

Editing Charting/Assessments

1. Navigate to a note/assessment needing to be edited. This can be done a few different ways:
 - a. Click onto a **View Chart** or **Notes** button from your access screen.
 - b. Click onto Toolbar > green **View** icon.
 - c. Navigate to the topic itself an edit the charting from the **Defined Review** portion of the documenting screen.
2. Click onto the entry which needs to be edited. The entry will turn red. This is called 'tagging' the entry.
3. Click **Edit**.
4. Select the desired editing feature.
5. When using Append, DC and Append, or DC and Copy, make the desired change and then click **Next**.
6. Click **Go** to see your changes.

Editing Feature	Function	Example
Append / Append All	Information is permanently attached to the entry	Cosigning a student's documentation
New	A new, separate entry is made in the same topic area	Add in a new emergency contact to a resident's face sheet
Copy	An exact copy of the entry is made	An entry was accidentally discontinued and needs to be made active again or a resident discharged from the facility and the user wants to make their medication orders active again
Copy One (All) to Other Client[s]	An exact copy of the entry is made and placed in another resident's chart	An entry was accidentally made in the wrong resident's chart; use All if more than one entry was selected.
Discontinue and Append	Entry is discontinued and user is taken to a Write screen to document a reason as to why the entry is being discontinued	An error was made in documenting the entry and the user would like to explain why the entry is being discontinued or a physician order is discontinued and the user would like to state why it was discontinued (dose increased/decreased)
Discontinue and New	Entry is discontinued, a new entry is made in its place	The user realizes that they charted the progress note incorrectly so they would like to discontinue it and start over with a new entry
Discontinue and Copy	Entry is discontinued, copy of entry is displayed allowing user to make changes to the original entry	User forgot to use a button word when documenting and would like to 'insert' the word into the entry

Discontinue	Entry is discontinued	The user realizes that they have duplicate entries in a topic and wants to remove one without adding an explanation as to why
Discontinue All	All highlighted entries are discontinued for one client	The user realizes that several entries were duplicated on a resident's record and they would like to remove them all at one time, without adding an explanation as to why
Discontinue Multiple Client Entries	All highlighted entries are discontinued for multiple clients	A user charted an immunization entry on several residents in error and needs to remove it from all resident records