Phreesia

Help | Patient Note Alert

OVERVIEW	⇩

WORKING ON PATIENT NOTE	⇩

WORKING ON VISIT NOTE	⇩

WORKING ON URGENT NOTE	⇩

FREQUENTLY ASKED QUESTIONS (FAQs)	⇩

WRITE TO US.

CHAT WITH US

OVERVIEW ⬇

A patient note is a primary statement of communication to ensure the quality of care and service. There are three different types of patient notes as mentioned below.

PATIENT NOTES	VISIT NOTES	URGENT NOTES
Any information about the patient which does not change from visit to visit. For example – patient needs a wheelchair, patient is visually impaired etc.	Any information about the patient pertaining to a particular visit only. For example – patient has some important paperwork to be done	Any information about the patient pertaining to a particular visit but it is urgent and important. For example – the patient can be late, and he should be immediately routed to the doctor

WORKING ON PATIENT NOTE ⬇
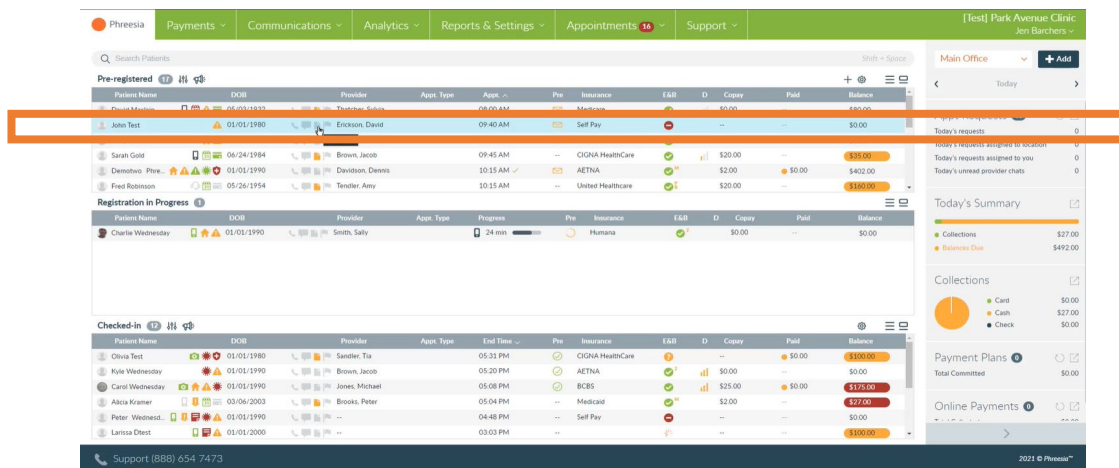
How to add a patient note? ⬇

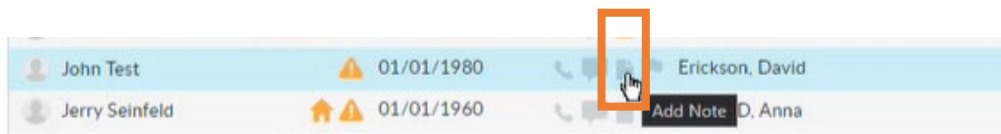**STEP 1: Be on the dashboard**

WRITE TO US.

CHAT WITH US

STEP 2:   Hover your mouse over the patient's name for whom you want to add a note. You will observe that the row gets highlighted in the colour blue.
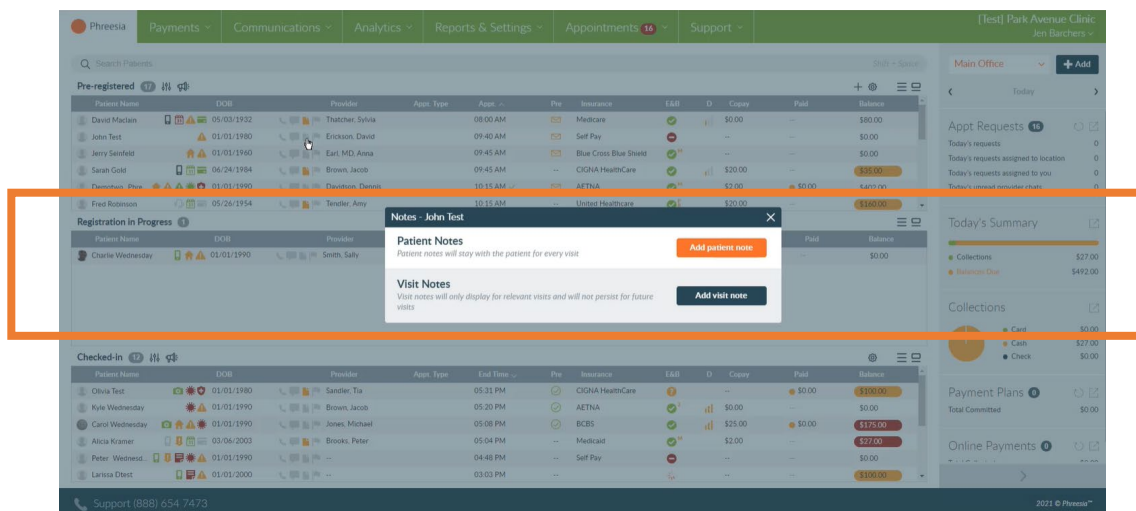

STEP 3:   Click on the *Notes* icon as shown below.
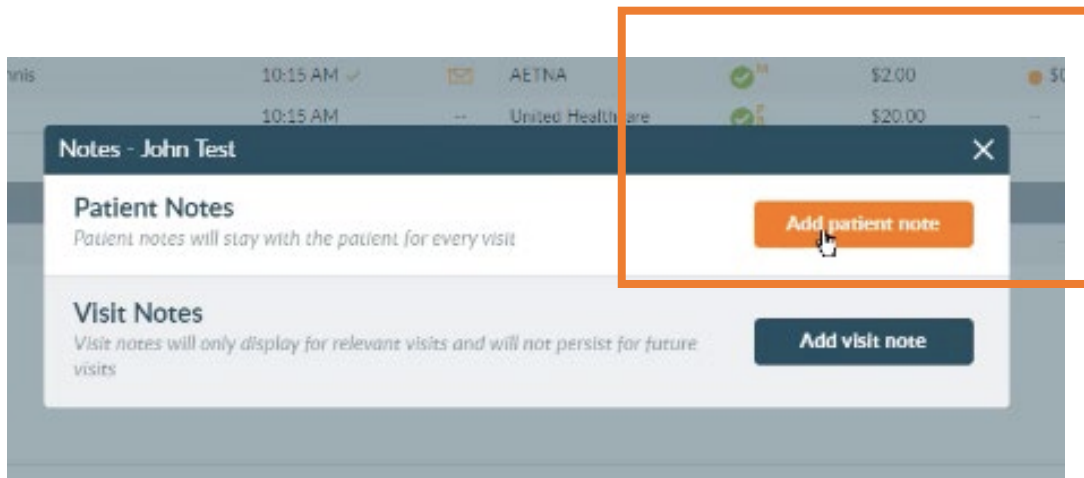

STEP 4:   After clicking on the *Notes* icon, a pop-up will appear
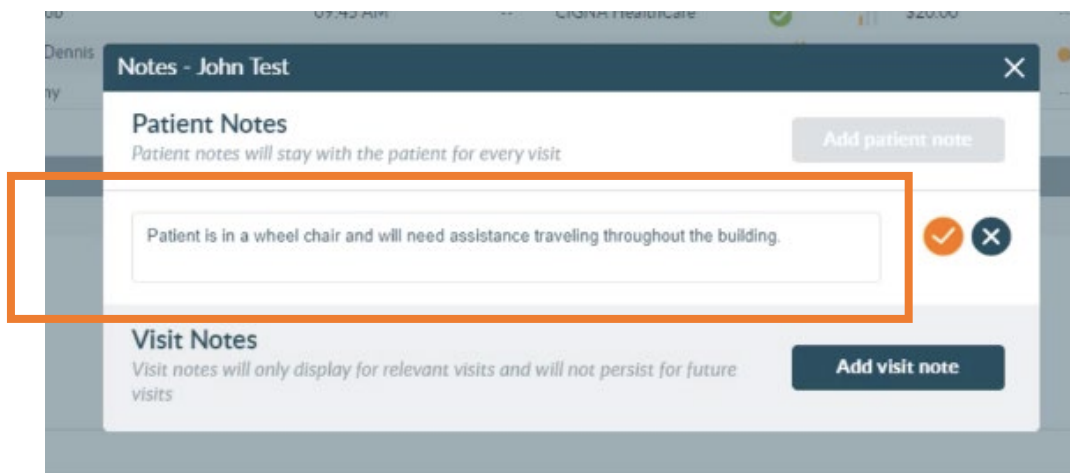

WRITE TO US.

