

## Mark a note template as a favorite

1. Click the clear flag icon on the end of the Templates line to turn the flag blue.
2. To remove a template from the Favorites list, click the red **X** icon on the end of the Templates line.

## Complete and sign a note

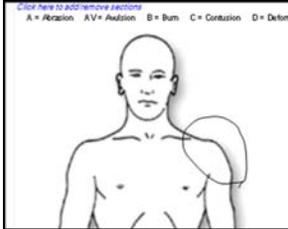
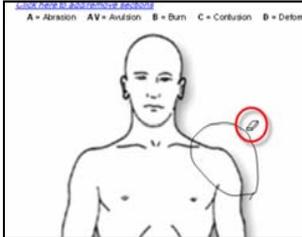
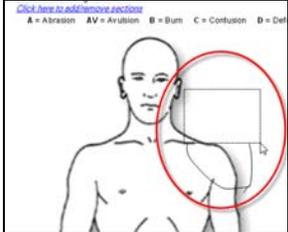
1. Open an existing note on the **Documents** sub-tab.
2. Navigate through the note, supplying information in various fields as necessary.
3. Scroll to the **Signatures** section at the bottom of the note, and click **Click here to sign**.
4. Click OK.

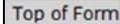
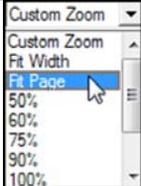
## Create an addendum

1. On the Documents sub-tab, click the **Open Finalized Document** .
2. Click the **Select an Addendum Template** drop-down and select the desired addendum template.
3. Click the **Create addendum**  button.
4. Enter the desired data for the addendum.
5. Click **Save**  and **Close** , or **Sign** the document.

## Physician Documentation tools

Icon	Description
	<b>Saves</b> a draft of the current note, with a status of Preliminary. A draft can only be opened by the user who initially created the note.
	Displays all data currently on the <b>clipboard</b> .
	<b>Prints</b> the current document
	Toggles between <b>Keyboard input</b> mode and <b>Pen</b> mode. When in Pen mode, the keyboard displays with a red <b>X</b> .

	<p>When Pen is in active input mode, the icon displays in blue, and the cursor changes to a dot. Click the left mouse button and drag the cursor to 'write' on the note.</p> 
	<p>Use this tool to delete markings that were made with the Pen tool. When the eraser is active, the cursor changes to an erase. Touch the cursor to a line to delete it.</p> <p>You <b>can not undo</b> the action of erasing.</p> 
	<p>You can use the Eraser Box to delete a section of ink that was created with the Pen tool. The cursor changes to an eraser when the eraser box is active.</p> <p>Click and drag the cursor to draw a box. Everything within that box will be deleted.</p> 

	The <b>Previous Page</b> and <b>Next Page</b> icons scroll forward and backward through the note.
	The <b>Previous Document</b> and <b>Next Document</b> icons allow you to close the current document and view the previous or next document for the patient. You can hover the mouse over the icons to display a popup of the name of the document that will display if you click the icon.
	<p>The <b>Invalidate</b> icon deletes the current note. The note is saved and labeled as "invalidated".</p> <p>When this icon is clicked, a reason must be chosen as to why the note is being invalidated—for example, "wrong patient".</p>
	This icon <b>closes</b> the current note.
	This icon resets the view to the top of the note. It is not applicable for notes that are Emergency MD Notes.
	<p>You can adjust the magnification to zoom into a specific part of the document using the drop down list or by sliding the indicator on the bar.</p> 
	This icon opens the Document Maintenance pane where you can merge templates and copy pages within a note.

## Copying Vitals to the Clipboard

1. Hover over the value on the Vitals tab.
2. Click the value.
3. To remove a value from the clipboard, hover over that value, click to remove from clipboard.

## Copying CPOE Orders to the Clipboard

1. Click the **CPOE** tab, go to Order Queue.
2. Click the **Clipboard** button.
3. Select the checkbox next to each order to add to the clipboard.
4. Click the **Add to Clipboard** button.

## Entering data in a note/document

- Depending on how the template is setup, there can be several different ways to enter/select data in a note.
  - For text fields, click the field and enter the desired text.
  - Some fields, that correspond to the Patient Profile, open a specific module in the Patient Profile when you click in the field. After data is entered and saved in the Patient Profile module, it automatically populates in PhysDoc.
  - If the field is a check box, click the check box to select it. To deselect it, click it again.
  - Certain fields automatically populate when they are a gallery item in the template and cannot be modified (for example: last Vitals).
  - Dragon Voice Recognition software/microphone (if applicable at your facility)
  - **Macros** – you can have a macro created by McKesson which allows you to type the macro name and your desired text will appear. **NOTE:** To request that a macro be created for you, go to website [wsp.mclaren.org](http://wsp.mclaren.org), scroll down to the bottom, and click the “PhysDoc Macro Request Form” link on the right side of the screen. Complete the form and email to the specified email address.

## Status Descriptions of Existing Documents

Status	Description
<b>Preliminary</b>	The note has been initiated, but not yet signed. Notes that are in this status can only be re-opened and edited by the user who originally saved the draft.
<b>Co-sign Requested</b>	An attending physician has been required to edit/sign the note.
<b>Co-sign Preliminary</b>	An attending physician has viewed and/or edited the note without signing it.
<b>Final</b>	The note has been signed by a physician.
<b>Final with Addendum</b>	An addendum has been added to a signed note.
<b>Invalidated</b>	The note has been invalidated.



## Physician Documentation Quick Reference



### To Access Physician Documentation

1. Log in to WSP.
2. Select the **Documentation** tab.

### Create a new note



-To create a note from the **Documents** sub-tab (must have Favorite Note Templates flagged), click the drop down arrow under **Create From A Favorite**.

-To create a note from **Search Note Templates** sub-tab:

3. Select the desired note template from the list **Search By Template Type**.
4. Click the **Blue Notebook**  next to the desired note template.

-To create a note from the **Favorite Note Templates** sub-tab, click the **Blue Notebook**  next to the desired note template on the Favorite Note Templates sub-tab.