Using Note Sections & Checklist Tagging for 21st Century Cures Act and Information Blocking Requirements

The new Note Section template control, introduced in version 6.5.7 of the ChartMaker Medical Suite, which can be used in conjunction with Checklist Tagging, allows you to easily capture the entirety of a chart note (including such non-discrete data as dictation, free-text notation, and picklists) that is then used to populate the C-CDA for the various Document Type exports.

Using the Note Section template control to tag sections of a chart template with C-CDA Section Labels, and/or the Checklist Tagging functionality, in conjunction with the ChartMaker® PatientPortal, is our recommended method for ensuring that proper patient health information in a chart note is being shared electronically with the patient via the Note Summary, eliminating the need to upload PDF copies of chart notes to the PatientPortal. Likewise, as the C-CDA is the standard method to facilitate interoperability, using the Note Section control and/or Checklist Tagging ensures that the C-CDAs that are generated to share electronically with patients, other healthcare providers, HIEs, ACOs, APIs, and other registries are complete and contain the necessary information.

This document will walk you through how to tag a checklist in the template editor, how to configure your template with C-CDA Section Labels, and how that information will appear in the chart note, as well as turning off the export of PDF copies of chart notes once your templates have been updated with the Note Section template control and/or Checklist Tagging.

Template Editing – Tagging a Checklist

Use the following steps to tag a checklist in the Template Editor.

1. Open the Template that contains the checklist you want to tag.

2. Right-click the heading bar of the checklist you want to tag to access the Finding Check List Properties dialog.

3. In the Finding Check List Properties dialog, click the **Include As** drop-down list, and then select the type of data the checklist will be used for:

   - If the **Chief Complaint** option is selected in this field, information selected in the checklist will then populate in the patient's Clinical Summary and will also be tracked and counted towards the applicable Meaningful Use objectives and/or quality measures.
   - If the **Assessment** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has an Assessment section.
   - If the **Complications** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Complications section.
   - If the **General Status** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a General Status section.
   - If the **Hospital Course** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Hospital Course section.

- If the **Imaging Narrative** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Findings Section.
- If the **Lab Report Narrative** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Lab Report Narrative section.
- If the **Past Medical History** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Past Medical History section.
- If the **Pathology Report Narrative** option is selected, any data entered in the checklist will be pulled into any C-CDA
- document type that has a Pathology Report Narrative section.
- If the **Physical Examination** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Physical Examination section.
- If the **Plan of Treatment** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Plan of Treatment section.
- If the **Procedure Description** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Procedure Description section.
- If the **Procedure Indications** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Procedure Indications section.
- If the **Review of Systems** option is selected, any data entered in the checklist will be pulled into any C-CDA document type that has a Review of Systems section.

NOTE
The options included in these instructions are available in the latest version of the ChartMaker® Medical Suite (6.5.3.373), or later. If you are not using the 6.5.3.373 version or later, we recommend updating.
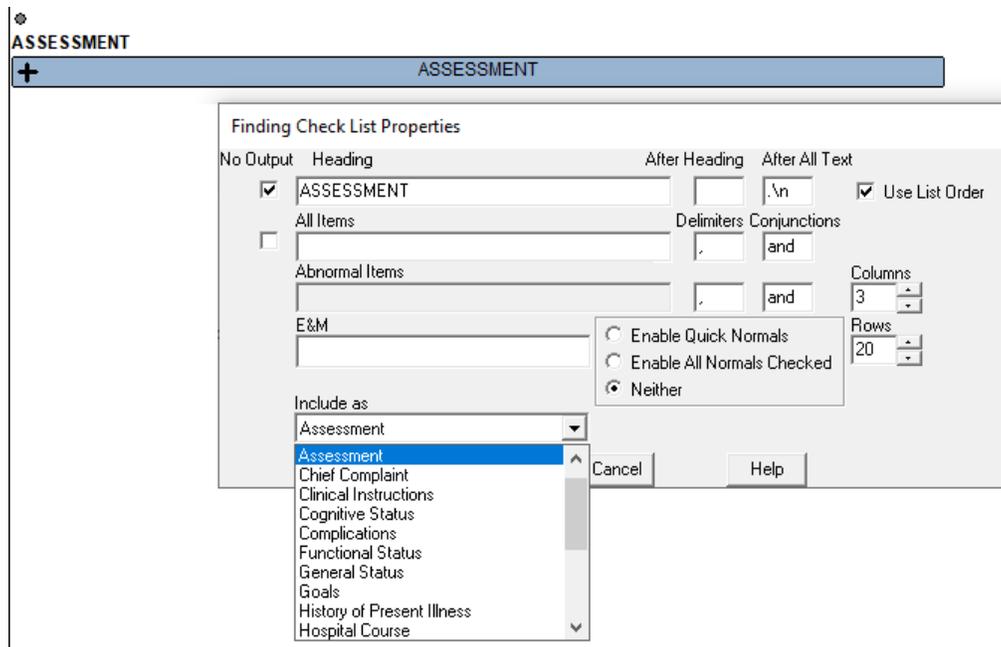
4. When finished, click the **OK** button.

