F226 - Enter Plain Text Progress Notes (TIU) - Overview

User

Delete Note

- Select the desired note(s) from the list of unsigned notes[2]
- Select the "Delete" button on the action bar
- Delete the selected note

Edit Note

- Select the desired note(s) from the list of unsigned notes[2]
- Select the "Edit" button on the action bar
- Edit the selected note → 1

- Select the Notes button to open the Note tray
- All Notes view opens
- Need to create a new note? — No → Review list of notes on the patient, which is sorted by status and date
- Need to delete an unsigned note? — No → Need to see a preview of a note? — No → Need to edit a note? — No → Need to sign a note? — Yes → Sign the selected note[1] → End
- Yes (delete) → Delete Note
- Yes (edit) → Edit Note
- No →
- Yes → Need to create a new note → New Note

New Note

- Select the "+New Note" button[3]
- Create a new note → 1

Preview Note

- Select the desired note from the list of unsigned, un-cosigned, and/or recently signed notes
- Select the "View" button on the action bar
- A read-only preview of the selected note appears in separate modals
- Select the "X" button in the preview modal, as necessary
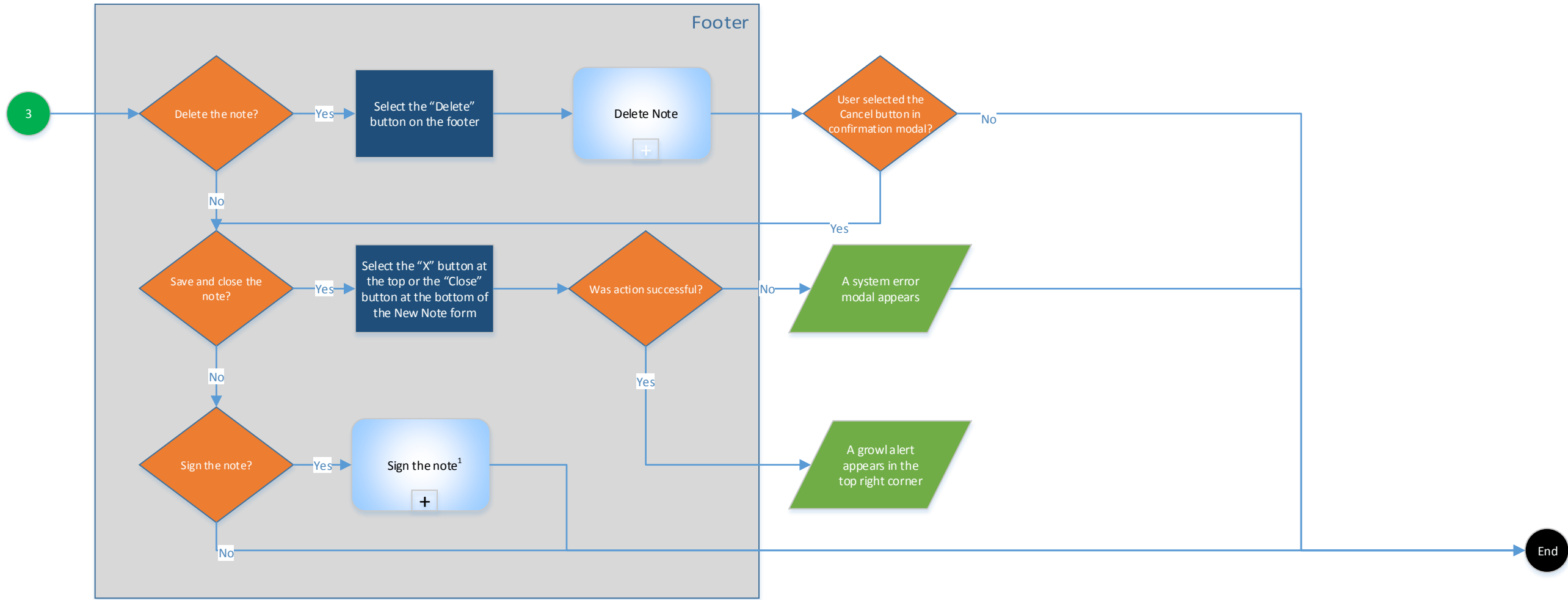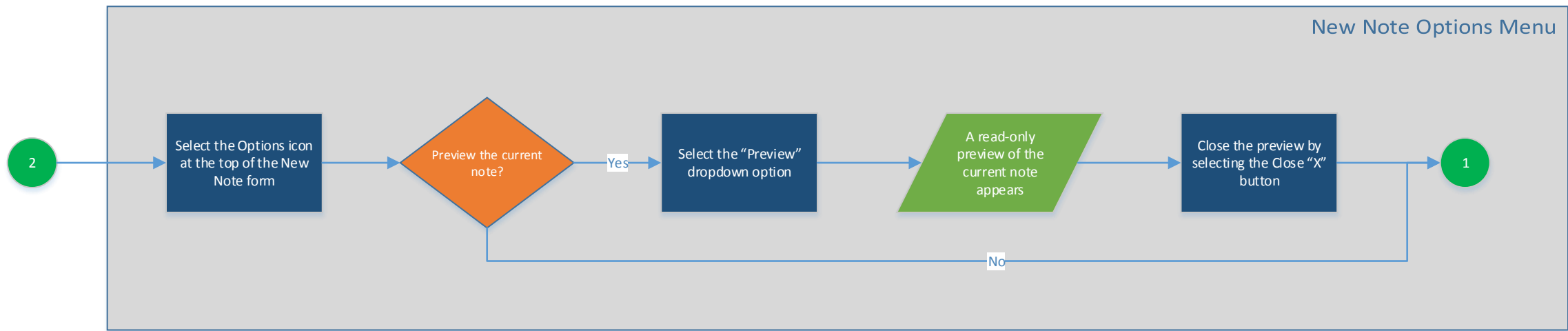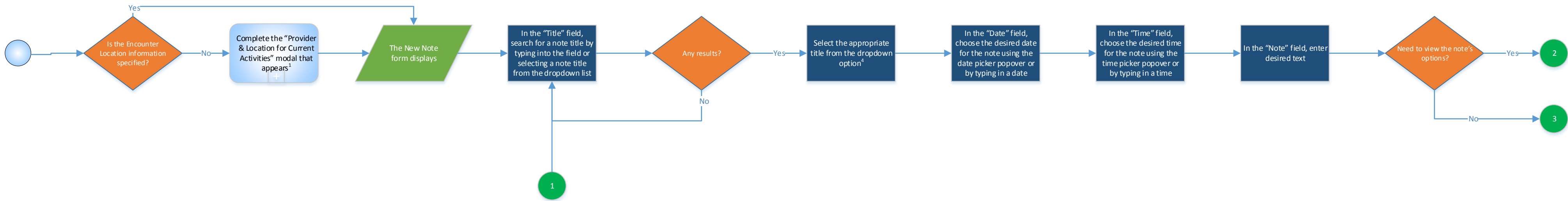
User Workflow Overview

From the Note tray, the list of all of the unsigned, un-cosigned, and signed notes associated with the patient in context appears within their appropriate accordions, which are all open by default. From the tray, the user can also choose to create a new note by selecting the "+ New Note" button or edit or delete an unsigned note by selecting the note and then selecting the respective buttons on the action bar. Additionally, the user can select any note from the list and select the "View" button to review a read-only preview of the note.

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[1] This sub-process is documented in another workflow document.
[2] The option to edit, delete, or sign a note is only available for un-signed notes.
[3] The user may also start a new note from the Documents applet by selecting the "+" button in the applet to open the New Note dialog in the Notes applet
[4] The "Title" field is required to save a note.

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F226 - Enter Plain Text Progress Notes (TIU) - New Note View

User

Is the Encounter Location information specified?

