



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

Any information about the patient which does not change from visit to visit.

For example – patient needs a wheelchair, patient is visually impaired etc.

VISIT NOTES

Any information about the patient pertaining to a particular visit only.

For example – patient has some important paperwork to be done

URGENT NOTES

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

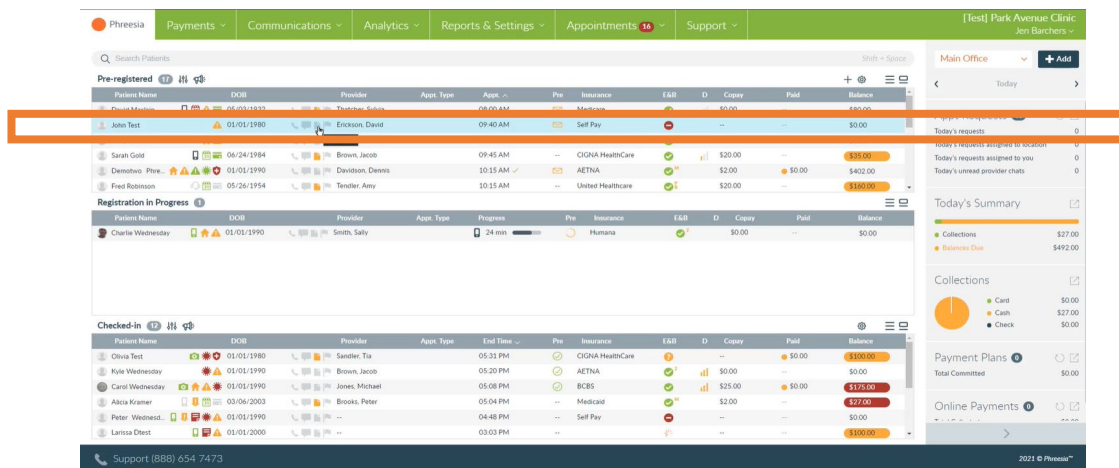
The screenshot displays the Phreesia dashboard interface. At the top, there is a navigation bar with tabs for Payments, Communications, Analytics, Reports & Settings, Appointments (16), and Support. The main content area is divided into three sections: Pre-registered, Registration in Progress, and Checked-in. Each section contains a table of patient information, including Patient Name, DOB, Provider, Appt. Type, Appt. Time, Insurance, E&B, D, Copy, Paid, and Balance. The Pre-registered section lists patients like David Maclean, John Test, Jerry Seinfeld, Sarah Gold, Demetrio Phire, and Fred Robinson. The Registration in Progress section lists Charlie Wednesday. The Checked-in section lists Olivia Test, Kyle Wednesday, Carol Wednesday, Alisa Komer, Peter Wednesday, and Larissa Davis. On the right side, there is a sidebar with 'Main Office' and 'Add' buttons, 'Appt Requests' (10), 'Today's Summary' (Collections: \$27.00, Balances Due: \$492.00), 'Collections' (Card: \$0.00, Cash: \$27.00, Check: \$0.00), 'Payment Plans' (Total Committed: \$0.00), and 'Online Payments' (0).



WRITE TO US.

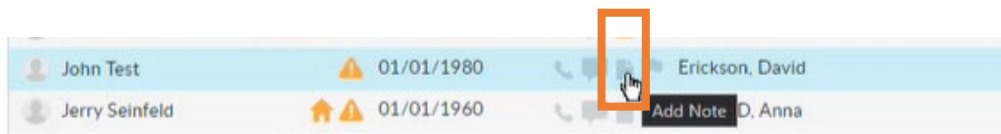


STEP 2: Hover your mouse over the patient's name for whom you want to add a note. You will observe that the row gets highlighted in the colour blue.

