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Articles in this section   ⌄
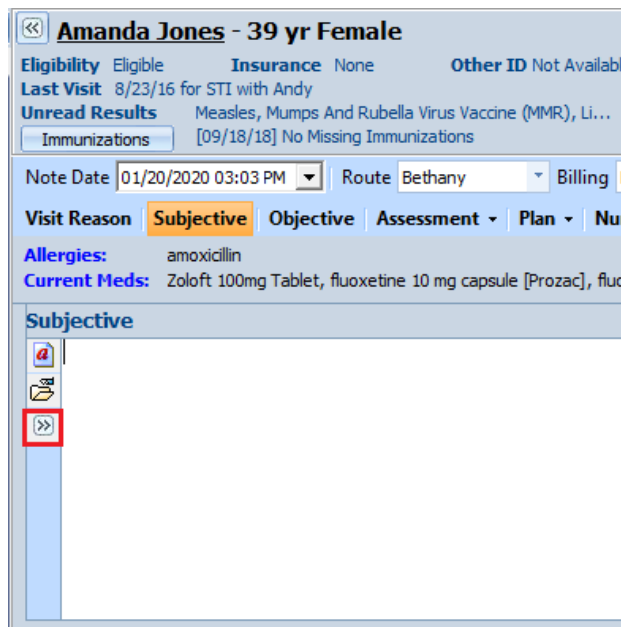
Note - Undo "Collapsed" Note Sections

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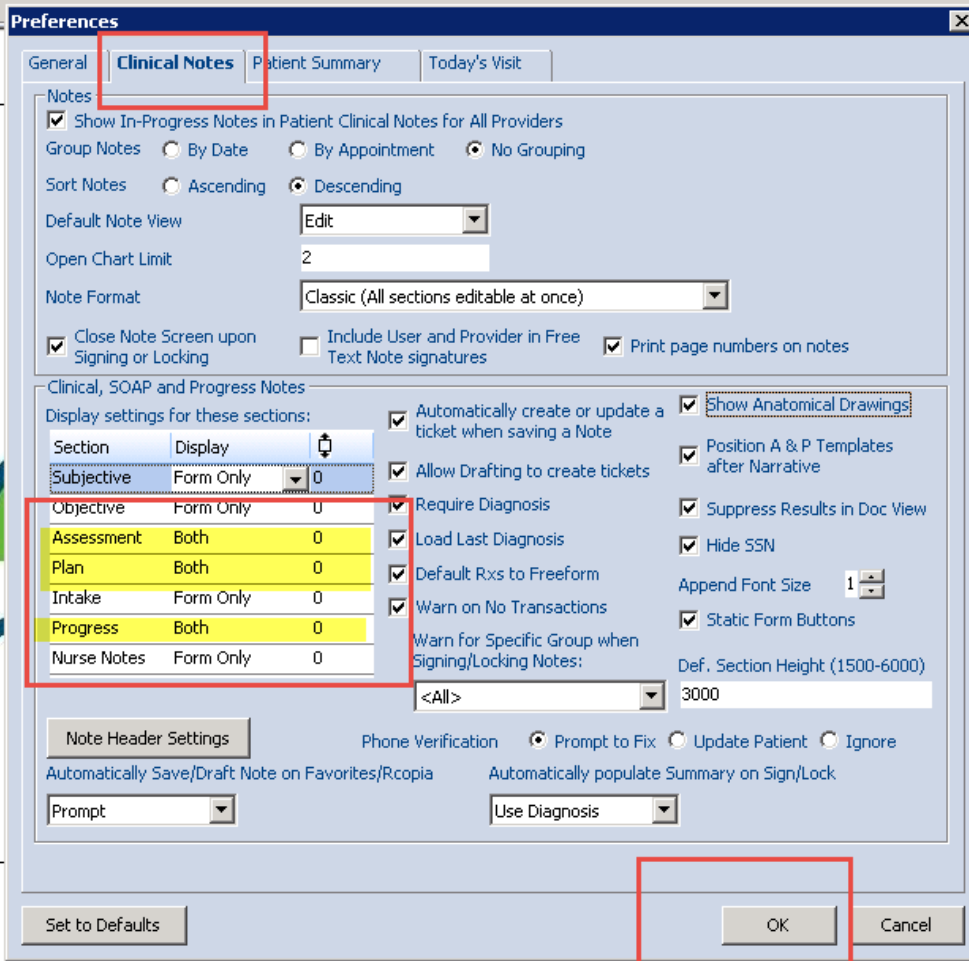
The entire template section within a note can be collapsed to allow for more charting room in the note. It's easy to accidentally collapse this section and not realize it! The Support team gets calls regularly for "disappearing templates."

