

How to create Clinical Notes Templates in the IHS Dentrix Enterprise EDR: (updated 170823)

The attached Clinical Notes templates are designed to meet current IHS DOH guidelines for record documentation as well as expected Electronic Health Record (EHR) documentation guidelines. Since Dentrix Clinical Notes are to be transferred into the EHR with implementation of Dentrix 8.0.9, the notes are intended to provide basic medico-legal documentation of existing condition (Subjective and Objective findings), Assessment (diagnosis) and Planned (and completed) treatment. If additional details are desired, they can be easily incorporated into the templates.

Note: These templates are not 'official' Dentrix or IHS DOH sanctioned templates; therefore, they can be used and modified as you find works best for your clinic.

Please note: on first review, the spreadsheets appear quite blank. However, if you click on the little "+" signs, additional rows and/or columns are opened. To close the rows/columns, simply click on the little "-" sign in the box.

Creating Clinical Notes Templates (quick guide):

The advantage of the attachments is all typing has already been done for you.

Step 1: The prompts should be created first. The spreadsheet titled: **Clinical Notes Template Prompts** provides all of the information to create the prompts used in the templates.

Step 2: The attachment: **Dentrix Templates_Template list with clinical note text outline** provides the set-up for the template. These can be cut and pasted into the template "box".

Step 3: Import the prompts into the template prompt list in the order they appear in the template. You do not need to use the "insert prompt" feature as long as the name of the prompt and the prompt listed in the template have not been changed.

Most importantly, ensure the '**Grouped Prompts**' box is checked (on the Template Setup screen)!!!! If this is box not checked, using the templates will drive you crazy within minutes.

For more instructions about clinical note templates, see the "**Creating clinical note templates,**" "**Creating clinical note prompts,**" and "**Setting up clinical note template categories**" topics in the Dentrix Enterprise Help (the "Help" tab on the top of the page in Dentrix Enterprise (see image below). You will need to navigate through (open) the following selections from the list of topics on the left side:

- Patient Chart;
- Working with Clinical Notes;
- Managing Clinical Notes Templates;
- then you will find: Creating Clinical Notes Templates, etc.
- Creating clinical note templates

You can create clinical note templates to use for adding clinical notes.

Note: Only users with security rights to "Clinical Notes, Template Setup" can create clinical note templates.

To create a clinical note template

1. With a patient selected in the Patient Chart, from the File menu, click Clinical Notes.

The Clinical Notes window appears.

2. Click the Template Setup button.

The Template Setup dialog box appears.

3. Click New Template.

The New Clinical Note Template dialog box appears.

4. Select a Category.
5. In the Template Name field, type a name for the template.
6. If applicable, select prompts for the clinical note.
7. If you want to change the order of the prompts, under Clinical Note Prompts, select a prompt, and then click Move Up or Move Down to move the prompt up or down by one item in the list.
8. In the Clinical Note Text field, type a clinical note. Also, you can click the Spell Check button to check the spelling of the note text (this button is available only if a certain preference setting has been enabled).

To add a prompt in the note where the text cursor is located, select a prompt from the list, and then click Insert Prompt in Text.

Tip: Make sure you leave a space before and after the inserted prompt name so that the completed clinical note will be displayed properly.

9. Click "OK".

Creating templates does take time and attention to detail to have them work efficiently and effectively. It may be beneficial to designate one person to create them over a time period of a few days. However, the process does go rather quickly since all typing has been done for you.

As always, if you have comments or find faults in the program, please let me know!!

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