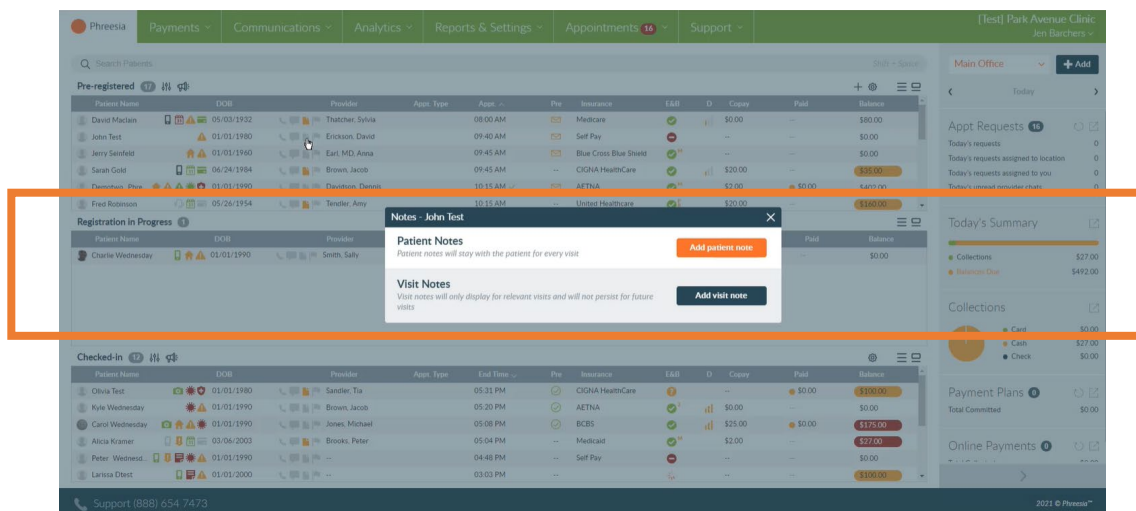


Patient Name	DOB	Provider	Appt. Type	Appt. Time	Pre	Insurance	EOB	D	Copy	Paid	Balance
John Test	01/01/1980	Erickson, David	09:40 AM	09:40 AM	Medicare	Self Pay	---	---	---	\$0.00	\$0.00
Sarah Gold	06/24/1984	Brown, Jacob	09:45 AM	09:45 AM	---	CIGNA HealthCare	---	---	---	\$20.00	\$105.00
Demonio, Ph...	01/01/1990	Davidson, Dennis	10:15 AM	10:15 AM	---	AETNA	---	---	---	\$2.00	\$402.00
Fred Robinson	05/26/1954	Tender, Amy	10:15 AM	10:15 AM	---	United Healthcare	---	---	---	\$20.00	\$100.00

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



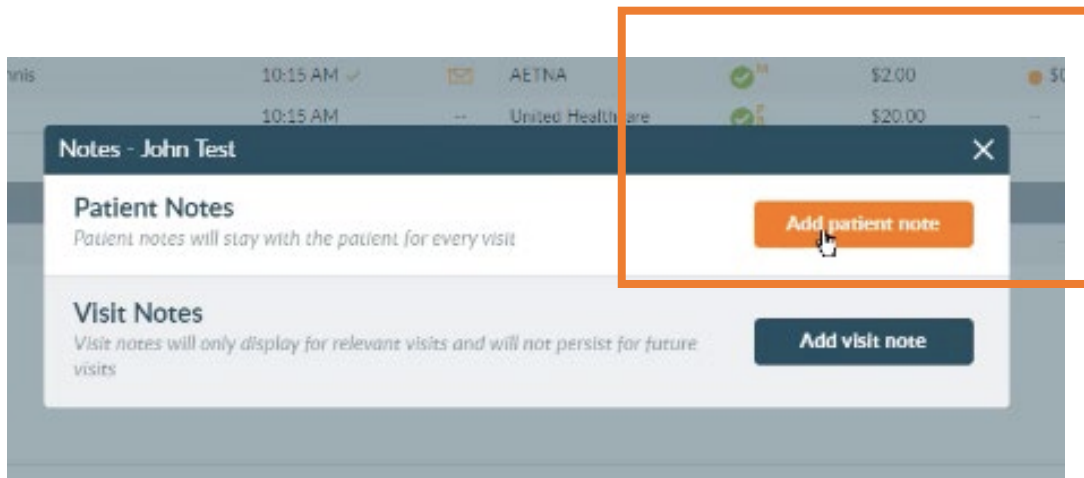
STEP 4: After clicking on the *Notes* icon, a pop-up will appear



