CareStack Setup Checklist – Care Notes

Care Notes are CareStack's answer to the complexities of documenting clinical findings. Rather than providers writing notes over and over, and possibly missing key details, providers can create notes by answering prompt questions with pre-set response options.

Care Notes are complex by necessity. They are meant to provide detailed information about the patient and treatment that is complete and stands the test of time. Information you can go back to for good and for less good.

That means building these notes takes careful thought about what needs to be documented, careful planning to ask the right questions, and careful construction so the notes perform in the way that meets your practice's needs.

Before You Begin

Know What You Need to Know

I know you want to jump in and get started with notes. They are fun to build and have a clear benefit as you create charts, but to build good notes from the beginning, you'll need to be familiar with CareStack's clinical features.

- ☐ If you haven't done so yet, please complete the **Welcome to CareStack** lesson. It shares a day in the life of a patient so you can see how all the pieces fit together.
- ☐ Please complete the lessons in the **Clinical Charting** path. Knowing how the tools work and how you will use them in your practice will make your setup decisions easier. You will know which options you like and which you don't.
- ☐ Since notes can link to your conditions and procedure codes, make sure that you are comfortable with your setup of those.

Choose Your Site Wisely

Your **Sandbox** site (*practice.sb.carestack.com*) includes some sample Care Notes so you can experiment with the prompts, responses, options, and linkages so you can better make your decisions. In some cases, you may see versions of existing notes copied in the conversion.

Please feel free to edit and link these sample and copied notes as part of your learning and practice but know that **the work you do here does NOT carry forward into your final site**.

You should only construct your final notes in your **Interim-live** (*practice.carestack.com*) site in preparation for your CareStack launch.

Planning

It is critically important to plan your note elements before you begin constructing them. Before jumping into individual note development, consider the individual elements and decisions:

- ☐ Review the note library provided by CareStack? Determine if you will use, edit, or discard any of them.
- ☐ Set your naming convention for your notes.
- ☐ Will your notes be color coded?
- ☐ If so, how, by code, topic, etc.?
- ☐ Will providers have different notes from one another?

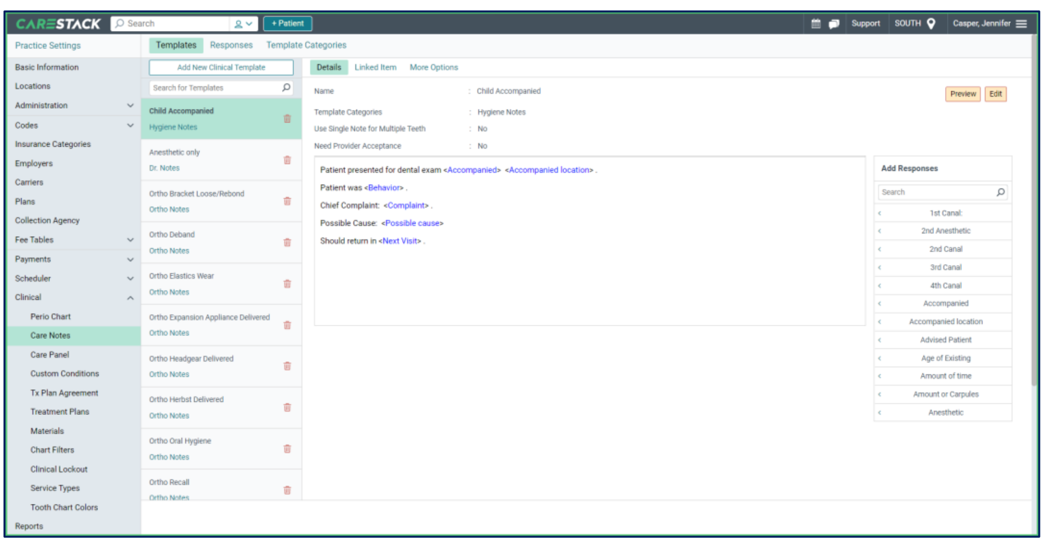
Build a Note

A Care Note has four components:

- Question and response sets
- Templates that set context and hold the response sets
- Links to launch the note when a linked condition or code is charted
- Rules to set the note's behavior

Because the question and response sets become your question bank, create those first. They can be easily added into multiple templates.

Begin creating your **Care Notes** from **Practice Settings**. They are found under the **Clinical** category.