5. Be sure to click the **Save Template** button if you do not have the **Auto-save** option checked.

Template Editing – Create & Modify Note Sections for C-CDA Section Labels

You can create note sections in a template that allow you to tag sections of a chart note with C-CDA Section Labels which will then be used when exporting C-CDAs. Once the various sections have been tagged inside the template, any text output (whether generated from a widget or free text) between the start and end tag of that section label in the chart note, will be saved to the database as structured data and will be included in any applicable C-CDA exports for the corresponding document types.

For example, if a section of the template is tagged as Assessment, then any text output generated in that section of the chart note will be saved to the database as Assessment data for that note, and then when a C-CDA Document Type is exported for that note, that data will be populated in the Assessment section of that C-CDA
file, if an Assessment section exists for that document type.

Use the following steps to create a note section for C-CDA Section Labels in a template.

1. Access the template you want to create a section or sections for, and once the template has been accessed, click and drag through the section of the template that you want to mark as a specific section, then right-click the highlighted section and click **Select Section**.

> ***NOTE***
> Different section labels can overlap and can be embedded in other section labels, as needed.
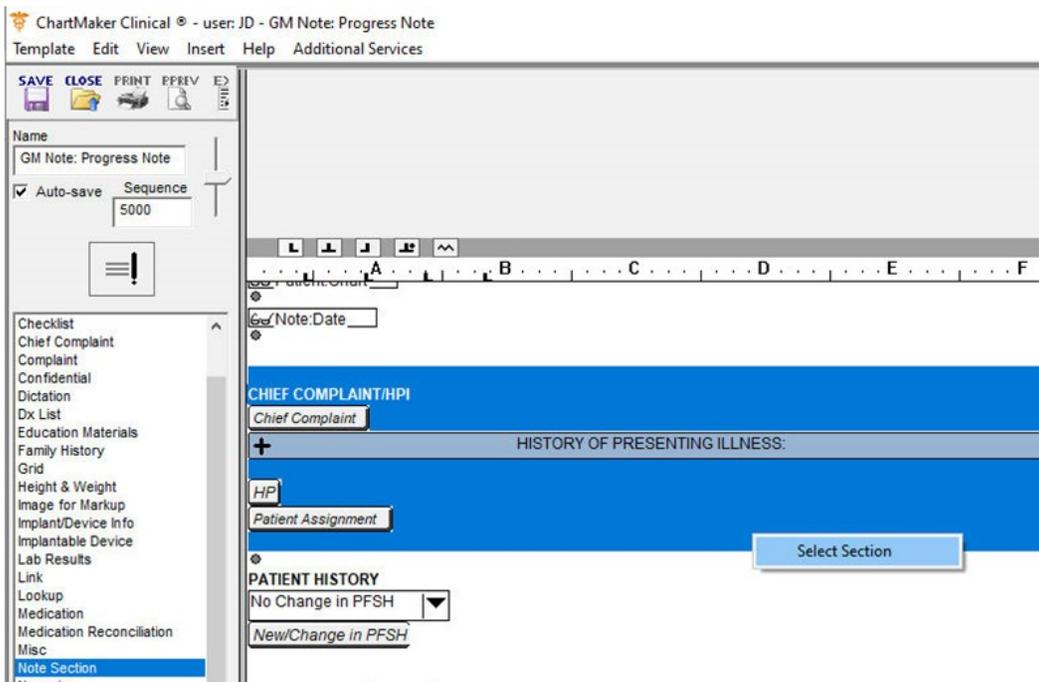

2. In the Section Label Management dialog, click the **C-CDA Section Labels** radio button, then select the **Label** for the highlighted section, and then click the **OK** button.

> ***NOTE***
> Each section label can only be used once in a chart template. If the section label you want for the section has already been used, click the **Copy** button to generate a copy of the label to use. A copied section label is automatically associated with the C-CDA section of the label it was copied from, and the name of the copy is system generated. Likewise, if you want to remove a copied label from the list, highlight the **Label**, and then click the **Delete** button. You cannot delete section labels that came with the system.