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.
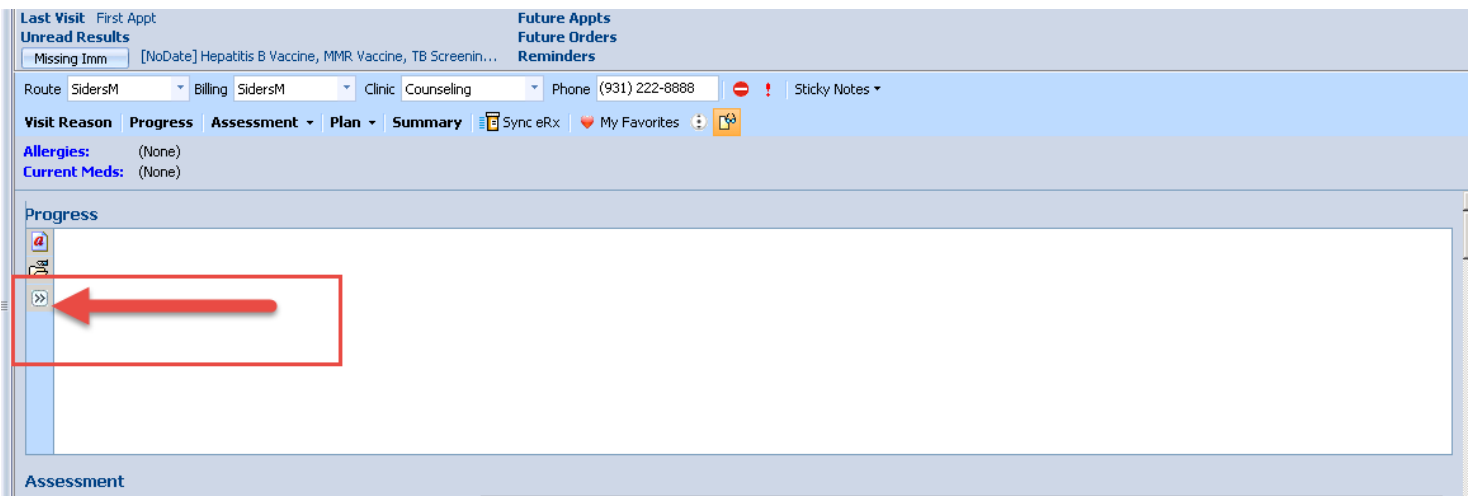

If your templates are collapsed and you don't see the arrows to the right to expand your template selection, an EHR preference change is necessary to get your template area to return. Follow the steps below:

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. **(See the image below)**

Support

Preferences

General | **Clinical Notes** | Patient Summary | Today's Visit

Notes

☑ Show In-Progress Notes in Patient Clinical Notes for All Providers

Group Notes   ○ By Date   ○ By Appointment   ◉ No Grouping

Sort Notes   ○ Ascending   ◉ Descending

Default Note View   [Edit ▼]

Open Chart Limit   [2]

Note Format   [Classic (All sections editable at once) ▼]

☑ Close Note Screen upon Signing or Locking   ☐ Include User and Provider in Free Text Note signatures   ☑ Print page numbers on notes

Clinical, SOAP and Progress Notes

Display settings for these sections:

Section	Display	
Subjective	Form Only ▼	0
Objective	Form Only	0
Assessment	Both	0
Plan	Both	0
Intake	Form Only	0
Progress	Both	0
Nurse Notes	Form Only	0

☑ Automatically create or update a ticket when saving a Note
☑ Allow Drafting to create tickets
☑ Require Diagnosis
☑ Load Last Diagnosis
☑ Default Rxs to Freeform
☑ Warn on No Transactions
Warn for Specific Group when Signing/Locking Notes:
[<All> ▼]

☑ Show Anatomical Drawings
☑ Position A & P Templates after Narrative
☑ Suppress Results in Doc View
☑ Hide SSN
Append Font Size [1 ▲▼]
☑ Static Form Buttons
Def. Section Height (1500-6000)
[3000]

[Note Header Settings]   Phone Verification   ◉ Prompt to Fix ○ Update Patient ○ Ignore

Automatically Save/Draft Note on Favorites/Rcopia   Automatically populate Summary on Sign/Lock

[Prompt ▼]   [Use Diagnosis ▼]

[Set to Defaults]   [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. **(See the images below)**

