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## Note - Undo "Collapsed" Note Sections

1 year ago · Updated

The entire template section within a note can be collapsed to allow for more charting room in the note. It's easy to accidentally collapse this section and not realize it! The Support team gets calls regularly for "disappearing templates."

If you use both the Narrative section and templates in your note, it's easy to get your templates back. Click the **arrows pointing to the right** and the template options will return.

📧 <u>Amanda</u>	<mark>) Jones</mark> - 3	39 yr Fen	nale	
Eligibility Eligib Last Visit 8/23 Unread Result	3/16 for STI wit s Measles	, Mumps And	ne <b>Othe</b> Rubella Virus Vacci I Immunizations	<b>r ID</b> Not Available ine (MMR), Li
Note Date 01/	20/2020 03:03	B PM 💌 Ro	oute Bethany	* Billing E
Visit Reason	Subjective	Objective	Assessment -	Plan - Nur
Allergies: Current Meds	amoxicillin Zoloft 100m	ig Tablet, fluo	xetine 10 mg caps	ule [Prozac], fluo:
Subjective				

If your templates are collapsed and you don't see the arrows to the right to expand your template selection, an EHR preference change is necessary to get your template area to return. Follow the steps below:

1. In EHR go to **Options** on the toolbar (gray screen icon) and go to the Clinical Notes tab. In the *Display* for *Section* under Assessment, Plan and Progress, choose **Both** for all sections in the Display drop down. Then choose **OK** to save. <u>(See the image below)</u>

	linical Notes P	tient Summary	Today's Visit	
	n-Progress Notes in s 🔿 By Date	Patient Clinical	Notes for All Providers tment 📀 No Grouping	
Sort Notes	C Ascending	Oescendir	Ig	
Default No	te View	Edit	<b>•</b>	
Open Char	t Limit	2		
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Close N Signing	lote Screen upon or Locking	Include Text No	User and Provider in Free 🛛 🔽 Pri te signatures	int page numbers on notes
	AP and Progress N		A. (6	Show Anatomical Drawings
	tings for these sec	tions:	Automatically create or update ticket when saving a Note	
Section	Display	¥	Allow Drafting to create tickets	Position A & P Templates
Subjective			Require Diagnosis	
Objective Assessme	Form Only ht Both		<ul> <li>Load Last Diagnosis</li> </ul>	Suppress Results in Doc View
Plan	Both		Default Rxs to Freeform	Fide SSN
Intake	Form Only	0		Append Font Size 1 🚔
Progress	Both	0	Warn on No Transactions	Static Form Buttons
Nurse Not	es Form Only	0	Warn for Specific Group when Signing/Locking Notes:	Def. Section Height (1500-6000)
			<all></all>	- 3000
	ader Settings		ne Verification 💿 Prompt to Fi	× O Update Patient O Ignore e Summary on Sign/Lock
Prompt	•		Use Diagnosis	•
			7	
Set to Defa	. 1			OK Cancel

2. Select a Testpatient account and open a **Progress Note**. In the Progress Note go to the Progress section and choose the arrows pointing to the right (chevron icon) to expand the display to show the templates in the Progress section. <u>(See the images below)</u>

Last Visit First Appt Future A Unread Results Future ( Missing Imm [NoDate] Hepatitis B Vaccine, MMR Vaccine, TB Screenin Remind	Inders
Route SidersM T Billing SidersM T Clinic Counseling T Pho	ne (931) 222-8888 🗧 🗢 🕴 Sticky Notes 🔻
Visit Reason Progress Assessment - Plan - Summary	Several Antipage Anti
Allergies: (None) Current Meds: (None)	
Progress	
Assessment	

Z	То	Do 🖾 Orders 🔝 🔀 🀓 🚹 UpToDate®		Search Quick Text   Last Accessed   Print Form
<b>#</b>	E	Chelsea Testpatient - 17 yr 9 mo Fen      ligibility Not Eligible Insurance None Othe     ast Visit First Appt  Inread Results  Missing Imm  [NoDate] Hepatitis B Vaccine, MMR Vaccin	<b>r ID</b> Not Available	le Phone (931)222-8888 DOB 11/1/98 Chart Not Available Email Not Available Future Appts Future Orders Perminders
			Counseling	▼ Phone (931) 222-8888 🗢 ! Sticky Notes ▼
	4	Allergies: (None) Carrent Meds. (None)	1	
		Progress  Counseling		
-		<ul> <li>→ Narrative</li> <li>Counselor Completed</li> <li>Intake</li> </ul>		
		Counselor Completed Screening Form		
	1	Assessment		
	5	5et - Search 👫 🖣	. 📧 😭 #	Description Final ICD10-CM IC

3. Repeat the same steps as above on option 2. for the Assessment and Plan sections. (See the images below)







Plan Plan Plan Plan Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C Plan C C Plan C C C C C C C C C C C C C C C C C C C	
Summary:	
Attachments	

4. Close the note. Then go back to your EHR Options (the gray screen icon) and change your preferences on the Clinical Notes tab, back to the original settings. Go to the *Display* settings and under Assessment, Plan and Progress choose Form Only in the Display drop down. Choose OK to save the changes. (See the image below)

	C By Date C Ascending iew	Patient Clinic O By Appo O Descence Edit 2	intme	tes for All Providers ent   No Grouping	
Note Format Close Note Signing or I	Screen upon .ocking	Include	e Use	r and Provider in Free ring Prini	t page numbers on notes
	and Progress No s for these sect Display Form Only Form Only Form Only Form Only Form Only Form Only Form Only Form Only		<u>र</u> र र र	Automatically create or update a ticket when saving a Note Allow Drafting to create tickets Require Diagnosis oad Last Diagnosis Default Rxs to Freeform Warn on No Transactions Varn for Specific Group when igning/Locking Notes:	<ul> <li>Show Anatomical Drawings</li> <li>Position A &amp; P Templates after Narrative</li> <li>Suppress Results in Doc View</li> <li>Hide SSN</li> <li>Append Font Size</li> <li>Static Form Buttons</li> <li>Def. Section Height (1500-6000)</li> </ul>
Note Heade Automatically 9 Prompt	Save/Draft Note				3000       C Update Patient     C Ignore       Summary on Sign/Lock       OK     Cancel

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3 out of 3 found this helpful

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