatioVariatioVariatio Variatio	
Image: Second	lous Address		Send Statement Send HiCFA Attachments Use Default - No Send V Use Default - No Send V Manage Barcodes	
Fri Jan 27 T.Test 🔺 Referred By 🌣	Patient Followup Note	Notes		
Fri Jan 27 T.Test Dr. Notes				
Fri Jan 27 T.Test				
Fri Jan 27 T.Test Insurance Info			12	
Fri Jan 27 T.Test				
Fri Jan 27 M.Jones			//	

Once the patient's **Phone 1** is filled in and saved, users can view the patient barcodes by clicking the **Manage Barcode** button.

				×
Sc	an a barcode to add	t it to this patier	e e	
			Add	
Ba	rcode ¢	Date Update	d ≑	
•	23456789	01/2	27/2023	
			Clo	se

The phone number will now be added into the patient's barcode.

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:54 AM EST (Logout)															
Schedule Document and B	iill Billing - Wo	orkbench - Search -	Reports 1	Con	nfig 🗸 Files 🕶 Versions 🕶	Ар	ps	Help - What's Nev	v?					Tabs 🗸	X ?
Home Schedule 🛎					My Profile/Change Passwor	rd									
- Acct # / Barcode -	Patient Month	Week Day (Office) Main Office		3rd Party Services	₽	y S	Today's Practition	ner 🕶	Log 🗸	0-1-0-0	1-1	?		
- Last/Nick Name -	ALEX JONES (D	P)	,		Payer	•	HE	ALTH (DP)	_	DF	R. JOHN (DP)				
- First/Nick Name -	7:00a			2	Practice	•		Attachments			7:00a				^
- Date of Birth -	7:15a				System	Þ		Billing			7:15a				
- Phone 1 -	7:30a							Contacts			7:30a				
- Phone 2 -	7:45a							Careplans			7:45a				
- Email -	8:00a							Documentation			8:00a				
- Assigned Phys -	8:15a							EUD C			8:15a				
Clear Create More	8:30a							EHR Connections			8:30a				
	8:45a							Front Desk			8:45a				
🞇 Popup On 🕨	9:00a							Logins			9:00a	Out of Offic	e		
Date 🔻 Patient	9:15a							Patient Portal			9:15a				
	9:30a							PHI			9:30a				
	9:45a							Reports			9:45a		_		
	10:00a							Reports			10:00a		_		
	10:15a						10	Settings			10:15a		_		
	10:30a						10:	30a			10:30a		-		

To enable this feature:

- 4. Go to **Config**
- 5. Hover over **Practice**
- 6. Then click **Settings**

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:56 AM EST (Logout)		\$ • 115 • 521 • • • • • • •
Schedule Document and Bill Billing • Workbench • Search • Reports • Config • Files •	Versions - Apps Help - What's New?	Tabs 🗸 🛛 🕐
Home Settings 🕷		
PROV PRACTITIONER SVCFAC PINMAP LOG CP CPTS SETTINGS INVOICE	POS PATCALL NDC CONTRACT	PROC PYMTTYPE CONSENTS SIGNATURE TYPE
0		?
Basic Advanced User Defaults		
Print Csv Showing 223 of 223 • 😰 Save		
Type 🔺	Value Default Descript	ion
billing_sheet.auto_populate_service_facility	F F If T, when	n creating a patient on the Billing Sheet, the service facility
billing_sheet.enable_hover_message	F F If T, a po	pup of the full date for the row your mouse cursor is hoveri
billing_sheet.require_dob_new_or_activate_patient	F F if set to T	, requires Date of Birth when creating/activating a patient i
care_to_me.provider_availability.enable	T F If set to T	, enable provider availability feature in Care To Me portal
From within the settings page: 3. Click Settings		

4. Click Advanced

Schedule Document and Bill Workbench - Data Entry - Search -	Reports • Config • Files • Versions • Ap	ps Help What's New?	Tabs - 🗙 💽
Home Settings 🗷			
Prov Practitioner SvcFac PinMap Log CP CPTS	Settings Invoice POS PatCall	NDC Contract Proc Pi	YMTTYPE CONSENTS SIGNATURE TYPE
			?
Basic Advanced User Defaults			
Print Csv Showing 1 of 467 • 🎓 Save 3			
Type	Value	Default Description	
u.patient.auto_import_prione_barcode			
ui.patient.auto_import_phone_barcode	т (2)	F When (T)rue - Patient.P	hone1 will be automatically imported to the p

Inside the advanced settings:

- 6. Type *ui.patient.auto_import_phone_barcode* on the respective field and hit enter
- 7. Set the value to **T**
- 8. Click on **Save**

Note*: This is a Coach enabled setting.

