

CUSTOMIZING 'NOTES' ON TEBRA CLINICAL

Click on "My Settings"

The screenshot shows the TEBRA Clinical Dashboard for user Greg Murphy. The main content area displays a calendar for May 2019, with the current date being Thursday, May 16. A patient appointment for SHOELISS JACKSON (DOB: 1/27/1963, 56 y/o Male) is scheduled for 1:00 PM - 1:45 PM. The appointment status is 'Scheduled'. To the right, there is a section for 'Outstanding Items' with the following counts: Flagged Messages (0), Open Notes (77), Tentative Appointments (0), and Patient Intake (0). A blue arrow points from the 'Outstanding Items' section towards the 'My Settings' link in the user profile menu on the right. The user profile menu includes links for My Settings, Practice Settings, Support, Sign Out, and Privacy Policy.

In My Settings, click Note Types:

The screenshot shows the 'My Settings' page. On the left, there is a sidebar menu with the following items: My Account, Drug Favorites, Text Shortcuts, Note Types, and Templates. A blue arrow points to the 'Note Types' item. On the right, there is a section titled 'Account Information' with the following details:

Name	Greg Murphy
E-mail	greg@medibillpros.com
Phone	(651) 829-2960
Roles	System Admin Clinical Assistant Office Staff Billor Business Manager

In Note Types, double-click on an existing Active Note, such as “Therapist Initial Visit”:

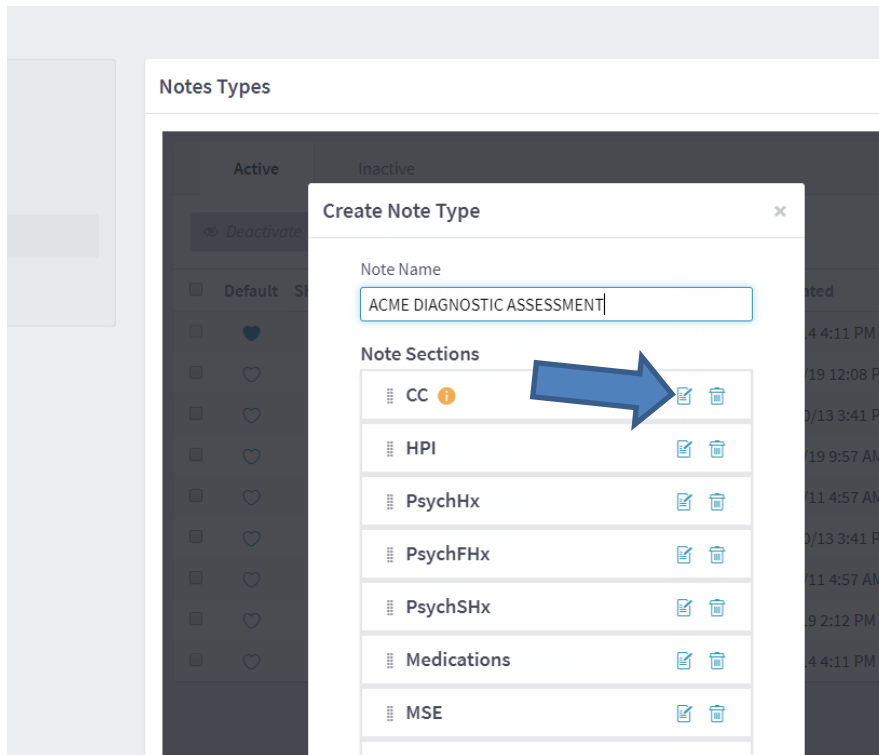
The screenshot shows the 'My Settings' page with a sidebar on the left containing 'My Account', 'Drug Favorites', 'Text Shortcuts', 'Note Types', and 'Templates'. The main content area is titled 'Notes Types' and has two tabs: 'Active' and 'Inactive'. Below the tabs are buttons for 'Deactivate' and 'Set Specialty Filter'. A table lists various note types with columns for 'Default', 'Shared', 'Name', 'Creator', and 'Updated'. The 'Therapist Initial Visit' entry is highlighted, and a blue arrow points to it.