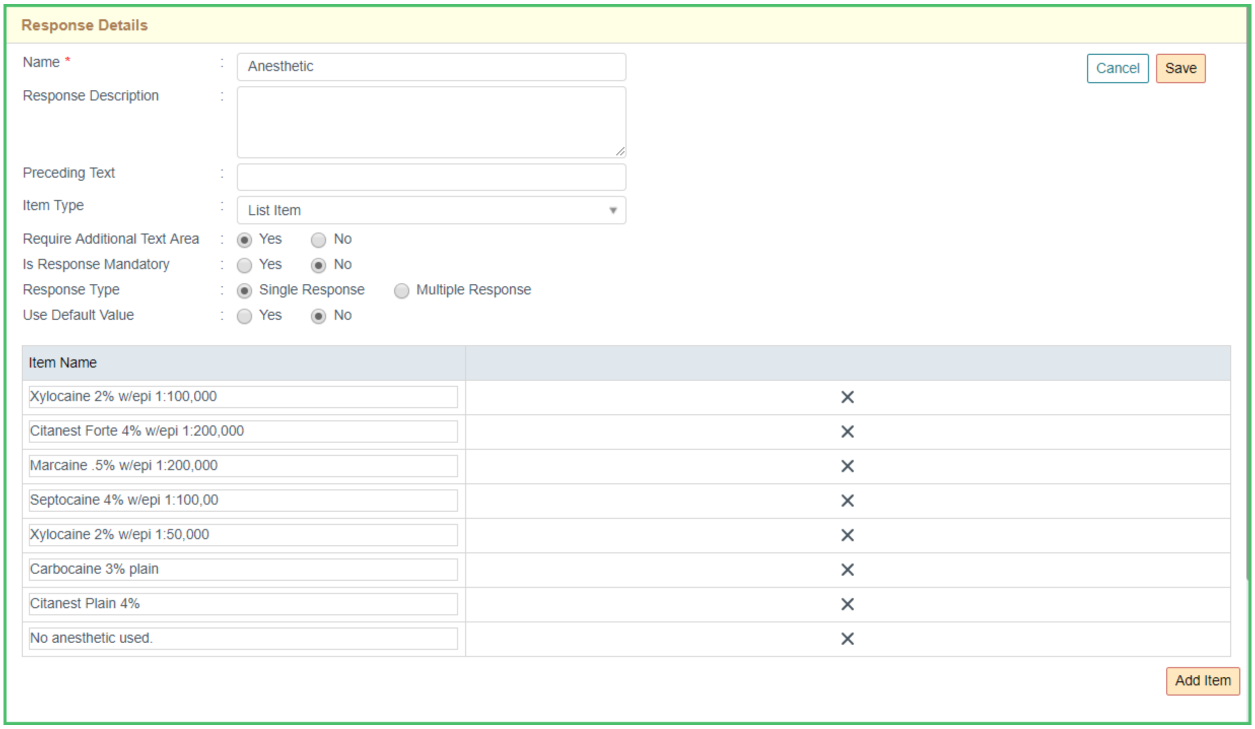
You'll find the elements in their tabs.

CARESTACK UNIVERSITY

Responses

Responses are the question and answer sets that your providers will use to add the important information into the note. You'll have options to describe the response and control its behavior.

In the Response Details area, click **Edit** to open the fields.



- The **Name** is the prompt that will be addressed in the note
- The **Response Description** is optional text that is only visible in this setup area.
- Add **Preceding Text** if you want extra text to be included with the response ONLY when it is answered.
  - This option is helpful when you will use rules to skip prompts because you won't be left with dangling sentences.
- **Item Type** controls the type of response to your prompt. You can use standard date, tooth number, area of the mouth, or surface selectors or create your own multiple-choice type list.
  - When you choose List Item, you will need to add each of the choices. Click the Add Item button and type your option. Be sure your option is distinct from the other choices.
- The options for **Additional Text Area**, **Mandatory**, **Type** and **Default** are unique to the List Response and provide additional options and control. Be consistent.

