# Tagging text in a document

Care Delivery

Quick reference guide

The Tag feature allows for pathology results or text within a document to be tagged and saved for use when creating a new Progress Note. This feature is similar to "Copy and Paste". However, it allows for <u>multiple items</u> to be copied and saved for later use.

1. Open the patient's medical record.

2. For Progress Notes and other documents, click Documentation or Clinical Notes View.
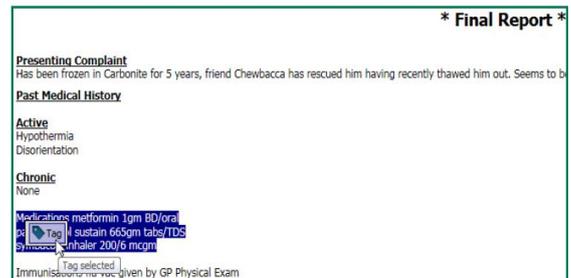
3. For Radiology or Pathology results, click Results.
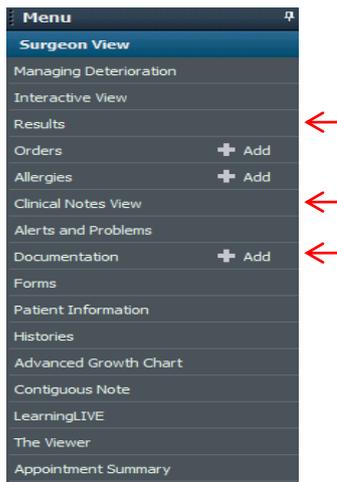
Documentation

1. Click on Documentation from the Patient Menu.

2. From the Documentation List, click on the required document.
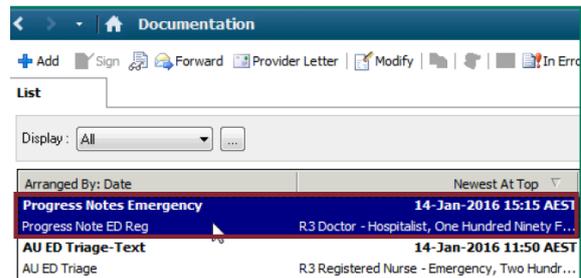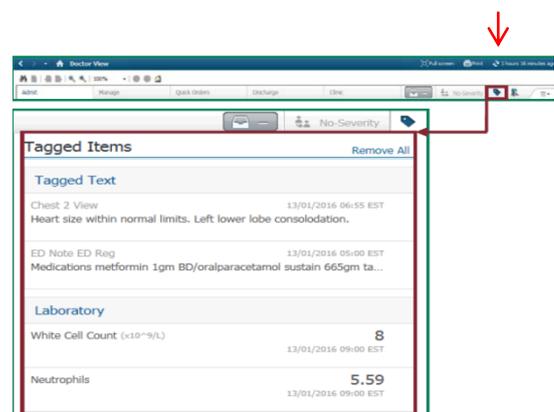
3. Click and drag to highlight the text to be Tagged from the selected Note/Document.

4. Release mouse after highlighting text and a Tag icon will appear.

5. Click the Tag icon to Tag the text.

The Tagged items icon in the Documentation Toolbar will change colour to indicate there are tagged items.

6. Click the icon to see all tagged items.

7. To remove any Tagged items, click icon next to the item to be removed, or click Remove All.

The Tag function can also be used to copy Lab Results as well. Refer to Quick Reference Guide (QRG) Tagging Lab Results to use in a Progress Note.

Clinical Notes View

The process is the same to tag text from Clinical Notes View.

1. Click on Clinical Notes View from the patient menu.

2. Locate the required Note/Document from the menu.
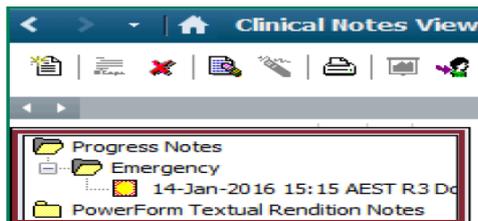
3. Double Click the required Note/Document to open it and view the text.

4. Follow steps 3 to 8 above to Tag text from Notes/Documents in Clinical Notes View.

Radiology and Pathology Results

Written reports from Pathology and Radiology can also have text tagged and used in a Progress Note.