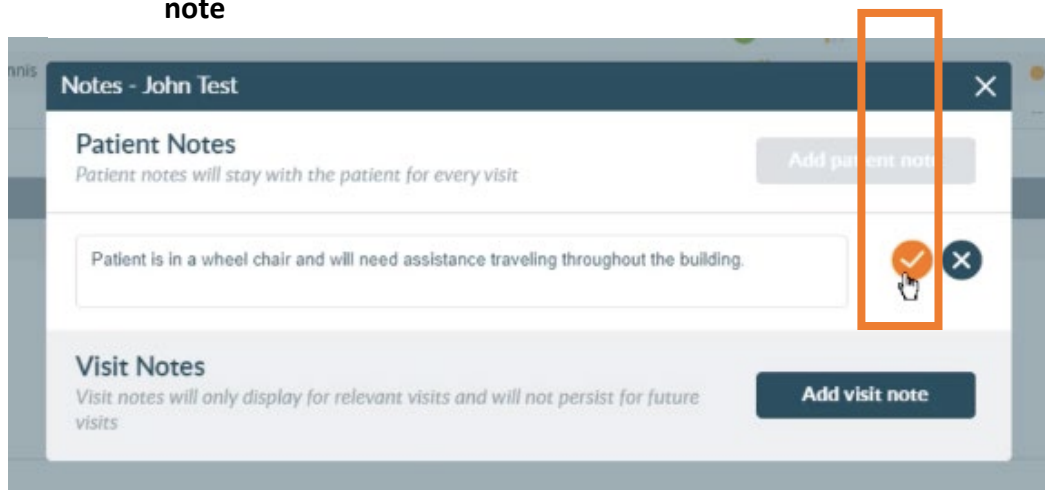CHAT WITH US

STEP 5:   Click on *Add patient note*

STEP 6:   i.   A text box will appear where you can type the required details
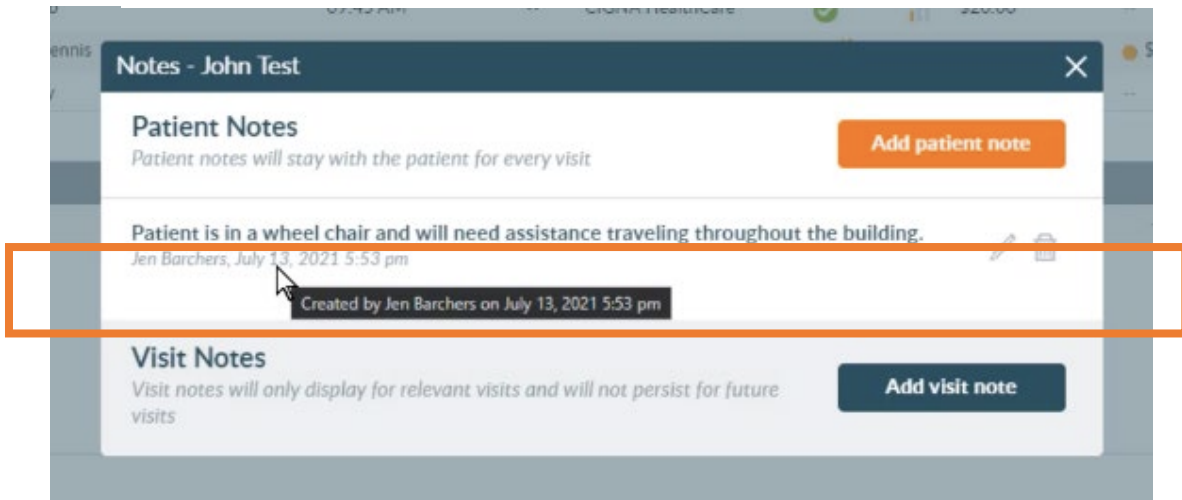

ii.   After entering the text, click on the *orange check mark* icon to add the note
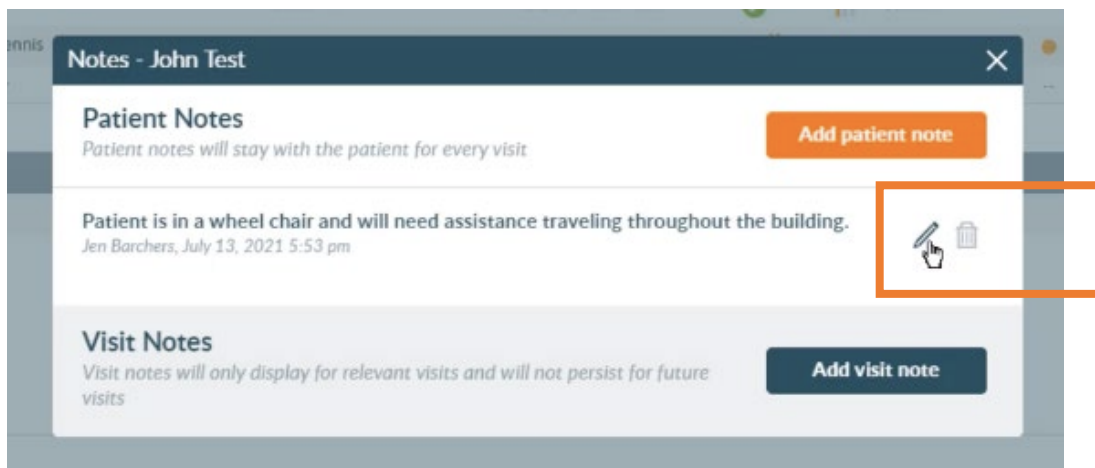

WRITE TO US.

CHAT WITH US   💬

Once the note has been added, you can see a time-stamp below it.

