

Patient Notes (EHR)

Word Merge Narratives

We have added a new **Narrative** tab in patient notes where you can generate a narrative that condenses information from the note and added subnotes into an easily readable form. The **Narrative** tab uses Word® merge documents assigned to note and subnote templates to pull the required data into the narrative.

The narrative data is saved in the patient note and subnotes and can be generated into a narrative as needed. The generated narrative can be saved as a PDF document (attached to the patient note in the patient chart), printed, and faxed.

Important Note: *Word merge narratives only function in notes that were created in Patient Notes version 2 or higher.*

Use the new narrative function to:




- Generate a narrative.
- Select a Word merge document for a note or subnote.
- Exclude a Word merge document from the narrative.
- Set a default Word merge document for a note or subnote.
- Edit a narrative.
- Create a Word merge document for a note or subnote.
- Save a narrative document to the patient chart.
- Print/Fax a narrative.

As part of the new Word merge narrative functionality added to patient notes, we have added the ability to assign a default Word merge document to a patient note or subnote template on the **Template Word Merge Document** screen. You can also access the **Template Word Merge Document** screen from the new **Narrative** tab.

This feature will be released in stages over the next few months.

Open a patient chart.




Office Visit - Exam

Save | Cancel | Review | Sign | New | Delete | Add Linked | Print | Fax | Word Merge |   

Print/Send Summary/Referral

Info | Vitals | Exam | A&P | SubNote | Narrative

Displaying Word Merge / Narrative Template: Office Visit Narrative SubNote Templates: 0 [Select Templates](#) [Save to Document](#)

Office Visit - Exam 1 / 1   

Nancy Smith — 53 yrs.

<p>Current Allergies: No allergies on file</p> <p>Current Medications: No current medications on file</p> <p>Vitals: HT: 179 cm WT: 169 lbs. TEMP: 97.9</p> <p>Social History: SMOKING STATUS: Never smoker.</p>	<p>Reason For Visit: Follow-up.</p> <p>History of Present Illness: Feels dizzy when rising quickly.</p> <p>Family History: No family history entered.</p>
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Sub Notes:

Eyes
Conjunctiva & Lids
Pupils & Irises
Abnormal

The patient note displays at the top

Word merge documents assigned to the patient note

Select Word Merge / Narrative Templates

Note / Subnote Name	Word Merge / Narrative Template	
Office Visit	Well Visit (Default)	...
Referral Consult	Referral (Default)	...
Exam_Male	Exam_Male1 (Default)	...

Cancel [Save Selected Templates](#)

Subnotes used in the patient note display below

Word merge documents assigned to the subnotes

Generate a Narrative

Use the **Narrative** tab to generate a narrative in a saved patient note.

Note: *The narrative will not be generated until the patient note is saved. You can also save the note and generate the narrative on the **Narrative** tab by clicking **Save Note and Generate Narrative**.*

1. Create and save a patient note. The template used to create the patient note must have a Word merge document assigned to it to generate a narrative.
2. Go to the **Narrative** tab and the narrative is generated.

The narrative generated displays information in the following order:

- Patient note information.
- Subnote information with a header of **Sub Notes**.
- Subnotes added as an addendum after the patient note has been signed.

Select a Word Merge Document

If a note or subnote has more than one Word merge document assigned, you can select which Word merge document is used in the narrative.

1. Generate a narrative.
2. Click **Select Templates**. The **Select Word Merge/Narrative Templates** window opens.



3. Under the **Word Merge/Narrative Template** header click the arrow  on a note or subnote to display a list of Word merge documents available.



4. Select the required Word merge document from the list and click **Save Selected Templates**.
5. A **Narrative will be Regenerated** warning displays. Click **Yes** to regenerate the narrative using the selected Word merge documents.