1. Click on Results in the patient menu.

2. Click on the required tabs (e.g. Medical Imaging, Documents etc.).

The Documents tab contains written Pathology and Radiology reports as well as Clinical Notes and other Documents.
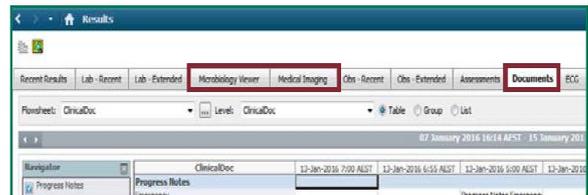
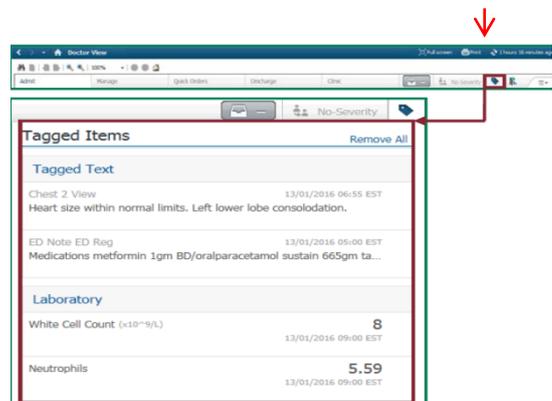3. Double click on Report that contains the text to be tagged. This will open the written report.
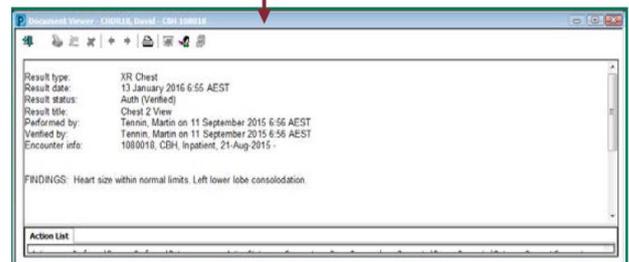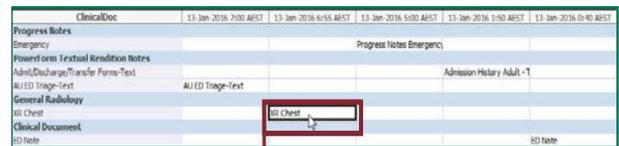
4. Follow Steps 3 to 8 above to Tag text from Reports/Notes/Documentation in Results.

Viewing saved Tagged Text

1. When a Patient's Medical Record is opened, click the Tagged Items icon to view all Tagged items.

2. To remove any Tagged items, click [icon] icon next to the item to be removed or click Remove All.

Using Tagged Text in a Progress Note

Once the process of "Tagging" has been completed, a new Progress Note can be created and populated with the saved Tagged items. Tagged text can be used in any of the Progress Note Templates.

When creating a new Progress Note the Tagged text is displayed on the left of the Note being created.
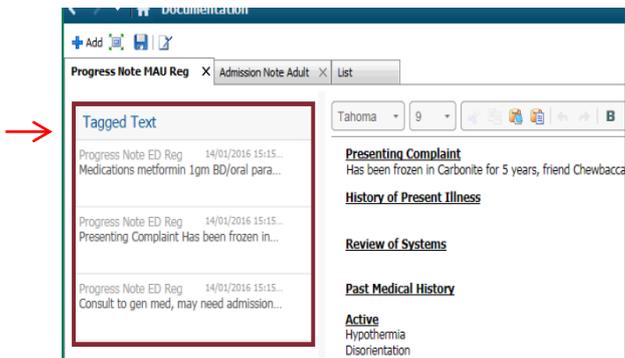
1. Highlight the desired Tagged text and "drag and drop" into the Progress Note under the relevant heading or required area.

The area around the heading or blank area will turn blue to indicate the text can be dropped into that area.
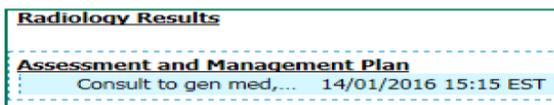
The Tagged text will also display a small number next to it. This is a Reference Number and the source of the Tagged text can be found at the bottom of the Note matched to the Reference Number.

2. Continue dragging and dropping any further required Tagged text into the Note.

3. Complete remainder of Progress Note.

4. Click Sign/Submit to finalised Progress Note or Save & Close to return to the document at a later time to finalise.