How to Document Confidential Notes

Overview: View and Document Confidential Items

1. Prescriptions
2. Orders
3. Social History
4. Problem List: “This Visit” Diagnoses and “Chronic” Problems
5. Patient Education

Currently Available Confidential Note Types

1. How to Create Confidential Notes in Direct Charting
2. How to Create Confidential Documentation in Dyn Doc:
   - Fully Confidential Note – Use when entire visit needs to be kept confidential (one note)
   - Dual Note – Use when only part of the visit is confidential (2 notes filtered by confidentiality)
3. How to Create Confidential Note(s) via Documentation Templates
   - Fully Confidential Note – Use when entire visit needs to be kept confidential (one note)
   - Dual Note – Use when only part of the visit is confidential (2 notes filtered by confidentiality)

Overview: View and Document Confidential Items

Prescriptions

**View:** CONFIDENTIAL will appear in Home Medication display

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**Update:** Select Yes for Confidential Medication item

Orders
*View:* CONFIDENTIAL order will display in order details

*Update:* Click CONFIDENTIAL order and select Yes

*Note:* All labs related to Minor Consent are automatically defaulted to Confidential, regardless of whether the scenario requires confidentiality. Ordered Minor Consent labs will only display in confidential Dynamic Documentation notes.

Social History
*View:* Categories containing confidential information will have (Confidential) label after Category name.

*Update:* Document confidential information in the categories labeled as confidential. Click Add to document new, right-click and **Modify** to update existing information.
Problem List: “This Visit”
Diagnoses and “Chronic” Problems

View: Confidential will display in Classification column

Set Classification to ALL

Update: To make a Problem/Dx confidential, select Modify, and set the *Classification field to Confidential, Ok

Note: If there is a new Confidential Problem that is both Chronic and This Visit, add it as Chronic first, make it confidential (see Update), then click This Visit and make confidential. Number all Non Confidential followed by any Confidential

Patient Education
Any selected education content will be viewable through the portal and become part of the clinic visit summary.

Note: If you want to provide education content to the patient, select topic content, 1 Print and select 2 Remove, which removes it from Clinic and Discharge Summaries and My Children’s Portal.

Currently Available Confidential Note Types

Adolescent Primary Care Confidential
Confidential
Gynecology Clinic Confidential
Pediatric Clinic Note Confidential
Well Child Check Confidential

There are three methods of creating documents currently in use at our organization.

- If you currently create notes using the Notes tab (also known as Direct Charting), click here.
- If you currently create notes using Dyn Doc by clicking “Select Other Note” at the bottom of the Workflow Summary page, click here
- If you currently create notes using Documentation Templates in the Workflow Summary, click here.
How to Create Confidential Notes in Direct Charting

1. From the Documents component in the Workflow Summary or the Clinical Summary, click on the header to go to the Notes section.

2. Click the add icon. Once document opens, ensure Confidential Note Type is in your drop down list. (If you do not have this note type added to your personal list, refer to: Adding Document Types for your Personal List.)

3. When a confidential Note Type is selected you will need to document the reason for confidentiality.

   **Confidential Reason**
   - Minor Consent: _
   - Professional Judgement: _

4. Document your confidential items via Typing, dragon and/or the following dot phrases.
   - .homeMedsOnlyConf
   - .homeMedsNonConf+Conf
   - .problemslistOnlyConf
   - .problemslistNonConf+Conf
   - .socialHxNonConf+Conf
   - .socialHxOnlyConf

   **NOTE:** Depending on the situation, you also may need to create a non-confidential note by following your usual process.

How to Create Confidential Documentation in Dyn Doc:

Fully Confidential Note – Use when entire visit needs to be kept confidential (one note)

1. It is important to identify confidential items in the chart despite all documentation pulling into one note.

2. Document information in the Workflow Summary per your current process.

3. Mark the appropriate Meds, Labs, Problems, & Social History confidential. (Refer to How to View and Document Confidential Items)

4. Click Select Other Note
5 Select Confidential Note Type (different clinical areas may have specific document types, see general information section for a list of available Confidential Document Types) and Confidential Note template.