Patient Statement Option to display Date of Birth

This new feature displays the patient's DoB or date of birth on the patient statement.

Patient Statements 0		From	
Jayson Test Address City Of San Jose Del Monte, PH 3023	Demo Practice	Dev Practice 445 Pay To St Voorhees, NJ 2011112223	
Account # VRC9406229 Patient DOB: 07/30/1997 For Activity: 01/01/1000 to 01/01/9999			
			Amount Owed 0
Please call and speak with Diane if there are any questions - 555 -555-5555			

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:54	4 AM EST (Logout)	\$ + 115 + 521 + · + · + · · · · · · · · · · · · · ·
Schedule Document and Bill Billing • Workbench • Search • Repo	orts 1 Config • Files • Versions • Apps Help • What's New?	Tabs - 🗙 ?
Home Schedule 🖲	My Profile/Change Password	
- Acct # / Barcode - Patient Month Week Day (Office) Main (Office 3rd Party Services	Log ▼ 0-1-0-0 1-1 ?
- Last/Nick Name - ALEX JONES (DP)	Payer	DR. JOHN (DP)
- First/Nick Name - 7:00a	Practice Attachments	7:00a
- Date of Birth - 7:15a	System 🕨 Billing 🕨	7:15a
- Phone 1 - 7:30a	Contacts 🕨	7:30a
- Phone 2 - 7:45a	Careplans	7:45a
- Email - 8:00a	Documentation	8:00a
- Assigned Phys - 8:15a	EHR Connections	8:15a
Clear Create More 8:45a	Front Desk	8:45a
2 Popup On P 9:00a	Logins	9:00a Out of Office
Date Patient 9:15a	Patient Portal	9:15a
9:30a		9:30a
9:45a	Phi	9:45a
10:00a	1 Reports	10:00a
10:15a	1 (3) Settings	10:15a
10:30a	10:30a	10:30a

To enable this feature:

- 1. Go to **Config**
- 2. Hover over **Practice**
- 3. Then click Settings

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:56 AM EST (Logout)		\$ + 115 + 521 + · + · · · · · · · · · · · · · · · ·
Schedule Document and Bill Billing • Workbench • Search • Reports • Config • Files •	Versions - Apps Help - What	's New? Tabs - 🗙 🔋
Home Settings		
PROV PRACTITIONER SVCFAC PINMAP LOG CP CPTS SETTINGS INVOICE	POS PATCALL NDC C	ONTRACT PROC PYMTTYPE CONSENTS SIGNATURE TYPE
0		?
Basic Advanced User Defaults		
Print Csv Showing 223 of 223 • 🥏 Save		
Туре 🔺	Value Default	Description
billing_sheet.auto_populate_service_facility	F F	If T, when creating a patient on the Billing Sheet, the service facility
billing_sheet.enable_hover_message	F F	If T, a popup of the full date for the row your mouse cursor is hoveri
billing_sheet.require_dob_new_or_activate_patient	F F	if set to T, requires Date of Birth when creating/activating a patient i
care_to_me.provider_availability.enable	T F	If set to T, enable provider availability feature in Care To Me portal

From within the settings page:1. Click Settings2. Click Advanced

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 09:20 AM EST (Logout)	\$ + 115 + 521 + · + · + · · · · · · · · · · · · · ·
Schedule Document and Bill Billing • Workbench • Search • Reports • Config • Files • Versions • Apps Hel	Ip • What's New? Tabs • 🗙 🔋
Home Settings 🖲	
PROV PRACTITIONER SVCFAC PINMAP LOG CP CPTS SETTINGS INVOICE POS PATCALL	NDC CONTRACT PROC PYMTTYPE CONSENTS SIGNATURE TYPE
	?
Basic Advanced User Defaults	
Print Csv Showing 1 of 223 • 🛊 Save 3	
Type A Value De	efault Description
u.patient.statements.snow_patient_dob	If set to 1, show patient date of birth in new patient statements.

- Inside the advanced settings:
 1. Type *ui.patient.statements.show_patient_dob* on the respective field and hit enter
 2. Set the value to T

 - 3. Click on **Save**

XDocs Macro Management

Previously, macros could only be managed by opening a document and going to the Macros tab. Now, Macros can be managed without opening existing documents.