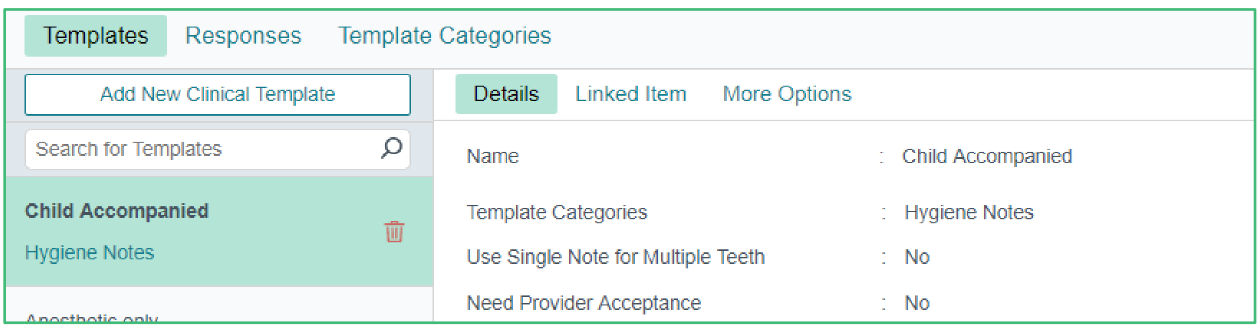
- If you choose to have a default answer, it will be pre-populated as the response. You will also have the option to have that answer filled in for the provider.

To Do:

- ☐ Determine the facts or questions that need to be addressed in your notes that are not addressed by the codes.
    - Consider questions about behavior, prognosis, procedures, results, anesthetic, and return visits.
    - Consider the best way to address the question.
    - Create some basic questions that can drive further questions, like simple Yes/No options.
- ☐ For each question, determine the possible answers.
    - How will the provider answer the prompt?
    - Will the answers have single or multiple options?
    - Will there be a default option?
    - Will the response be required?

Templates

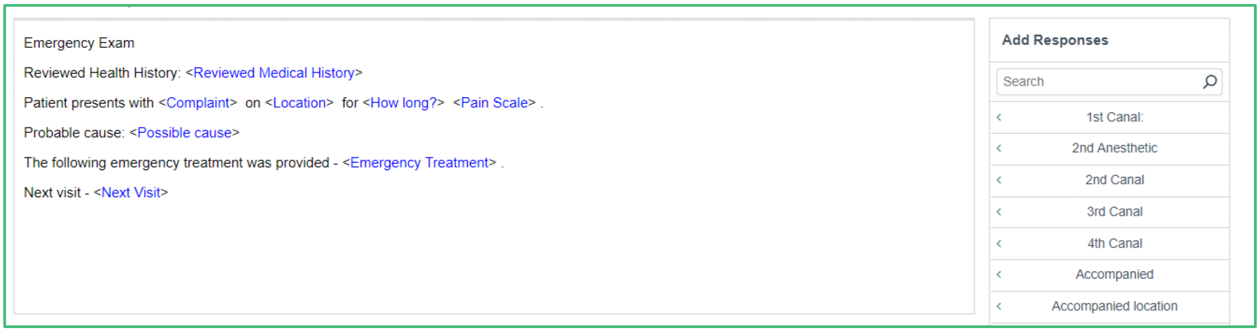
The note template contains the constant boilerplate text that links the prompt/questions into a cohesive statement.



- The **Name** is the note's title. Use a title that makes the note's purpose easy to recognize in a drop-down list.
- Select a **Template Category** to organize your notes and make them easier to find.
- Select Yes for the **Single Note** option when you want to have only one note for identical procedures charted on the same day. For example, many practices use this option for sealant notes.
- The option for **Need Provider Acceptance** requires the indicated provider review the note before it can be finalized.

- When selected, the provider will need to review the content and click Finalize to complete the note regardless of who completed it.
- Providers can sign notes at the time they are entered by entering a password. Notes can also be found and reviewed from the **Clinical Notes** section of the **Control Center**.

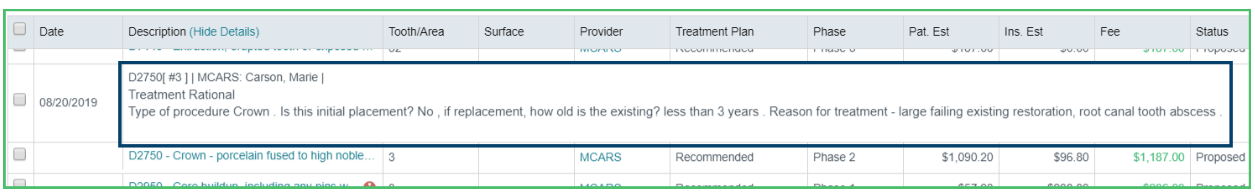
In the Content Area, write and format the boiler plate text using the familiar tools. Text will appear in the final note exactly as formatted.

