

Creating Documentation Filters

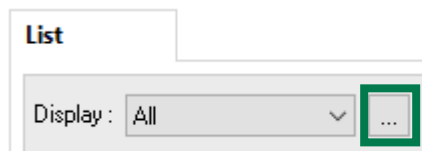
Creating a Custom Documentation Filter

You can create custom filters in the *Documentation* screen to quickly locate particular document types.

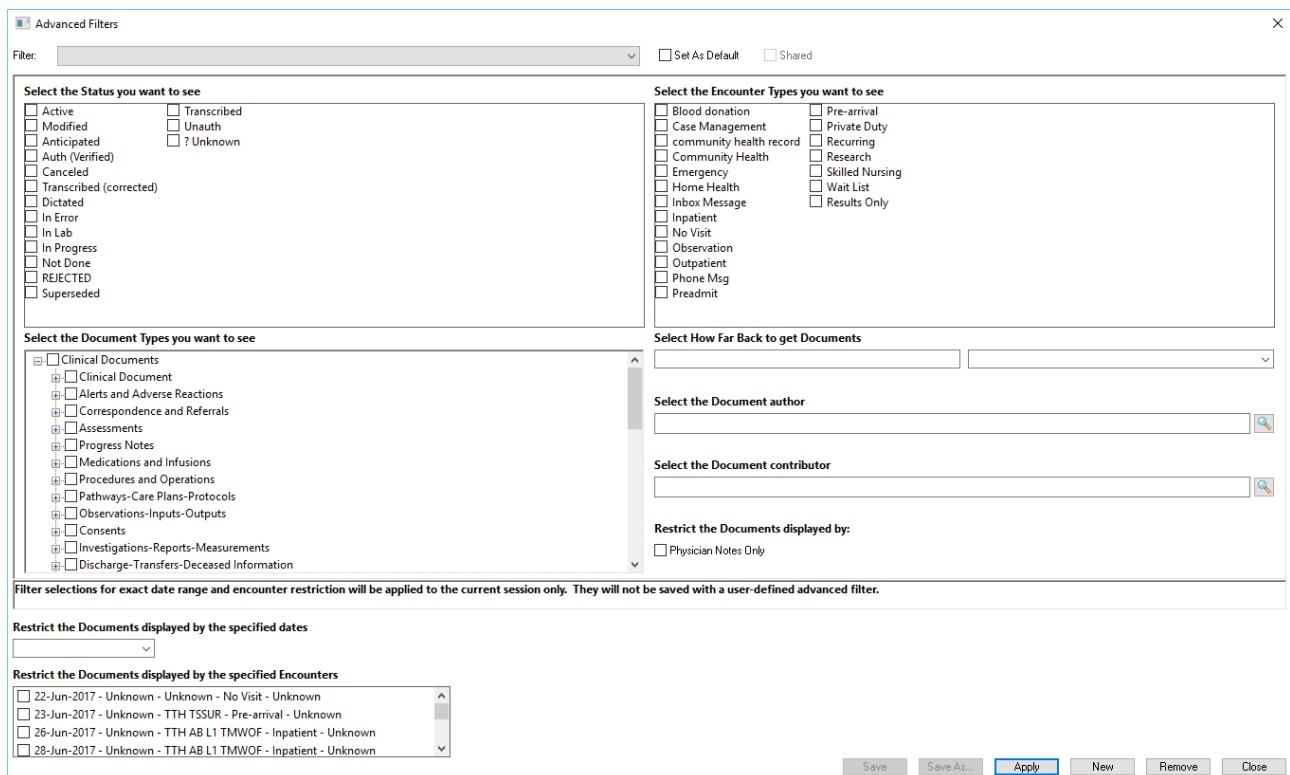
1. Open the patient's chart and go to *Documentation*.



2. Click on the ellipsis button beside the *Display* drop-down menu.



3. The *Advanced Filters* window will open.



Filters can be set up according to *Status*, *Encounter Type*, and *Document Type*. Some options under *Document Types* contain multiple levels. Click the + icon to expand these.

