Charting By Exception

07/08/2024 7:56 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	(1997) (1997)	Legend: & Edit + Move &	Copy to clipboard X Archive
Form List +	H&P Review of Systems	Form To	ols
Presets Additional General [-]	General	New Fie	ds Field Clipboard
H&P CC / History of Present Illness	Multiple Select	• • • ¢	ext Field
H&P Med / Fam / Social History General Co	mments	Yes / N	•
H&P Review of Systems		Switch	ONO
H&P Physical Exam	Multiple Select	•••	Select
H&P Assessment Skin Comr	rents	Multiple	e Select
H&P Plan		Free Dr	aw (11/1/1/
SOAP Subjective HEENT [-]	HEENT	Fractio	n Field
SOAP Objective	Multiple Select	••••	
SOAP Assessment HEENT Co	mments	Subhea	ıder
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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	
H&P Assessment	Edit Ø Va	alue 🛔 Patient 🛗 Date 📀 Date & T	ime 🛗 Field Date	O Field Date & Time	act	
H&P Plan	Preview Pt D	der Subheader Bold Italic Unde	rline x₂ x² System Vitals ▼	Custom Vitals -		
SOAP Subjective	GEN	ERAL: no weakness. no fatique, no fe	ever. no significant v	veight change	d	
SOAP Objective			, , , , , , , , , , , , , , , , , , , ,			
SOAP Assessment					&	
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				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	O 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	
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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				
Default	[1-3 × •]					
OnPatient Review of Symptoms	Areas of Pain Please select at least one option	Have you always experienced headaches?				
Additional Info Test Dane	Knee (Read-only view)	Any images that would help us? (Read-only view)				
Patient Information 1.1	M/M Free Draw	MM Free Draw				
	Blood pressure	Additional comments/info?				
	Automated Text					
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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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Schedule Clinical Patients Reports	Billing Account Help	Search 🚺 💷 🕇
H&P SOAP ADDITIONAL APPS	Uncle Sam Male 41 years 07/04/1976	Vitals 👄 Print section 🔒 Fax section
View 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	Quality	Quality Comments
Physical Exam	Please select at least one option	
Assessment	Severity	Severity Comments
Plan	Please select one option v	
Billing	Duration	Duration Comments
	Please select at least one option	6
	Onset / Timing	Onset Comments
Feedback Support 🔗	Please select at least one option	Practice Chat

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