Welcome, Dr. DEV PHYSICIAN 1 - Smith Wed 01/25/23 10:56 AM	EST (Logout)	S3	x ⁹⁹ x ²⁹⁵ 🗐 🔞 ?
Schedule Document and Bill Billing - Workbench - Search - Reports -	Config • Files • Versions • Apps Help • What's	s New?	Tabs 🗸 🕺 🕐
Home Manage Document Macros			
Document Macros 👔	Import A Export S	3 Show All Show Created By Me Active	Rename Delete
Name	Provider	Person	
ADL Testing Macro	123456789DEV	devphysician1	*
Sharp Pain Middle Back	123456789DEV	devphysician1	
Doctor Apurva	123456789DEV	devphysician1	
Diagnosis Macro	123456789DEV	devphysician1	
prabakar-supernote-test-macro	123456789DEV	devphysician1	
Test shoulder Pain V2	123456789DEV	devphysician1	
Kneepain Drowsiness	123456789DEV	devphysician1	
Manual Therapy Macro	123456789DEV	devphysician1	
Middle Back Acupuncture	123456789DEV	devphysician1	
Knee Pain Gradual Onset	123456789DEV	devphysician1	
Blank macro test 2	123456789DEV	devphysician1	
Prescription Template - Blank Xdoc	123456789DEV	devphysician1	
meg-cervical test	123456789DEV	devphysician1	

Within the Manage Document Macros, users have several options in managing their macros such as:

- 1. **Import** allows users to import macros for use.
- 2. **Export** allows users to export existing macros for others to use.
- 3. Show All / Show Created By Me allows users to toggle between displaying all available macros or macros created by the user.
- 4. Active/Inactive allows users to toggle between viewing active or inactive macros.
- 5. **Rename** allows users to rename the selected macro.
- 6. **Delete** allows users to delete the selected macro.



This new feature can be found by:

- 1. Clicking **Config**
- 2. Hovering over Practice
- 3. Hovering over Documentation
- 4. Clicking Manage Document Macros

FlexNote Updates Updated Salted Value Highlights

Salted Values (values that are pulled in from the previous notes) are **highlighted** for visibility and **automatically de-highlighted** once the value is updated.

BETA	Welcome, Dr. DEV PHYSICIAN 1 - Smith Thu 01/26/23 09:02 AM EST (Logout)	\$+ 114+521+ ++ ++	82	
Schedule D	locument and Bill Billing + Workbench + Search + Reports + Config + Files + Versions + Apps Help + What's New?	Tabs 🗸	X ?	
Home Do	cument and Bill 🗵			
\rightarrow	HPI : 2 國 八 入	Field Navigator		
	No Note Type V Created: 1/26/2023 at 9:01 AM Encounter: 12/31/2022 at 11:30 AM Service	I< < 56 > >I	1	
	Paragraph \vee B $I \ \cup \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	Note Editing Toolset	X	
	E V 🖸 Ó Add Task 📑 New Field	Macros Prior Notes Chart	0	
	History of Present Illness Patient Tester, Patient The, age 25, presents today to establish care. he / him is having pain in back since a week.	Macro Set Chiropractic Note Macros		
	Past Medical History: he / him doesn't report any medical history.	Click to insert macro into note: $=$ \uparrow		
	Current Medications: he / him doesn't report any current medication.	Initial Eval - 99202 - One Complaint		
	Social History Administered? Does not have social history record.	Patien Name: {patient_name} Patient DOB :		
	Rexiew_of.Systems General/Constitutional: {denies?}	Title {field} {field} This is {patie	=+	
	EN1: {demes?} Respiratory: {denies?} Cardiovascular: {denies?}	Title {field} {field} This is {patie		
	Gastrointestinal: {denies?} Genitourinary: {denies?} Musculoskeletal: {denies?}			
	U ICD: + Add Code	Add Macro		

New Add Addendum Option

A new option is available at the bottom of the signed-off note, which is the **Add Addendum** button, this allows the provider to add additional information to be added without un-signing the original note.

BELLA	Welcome, Dr. DEV PHYSICIAN 1 - Smith Wed 01/25/23 11:24 AM EST (Logout)	6 4 %9 ×25 2 0	82
Schedule	Document and Bill Billing + Workbench + Search + Reports + Config + Files + Versions + Apps Help + What's New?	Tabs +	X ?
Home	Document and Bill 🔅 Manage Document Macros 🙁		
\rightarrow	НРІ	Ø Field Navigator	
	No Note Type Created: 1/25/2023 at 11:01 AM Encounter: 12/31/2022 at 11:30 AM Service Date: 12/31/2022	< < 56 > >	ß
	History of Present Illness	Note Editing Toolset	X
	Patient Tester, Patient The, age 25, presents today to establish care. he / him is having pain in back since a month.		8
	Anergies: ne / nim doesn't report any anergies.		
	Past Medical History: he / him doesn't report any medical history.	Chiropractic Note Macros	100
	Social History Administered? Does not have social history record		
	De la construction de la constru		Ê
	<u>Review of Systems</u> General/Constitutional: {denies?}	Initial Eval - 99202 - One Complaint 🏢 🗄	
	ENT: {denies?} Respiratory: {denies?}	Patien Name: {patient_name} Patient DOB :	
	Cardiovascular: {denies?}	Title {field} {field} This is {patie	=+
	Gastrointestinal: {denies?}	Title {field} {field} This is {patie	
	Musculoskeletal: {denies?}		-
	Neurologic: {demes?} Psychiatric: {demes?} X Add Addendum		
	Skin: {denies?}		
	UP ICD: A01.04		

To do so, click the **Add Addendum** button at the bottom of part of the signed note.

