Charting By Exception

07/24/2024 1:10 pm EDT

Charting by exception allows providers to quickly include pre-filled information while charting. By saving time with charting by exception, you gain it back to spend with your patient.

This functionality is available on each form builder field except for Free Draw, Header, Sub Header, and Reference fields because no interaction occurs with those fields.

1. Hover your cursor over the **Clinical** tab and click on **Form Builder**. Once you're on that page, please click on one of the fields.

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Form Builder		Legend: & Edit	Hove Nove Copy to clipboard X Archive
Form List +	H&P Review of S	systems	Form Tools
		neral	New Fields Field Clipboard
H&P CC / History of Present Illness		ultiple Select	Short Text Field
H&P Med / Fam / Social History Gen	eral Comments		Yes / No
H&P Review of Systems			Switch
H&P Physical Exam		n ultiple Select	Single Select
H&P Assessment	Comments		Multiple Select
H&P Plan	Commenta		Free Draw
SOAP Subjective HEE	NT [-] HEE	ENT	Fraction Field
SOAP Objective		ultiple Select ••• \$	Header
SOAP Assessment HEE	NT Comments		Subheader
* C	Dptions -	Save as Save	
Share			

2. Once you click into a field (as long as it requires interaction) you'll notice a **Default Value** switch. Simply toggle the switch to the **On** position.

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Form List	Edit Field				×	
Presets Additional	Label Name	General [-]	Try to keep	it short!	Field	
H&P CC / History of Present II		Required field			ield	
H&P Med / Fam / Social Histo	Spacing within note	New Line New Paragraph	Smart Field			
H&P Review of Systems	Default value					
H&P Physical Exam	Gen	erated text			t	
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H&P Plan	Preview	der Subheader Bold Italic Unde lemogr Service Date & Time	erline x ₂ x ² System Vitals •	Custom Vitals -		
SOAP Subjective		ERAL: no weakness, no fatigue, no fe			d	
SOAP Objective			, , , , , , , , , , , , , , , , , , , ,			
SOAP Assessment					&	
Share	Billing Profile	(None) 🔹				
Library Email f Facebook	Clinical codes	Code System	Code	Description		
				Ø Cancel	Add New Update field	
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For single and multiple select fields, click **Default** next to the value(s) you would like to populate by default.

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H&P CC / History of Present I	Required field				ield
H&P Med / Fam / Social Histo Allowed Va	Positive	Move	• Default	× Remove	
H&P Review of Systems	Negative	Move	O Default	× Remove	
H&P Physical Exam	rash present	Move	Default	× Remove	t V
H&P Assessment	lump	Move	Default	× Remove	ect 🖉 🗹
H&P Plan	sore	Move	• Default	× Remove	
SOAP Subjective	itching	Move	Default	× Remove	d D/D
SOAP Objective	dryness	Move	O Default	× Remove	
SOAP Assessment	color change	Move	• Default	× Remove	
Share	changes in hair or nails	Move	O Default	× Remove	
Library Email f Facebook	+ Add option				
		00	ancel	No changes	
Feedback Support 🕜 💋					Practice Chat

Once configured, every time you start a note, all of your default fields will be automatically applied.

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Schedule Clinical Patients Reports	Billing Account Help 💈 🔀	Search 🖸 💷 🕂
H&P SOAP ADDITIONAL APPS	Uncle Sam Male 41 years 07/04/1976 Yes No	SOAP Test
View Complete Note	Does patient smoke?	Headache Procedure
Concussion Example		OFF
Patient Information 1.1	Cigarettes per Day?	Concussion
test 1 Default	1-3 × v	OFF
OnPatient Review of Symptoms	Areas of Pain Please select at least one option	Have you always experienced headaches?
Additional Info Test Dane onpatient Additional Info	Knee (Read-only view)	Any images that would help us? (Read-only view)
Patient Information 1.1	MMW Free Draw	MM Free Draw
	Blood pressure	Additional comments/info?
	Automated Text	
Feedback Support 📝		Practice Chat

Default Value fields will not appear in a clinical note unless the setting **Include in Note** is switched on. This field is switched off by default.

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	Uncle Sam Male 41 years 07/04/1976			
H&P SOAP ADDITIONAL APPS		Vitals 🔒 Print section		
Liew Complete Note				
onpatient / Check-In	No Include in Note	"Add to note" must be checked for this to render.		
CC / History of Present Illness				
	Location	Location Comments		
Med / Fam / Social History	Please select at least one option			
Medications & Allergies				
Review of Systems	Quality	Quality Comments		
Physical Exam	Please select at least one option			
Assessment	Severity	Severity Comments		
Plan	Please select one option			
Billing	Duration	Duration Comments		
	Please select at least one option			
	Onset / Timing	Onset Comments		
	Please select at least one option			

Note: Default field values will be overwritten if the Copy Previous Note feature is used.