**Note:** If you do not have this note type added to your personal list, refer to: Adding Document Types for your Personal List.

6 All documentation, both confidential and non-confidential, from the Workflow Summary and other areas of the chart will pull into this note.

**Note:** The assessment will pull in as two separate sections, the first one is all the non-confidential diagnoses and the second is confidential diagnoses. You will want to number your diagnoses so the confidential ones are grouped at the bottom.

7 Complete your documentation and sign note.
Dual Note – Use when only part of the visit is confidential (2 notes filtered by confidentiality)

1. While documenting and ordering, items marked as confidential will filter to a separate confidential only note, leaving all items NOT marked confidential in the Clinic Note.

2. Document Non confidential information in the Workflow Summary per your current process.
   **Note:** Do not enter confidential information here. Your confidential narrative will be added later in the process.

3. Mark the appropriate Meds, Labs, Problems, & Social History confidential. (Refer to How to View and Document Confidential Items)

4. Click **Select Other Note** – **you must generate the Non Confidential note first**, selecting Note Type and Dyn Doc template per current process.

5. Once the Non Confidential note is open in Dyn Doc, click **Add** to create the Confidential note.

6. Select **Confidential Note Type** (different clinical areas may have specific document types, see general information section for a list of available Confidential Document Types) and Confidential Addendum template

**Note:** If you do not have this note type added to your personal list, refer to: Adding Document Types for your Personal List.
7 Both notes will open as two separate tabs in Dyn Doc that can be easily toggled between.

8 Workflow Summary documentation and non-confidential data will pull into the Clinic Note only. All Confidential data items will pull to the Confidential Addendum; however any narrative text needs to be entered directly into the note.

9 Complete documentation and sign each note.

**How to Create Confidential Note(s) via Documentation Templates**

Fully Confidential Note – Use when entire visit needs to be kept confidential (one note)

1 It is important to identify confidential items in the chart despite all documentation pulling into one note.

2 Use appropriate clinic specific Documentation Template.

3 While documenting in the template, indicate confidential items by clicking on the “lock” symbol on the left.

4 Document information in the HPI, ROS, PE and Non-Confidential Assessment fields per your current process.

5 Mark the appropriate Meds, Labs, Problems, & Social History confidential. (Refer to How to View and Document Confidential Items)
6 Once the Documentation Template has been signed, select the Confidential Note pair as shown below.

![Confidential Note pair](image)

7 Click **Create Note**.

8 You must indicate reason for confidentiality as either minor consent or professional judgement.

![Confidential Reason Required](image)

9 All documentation, both confidential and non-confidential, from the Workflow Summary and other areas of the chart will pull into this note.

**Note:** The assessment will pull in as two separate sections, the first one is all the non-confidential diagnoses and the second is confidential diagnoses. You will want to number your diagnoses so the confidential ones are grouped at the bottom.

![Problem List/Dx](image)

10 Complete your documentation and sign note.
Dual Note – Use when only part of the visit is confidential (2 notes filtered by confidentiality)

1. While documenting and ordering, items marked as confidential will filter to a separate confidential only note, leaving all items NOT marked confidential in the Clinic Note.

2. Use appropriate clinic specific Documentation Template.

3. While documenting in the template, indicate confidential items by clicking on the “lock” symbol on the left.

4. Document Non-confidential information in the HPI, ROS, PE and Non-Confidential Assessment fields per your current process.

   Note: Do Not enter confidential information here. Your confidential narrative will be added later, directly into the note.

5. Mark the appropriate Meds, Labs, Problems, & Social History confidential. (Refer to How to View and Document Confidential Items)

6. Once the Documentation Template has been signed, select both the Clinic Note – Templated and Confidential Addendum options as shown below.

7. Click Create Note.
8 You must indicate reason for confidentiality as either Minor Consent or Professional Judgement.

9 Both notes will open as two separate tabs in Dyn Doc that can be easily toggled between.

10 Workflow Summary documentation and non-confidential data will pull into the Clinic Note only. All Confidential data items will pull to the Confidential Addendum; however any narrative text needs to be entered directly into the note.

11 Complete documentation and sign each note.