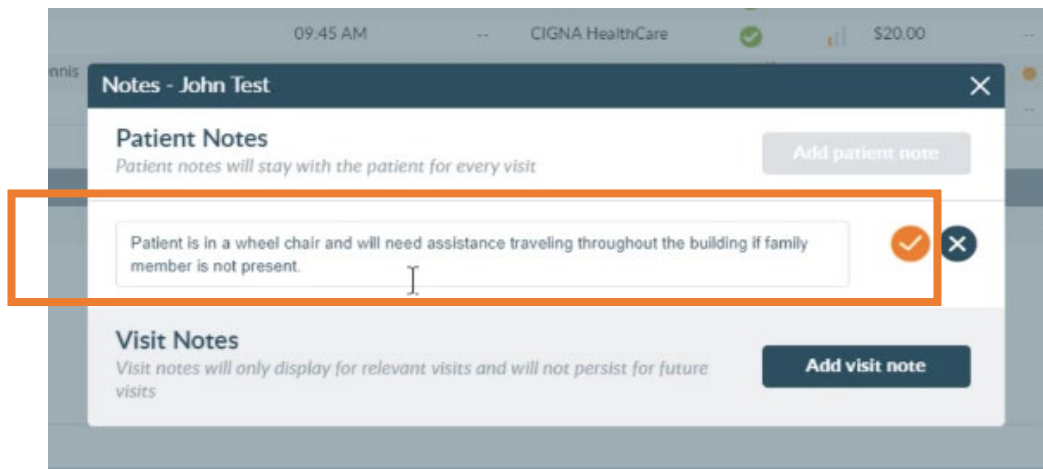How to edit a patient note?   ⬇

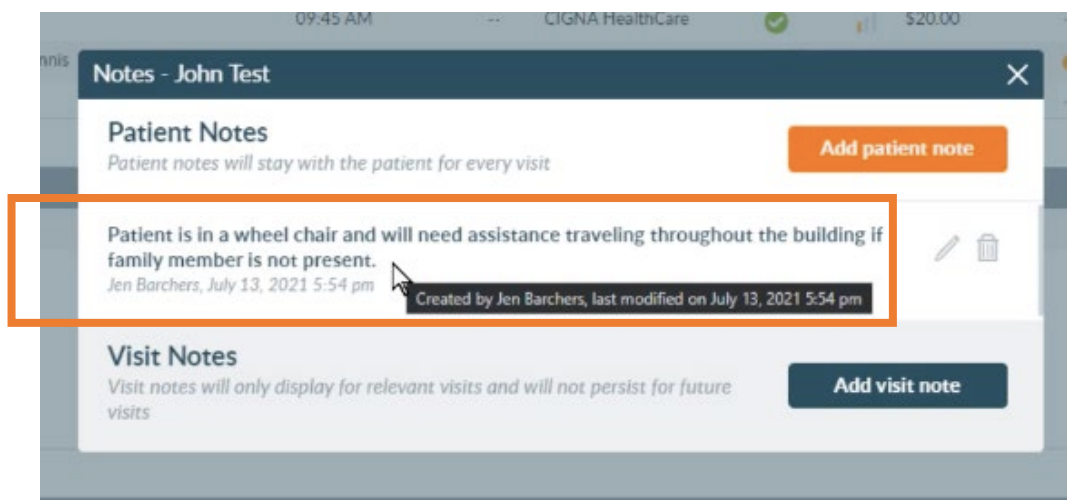**STEP 1: For an already existing note, click on the *pencil* icon**

WRITE TO US.

CHAT WITH US

STEP 2: Make the changes to the note and click on the *orange check mark* icon

The edited note will appear with the time-stamp

WRITE TO US.

CHAT WITH US

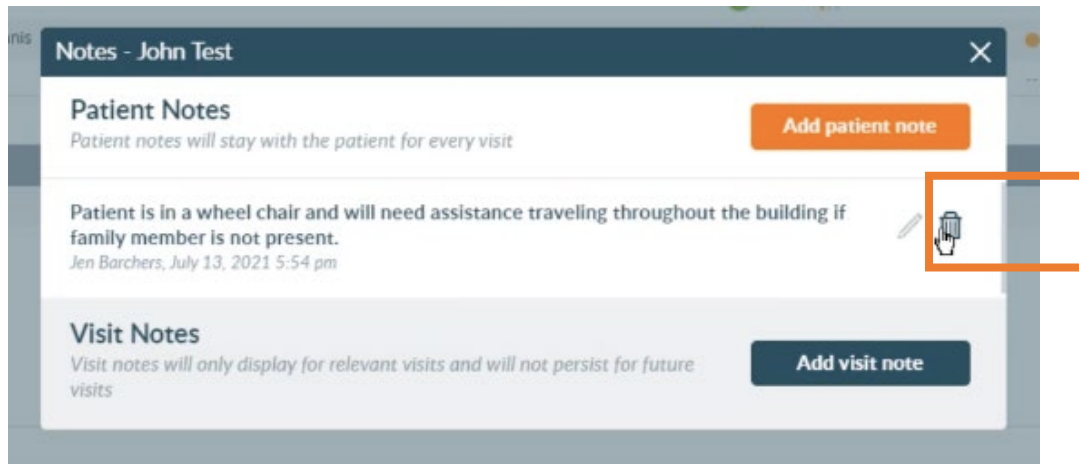## How to delete a patient note?   ⇩

For an already existing note, simply click on the *trash* icon.

WORKING ON VISIT NOTE   ⇩

How to add a visit note?   ⇩
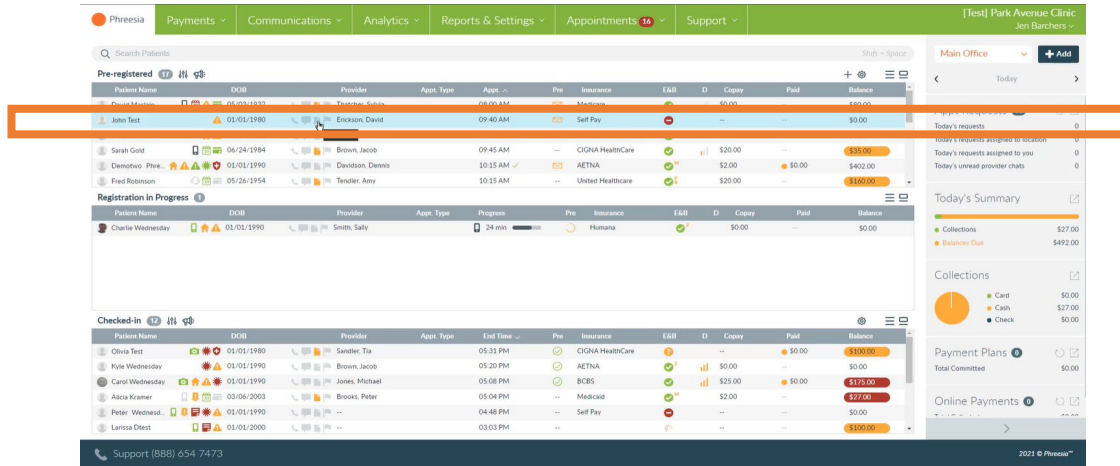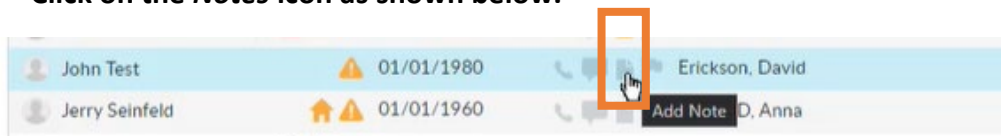
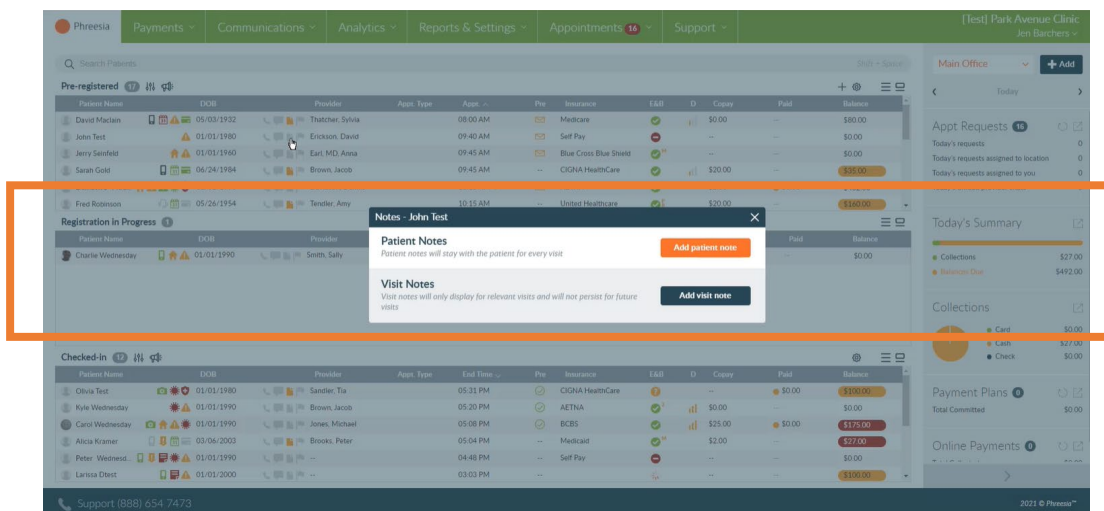**STEP 1: Be on the dashboard**

WRITE TO US.