BETT	Welcome, Dr. DEV PHYSICIAN 1 - Smith Wed 01/25/23 11:29 AM EST (Logout)	SI X29 Z0 87
Schedule	Document and Bill Billing + Workbench + Search + Reports + Config + Files + Versions + Apps Help + What's New?	Tabs 🗸 🕺 🔋
Home	Document and Bill 🕅 Manage Document Macros 🕱	
\rightarrow		Field Navigator
	No Note Type Created: 1/25/2023 at 11:21 AM by Dr. DEV 11:10 AM Encounter: 12/31/2022 at 11:30 AM PHYSICIAN 1 - Smith Service Date: 12/31/2022	
	History of Present Illness	Note Editing Toolset
	Patient Tester, Patient The, age 25, presents today to establish care. he / him is having pain in back since a month.	Macros Prior Notes Chart
	Past Medical History: ha / him deacht report any medical history	Macro Set
	Current Medications: he / him doesn't report any incurent medication	Chiropractic Note Macros
	Addendum	Click to insert macro into note:
	$\begin{array}{cccccccccccccccccccccccccccccccccccc$	Initial Eval - 99202 - One Complaint
		Patien Name: {patient_name} Patient DOB
	Additional Information	Title {field} {field} This is {patie
	Ŭ Ŭ	Title {field} {field} This is {patie
		Y
	Cancel Save Addendum	
	U ICD: A01.04 Clear	
	CPT: 00524 Clear	Add Macro

From here, clinicians can add additional information that has been missed out on the original note. Once the information has been added, simply click on the **Save Addendum** button to update the note.

BUR	Welcome, Dr. DEV PHYSICIAN 1 - Smith Wed 01/25/23 1	1:36 AM EST (Logout)		SA X99	× ²⁹⁵ 💶 🗧 ?
Schedule	Document and Bill Billing + Workbench + Search + F	Reports Config Files Versions	Apps Help + What's New?		Tabs 🗸 🙁 🍞
Home	Document and Bill (8) Manage Document Macros (8)				
\rightarrow	HPI		()	Field Navigator	\bigcirc
	No Note Type Created: 1/25/2023 at 11:10 AM Encounter: 12/31/2022 at 11:30 AM Service Date: 12/31/2022	✓ Signed 01/25/2023 at 11:21 AM by Dr. DEV PHYSICIAN 1 - Smith	Document is hard signed (read-only)	▶ < < 56 >	>1
	SKIN: {Yes/No} turgor, rashes {Yes/No HEART: regular rate and rhythm murm	SKIN: {Yes/No} turgor, rashes {Yes/No}, warm and dry. HEAPT, require rate and shuthen purpure [Ves/No], [Ves/No], S3, [Ves/No], S4, [Ves/No],		Note Editing Toolset	X
HEARI regular rate and mythm, murmurs {res/No}, {res/No}, S3 {res/No}, S4 {res/No}. LUNGS: {Yes/No}, wheezes {Yes/No}, {Yes/No} MUSCULOSKELETAL: {Yes/No}, swelling or deformity {Yes/No}, normal strength/tone.				Macros Prior Notes	Chart
EXTREMITES: [Observations?] NEUROLOGIC: cognitive exam grossly [Yes/No], gait [Yes/No], sensory exam [Yes/No], cranial nerves [PSYCH: [Observations?] GAIT: [Observations?]. MENTAL STATUS: [Observations?]			sory exam {Yes/No} , cranial nerves {Yes/No} .	Macro Set Chiropractic Note Macros	
	Hydration {Observations?} . VOICE: {Observations?} .			Click to insert macro into note:	
	Assessments:			Initial Eval - 99202 - One Complaint	
	Plan:			Patien Name: {patient_name} Patient	DOB 🛛 🗄
	Follow Up: +/- 3months and PRN			Title (field) {field} This is {patie	=+
	Total time for patient case menting rao i	eview, I will leview, plan of care	and assessment opnini	Title {field} {field} This is {patie	
	Addendum Additional Information Added 01/25/2023 at 11:36 AM by devolvesician1		😵 Add Addardur		•
	U ICD: A01.04		Clear		
	E CPT: 00524		Clear		

The Addendum will be shown on the bottom part of the updated note.