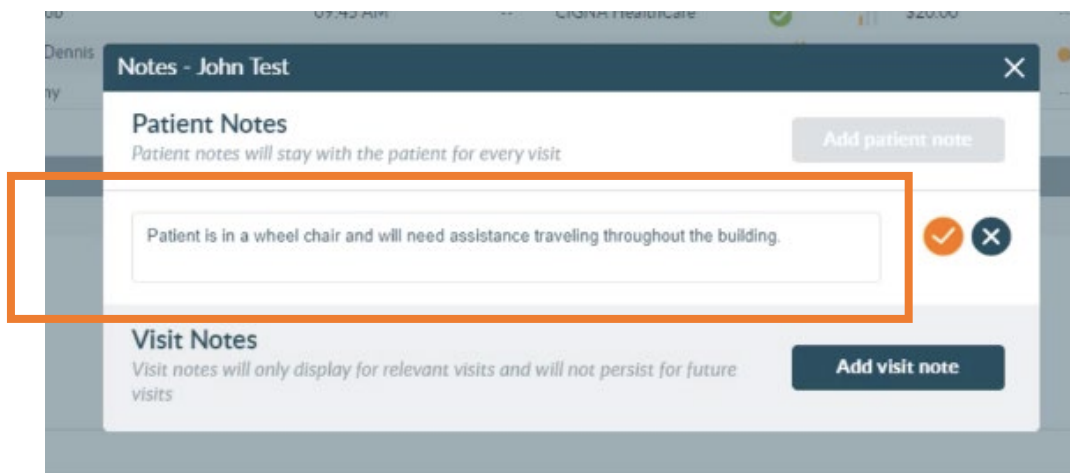
WRITE TO US.