Exclude Subnote Information from the Narrative

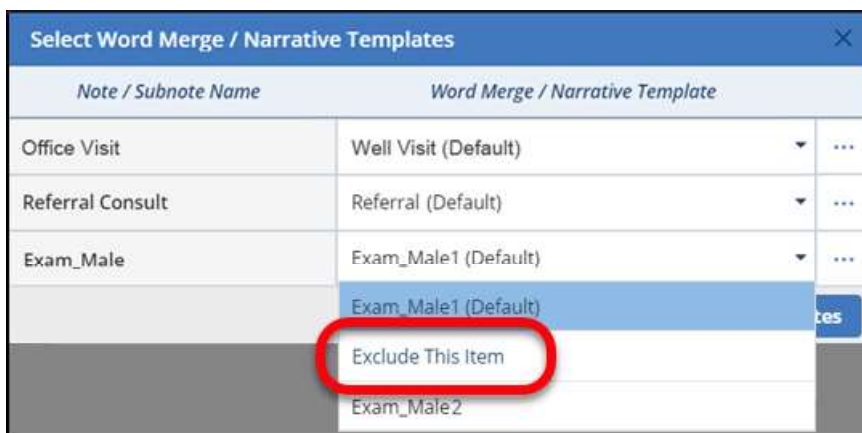
If you do not want the information from one or more subnotes to be included in the narrative, you can exclude it.

Note: *You cannot exclude information from the patient note.*

1. Generate a narrative.
2. Click **Select Templates**. The **Select Word Merge/Narrative Templates** window opens.



3. Under the **Word Merge/Narrative Template** header click the arrow  on a subnote.
4. Select **Exclude This Item**.



5. Click **Save Selected Templates**.
6. A **Narrative will be Regenerated** warning displays. Click **Yes** to regenerate the narrative excluding the information from the selected subnote.

Set/Change a Default Word Merge Document

When you have one or more Word merge documents assigned to a note or subnote template, you can set a default Word merge document for the template through the **Narrative** tab.

There are two scenarios for setting a default Word merge document:

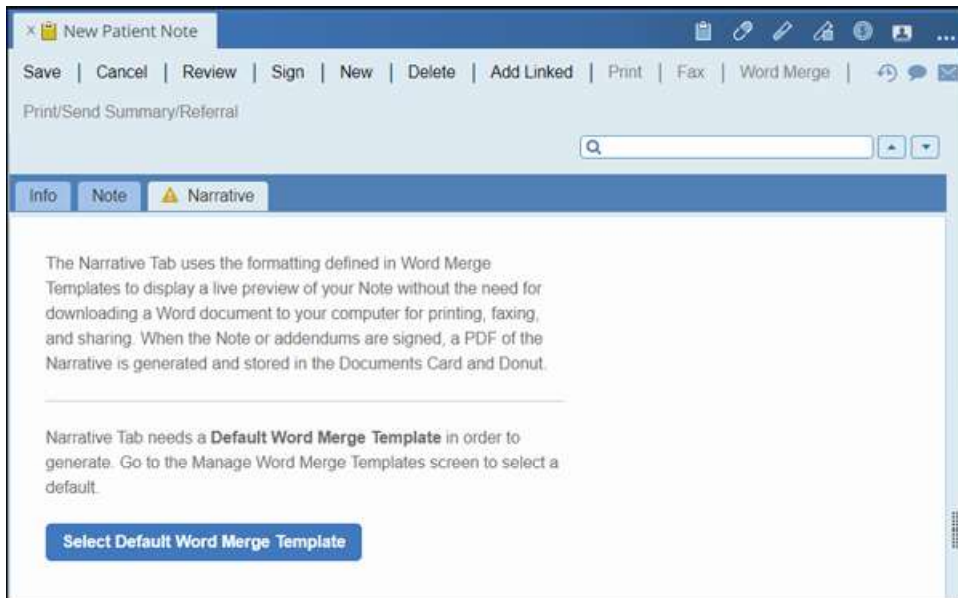
- Set a default Word merge document for the patient note when no default exists.
- Change the default Word merge document for a note or subnote.