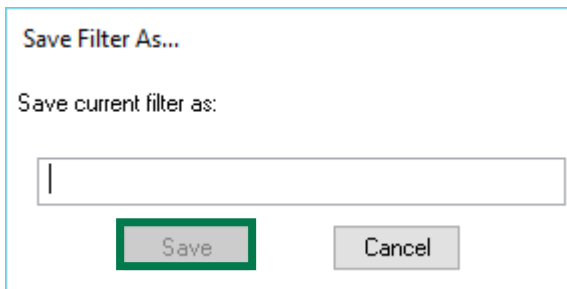
Results can also be filtered by date range, author or specific encounter.

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4. Select the options to set up your filter as required.
5. Select *Save As...*. This will open a box for you to name your filter.



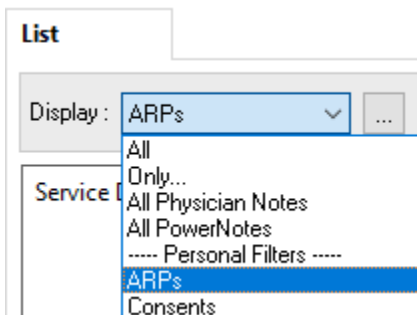
6. Name your filter as desired and click *Save*.



7. You will be returned to the *Advanced Filters* window. Select *Close* to return to *Documentation*.



8. Your filter is now available from the *Display* drop-down menu under *Personal Filters*.



Saved filters can be edited by opening the *Advanced Filters* window as described above and selecting the *Filter* from the drop-down box at the top of the *Advanced Filters* window.



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Examples of Commonly Used Filters

Advanced Care Planning

- Select *Alerts and Adverse Reactions* under *Document Types* to view *Advanced Health Directive* and *Statement of Choices* documentation and historical paper ARPs.

Select the Document Types you want to see

A screenshot of a web interface showing a list of document types under the heading "Select the Document Types you want to see". The list includes: Clinical Documents (expanded), Clinical Document, Alerts and Adverse Reactions (highlighted with a green box), Correspondence and Referrals, Assessments, Progress Notes, Medications and Infusions, Procedures and Operations, Pathways-Care Plans-Protocols, Observations-Inputs-Outputs, Consents, Investigations-Reports-Measurements, and Discharge-Transfers-Deceased Information. Each item has a plus icon to its left and a checkbox to its right.

Enduring Power of Attorney

- Select *Legal* under *Document Types* to view *Enduring Power of Attorney* documentation.

Select the Document Types you want to see

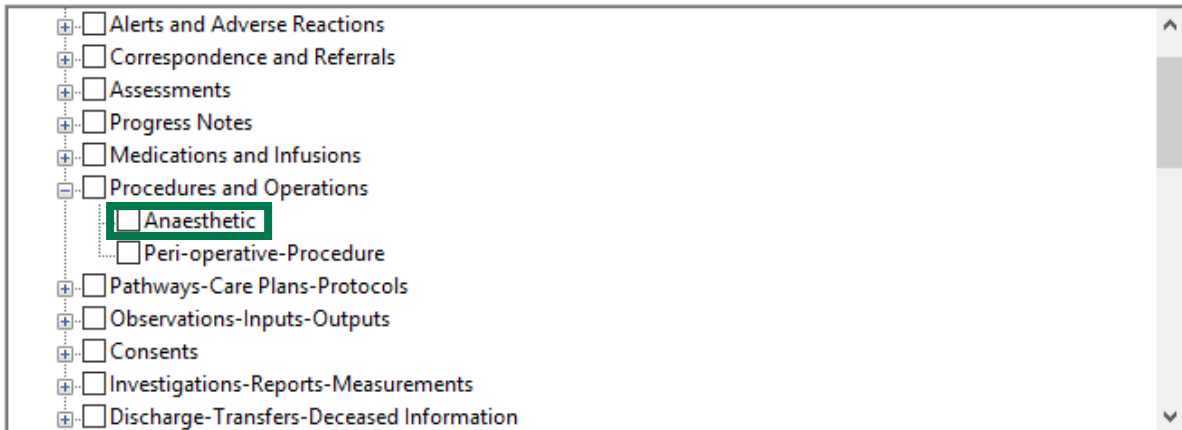
A screenshot of a web interface showing a list of document types under the heading "Select the Document Types you want to see". The list includes: Pathways-Care Plans-Protocols, Observations-Inputs-Outputs, Consents, Investigations-Reports-Measurements, Discharge-Transfers-Deceased Information, Administrative, Legal (highlighted with a green box), Research, Discharge Documents, ED Documents, Assessment Documents, Operation Documents, and PACU Reports. Each item has a plus icon to its left and a checkbox to its right.