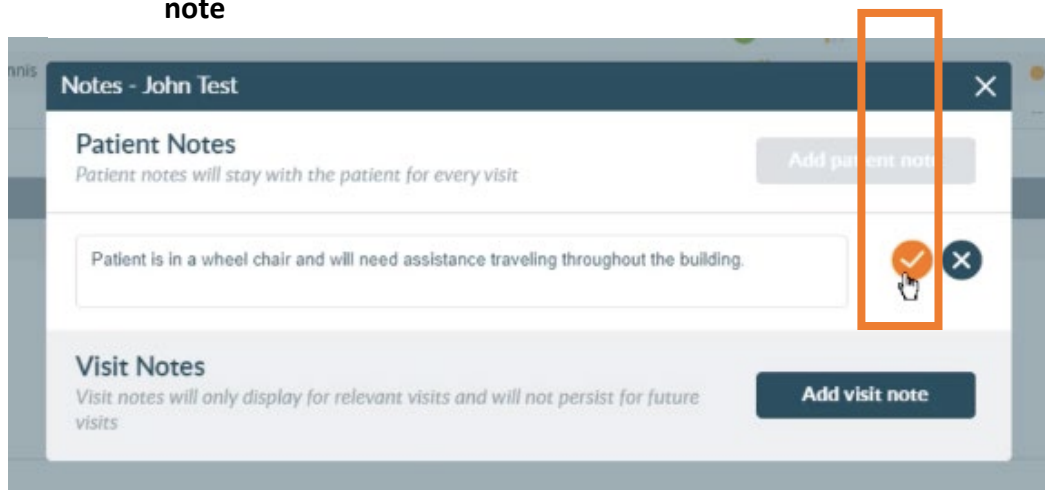
STEP 5: Click on *Add patient note*



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



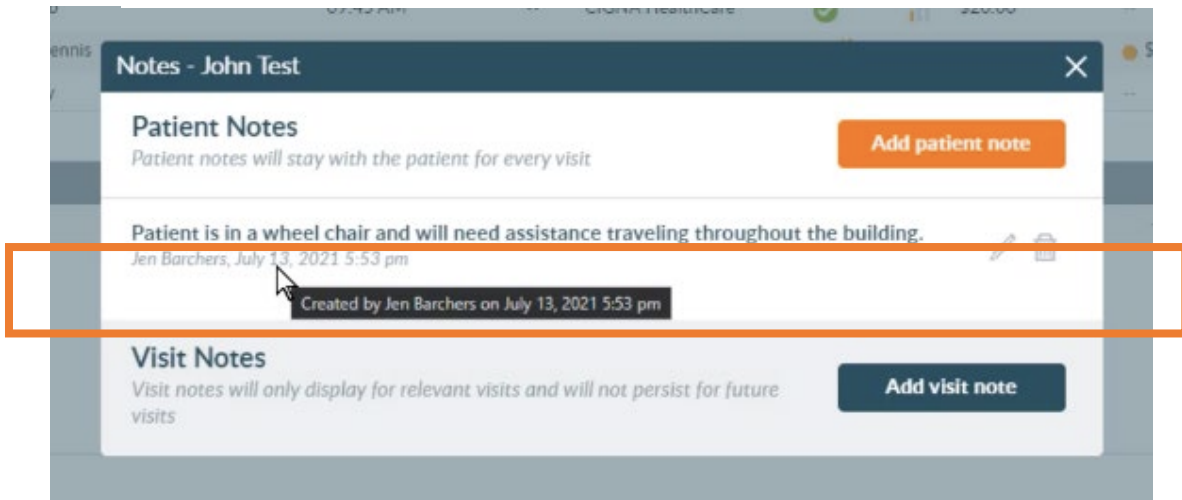
ii. After entering the text, click on the *orange check mark* icon to add the note



WRITE TO US.



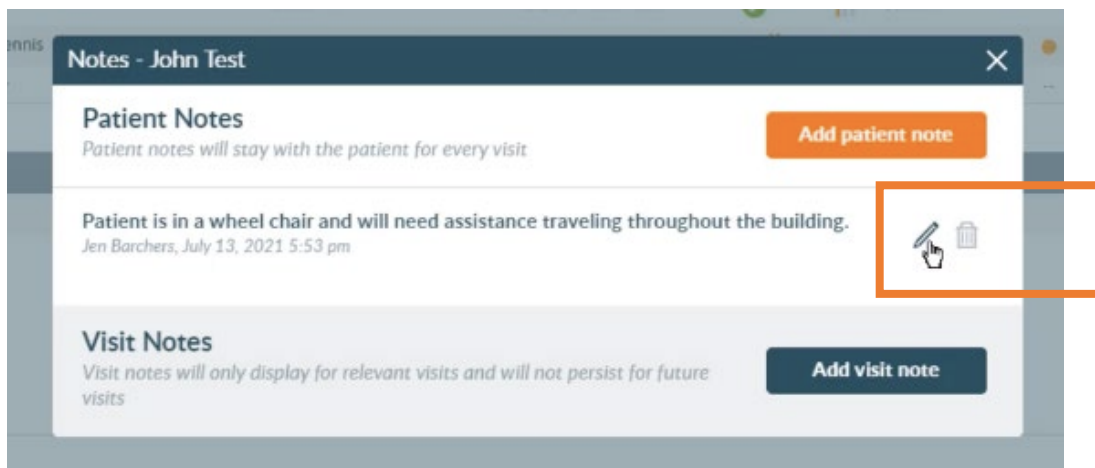
Once the note has been added, you can see a time-stamp below it.



How to edit a patient note?



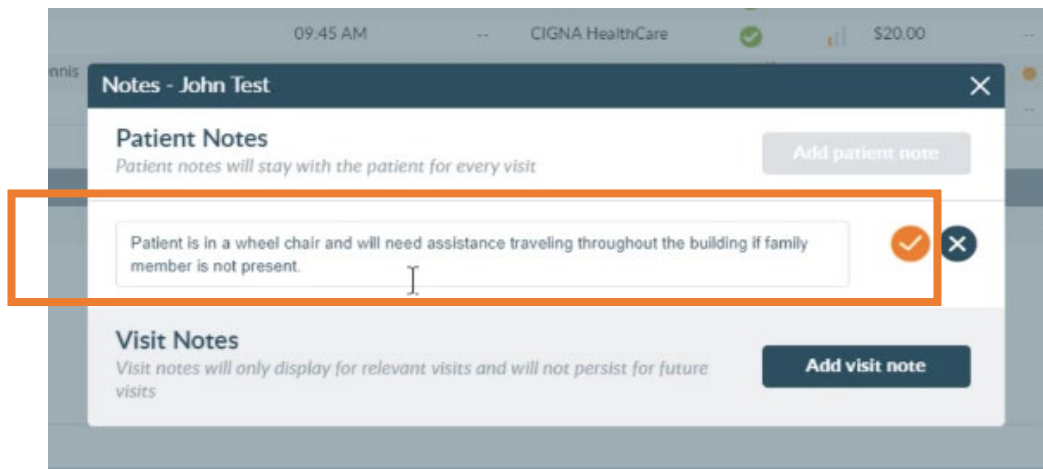
STEP 1: For an already existing note, click on the *pencil* icon