Set a Default Word Merge Document for the Patient Note

If one or more Word merge documents are assigned to a patient note, but no default Word merge document has been set, you must select a default Word merge document for the

patient note before a narrative can be generated.

1. Create a new patient note and select a patient note template that does not have an assigned default Word merge document.
2. Go to the **Narrative** tab and click **Select Default Word Merge Template**. The **Template Word Merge Document** screen opens with the note template already selected.



3. Click the **Default Template Narrative** drop-down and select a default Word merge document from the list of Word merge documents assigned to the note template. The new default is automatically saved.

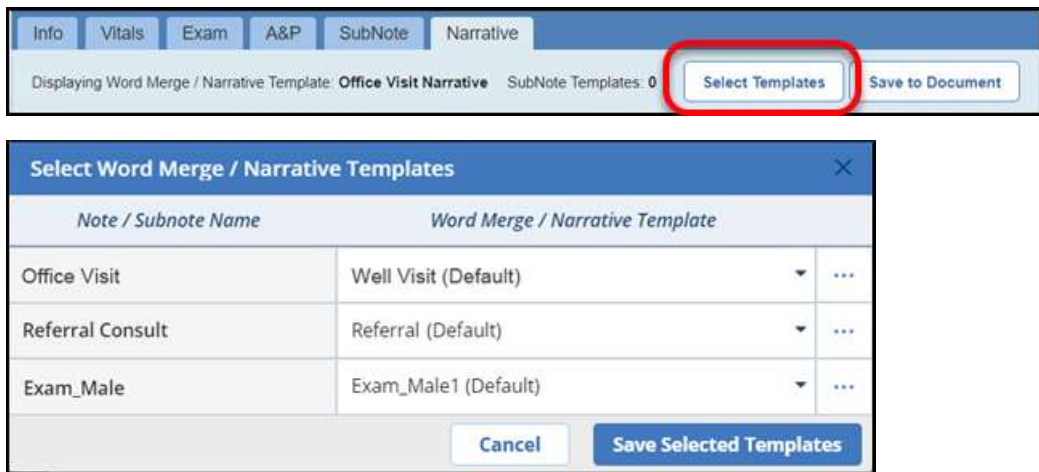



4. Close the **Template Word Merge Document** screen to return to the patient note.
5. Click **Save**. The narrative generates.

Change the Default Word Merge Document for a Note or Subnote

You can change the default Word merge document for a note or subnote from the **Narrative** tab.

1. Generate a narrative.
2. Click **Select Template**. The **Select Word Merge/Narrative Templates** window opens.



3. Click the ellipsis  next to a note or subnote and select **Manage Word Merge Templates**. The **Template Word Merge Document** screen opens with the note or subnote template already selected.
4. Click the **Default Template Narrative** drop-down and select a default Word merge document from the list of Word merge documents assigned to the note template. The new default is automatically saved.



5. Close the **Template Word Merge Document** screen to return to the **Select Word Merge/Narrative Templates** window.
6. Click **Save Selected Templates**.
7. A **Narrative will be Regenerated** warning displays. Click **Yes** to regenerate the narrative.

Edit a Narrative

You can edit the information captured in the narrative by editing the fields in the patient note that are included in the narrative. Each time you make changes to the patient note, save the

note and go to the **Narrative** tab to generate a new narrative to include those changes in the narrative.

1. Open the patient note.
2. Make the necessary changes and **Save**.
3. Go to the **Narrative** tab and a new narrative generates that includes the new information.