- Yes
- No → Complete the "Provider & Location for Current Activities" modal that appears[1]

The New Note form displays

In the "Title" field, search for a note title by typing into the field or selecting a note title from the dropdown list

Any results?
- Yes → Select the appropriate title from the dropdown option[4]
- No → (1)

In the "Date" field, choose the desired date for the note using the date picker popover or by typing in a date

In the "Time" field, choose the desired time for the note using the time picker popover or by typing in a time

In the "Note" field, enter desired text

Need to view the note's options?
- Yes → (2)
- No → (3)

New Note Options Menu

(2) → Select the Options icon at the top of the New Note form

Preview the current note?
- Yes → Select the "Preview" dropdown option → A read-only preview of the current note appears → Close the preview by selecting the Close "X" button → (1)
- No

Footer

(3) → Delete the note?
- Yes → Select the "Delete" button on the footer → Delete Note → User selected the Cancel button in confirmation modal?
  - No
  - Yes
- No → Save and close the note?
  - Yes → Select the "X" button at the top or the "Close" button at the bottom of the New Note form → Was action successful?
    - No → A system error modal appears
    - Yes → A growl alert appears in the top right corner
  - No → Sign the note?
    - Yes → Sign the note[1] → A growl alert appears in the top right corner
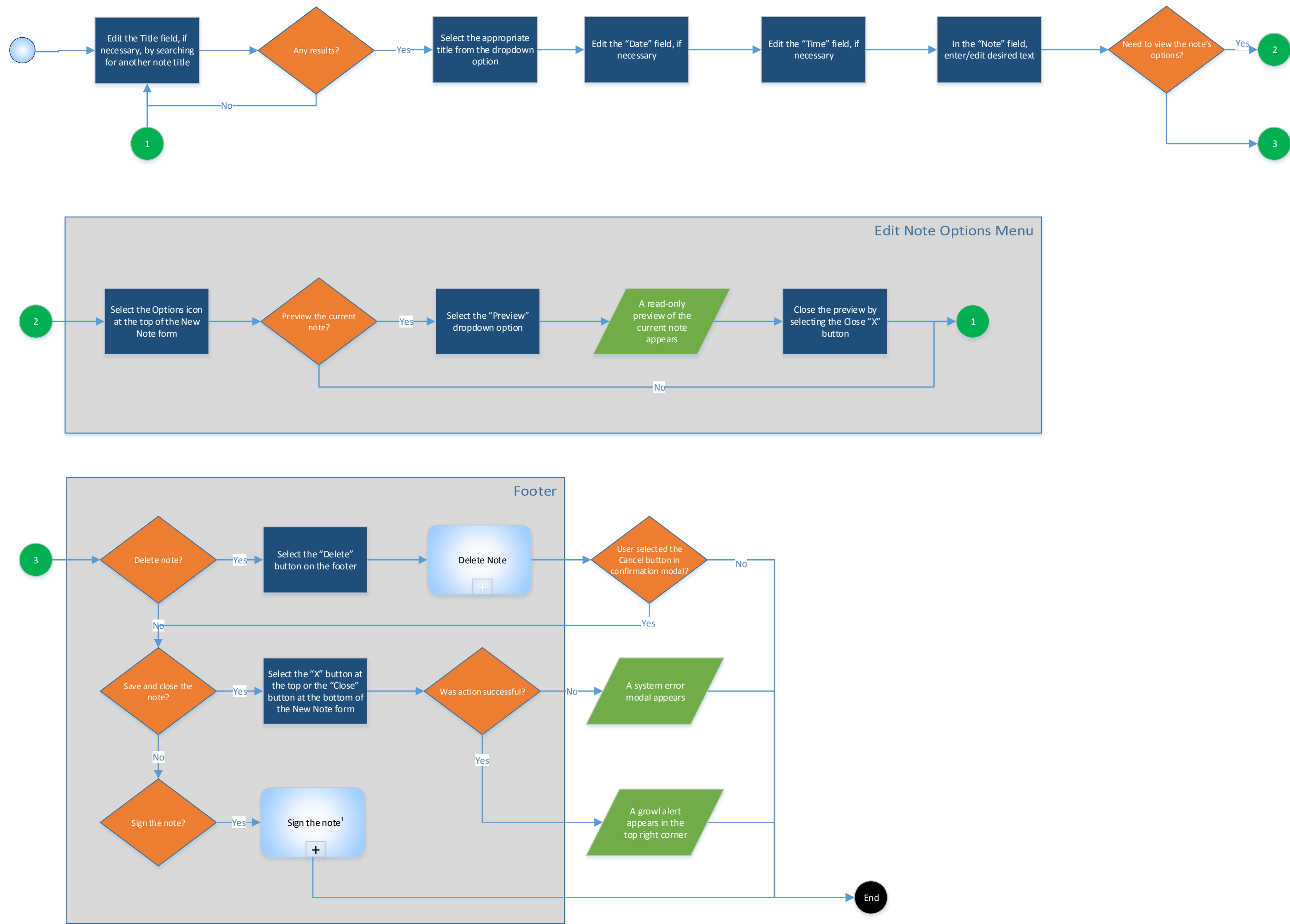   - No → End