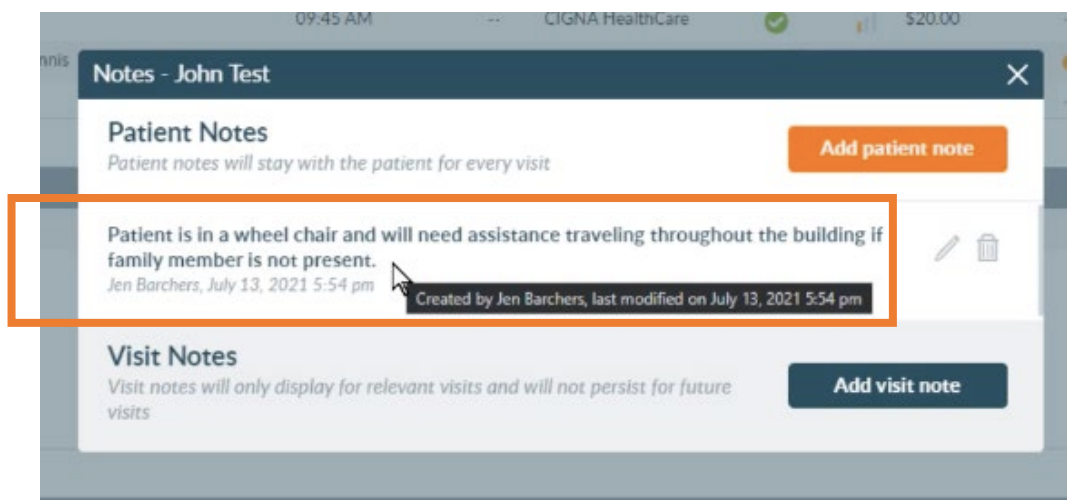
WRITE TO US.



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



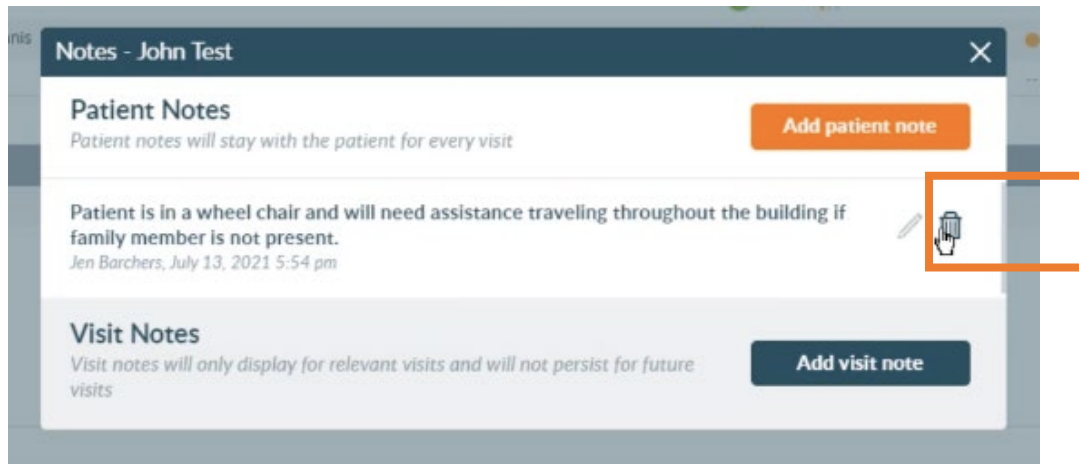
WRITE TO US.