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Anaesthetic Records

- Under *Document Types*, select the + icon beside *Procedures and Operations* and tick the *Anaesthetic* checkbox to view *Anaesthetic* records.

Select the Document Types you want to see

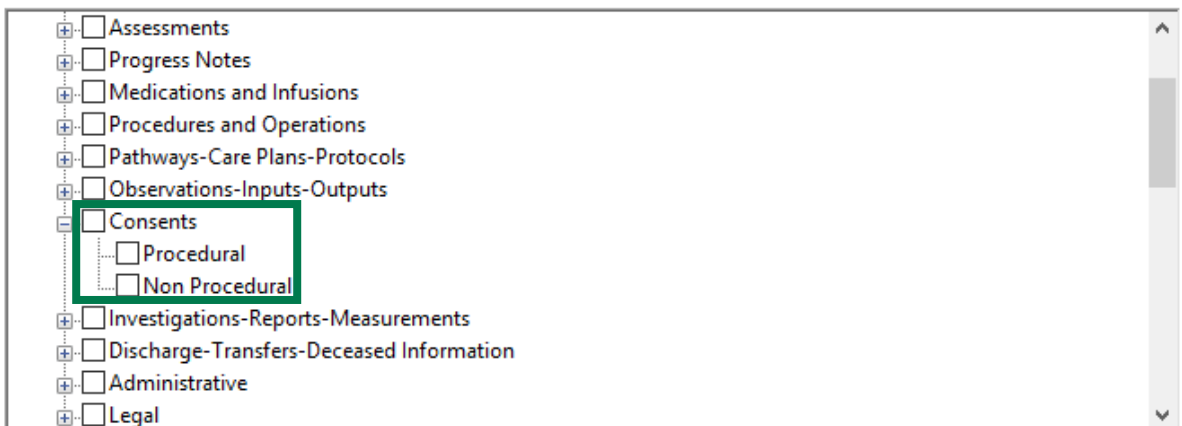


A screenshot of a web interface showing a list of document types with checkboxes. The list is titled "Select the Document Types you want to see". The items are: Alerts and Adverse Reactions, Correspondence and Referrals, Assessments, Progress Notes, Medications and Infusions, Procedures and Operations, Anaesthetic (highlighted with a green box), Peri-operative-Procedure, Pathways-Care Plans-Protocols, Observations-Inputs-Outputs, Consents, Investigations-Reports-Measurements, and Discharge-Transfers-Deceased Information. Each item has a plus icon to its left and a minus icon to its right.

Consents

- Select *Consents* under *Document Types* to view *Consent* documentation, including scanned documentation. *Procedural* and *Non Procedural Consents* can be specified as required.

Select the Document Types you want to see



A screenshot of a web interface showing a list of document types with checkboxes. The list is titled "Select the Document Types you want to see". The items are: Assessments, Progress Notes, Medications and Infusions, Procedures and Operations, Pathways-Care Plans-Protocols, Observations-Inputs-Outputs, Consents (highlighted with a green box), Procedural (highlighted with a green box), Non Procedural (highlighted with a green box), Investigations-Reports-Measurements, Discharge-Transfers-Deceased Information, Administrative, and Legal. Each item has a plus icon to its left and a minus icon to its right.



More documents than indicated here may be shown when a given filter is applied.