User Workflow Overview

From the New Note form view, if the user has not already set the Encounter Location in the Patient Care Information component, the "Provider & Location for Current Activities" modal appears, and the user must complete the required information. Once complete, the modal closes and the New Note form is displayed. The user can then fill out the title (required to save), date and time of the note, and the note body.

From the options menu within the form, the user can elect to save or preview the current note. The user can also choose to save the note by selecting the "Close" button at the bottom of the form, which saves and closes the New Note dialog and returns the user back to the All Notes view.

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[1] This sub-process is documented in another workflow document
[2] The option to edit a note is only available for un-signed notes.
[3] The user may also start a new note from the Documents applet by selecting the "+" button in the applet to open the New Note dialog in the Notes applet
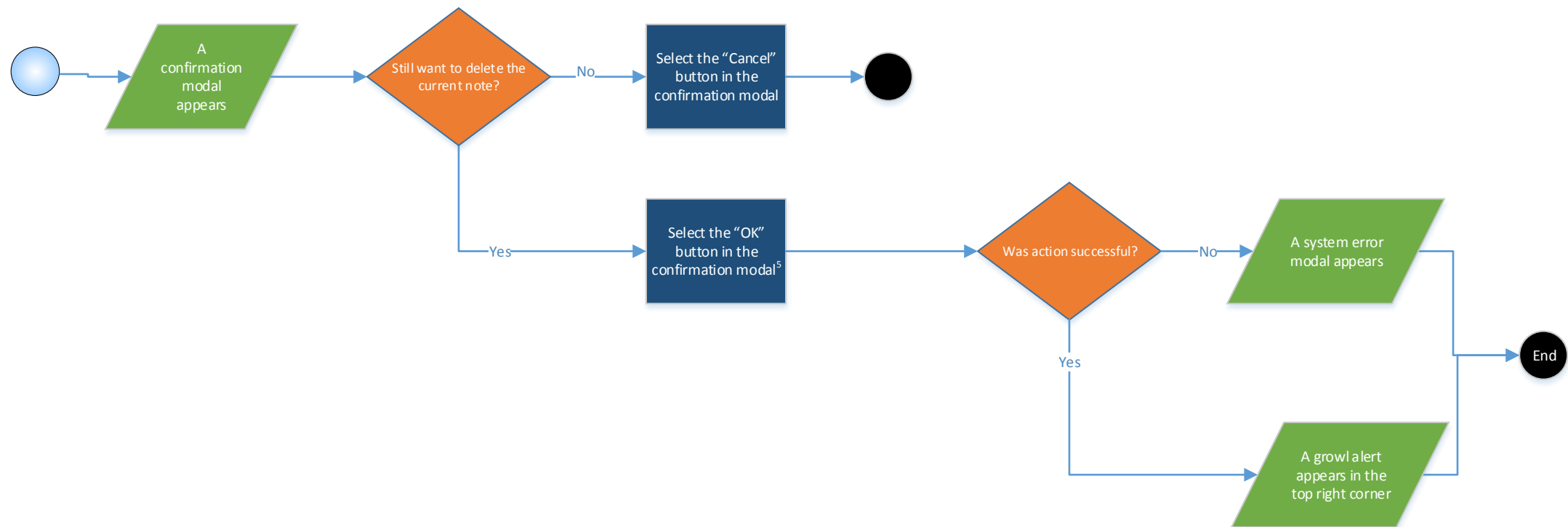[4] The "Title" field is required to save a note.