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

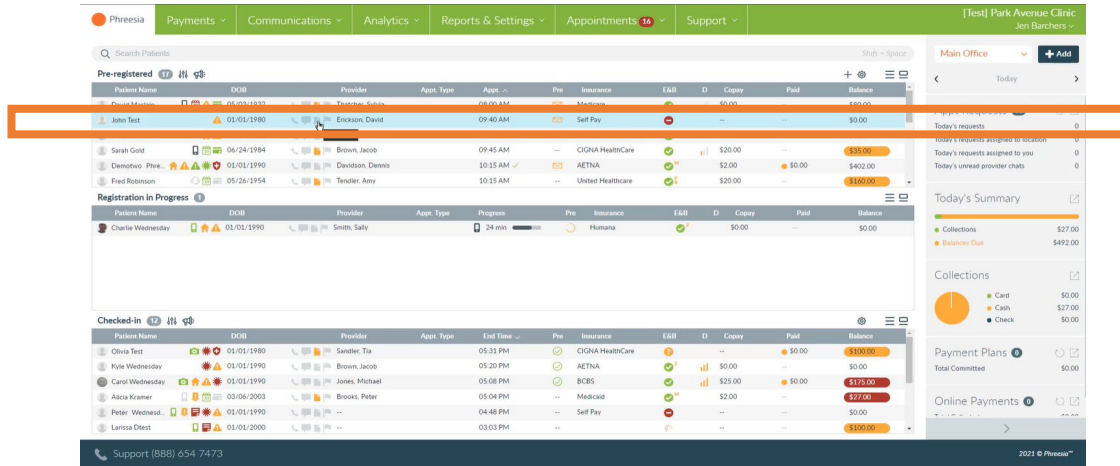


WRITE TO US.

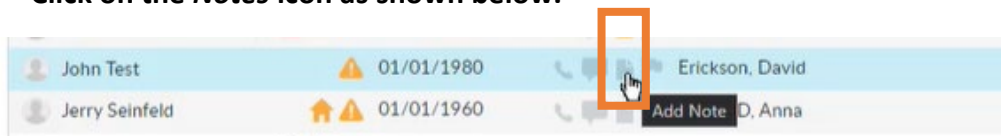
CHAT WITH US



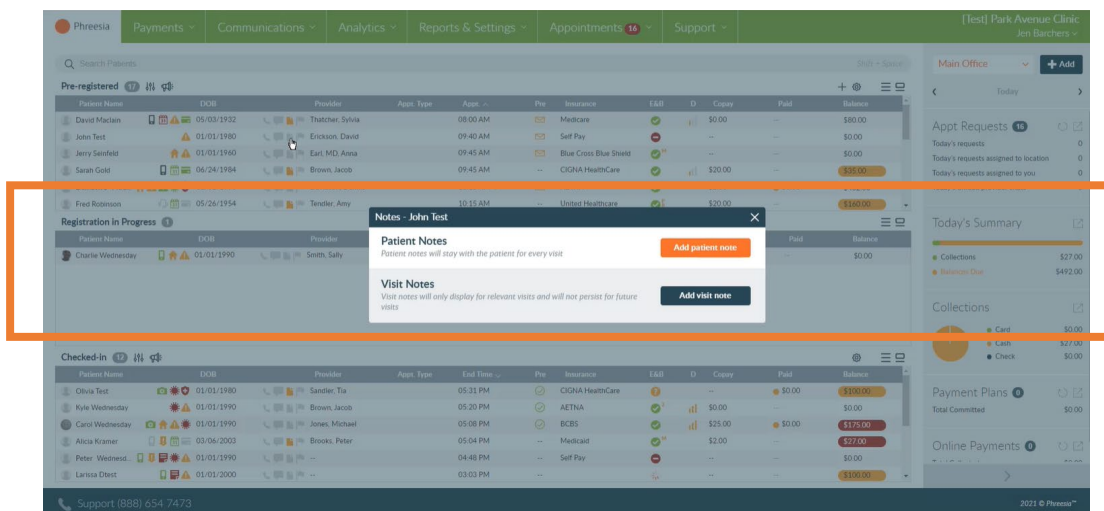
STEP 2: Hover your mouse over the patient's name for whom you want to add a note. You will observe that the row gets highlighted in colour blue.