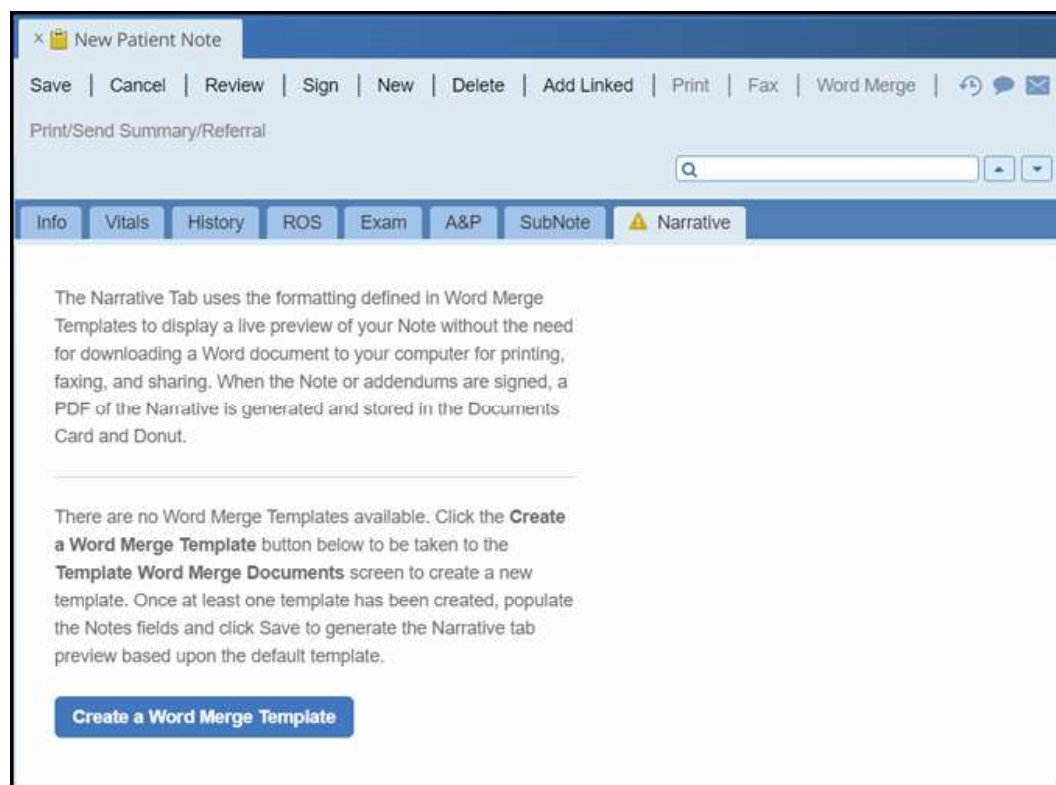
Note: You can save all narratives generated for a patient note into the patient chart by clicking **Save to Document** on each narrative generated with different information.

Each narrative is saved as a PDF document attached to the patient note and displays in the patient chart on:

- The **Timeline** linked to the patient note.
- The **Patient Notes** patient card linked to the patient note.
- The **Documents** patient card with the same name as the note template.

Create a Word Merge Document

If you are using a note template that does not have a Word merge document assigned, you can use the **Narrative** tab to access the **Template Word Merge Document** screen where you can create a Word merge document for the note template.



1. Add a patient note and select a note template that does not have a Word merge document assigned.

2. Go to the **Narrative** tab and click **Create a Word Merge Template**. The **Template Word Merge Document** screen opens with the note template already selected where you can create a Word merge document.
3. Create the Word merge document in the usual way.