CHAT WITH US

STEP 2: **Hover your mouse over the patient's name for whom you want to add a note. You will observe that the row gets highlighted in colour blue.**

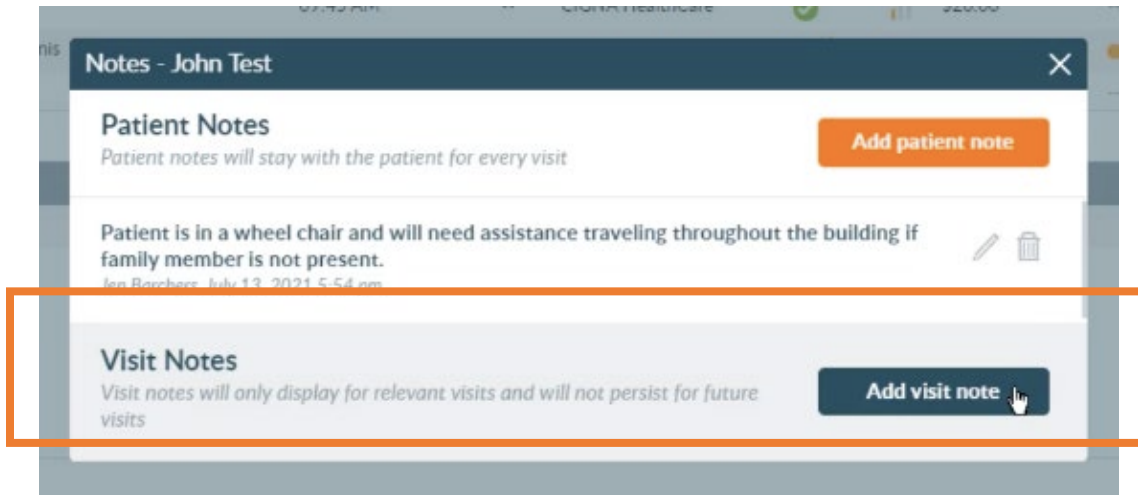**STEP 3:** **Click on the *Notes* icon as shown below.**

STEP 4: **After clicking on the *Notes* icon, a pop-up will appear**

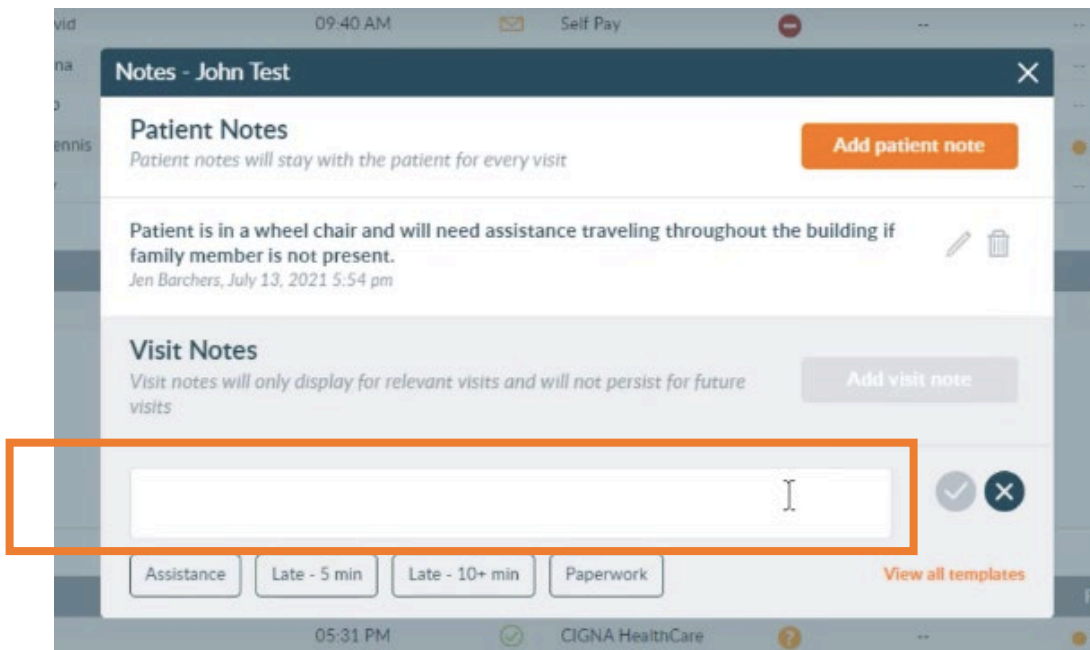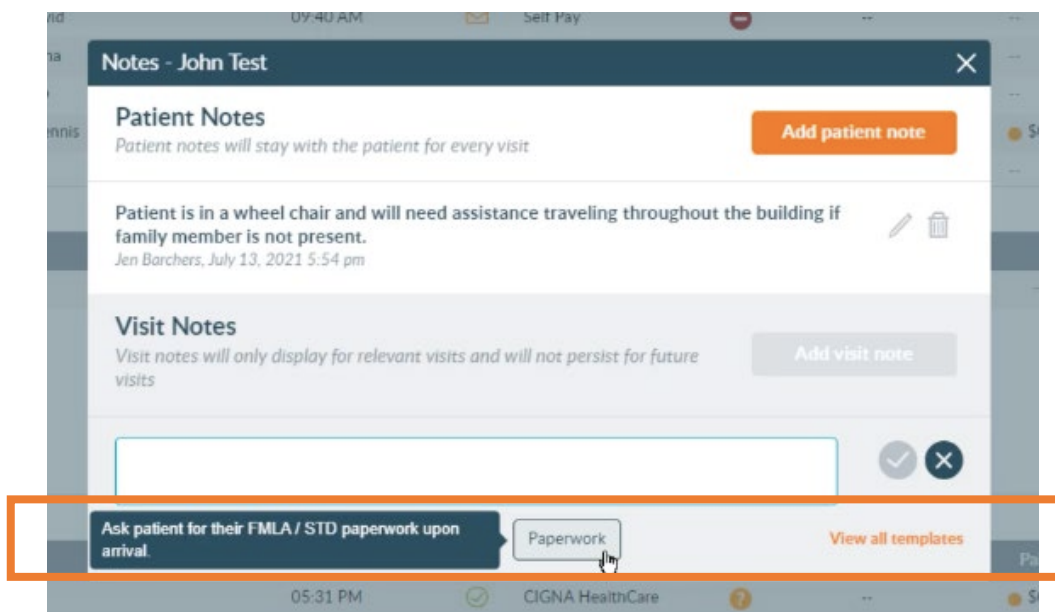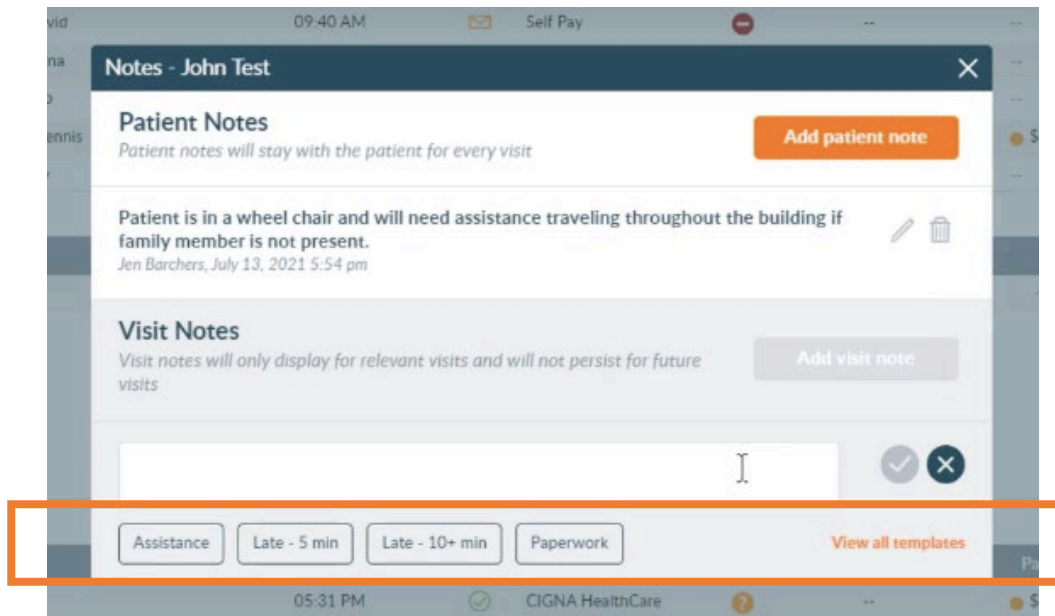