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



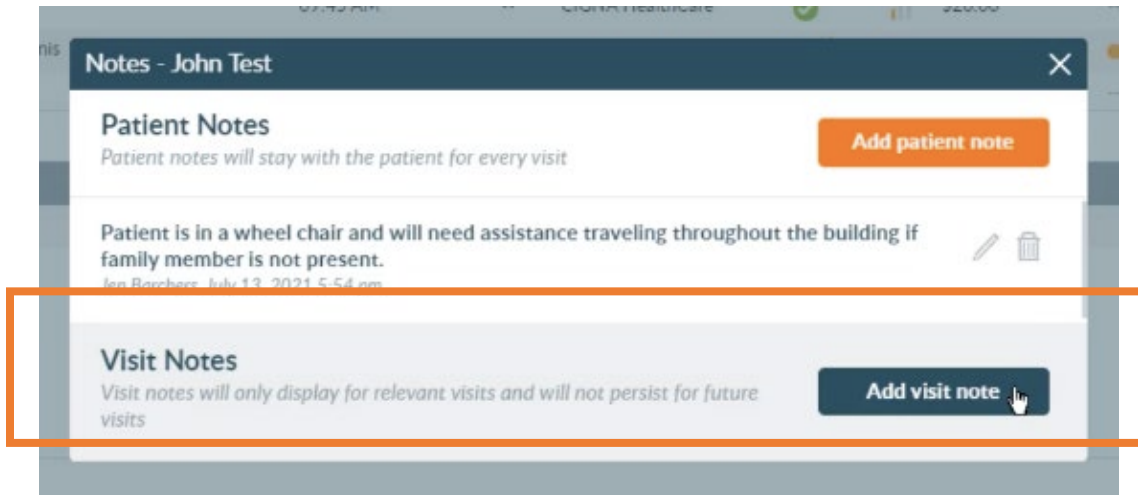
STEP 4: After clicking on the *Notes* icon, a pop-up will appear



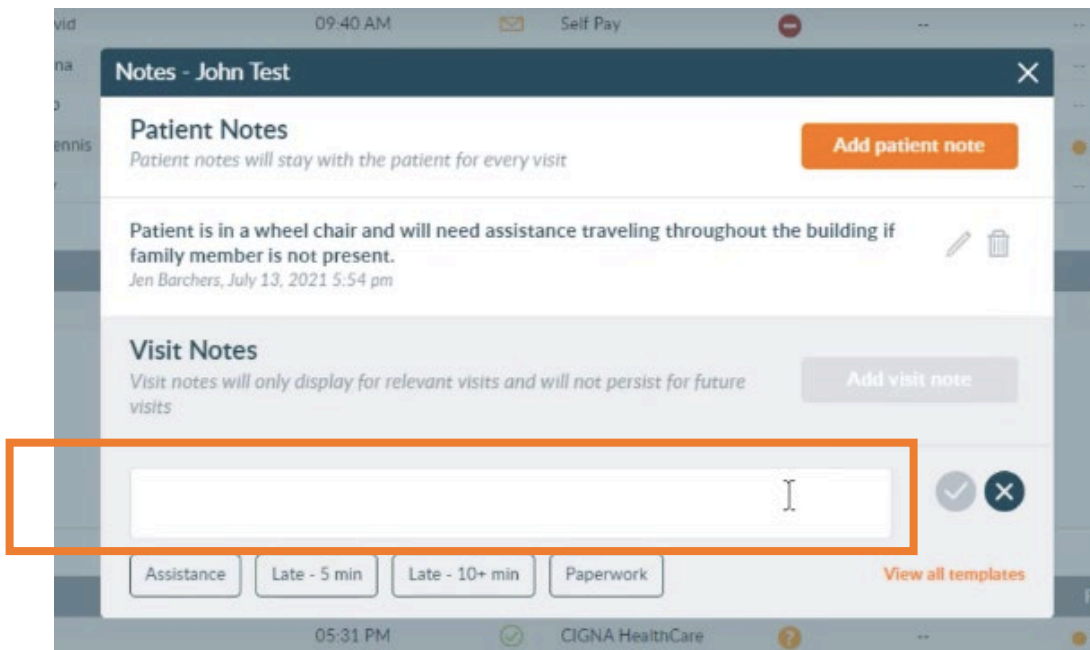
WRITE TO US.