> ***NOTE***
> The options included in these instructions are available in the latest version of the ChartMaker® Medical Suite (6.5.7.350), or later. If you are not using the 6.5.7.350 version or later, we recommend updating.
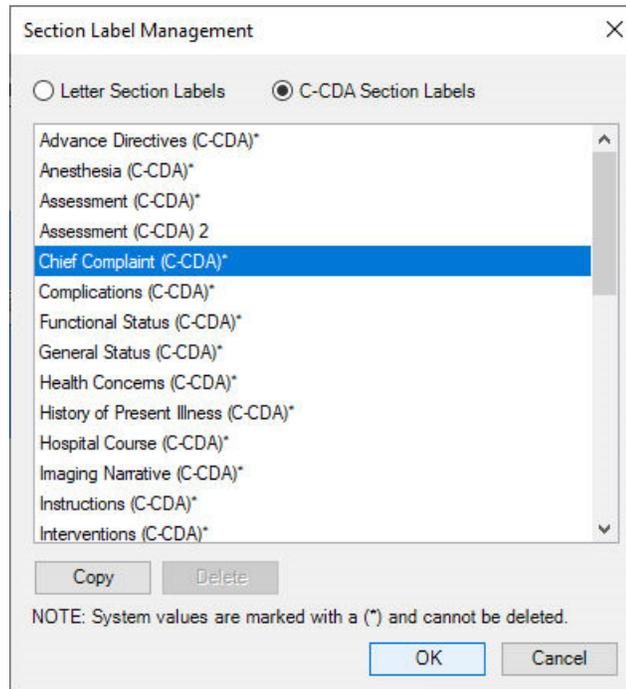
3. After the section label has been selected, the section will be marked with the label selected in the previous step. To change the label right-click either **Section Marker**, and then click **Edit Properties**. The Section Label Management dialog will appear, click the **C-CDA Section Labels** radio button, and you can select the proper **Label** for the section.
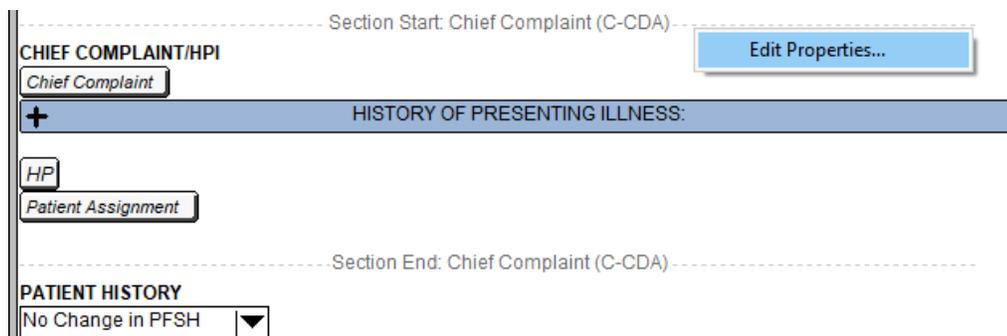
4. Repeat steps 2 - 4 to add additional sections as needed.

5. To delete a section, click the Note Section marker you want to remove in the template pane and drag that item toward the tools list on the left. Once a trash bin icon is seen release the mouse button and that item will be removed.

   Likewise, you can also place the cursor at the end of the Section End marker, and then press the Back Space button to remove the section. A confirmation message will then appear, click the Yes button to delete that section.

Note Sections in the Chart Note

Whenever a note section is added to chart template via the template editor, any text output (whether generated from a widget, copied/pasted from another part of the chart note, or typed as free text) between the start and end tag of that section label, will be saved to the database as structured data and will be included in any applicable C-CDA exports for the corresponding document types.

> ***NOTE***
> Any information that appears between the start and end tags of note sections from Grids, Signature (Topaz) widget, Embedded Objects/Files, Confidential button, Image for Markup Control, OLE Objects, Diagrams (or any images in general), and any formatting options that are used at bottom of note header will not be saved in the database as structured data or be included in the C-CDA export.

Turn off the Export of PDF Copies of Chart Notes

Use the following steps to turn off the generation and export of PDF copies of chart notes. ***Do note, that this functionality should only be turned off if your templates have been updated with Note Sections and/or Checklist Tagging. If you turn this off prior to updating your templates with this functionality, you may be in violation of the Information Blocking requirements of the 21CCA.***

1. In Clinical, click **Edit** > **Preferences**.

2. Click the **Signing** tab.

3. Uncheck the **Export PDF copy of chart note to Patient Portal** option.

4. Click the **Save** button.

5. When finished, click the **OK** button.