3. Repeat the same steps as above on option 2. for the Assessment and Plan sections. **(See the images below)**
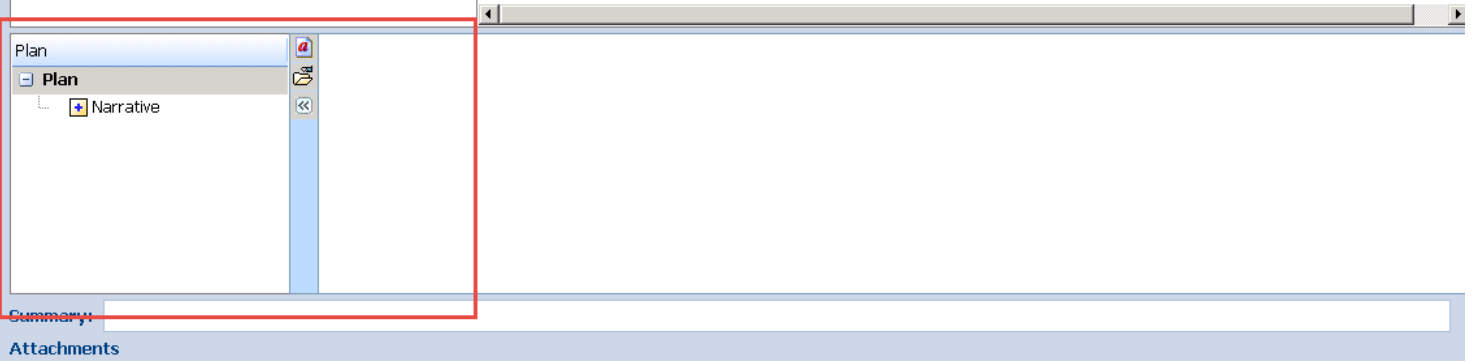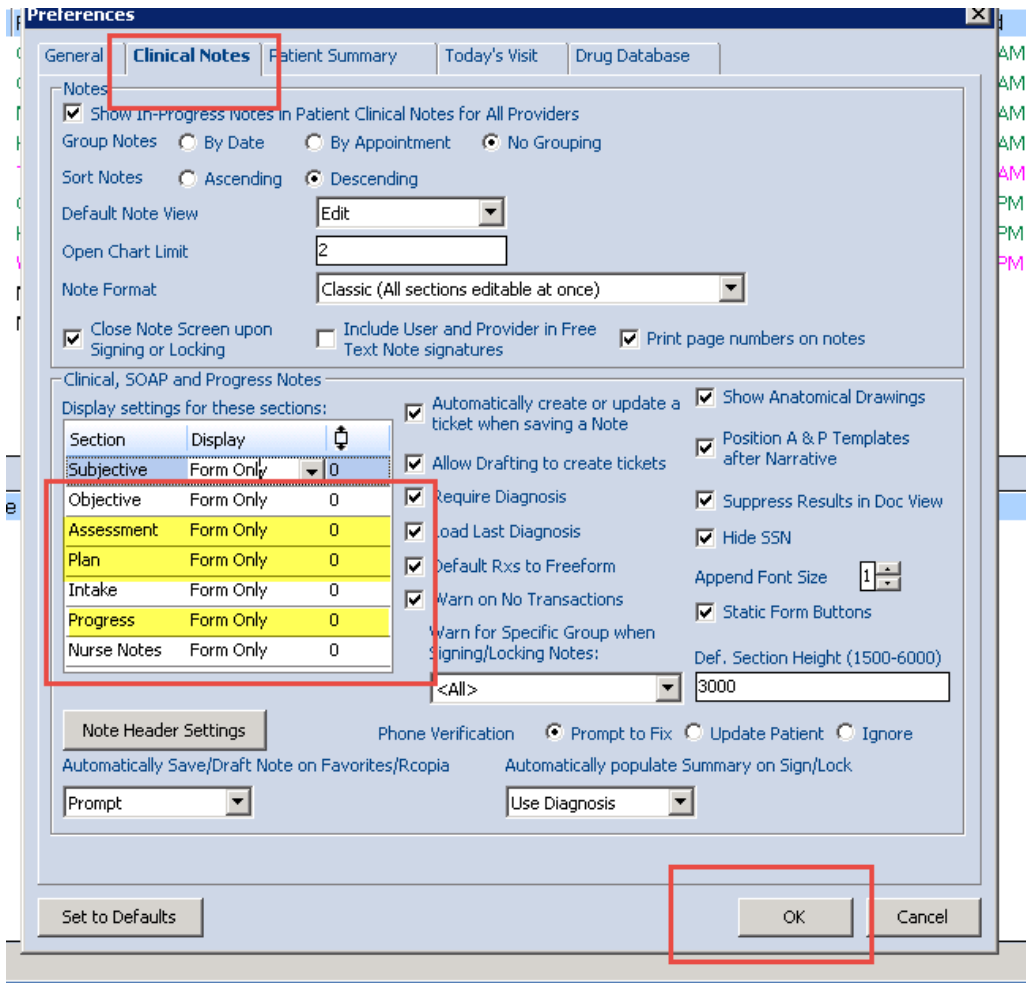
4. Close the note. Then go back to your EHR **Options** (the gray screen icon) and change your preferences on the Clinical Notes tab, back to the original settings. Go to the *Display* settings and under Assessment, Plan and Progress choose **Form Only** in the Display drop down. Choose **OK** to save the changes. (**See the image below**)

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| Yes | No |

3 out of 3 found this helpful

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