WRITE TO US.

CHAT WITH US

STEP 5:   Click on *Add visit note*

STEP 6:   i.   A text box will appear where you can type the required details
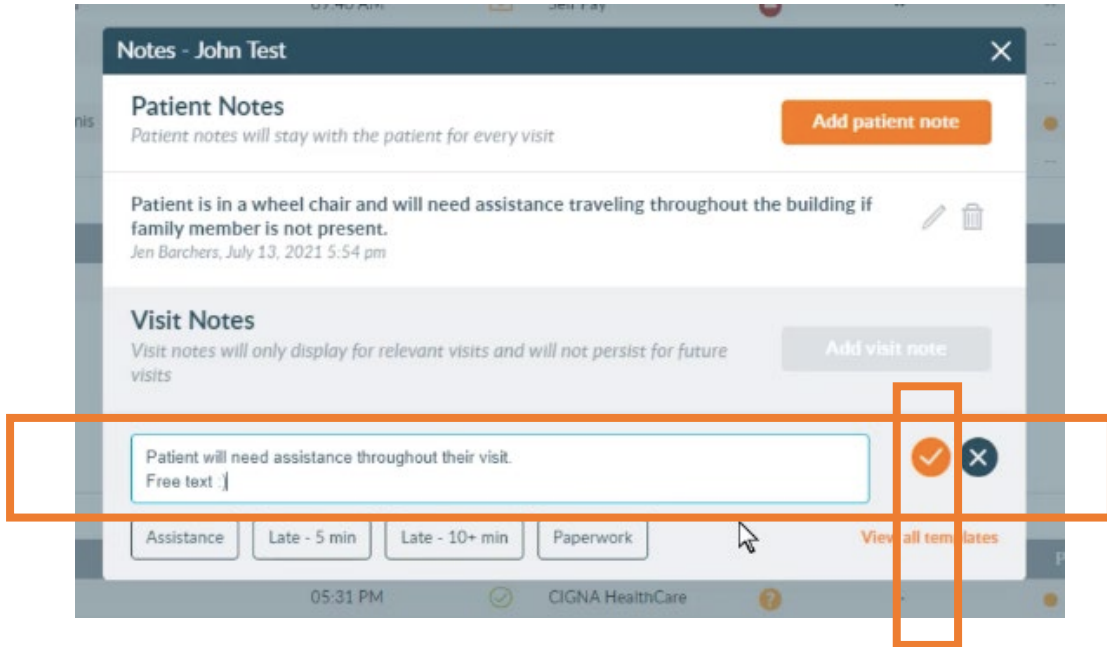

WRITE TO US.

CHAT WITH US

ii. **You can either chose to type the text or chose from the in-built templates.**
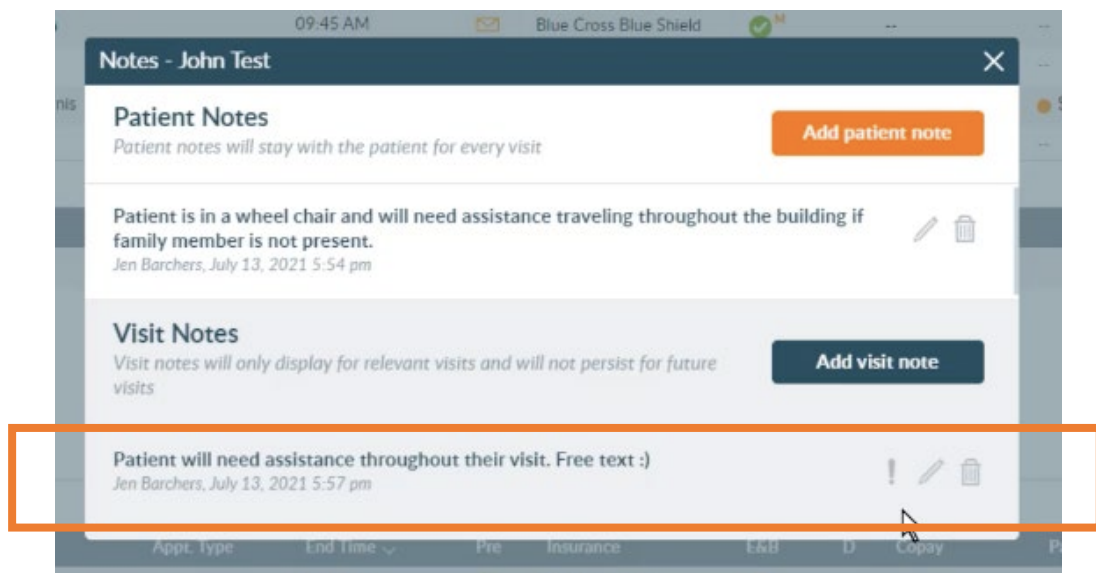

WRITE TO US.

CHAT WITH US

iii. **After entering the text, click on the *orange check mark* icon to add the note**

