


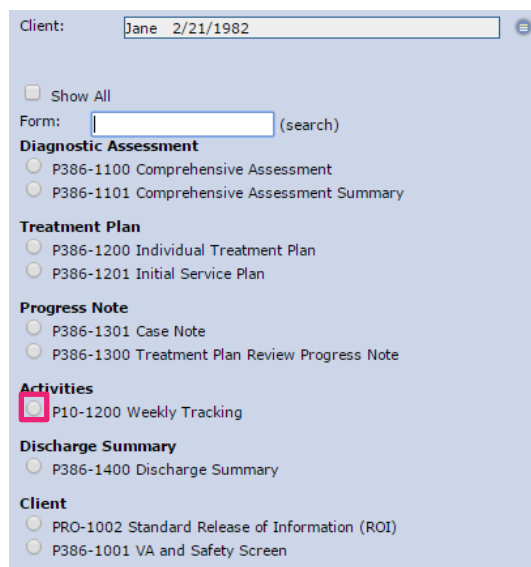



STUDENT TRAINING  
CREATING A CLINICAL DOCUMENT

## Creating a Clinical Document

To create a Clinical Document in Procentive (such as a Diagnostic Assessment, Treatment Plan, or Case Note), take the following steps:

1. **Click on the Clinical/Charting module** **Clinical/Charting**.
2. **Click Add.** To add a new document, click the “Add” **+ Add** button in the upper right corner. Once you click add, the “Document selection” window will appear.
3. **Select a client.**
  - You must select the client for which you are creating a document for. To find the client, click the “pick list” button  to the right of the client field. A new window will pop up.
  - **Click on the name of the client you need** from the list of clients.
4. **Program:** Select a program (this may or may not be required based on your database).
5. **Select the document:** Find the document you want to create and click the radio button to the left of the document name.



- **Show all:** If you do not see the document you need to create, click the “Show all” checkbox  **Show All** to expand the list of documents that are displayed.
  - **Form search:** You can also type in a portion of the document name into the “Form search” tool to narrow the list of document options.
6. **Click OK:** Click OK **OK** and your document will open.

- Example of a document (with chosen P386-1200 Individual Treatment Plan) below.

The screenshot shows a web-based form for creating a clinical document. At the top, there are fields for 'Template' (set to '[None]'), 'Title' (with a 'copy' link), and a signature dropdown. Below these are date fields for 'Effective date' and 'Date ineffective', followed by a 'days' field and checkboxes for 'Printed and Filed', 'Audit Ready', and 'Inactive'. A 'Service Line' dropdown is set to '[choose...]' with an 'edit' link. An 'Attachments' section includes a link to 'upload\_attachment\_scan'. The main title of the document is 'CHEMICAL DEPENDENCY INDIVIDUAL TREATMENT PLAN'. Below this, the 'Client Name' is 'Jane'. There is a large text area for notes with an 'add' button. Further down are date fields for 'Intake Date', 'Completed Date', and 'Modified Date'. The 'Program' field is followed by a text area. Below that are fields for 'Total amount of treatment' and 'How many days a week' (with a 'Choose One...' dropdown). The 'Anticipated Duration of Treatment' field is at the bottom.

## Clinical Document Features

Below, are some of the features in a clinical record that you will be able to use.

- **Copy:** Clicking this link will create a new, duplicate copy of this form. This is helpful for updating a document. It creates a word for word, field for field, exact duplicate record except for digital signatures. You can change the date and any other needed information, keep the rest of the information the same and click save. You now have a new, updated record.
- **Dates:** Whenever you open a document you must enter a date, in the upper left portion of the screen. Most documents will have only one date field. Treatment Plans will have an “Effective date” and a “Date ineffective”.  
Effective date: 10/26/2015    Date ineffective: 10/26/2015
- **Saving:** All documents have an “Auto save” feature at the bottom of the screen. It defaults to save every 60 seconds. You can modify this if you want. We recommend keeping the auto save at 5 minutes or less.  
Autosave: 1 minutes
- **Save button/Saving icons:** The Save button **Save** appears in the lower right portion of the screen. When you click save, and when the system auto-saves, you will notice an icon in the upper right side of the document. While saving, the icon is yellow. When saving is complete, the icon turns green and indicates the document was saved at xx:xx:xx time.
- **Spell check:** On Chrome and Explorer 11, spell check happens automatically as you type. For older versions of Explorer, there is a spell check button in the lower right portion of the screen. There is a spell check icon on the bottom of the screen, spell check is not automatic; you must tell it to spell check

- **Client:** Click this link to bring up the Client Module/Client Information. (Permission based.)

### Clinical Document Function

Below are some of the functions that will be available for your use in the clinical records.

- **Radio Button:** A list of options in which only one of the items can be chosen. Please note: once an option is selected from the list, you must choose one of the options; you cannot deselect. Keep this in mind when requesting radio buttons and plan to add an "N/A" choice if needed. On the printed form, you may chose to have all of the options print (including the options not chosen) or only the selected items print.
- **Checkbox:** A list of options in which all of the items can be chosen. On the printed form, you may chose to have all of the options print (including the options not chosen) or only the selected items print.
- **Dropdown List:** A list of options in which only one of the items can be chosen. You must click the drop down to see a list of the choices and make a selection.