<input type="checkbox"/>	Default	Shared	Name	Creator	Updated
<input type="checkbox"/>	♥		Therapist Progress	System	6/4/14 4:11 PM
<input type="checkbox"/>	♥		Amendment	System	11/20/13 3:41 PM
<input type="checkbox"/>	♥		INITIAL VISIT	Greg	3/11/19 9:57 AM
<input type="checkbox"/>	♥		Memo to Record	System	12/2/11 4:57 AM
<input type="checkbox"/>	♥		Office Form	System	11/20/13 3:41 PM
<input type="checkbox"/>	♥		Phone	System	12/2/11 4:57 AM
<input type="checkbox"/>	♥		th mh serb	System	4/5/19 2:12 PM
<input type="checkbox"/>	♥		Therapist Initial Visit	System	6/4/14 4:11 PM

In Note Type Details, **click Copy**, and give your new Note a name, such as ACME Diagnostic Assessment:

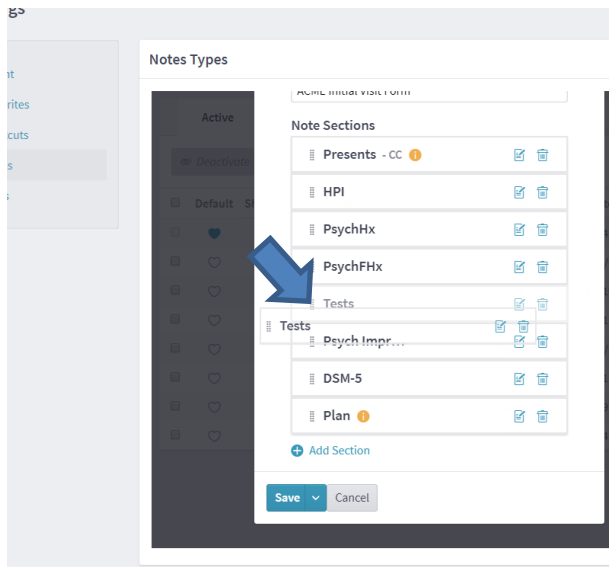
The screenshot shows the 'My Settings' page with the 'Notes Types' section. A modal window titled 'Note Type Details' is open for the 'Therapist Initial Visit' note type. The modal contains a list of 'Note Sections' including CC, HPI, PsychHx, PsychFHx, PsychSHx, Medications, MSE, Tests, and Psych Impression. A blue circle highlights the 'Copy' button in the top right corner of the modal.

Change the Section Names by clicking the pen/paper icon next to them:



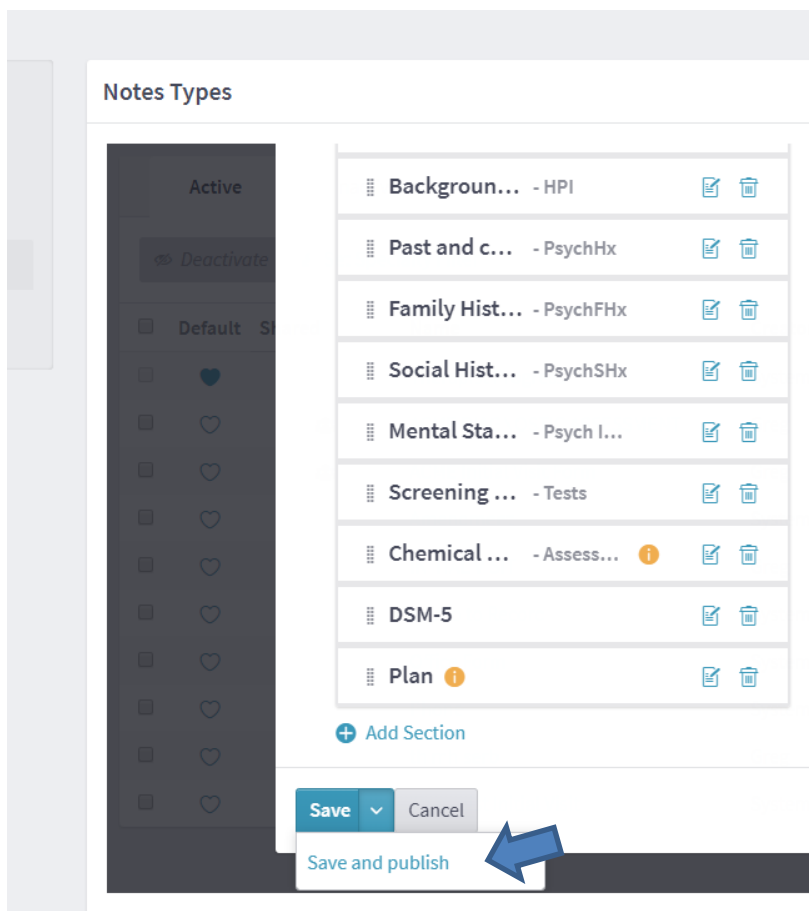
(To *Delete* a Section, click on its trash icon.)

