

Create Confidential Notes in Dynamic Documentation

Charting confidential information is important to protect patient privacy.

See below for steps on how to document confidential notes. Click [here](#) for information on documenting confidential data.

Confidential information should be recorded using the appropriate documentation methods and not entered directly into the note.

- Confidential items remain confidential from encounter to encounter. This ensures that confidential documentation is viewable in the patient's chart and remains confidential for future documentation.
- This process protects confidential data from populating into other notes or from being released in the portal.

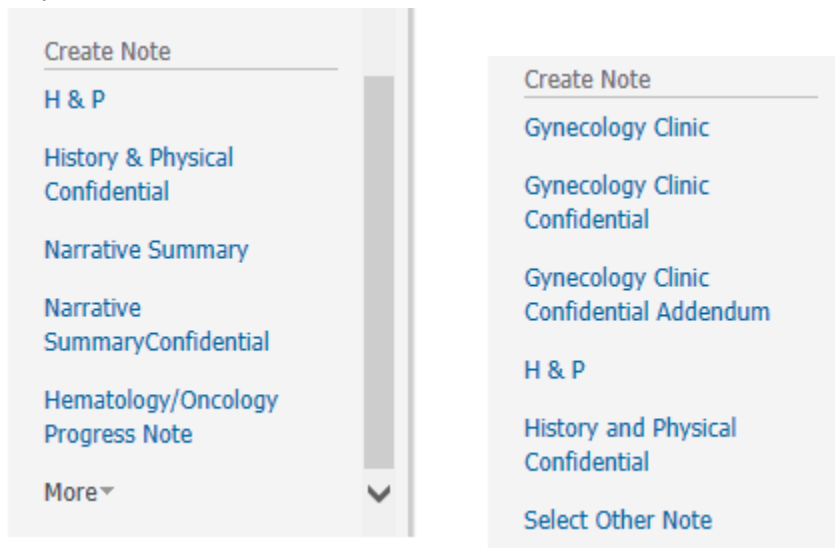
Available Confidential Note Types

Navigate to the bottom of your Workflow Summary to view and launch confidential documents specific to your area.

Fully Confidential Note

One fully confidential note should be created when the entire visit needs to be kept confidential.

1. Document confidential items in their respective components i.e., confidential problems in the Problem List/Dx component.
2. Navigate to the bottom of your Workflow Summary to view and launch confidential documents specific to your area.



Note: If the Workflow Summary does not display for the note type you need, choose **Select Other Note** or if **Select Other Note** is not available select **More** and then choose **Select Other Note**.

If the note type is missing from your drop-down list, please refer to: [Manage Personal Note Type List](#) and select the appropriate note template beginning with **Confidential**.

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- All documentation, both confidential and non-confidential, will populate this note.
Note: It is important to prioritize all **This Visit** problems (diagnoses) you want to include in your note. Rank Confidential problems marked **This Visit** at the bottom of your list.

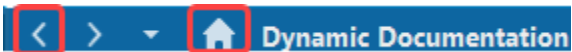
The screenshot shows the 'Problem List/Dx' interface. At the top, there are filters for 'Classification' (set to 'All') and 'Add as' (set to 'This Visit'). Below this is a table with columns: Priority, Problem Name, Code, Onset, Class..., and Actions. The table contains three rows: 1. Priority 1, Problem Name 'Breath shortness', Code 'R06.02 (IC...', Onset '--', Class... 'Medical', Actions 'This Visit' (checked) and 'Chronic' (unchecked). 2. Priority 2, Problem Name 'ADHD (attention deficit hyperactivity...', Code 'F90.2 (ICD-...', Onset '--', Class... 'Confidential', Actions 'This Visit' (checked) and 'Chronic' (unchecked). 3. Priority 3, Problem Name 'Chlamydia', Code 'A74.9 (ICD-...', Onset '--', Class... 'Confidential', Actions 'This Visit' (checked) and 'Chronic' (unchecked). To the right of the table is an 'Assessment' section with two items: 1. Breath shortness and 2. Chlamydia. A red star icon is next to the 'Confidential Assessment' heading.

- Complete documentation and sign note.

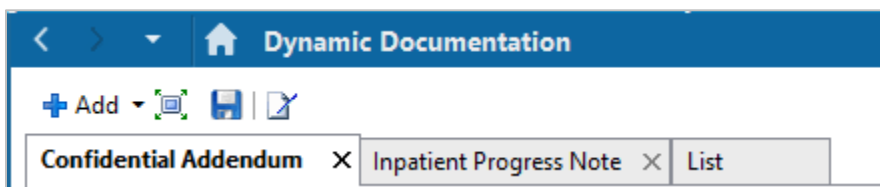
Dual Note

When confidential information is shared that is not related to the patient's primary reason for the visit, two notes should be created: confidential and non-confidential.

- The standard clinical note will not display items marked **Confidential**. Create a Confidential Addendum to display these items.
- Enter non-confidential narrative documentation in the Workflow Summary components per your current process. All confidential narrative information should be entered in the confidential documentation component.
- Mark the appropriate Meds, Labs, Problems, & Social History confidential.
- Navigate to the bottom of your Workflow Summary to view and launch the standard clinical note first.
- From Dynamic Documentation, click the back arrow or the house.



- Navigate to the bottom of your Workflow Summary to view and launch your Confidential Addendum.
- Both notes will open as two separate tabs in Dynamic Documentation that can be easily toggled between.



- Complete documentation and sign each note.

Important: It is imperative to create confidential notes following this process to prevent confidential data from populating into other notes or being released in the portal.