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F226 - Enter Plain Text Progress Notes (TIU) – Edit Note View

User

Edit the Title field, if necessary, by searching for another note title → Any results? —No→ (1)

Any results? —Yes→ Select the appropriate title from the dropdown option → Edit the "Date" field, if necessary → Edit the "Time" field, if necessary → In the "Note" field, enter/edit desired text → Need to view the note's options? —Yes→ (2)

Need to view the note's options? → (3)

Edit Note Options Menu

(2) → Select the Options icon at the top of the New Note form → Preview the current note? —Yes→ Select the "Preview" dropdown option → A read-only preview of the current note appears → Close the preview by selecting the Close "X" button → (1)

Preview the current note? —No→ (1)

Footer

(3) → Delete note? —Yes→ Select the "Delete" button on the footer → Delete Note → User selected the Cancel button in confirmation modal? —No→ End

User selected the Cancel button in confirmation modal? —Yes→ (back)

Delete note? —No→ Save and close the note? —Yes→ Select the "X" button at the top or the "Close" button at the bottom of the New Note form → Was action successful? —No→ A system error modal appears

Was action successful? —Yes→ A growl alert appears in the top right corner

Save and close the note? —No→ Sign the note? —Yes→ Sign the note[1] → (to growl alert)

End

User Workflow Overview

From the Edit Note form view, the user can edit the title (required to save), date and time of the note, and the note body. Once complete, the user may save and close the note to return back to the All Notes view.

From the options menu within the form, the user can elect to save or preview the current note. The user can also choose to save the note by selecting the "Close" button at the bottom of the form, which saves and closes the Edit Note dialog and returns the user back to the All Notes view.
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[1] This sub-process is documented in another workflow document
[2] The option to edit a note is only available for un-signed notes.
[3] The user may also start a new note from the Documents applet by selecting the "+" button in the applet to open the New Note dialog in the Notes applet
[4] The "Title" field is required to save a note.

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F560 – Delete an Unsigned Note

User

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(start) → [A confirmation modal appears] → <Still want to delete the current note?>
    --No--> [Select the "Cancel" button in the confirmation modal] → (end)
    --Yes--> [Select the "OK" button in the confirmation modal⁵] → <Was action successful?>
        --No--> [A system error modal appears] → (End)
        --Yes--> [A growl alert appears in the top right corner] → (End)
```

User Workflow Overview

If the user selects the "Delete" button, a confirmation modal appears asking if the user still wants to delete the note. If the user selects "Cancel" in this confirmation modal, the user is returned to the last view he/she was on. Otherwise, if the user selects the "Ok" button, the note is deleted, and the user is returned to the "All Notes" view regardless of what view he/she was originally on.

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[1] This sub-process is documented in another workflow document.

[2] The option to edit a note is only available for un-signed notes.

[3] The user may also start a new note from the Documents applet by selecting the "+" button in the applet to open the New Note dialog in the Notes applet

[4] The "Title" field is required to save a note.

[5] If the user selected the "Cancel" button in the Edit Note form, the user returns to the All Notes view and his/her changes since the last manual save action are discarded. If the user selected the "Delete" button in the New/Edit Note form, the user returns to the All Notes view and the entire note is deleted from the view.

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