Use of New Confidential Note Type
Expansion of confidentiality documentation protects adolescents from unwanted disclosure.

Why?
• To Prevent portal/HIM release/Visit Summary disclosure of adolescent Confidential information to parent/guardian.
• To enable trust so teens can confidently seek medical care for sexuality, mental health and substance use issues.
• To provide a documentation approach which respects the adolescents’ personal concerns/health issues while valuing the families need to know and assist with management of non-confidential acute and chronic conditions.

How?
• Confidential Note type has been added for use by all Clinicians. This new note type can be used by any Clinician via Templates, Direct Charting or Dictation. Clear labeling throughout the system will help to alert all Clinical teams that the notes are to be kept confidential
• Retire previous note types which may have contained confidential information so, going forward, release to the portal of non-confidential note types will assure confidential information is not included.
• All Clinicians need to familiarize themselves with how to create confidential documentation and how to add the new note type to their document type selection list.
• Reminder for all Clinical teams to respect confidential information created by other Clinicians from disclosure.

If you have questions or would like help for you or your team, please send a request to Professional Staff Education@Childrensmn.org.
Adding and Removing Document Types from Personal List

Setting Personal Default Documents for Dynamic Documentation

1. Click the **Select Other Note** option at the bottom of the Workflow Summary.

2. Select **View** (on top toolbar), **Customize**

3. **Remove Historical Note Types**

On the right hand side find any Documents that end in Historical or Hist, select it and move it to the left using the

- Examples of Historical would be:
  - Adolescent Primary Care Clinic Historical
  - Pediatric Clinic Note Historical
  - Well Child Check Historical
  - Well Child Check Historical 12 Yrs and Older Hist
  - Well Child Check Newborn to 11 Years Hist

4. **Select Note Types**

On the Left hand side find **Confidential**, select it and move it to the right using the

5. **Click**
6 Click  OK

7 Close the patient chart – when you open a new chart the defaults will be updated.

Setting Personal Default Documents for Direct Charting Documentation

1 Go to the Menu, Click on Clinical Documents option from the Menu

2 Select Documents, then Options

3 Remove Historical Note Types

On the right hand side find any Documents that end in Historical or Hist select it and move it to the left using the Examples of Historical would be:

Adolescent Primary Care Clinic Historical
Pediatric Clinic Note Historical
Well Child Check Historical
Well Child Check Historical 12 Yrs and Older Hist
Well Child Check Newborn to 11 Years Hist
4 Select Note Types

On the Left hand side find **Confidential**, select it and move it to the right using the...

5 Click

6 Click

7 Close the patient chart – when you open a new chart the defaults will be updated.

**How to View and Document Confidential Items**

**Prescriptions**

View: **CONFIDENTIAL** will appear in Home Medication display
Update: Select Yes for Confidential Medication item

Orders
View: CONFIDENTIAL order will display in order details
Update: Click CONFIDENTIAL order and select yes

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 confidential (see Update), then click This Visit and make confidential. Number all Non Confidential followed by any Confidential.

Social History
View: Categories containing confidential information will have (Confidential) label after name.
Update: Document confidential information in the categories labeled as confidential. Click Add to document new, right-click and modify to update existing information.

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, print (1) and select Remove (2), which removes it from Clinic and Discharge Summaries and “My Children’s Portal.”