Save a Narrative Document to the Patient Chart

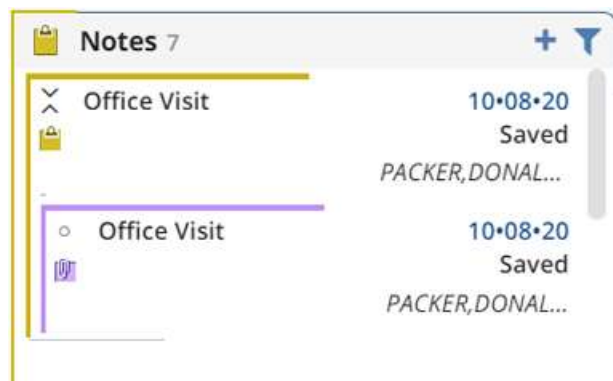
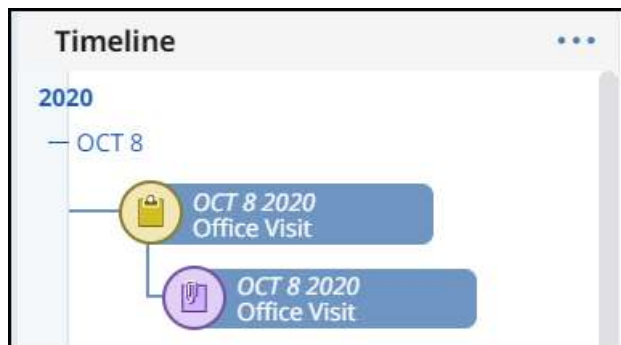
You can save a narrative as a document to the patient chart.

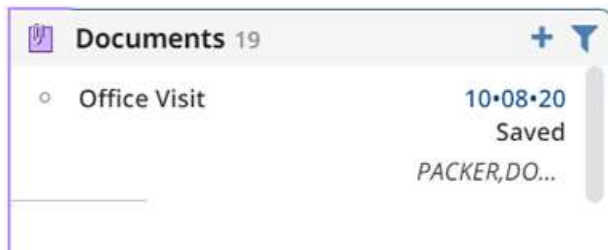
1. Generate a narrative.
2. Click **Save to Document**.



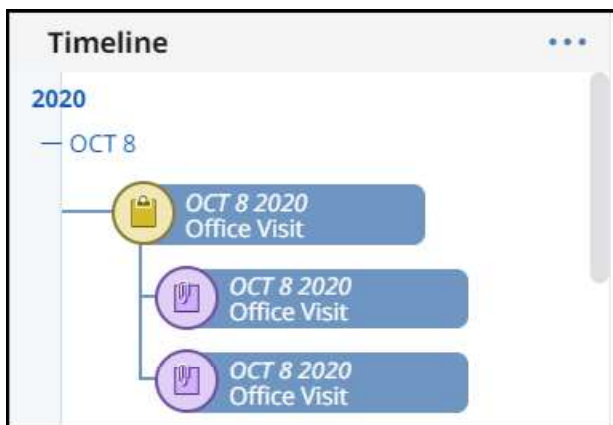
The narrative is saved as a PDF document attached to the patient note, and displays in the patient chart on:

- The **Timeline** linked to the patient note.
- The **Patient Notes** patient card linked to the patient note.
- The **Documents** patient card with the same name as the note template.





Note: A new narrative PDF document is saved to the patient chart each time changes are made to the note, and a new narrative is generated and saved as a document attached to the patient note.



If no changes have been made to the note, and you click **Save to Document**, a new document will not be created in the patient chart.

Print/Fax a Narrative

You can print/fax a narrative from the patient note.

1. Generate a narrative.
2. Hover over **Print/Fax** and select **Narrative**.

Each time a narrative is printed/faxed, if changes have been made to the patient note, a new narrative PDF document is attached to the patient note, saved to the patient chart and displays on:

- The **Timeline** linked to the patient note.
- The **Patient Notes** patient card linked to the patient note.
- The **Documents** patient card with the same name as the note template.

If no changes have been made to the patient note when the narrative is printed/faxed, no narrative document will be saved in the patient chart.

Template Word Merge Documents Screen

Assign a Default Word Merge Document

You can now assign a default Word merge document to a patient note or subnote template on the **Template Word Merge Documents** screen.

When you have more than one Word merge document assigned to a note or subnote template, you can assign a default Word merge document for the template.

*Open **Admin | Templates | Note or Subnote Templates** | Select a note or subnote template | Click **Word Docs**.*

Setup: *You must have the **Admin Templates Setup** privilege to access the **Template Word Merge Documents** screen. Go to PM | **User Management | Roles | EHR Admin**.*