



CEIS Office Management System

Charting Quick Start Guide

Developed by:



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CHARTING SETUP

To setup the charting folders and auto-lock options go to **Maintenance | Clinic | Charting Setup | Charting Setup**. This is where you specify the folders (on the server or main computer) that the exam files are to be stored in.

PATIENT EXAM NOTE TYPES

Under to **Maintenance | Clinic | Charting Setup | Patient Exam Note Types**. This area can be used to set up the types that are used for classifying charting notes and standard exam notes.

STANDARD EXAM NOTES

Go to **Maintenance | Clinic | Charting Setup | Standard Exam Notes**. Enter a Standard Note Name and optional Exam Note Type. After entering the Standard Note Name, click the Edit button to enter the text associated with the Standard Note Name.

DIAGRAM DESCRIPTIONS

Go to **Maintenance | Clinic | Charting Setup | Diagram Descriptions**. Enter descriptions for the diagrams that you will use. This helps you quickly find the diagram that you are looking for in a patient's file.

IMAGE DESCRIPTIONS

Go to **Maintenance | Clinic | Charting Setup | Image Descriptions**. Enter descriptions for the images that you will use. This helps you identify what the image is that is in a patient's file.

SCANNED DOCUMENT DESCRIPTIONS

Go to **Maintenance | Clinic | Charting Setup | Scanned Doc Descriptions**. Enter descriptions for the documents that you will be attaching to the patient's chart. This helps you identify what the document contains (ie Intake Form, Consent Form, Lab Results).

TEMPLATE DESCRIPTIONS

Go to **Maintenance | Clinic | Charting Setup | Template Descriptions**. Enter descriptions for the templates that you will be attaching to the patient's chart. This helps you identify what the template is (ie Biomechanical, Orthotic Order Form).

NEW EXAM

To create a new exam from the schedule, click the time beside the appointment that you want to chart, then click the EX button at the bottom of the schedule. The Patient Examination screen will open. There are tabs for Templates, Diagrams, Images, Scanned Documents, Examination Notes, Additional Products/Services, Invoice Notes. You can access Treatment Plan by clicking the TP button. You can access a patient's exam history by clicking the EH button. The exam can be locked manually by clicking the lock button. A copy of the exam can be printed by clicking the print button.

TEMPLATES

To use a template on the patient's exam, click the Browse button on the right side of the templates tab. This will allow you to pick a template file that exists in the Root Templates folder (set up in Charting Setup). Once you have selected the template, you can click the Edit button to open the template and enter information. Closing/saving the template will record the information and store it with the patient's chart. You can use the Template Description to classify the type of template that the file is. If you click the Email button on the right side, it will attach the template to an email, so you can send it to the email address that you specify.

DIAGRAMS

To add a diagram on the patient's exam, click the Browse button on the right side of the diagrams tab. This will allow you to pick a diagram file that exists in the Root Diagrams folder (set up in Charting Setup). Once you have selected the diagram, you can click the Edit button to open the diagram and draw or enter text on it. Closing/saving the diagram will record the information and store it with the patient's chart. You can use the Diagram Description to classify the type of diagram that the file is. If you click the Email button on the right side, it will attach the diagram to an email, so you can send it to the email address that you specify. You can also click the View button to show the diagram.

IMAGES

To add an image on the patient's exam, first save the picture from your device (ie digital camera) to the Root Images folder (set up in Charting Setup). Next, click the Browse button on the right side of the images tab. This will allow you to pick an image file that exists in the Root Images folder. Once you have selected the image, you can click the Edit button to open the image and draw or enter text on it. Closing/saving the image will record the information and store it with the patient's chart. You can use the Image Description to classify the type of image that the file is. If you click the Email button on the right side, it will attach the image to an email, so you can send it to the email address that you specify. You can also click the View button to show the image.

SCANNED DOCUMENTS

To add a scanned document on the patient's exam, first save the document from your device (ie scanner) to the Root Scanned Documents folder (set up in Charting Setup). Next, click the Browse button on the right side of the scanned documents tab. This will allow you to pick a scanned document file that exists in the Root Scanned Documents folder. You can use the Scanned Document Description to classify the type of document that the file is. If you click the Email button on the right side, it will attach the document to an email, so you can send it to the email address that you specify. You can also click the View button to show the document.

EXAMINATION NOTES

Under the examination notes tab, you can manually enter a note and type. If you click the edit button, it will open an Edit window which will show you the examination note and also allow you to use the standard exam notes or spell check. To quickly use pre-entered phrases, click the Standard Exam Notes button, then double click the standard note that you wish to enter into the examination note. Entering a Note Type or Note Name will show you a shorter list of standard notes that match the note type or name that you entered.

ADDITIONAL PRODUCTS/SERVICES

By clicking on the Additional Products/Services tab you can enter items that the patient wants to purchase. Select the product code and enter the quantity. The items will be transferred to the invoice when the transfer button is clicked from the schedule.

INVOICE NOTES

Under the Invoice Notes tab you can enter an invoice note or a confidential note. Both notes will be transferred to the invoice when the transfer button is clicked from the schedule. The invoice note will print on the patient's invoice and the confidential notes will be displayed on the invoice screen, but will not print on the patient's invoice.

EXAM HISTORY REPORT

You are able to print a report for a patient's exam history. From the menubar select **Reports | Exam History**. Select a patient and enter the date range that you want to see the history for. Indicate if you want to include Diagrams, Images and/or Exam Notes, then click the print, preview or pdf button.

PATIENT EXAM TAB

On the patient screen an Exam tab will be visible once you have activated the charting module. On the tab there will be a list of the exams including the exam number, date and practitioner. Clicking the Quicklink button beside an exam will open that exam. On the tab there is also an Exam History button and Treatment Plan button. You can start a new patient exam by clicking the New Exam button from the patient screen rather than the schedule screen.