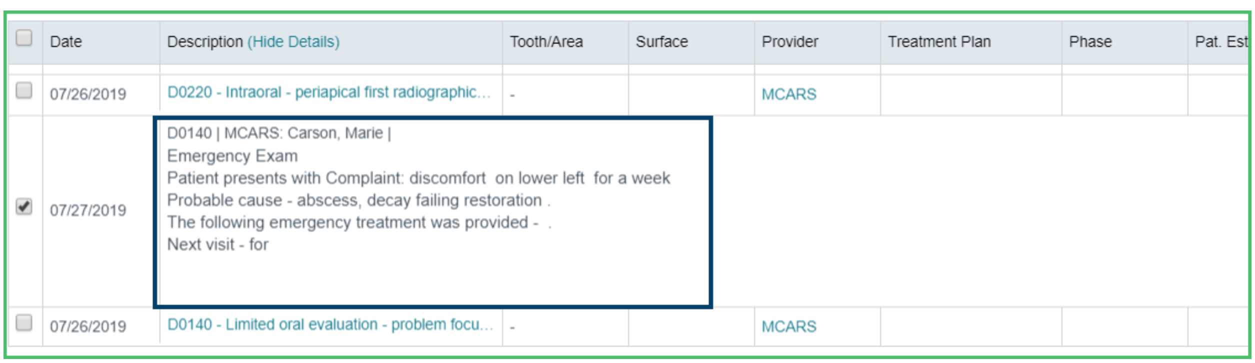


WYSIWYG

What You See Is What You Get

How you enter the boilerplate text and the responses influence how the note displays in the patient's chart:





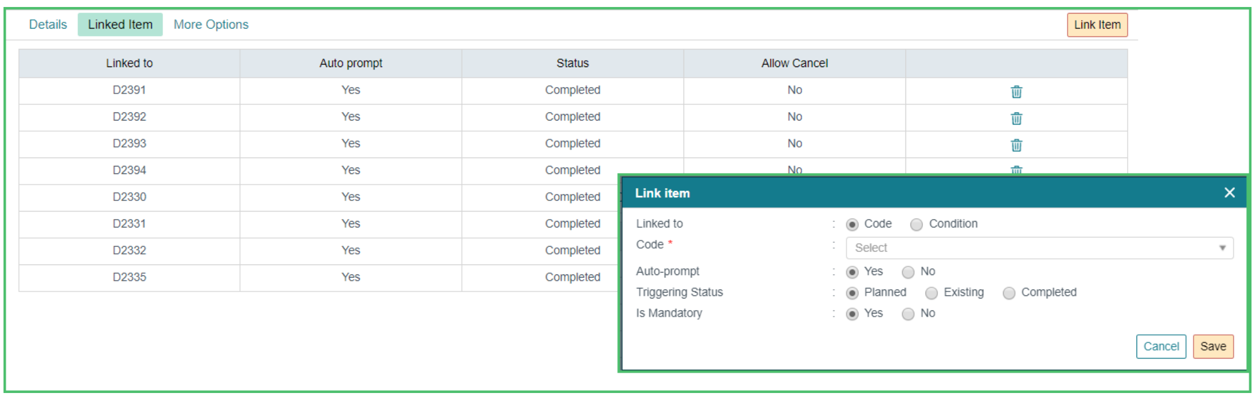
Add the response, shown in blue, directly into the note content by selecting the response from the list on the right side of the screen. Remember to use spacing and punctuation.

To Do:

- ☐ Determine the facts or questions that need to be addressed in your notes that are not addressed by the codes.
- ☐ Determine your preferred method of formatting.
    - Do you want each prompt on a separate line?
    - Should new lines have a header?
    - Do you want complete sentences?
- ☐ Build the note template.
- ☐ Select the response items.
- ☐ Format the note template. Don't forget spaces, punctuation, and emphasis.
- ☐ Determine if the note will require sign-off by the provider.