Sleep	<input type="radio"/> Yes	<input type="radio"/> No
Unclear Speech	<input type="radio"/> Yes	<input type="radio"/> No
Feeding/eating problem	<input type="radio"/> Yes	<input type="radio"/> No
Under/over weight problem	<input type="radio"/> Yes	<input type="radio"/> No
Over/under active	<input type="radio"/> Yes	<input type="radio"/> No
Lead exposure	<input type="radio"/> Yes	<input type="radio"/> No

#### Mood and Affect

<input type="checkbox"/>	Calm and comfortable
<input type="checkbox"/>	Cheerful
<input type="checkbox"/>	Anxious
<input type="checkbox"/>	Depressed/tearful
<input type="checkbox"/>	Angry

Mother	▼
Mother	
Father	
Clinician	
[other]	

What are the main concerns for which this client needs help?

- **Edit Field or Narrative/Text Field:** A field in which you can type in any information; a narrative data entry field.

Approaches

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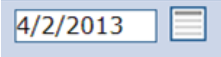

add

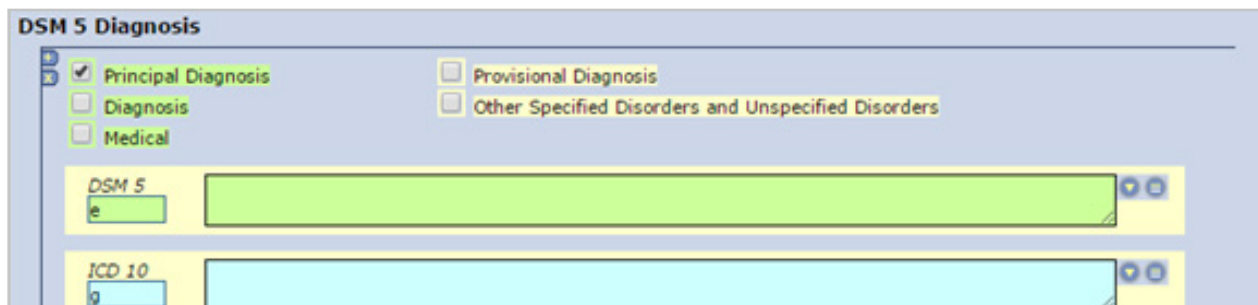
- **"Add" Tables:** Anything in the "table" will repeat. This allows for multiple entries, such as a medication table, in which you note the name of the medication, the dosage, the start date and end date, etc. Every time you click the "Add" button, the entire table will replicate for you to enter another line of information. The + button will add a specific field or section of fields above the current line; and the x button will remove that same field or section of fields.

Medications						
Name	Start Date	End Date	Dosage	Frequency	Prescribed By	Note
<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>

+ x

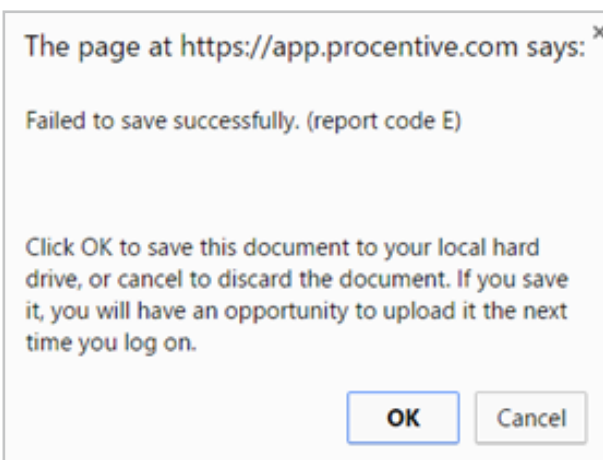
add


- **“Pick” lists:** A Pick List is the blue circle with three horizontal lines  next to an Edit field. Click on this to access a larger list of options. The contents of the list will depend on where the icon appears on the document, but it could be a list of staff, diagnoses, etc. Once an item or items are chosen they will appear in the edit field. You can then edit the item or add narrative around it. 
- **Date fields:** Date fields are simply edit fields that have calendar buttons next to them. You can use the calendar button  or you can type in the date and it will automatically format what you type into a date format of DD/MM/YYYY.
- **Data Flow:** Data flow is a feature that sends information from one field in a form to automatically appear in another field in a different form, creating less work for you. We all love that, right? The most **RECENT** date, **ACTIVE** record for that **CLIENT** within the same **PROGRAM** will be used as the data. Fields that could have information automatically appear from a previous record, are highlighted in green.



### Error Message

- If, while working on a clinical record, you encounter an error message, as seen on the right, you're record can be restored by following the steps listed below:



1. Click OK
  2. Click on the white exclamation mark  in the lower left-hand corner of the window.
  3. A window will pop up and tell you that “This information has been copied to the clipboard”. You can now paste this information into a ticket if you need Procentive to restore the document you are working on. DO NOT paste the information into an email.
  4. Click OK and then minimize the form window. DO NOT CLOSE the form window.
  5. Log back into Procentive and click the “Help” Button in the upper right-hand corner of the screen.
  6. In the new ticket window, title the ticket something like “Document Restoration” and set the Priority to High or Crisis.
  7. In the Description Field, type:
    - Form Name
    - Date of the Record
    - Client Name or Number.
  8. Right-click in the Description field of the ticket and select “Paste” to have the copied information appear in the ticket.

Helpful Tip: If you are on a tablet, you may need to long press in the description field to get the paste option to appear.
  9. Select the “Send to Procentive” button and then click Save.
- Procentive Help Desk Support will receive the request and restore the record within 1-2 Business days.