WELFORD CHART NOTES
NEWSLETTER

## NAME EDITOR WARN IF SIMILAR NAMES *(User's Manual, pgs. 1268-1269)*

Imagine the following scenario: a patient named Elizabeth Smith comes to your office for the first time and has an appointment. You enter her name into **Welford Chart Notes** and create a chart for her. A year later she calls your secretary, saying that she is Betsy Smith and wants to schedule an appointment. Your secretary types in the name "Betsy Smith", and finding it not listed in **Welford Chart Notes** decides that this is a new patient and creates a new chart for her, not realizing that she is the same person as Elizabeth Smith. How can you prevent this problem from occurring?

The answer is to check System\Name Options**Warn about Similar Names**. Once you do this, then anywhere in the program where you are asked to enter a patient's name, the program automatically shows you other names similar to the one you are entering so that you can be sure that you are selecting the correct name and you are made aware of the fact that there already is a chart for a patient with a similar name. You can then choose the name from the list that matches the patient. The program generates the list of similar names using an extensive database of nicknames (e.g. patients named "Betty", "Betsy", "Elizabeth", "Elisabeth", "Beth", "Liza", "Lizzy", "Eliza", "Elisa", "Elise" etc. with a last name similar to the one you have entered are all displayed) as well as using phonetic matching on both the first name and last name (e.g. patients with a last name of "Erickson", "Ericson", "Erikson", "Ericcsohn" etc. who have a first name similar to or a nickname of the name you have entered are all displayed).

Let's try this out: assuming you have already entered the name Kelly Erickson into the program,
1. Press System\Name Options.
2. Check **Warn about Similar Names**.
3. Press **OK**.
4. Press Name\Add.
5. For **Last Name**, enter "Ericson".
6. For **First Name**, enter "Kelley".
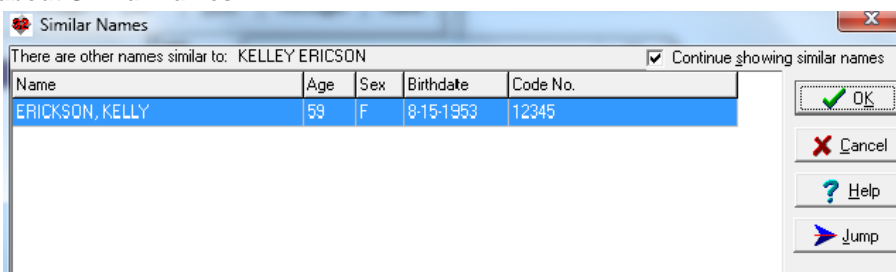
7. Notice that the program notifies you that there is a patient with a similar name, Kelly Erickson.
8. In this case, you verify that the patient you are talking to is in fact Kelly Erickson, based on the birthdate. If you are unsure, press **Jump\Patient Info**, and make sure that her address and telephone number also match. If she is in fact Kelly Erickson, then press **Cancel** and then **Quit** to abort creating a new chart for the same individual. If you would like to edit the Name Editor for Kelly Erickson, double-click her name on the Similar Names list or highlight it and press **OK**, and the program will take you to her Name Editor.
9. On the other hand, if she is a different patient who happens to have a name which sounds like Kelly Erickson and you want to create a new chart, press **Cancel** to indicate that you are not selecting the name of an existing patient, then press **Add It** to create a new chart for the different patient named Kelley Ericson.

VISIT ENCOUNTER DATE AND TIME *(User's Manual, pgs. 1279-1280)*

By default, **Welford Chart Notes** assumes that when you store a note permanently into the Visiter, the date and time when the note is stored is the same as the date and time when you saw the patient. This is true of

most users who create their notes at the time of the patient visit. However, some users write their notes later that day or on another day rather than at the time of the visit. Starting with version 6.2, you can record a separate encounter date and time for each visit which represents when the patient was actually seen, different from when the note was stored in the computer.

If you routinely store notes after the time of the encounter:
1. Press System\Writer Options**Auto Ask Encounter Date.**
2. Press **OK**.
3. Now, each time you store a note, you are automatically asked to specify the encounter date and time when the visit actually took place.
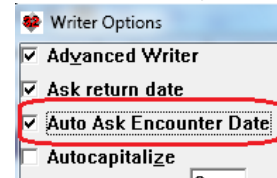
If you generally store notes at the time of the encounter, you would want to uncheck the above Option. But suppose that on a particular occasion you are now about to write a note in the Writer for a patient after the encounter has taken place and want to record the encounter date and time for this particular note:
1. Once you have opened the Writer for the patient, press Write\Encounter Date and Time.
2. Enter the date and time when the encounter took place and press **OK**.
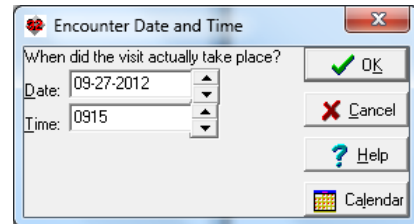
Suppose you have already stored a visit in the Visiter and realize that this visit took place previous to the time at which it was stored, so you want to record the Encounter Date and Time after the fact.
1. Press View\Visiter\View and move to the visit you wish to change.
2. Press **Go to\Change\Encounter Date**.
3. Enter the date and time when the visit actually took place and press **OK**.
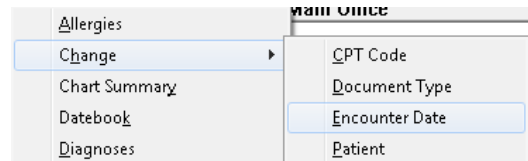
Suppose you wish to see the Encounter Date and Time at the top of each visit in the Visiter:
1. Press View\Visiter.
2. Check **Heading Show Encounter Date.** (If you don't wish to see it in the heading, you can still see this information at any time when viewing a Visit by pressing **Info**).
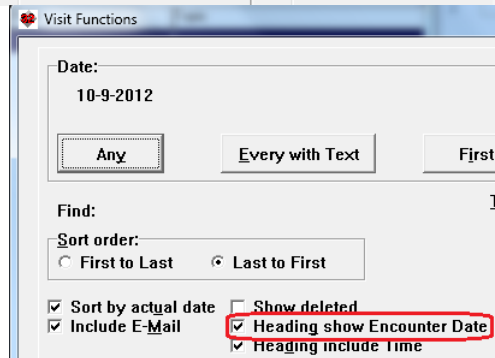
Suppose you want the Encounter Date and Time to appear at the top or bottom of each page when you print it:
1. Press System\Print Options**Print Settings Editor.**
2. Select the Print Settings Group you wish to use, or press **Add** to create a new one.
3. If you want the Encounter Date to appear at the top of each page, type @EncounterDate (or @EncDate) in the **Heading** box. If you want the Encounter Time to appear at the top of each page, type @EncounterTime (or @EncTime) in the **Heading** box.
4. If you want the Encounter Date to appear at the bottom of each page press the **Footer** button. Choose the location at the bottom of the page where you want this to appear **(Left Justified**, **Centered**, or **Right Justified**), and type @EncounterDate (or @EncDate) into the box. If you want the Encounter Time to appear in the Footer, type @EncounterTime (or @EncTime) into the box.
5. Press **OK** to store your revised Print Settings Group.
6. Press **Pick** to make this the active Print Settings Group.

SEND US YOUR TIPS

If you have tips, shortcuts, questions, or suggestions for future newsletter topics, please send them to us at:

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