Linking Notes

Notes can be linked to treatments and conditions, so the notes launch automatically when the item is charted. Set the link for the note on the **Template** page in the **Link Item** tab.



Click **Link Item** to open the window.

- You can **Link** your note to a Procedure Code or a Condition.
- Select the **Code** or **Condition** that will trigger the note from the drop-down list.
- Leave **Auto-prompt** as Yes to trigger the note when the code or condition is charted.
    - If the
- Select the code status that will launch the note in the **Triggering Status** field. For example, if the note refers to how a treatment was performed, choose Completed. If the note refers to a recommended treatment and rationale, choose Planned.
- To require the note be completed when launched, select Yes for **Is Mandatory**. This will prevent the note from being cancelled or discarded.
    - The individual note settings still apply to launched notes. This includes settings for response options and the template settings.

To Do:

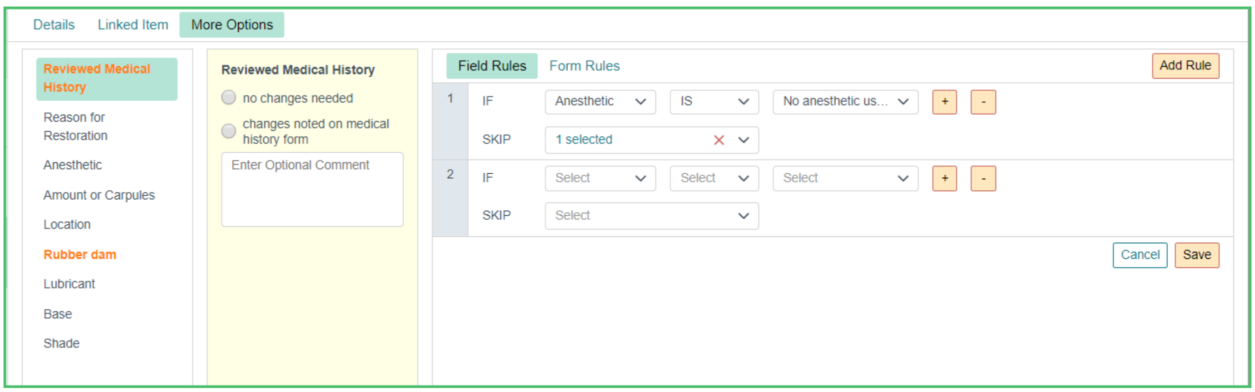
- ☐ Which notes should link to planned treatments?
- ☐ Which notes should link to completed treatments?
- ☐ Which notes should link to conditions?
    - A popular condition note is for Watch Tooth.

Rules

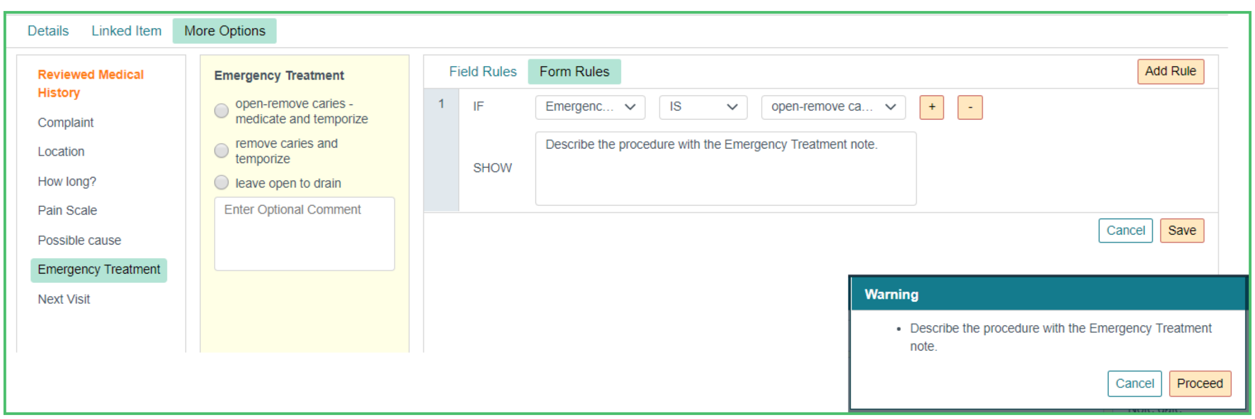
Field and Form rules allow you to customize the note's behavior in given situations by following an If/Then logic. These options let the provider skip a prompt when a previous answer makes it irrelevant.