To **Reorder Sections**, hover over the dotted-bar next to the Section name and mouse to new location/order:



(Click *Add Section* to choose from other defined Note Section types.)

To Save for *Everyone* to Use, click the drop-down next to SAVE, and select '**Save and publish**':



(To Save the Note for your own use only, just click Save.)

Now the Note type called "ACME DIAGNOSTIC ASSESSMENT" is available when you Create Clinic Note for patients:

The screenshot displays a patient dashboard for SHOELESS JACKSON, 1/27/1963 (56 y/o Male), with a scheduled visit on Thursday, May 16, from 1:00 PM to 1:45 PM. The dashboard includes a calendar view for May 2019, a navigation bar with '1 Scheduled', '0 In Office', and '0 Finished' items, and a section for 'Outstanding Items'. A message box states: '* STATEMENT NOTE: PLEASE CONTACT US WITH UPDATED INSURANCE INFORMATION. THANK YOU!'. The visit details include: Visit Reason (blank), Resources (Demo Provider), Patient Intake (Upgrade required), Balance (\$0.00), UCARE MN_MA (blank), Effective (Not Specified), Copay (\$0.00), and Eligibility (Status not checked or Unknown). A 'Create Clinical Note' dropdown menu is open, showing options: Therapist Progress, ACME DIAGNOSTIC ASSESSMENT (highlighted), ACME Initial Visit Form, Amendment, and INITIAL VISIT. A blue arrow points to the 'ACME DIAGNOSTIC ASSESSMENT' option.

Example blank Note : "ACME Diagnostic Assessment"

Google | Login | Kareo | BBC Sounds - Musi... | Videos - YouT... | Joe Bongiorno - Me... | Insurance_Portals | Edina Realty | The... | BICUSD — chart an...

Shoeless Jackson, DOB: 27 Jan 1963 (56 yo)

ACME DIAGNOSTIC ASSES... | SALT Note | 05/16/2019 | 01:00 PM

Assigned To: Greg Murphy

ACME DIAGNOSTIC ASSESSMENT

- [Chief Complaint, Symptoms](#)
- [Background Information](#)
- [Past and current treatments](#)
- [Family History](#)
- [Social History, Support systems](#)
- [Mental Status](#)
- [Screening Tools & Results](#)
- [Chemical Use History](#)
- [DSM-5](#)
- [Plan](#)

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Example "ACME THERAPY PROGRESS NOTE"

on, DOB: 27 Jan 1963 (56 yo)

ACME PROGRESS NOTE

Clear Note

05/16/2019



01:25 PM



Assigned To: Greg Murphy

ACME PROGRESS NOTE

Diagnosis:

Treatment Goals

Psych Symptoms:

Safety Concerns:

Mental Status:

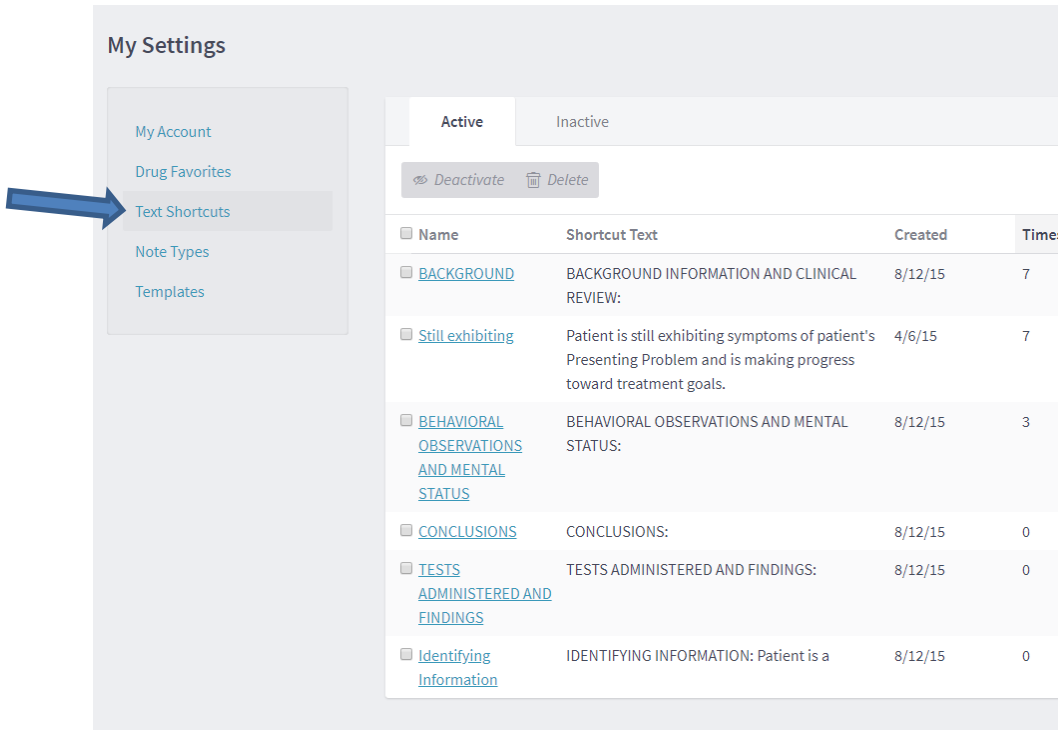
Assessment:

Plan:

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Other Tips for making Clinical Notes:

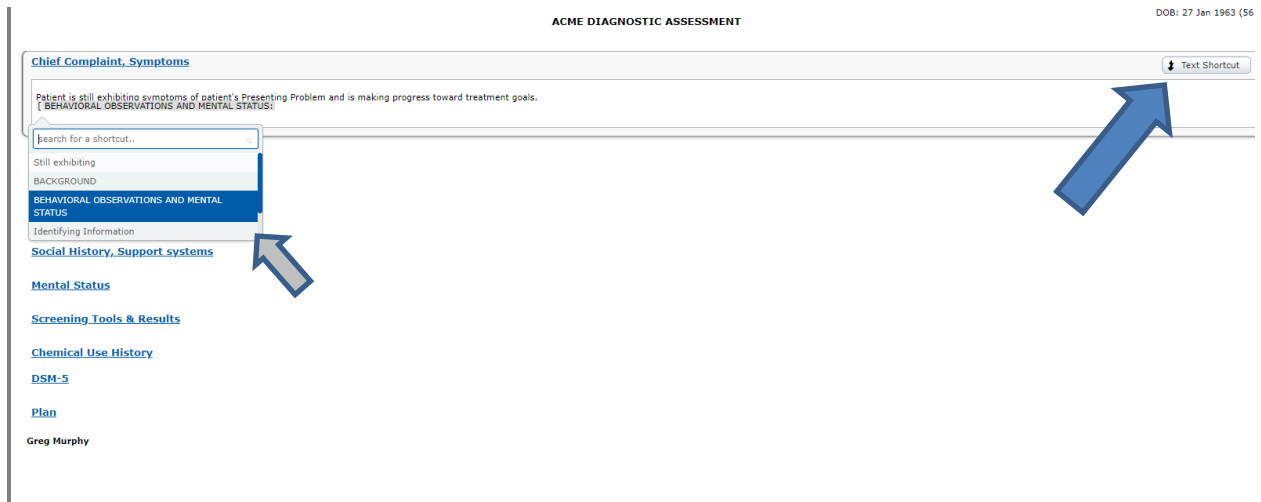
*Don't forget to build a Library of **“Text Shortcuts”** in My Settings!



