

Create Confidential Notes in  
Dynamic Documentation

## 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.

Information that is confidential should be documented in the appropriate way and not 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 pulling into other notes or from being released in the portal

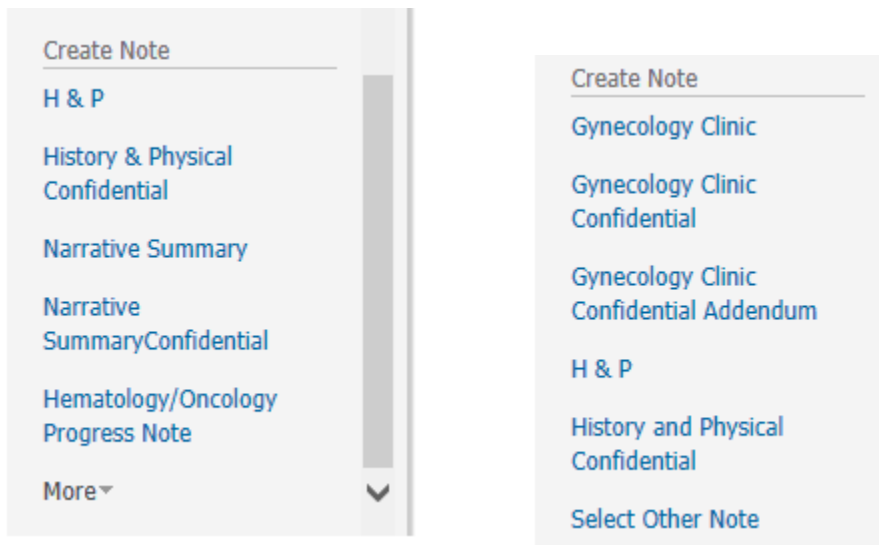
### Available Confidential Note Types

Go 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.  
**Note:** Individual chartable items must be documented in the appropriate component.
2. Go 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: **Personal Note Type List**. (link to new document)

3. All documentation, both confidential and non-confidential, will pull into this note.

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**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.

Priority	Problem Name	Code	Onset	Class...	Actions
1	Breath shortness	R06.02 (IC...	--	Medical	✓ This Visit <input type="checkbox"/> Chronic
2	ADHD (attention deficit hyperactivity...	F90.2 (ICD-...	--	Confidential	★ ✓ This Visit <input type="checkbox"/> Chronic
3	Chlamydia	A74.9 (ICD-...	--	Confidential	★ ✓ This Visit <input type="checkbox"/> Chronic

**Assessment**  
1. Breath shortness

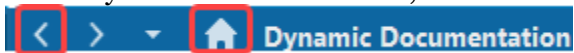
★ **Confidential Assessment**  
1. ADHD (attention deficit hyperactivity disorder), combined type  
2. Chlamydia

4. Complete documentation and sign note.

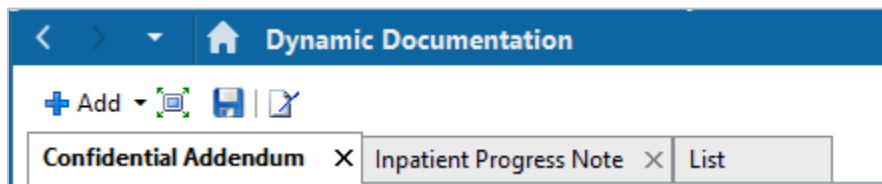
**Dual Note**

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

1. The standard clinical note will not display items marked **Confidential**. Create a Confidential Addendum to display these items.
2. 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.
3. Mark the appropriate Meds, Labs, Problems, & Social History confidential.
4. Go to the bottom of your Workflow Summary to view and launch the standard clinical note first.
5. From Dynamic Documentation, click the back arrow or the house.



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



8. Complete documentation and sign each note.

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