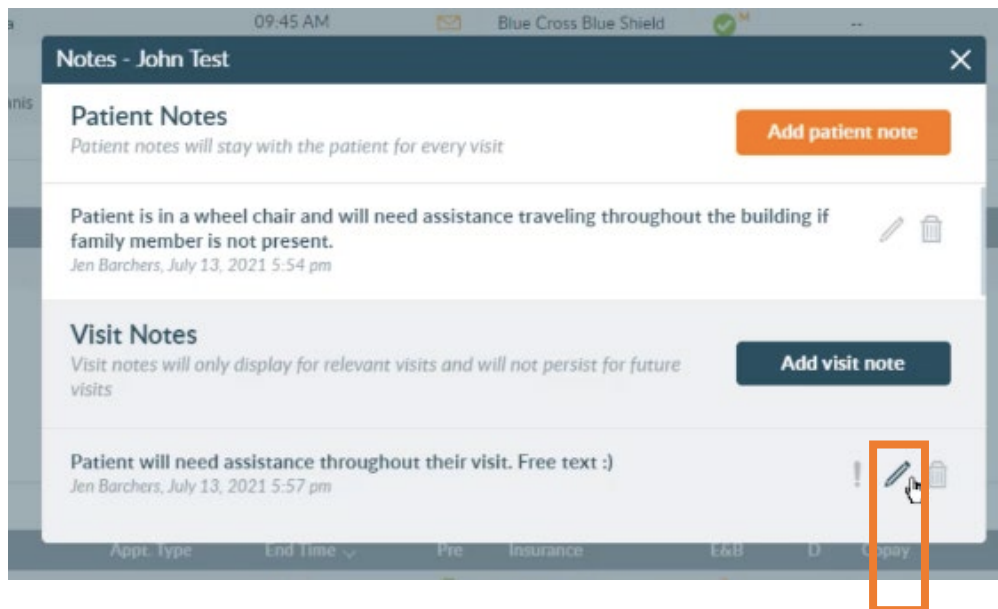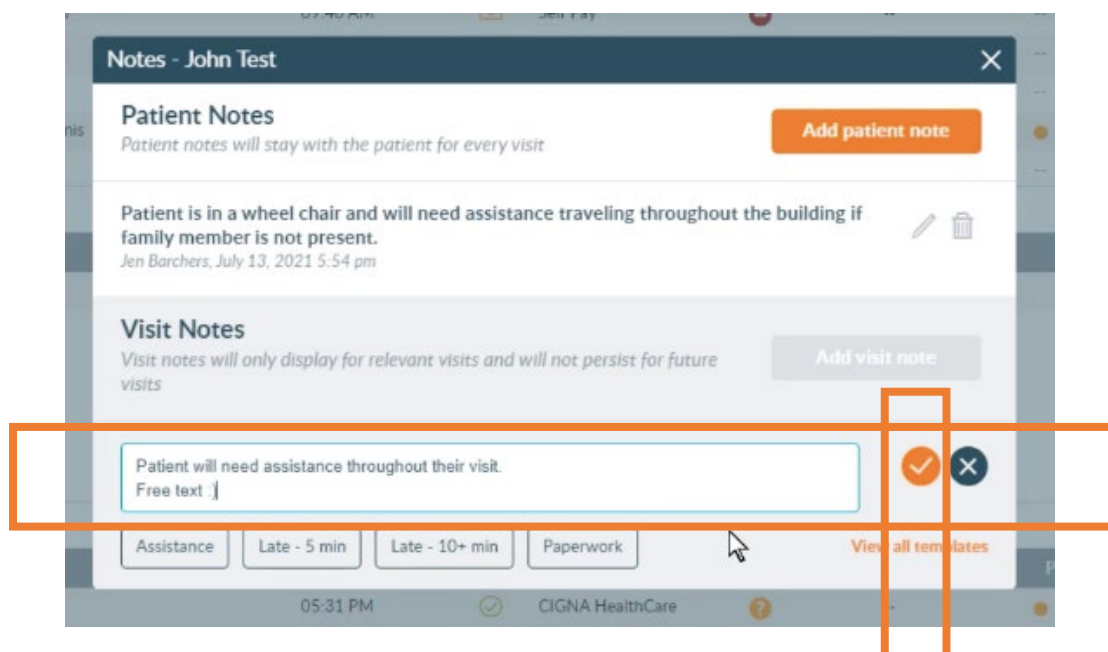**Once the note has been added, you can see a time-stamp below it.**

WRITE TO US.

CHAT WITH US

How to edit a visit note? ⇩

STEP 1: For an already existing note, click on the *pencil* icon

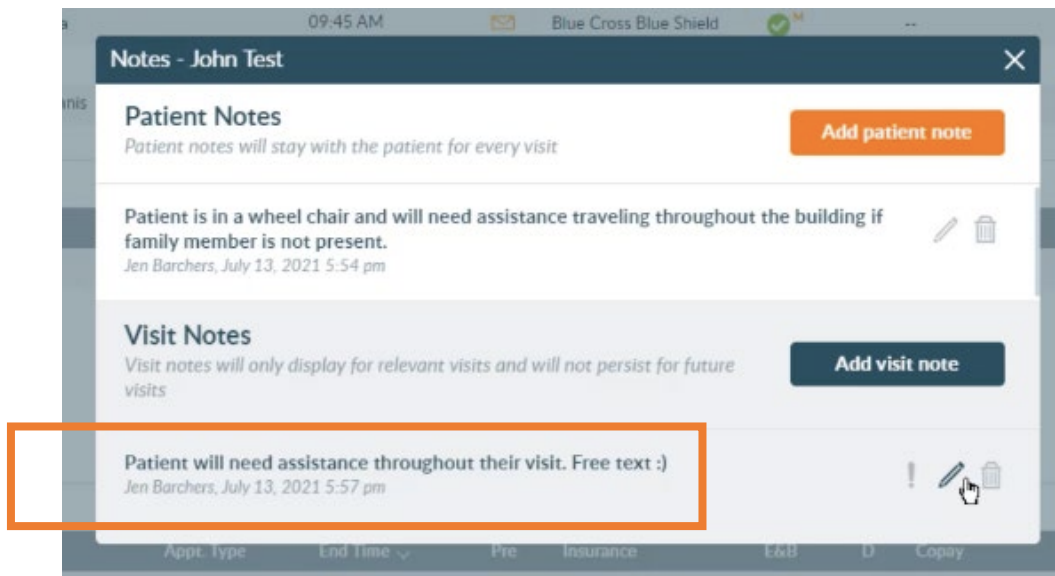**STEP 2: Make the changes to the note and click on the *orange check mark* icon**
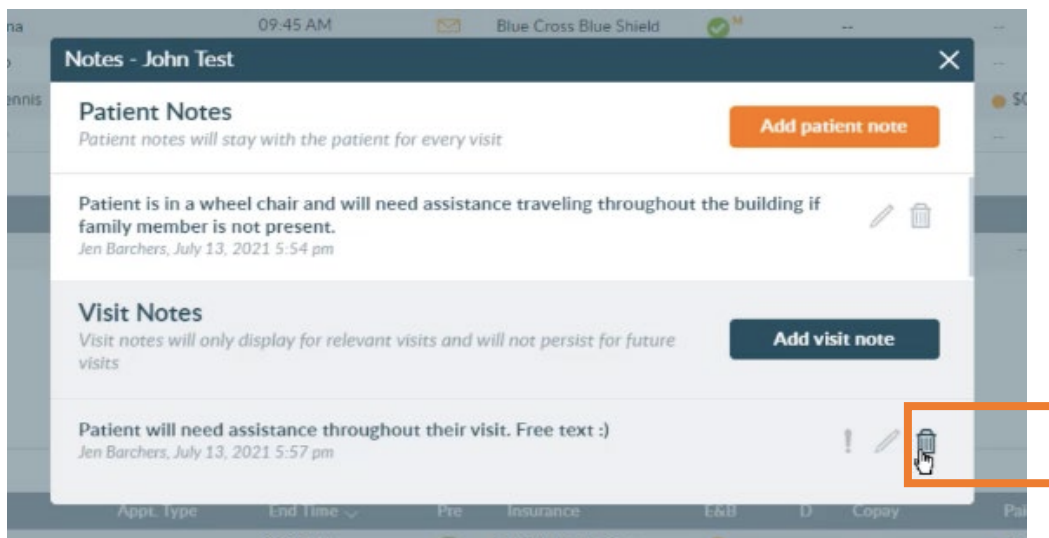

WRITE TO US.

