Tagging Text in a Progress Note

The *Tag* feature allows for *Pathology* results or text within a document to be tagged and saved for use when creating a new *Progress Note*. This feature is similar to “*Copy and Paste*”. However, it allows for multiple items to be copied and saved for later use.

**Tagging Text in a Document**

1. *Open* the patient’s medical record.
2. For *Progress Notes* and other documents, *click* *Documentation* or *Clinical Notes View*.
3. For *Radiology* or *Pathology* results, *click* *Results*.
4. *Click on Documentation* from the Patient Menu.
5. *From the Documentation List*, *click* on the required document.
6. *Click and drag* to highlight the text to be *Tagged* from the selected *Note/Document*.
8. *Click the Tag icon* to *Tag* the text.

** Documentation**

1. *Click* on *Documentation* from the Patient Menu.
2. *From the Documentation List*, *click* on the required document.
3. *Double Click* the required *Note/Document* to open it and view the text.
4. *Follow steps 3 to 8 above to Tag text from Notes/Documents in Clinical Notes View.*
Radiology and Pathology Results

Written reports from Pathology and Radiology can also have text tagged and used in a Progress Note.

1. Click on Results in the patient menu.
2. Click on the required tabs (e.g. Medical Imaging, Documents etc.).

The Documents tab contains written Pathology and Radiology reports as well as Clinical Notes and other Documents.

3. Double click on Report that contains the text to be tagged. This will open the written report.

4. Follow Steps 3 to 8 above to Tag text from Reports/Notes/Documentation in Results.

Using Tagged Text in a Progress Note

Once the process of "Tagging" has been completed, a new Progress Note can be created and populated with the saved Tagged items. Tagged text can be used in any of the Progress Note Templates.

When creating a new Progress Note the Tagged text is displayed on the left of the Note being created.

1. Highlight the desired Tagged text and “drag and drop” into the Progress Note under the relevant heading or required area.

   The area around the heading or blank area will turn blue to indicate the text can be dropped into that area.

   The Tagged text will also display a small number next to it. This is a Reference Number and the source of the Tagged text can be found at the bottom of the Note matched to the Reference Number.

2. Continue dragging and dropping any further required Tagged text into the Note.

3. Complete remainder of Progress Note.

4. Click Sign/Submit to finalised Progress Note or Save & Close to return to the document at a later time to finalise.