The screenshot shows the 'My Settings' page. On the left sidebar, 'Text Shortcuts' is highlighted with a blue arrow. The main content area shows a table of active shortcuts. The table has columns for Name, Shortcut Text, Created, and Time. The shortcuts listed are: BACKGROUND, Still exhibiting, BEHAVIORAL OBSERVATIONS AND MENTAL STATUS, CONCLUSIONS, TESTS ADMINISTERED AND FINDINGS, and Identifying Information.

Name	Shortcut Text	Created	Time
BACKGROUND	BACKGROUND INFORMATION AND CLINICAL REVIEW:	8/12/15	7
Still exhibiting	Patient is still exhibiting symptoms of patient's Presenting Problem and is making progress toward treatment goals.	4/6/15	7
BEHAVIORAL OBSERVATIONS AND MENTAL STATUS	BEHAVIORAL OBSERVATIONS AND MENTAL STATUS:	8/12/15	3
CONCLUSIONS	CONCLUSIONS:	8/12/15	0
TESTS ADMINISTERED AND FINDINGS	TESTS ADMINISTERED AND FINDINGS:	8/12/15	0
Identifying Information	IDENTIFYING INFORMATION: Patient is a	8/12/15	0

When selected, these will **“Auto-fill”** in the Section of the Note you are in, very handy if you use same phrasing often:



The screenshot shows a clinical note editor for 'ACME DIAGNOSTIC ASSESSMENT'. The 'Chief Complaint, Symptoms' section is active, and a dropdown menu is open showing a list of text shortcuts. The shortcuts listed are: Still exhibiting, BACKGROUND, BEHAVIORAL OBSERVATIONS AND MENTAL STATUS, and Identifying Information. A blue arrow points to the 'Text Shortcut' button in the top right corner of the note editor.

SALT NOTES (“Same As Last Time”) ** Very Convenient!

Be sure to utilize the SALT function when creating a new Note:

ackson, DOB: 27 Jan 1963 (56 yo)

Therapist Progress SALT Note 05/16/2019 12:51 PM

Assigned To: Greg Murphy

5/16/2019 - Patient is still exh... - ACME DIAGNOSTIC ASSESSMENT
5/16/2019 - Patient is still exh... - ACME DIAGNOSTIC ASSESSMENT
5/16/2019 - Patient is still exh... - Therapist Progress
1/19/2019 - sHOELESS PRESENETD F... - Therapist Progress
1/15/2019 - Therapist Progress
1/14/2019 - patiuent still echib... - Therapist Progress
10/30/2018 - Therapist Progress
10/24/2018 - Therapist Progress
3/26/2018 - f?LSDFn;oS NG... - Therapist Progress

Therapist Progress

CC

[Psych Symptom/Follow Up](#)

[Psych Syndromes](#)

Medications

MSE

[Psych Impression](#)

[Psych Intervention](#)

[DSM-5](#)

[Assessment](#)

[Plan](#)

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*This SALT Note will bring a copy of the one you selected into the current Note, Edit as Needed! (You can only recall a Note from the same patient.)