CHAT WITH US

The edited note will appear with the time-stamp

How to delete a visit note?   ⇩

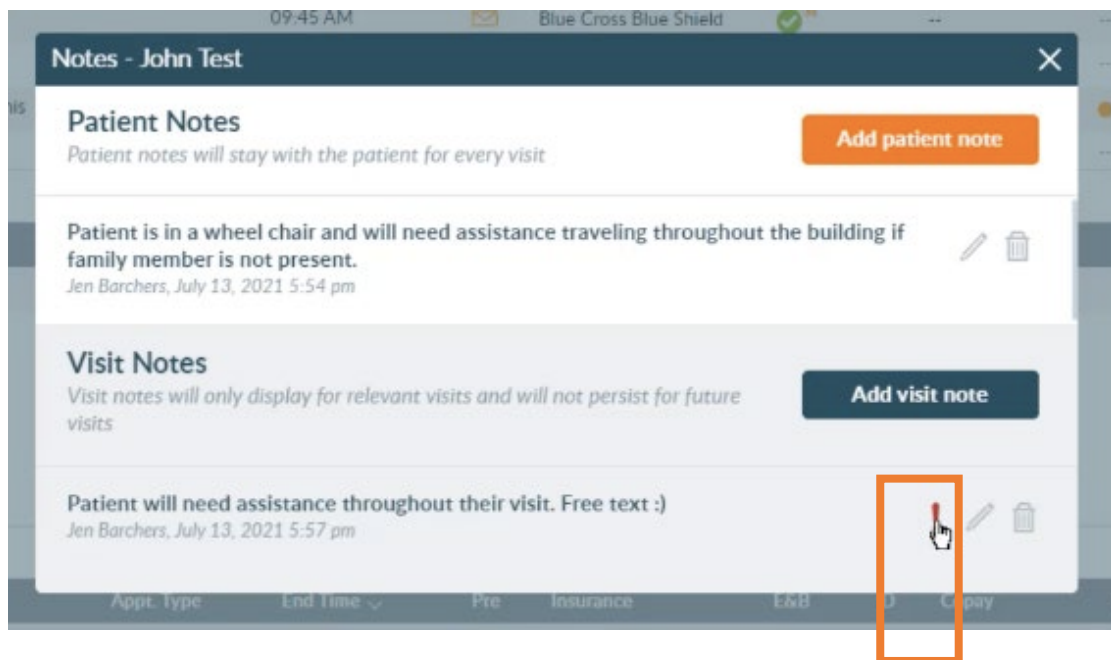**For an already existing note, simply click on the *trash* icon.**

WRITE TO US.

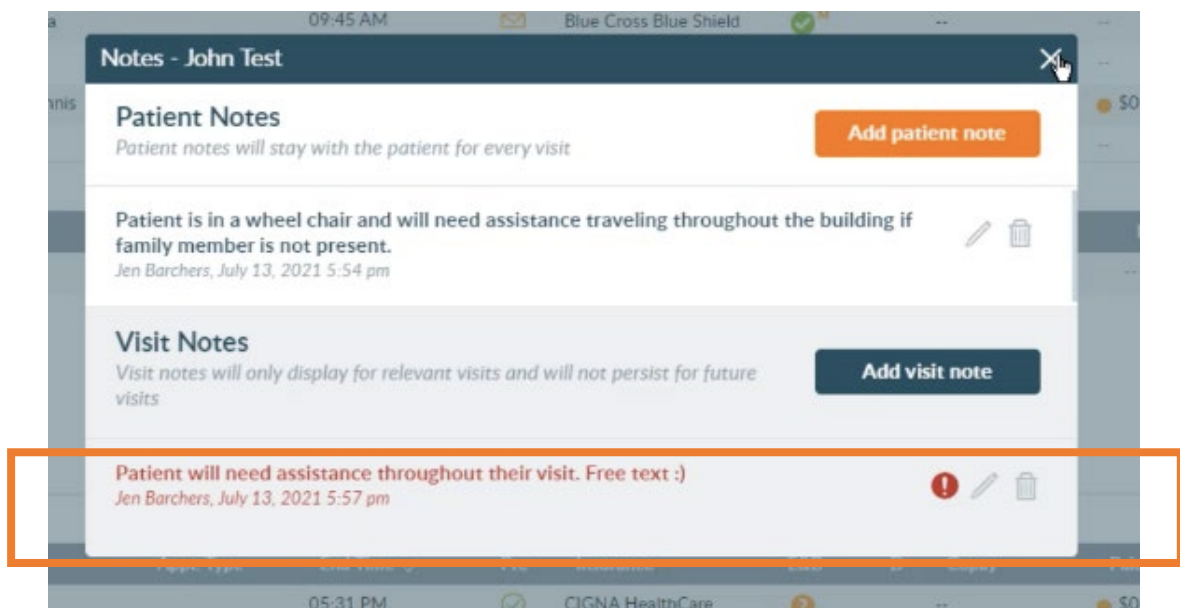CHAT WITH US

WORKING ON URGENT NOTE   ⇩

How to add an urgent note?   ⇩

For an already exisitng visit note, click on *exclamation* icon

You will observe that the note turns red, hence, showing that it is urgent

WRITE TO US.

CHAT WITH US   🗨

While being on the dashboard, we can also see that the patient's name has been highlighted in a reddish-orange colour and the note icon has also turned red.

How to delete an urgent note? ⇩

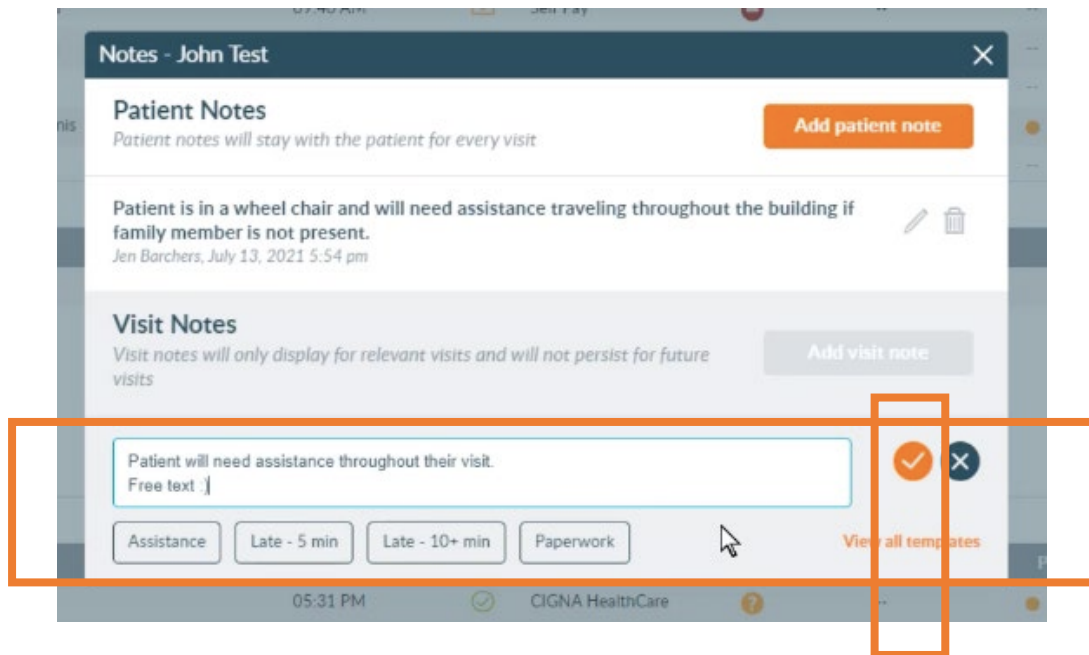**STEP 1: For an already existing note, click on the *pencil* icon**
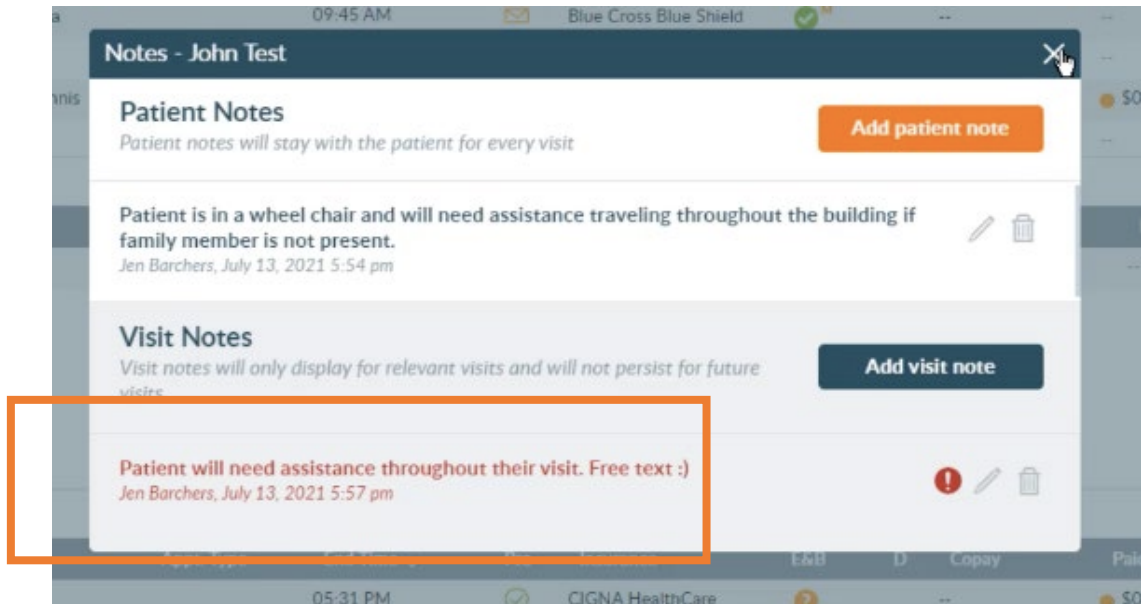