Set the rules for the note on the **Template** page in the **More Options** tab.

Field Rules let you build individual logic for each response option within then note. For example, a note prompts a provider to indicate the anesthetic used and then the number or carpules, but if no anesthetic is used, there is no reason to ask about the number of carpules.



Form Rules let you deliver a message to your provider based on the note selections when the note is finalized.

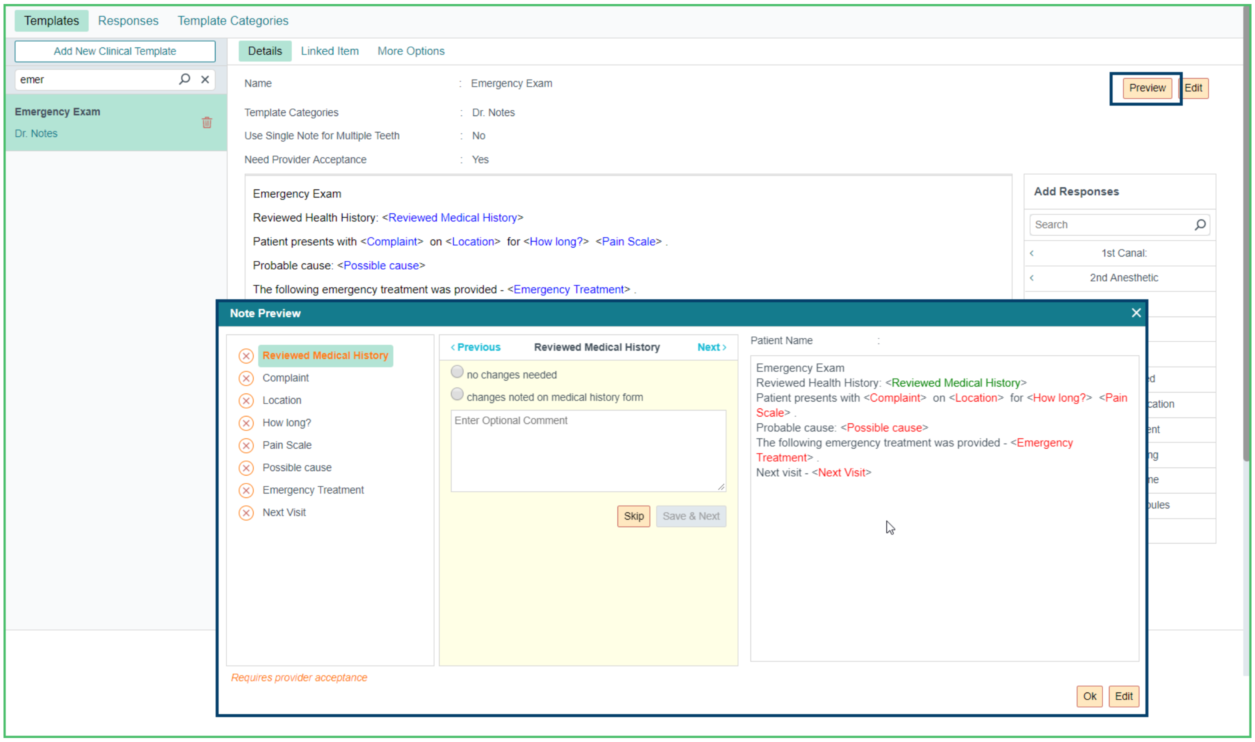


Test and Revise

It feels fantastic when you hit that Save button and your note and all its responses, formatting, links, and rules are completely setup.

You still have one more step. You need to test your note and make sure all the elements behave as you intended. Even if you follow every everything exactly perfectly, the notes have factors that influence each other.

The note template tab is your first place to start testing. Click the **Preview** button to launch the note as it would launch in the CareStack Chart.



Here you can test the prompt and response parings, the sentence structure and the behavior of the field rules. It seems redundant and overkill but test every response option. You might discover surprising things about your notes:

- ☐ Look at both the individual responses, the individual templates, and the resultant note
- ☐ Check for missing spaces that make preceding text run into a response
- ☐ Check for two responses that are nearly identical
- ☐ Check for responses that duplicate words in the template
- ☐ Confirm that mandatory responses don't cause larger problems with the notes.