WRITE TO US.

CHAT WITH US

STEP 2: Make the changes to the note and click on the *orange check mark* icon

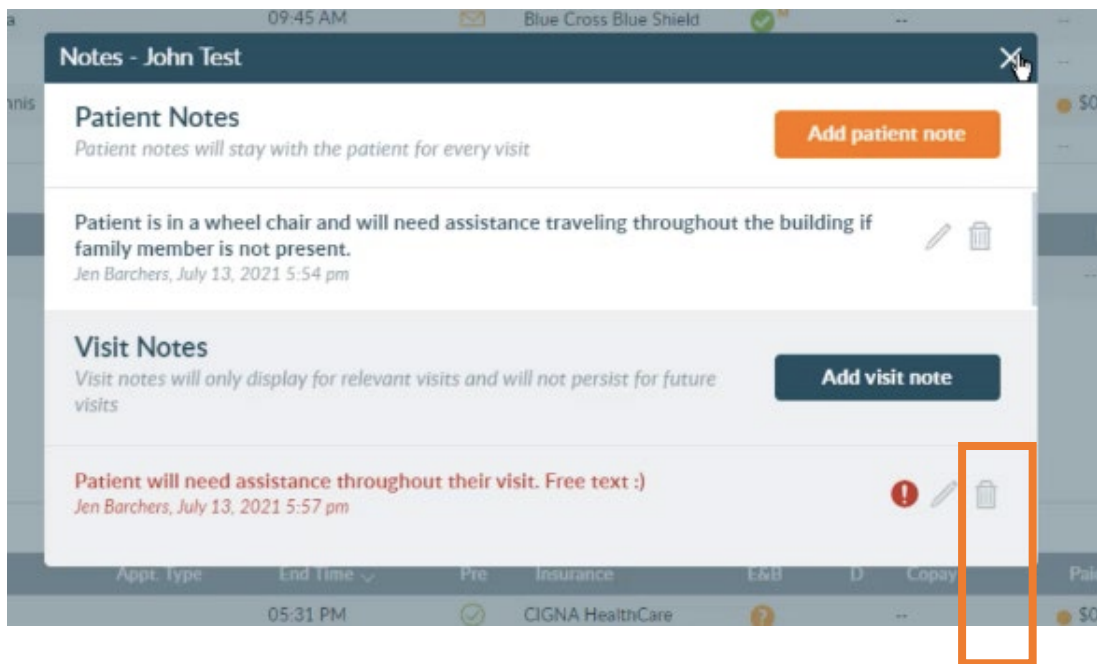**The edited note will appear with the time-stamp**

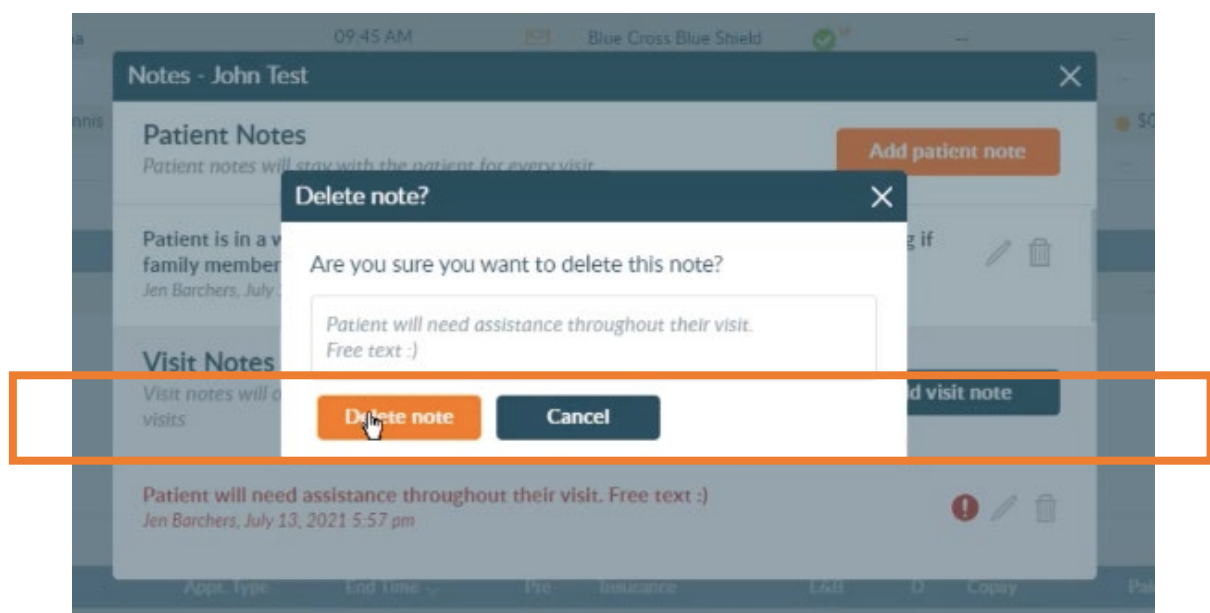
WRITE TO US.

CHAT WITH US

How to delete an urgent note?

STEP 1: For an already existing note, click on the *trash* icon

STEP 2: A pop-up will appear asking for you to confirm the deletion. Click on the *Delete note* button to confirm, else click on *Cancel*.

WRITE TO US.

CHAT WITH US

FREQUENTLY ASKED QUESTIONS (FAQs)   ⇩

Why are there built-in templates for adding visit notes?   ⇩

The built-in template feature helps to ensure a professional and quality communication by avoiding the chances of spelling errors and typos and hence, making the work of the front desk faster and easier.

Why are there built-in templates for adding visit notes?   ⇩

It turns red to grad the attentionfor instant resolution.

WRITE TO US.

CHAT WITH US