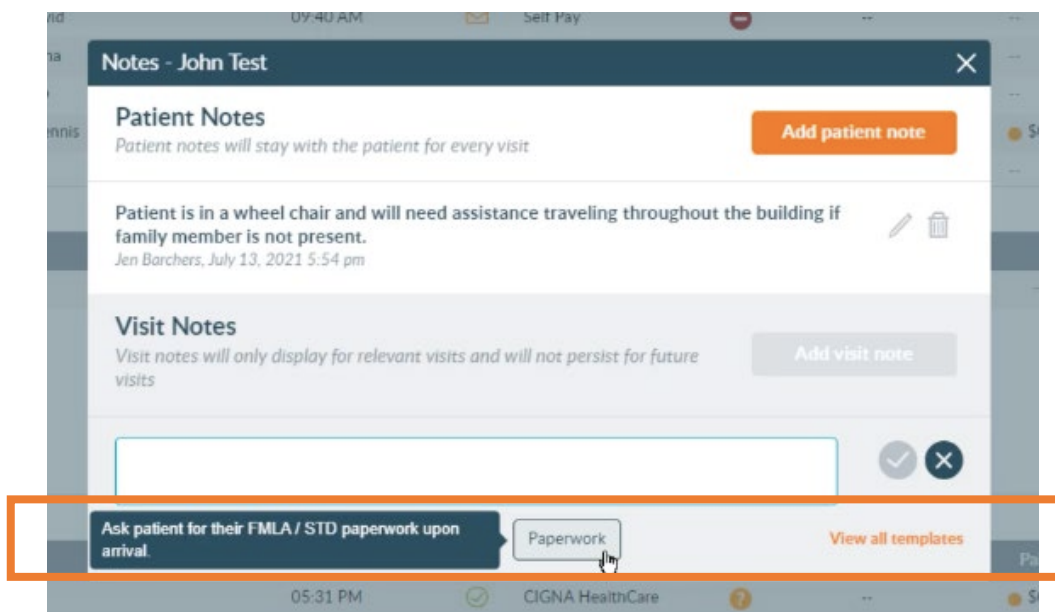
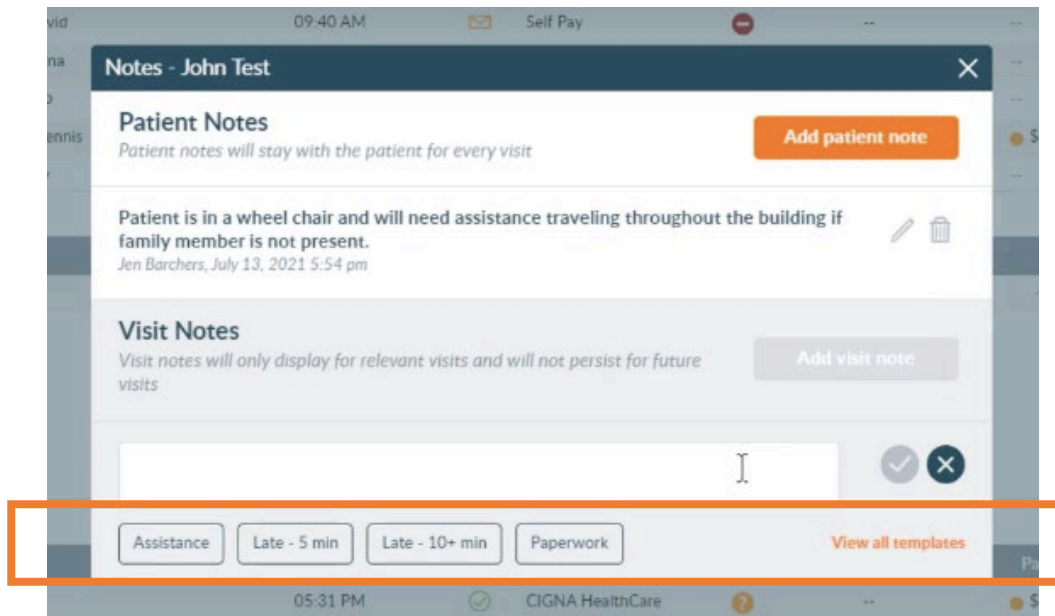
STEP 5: Click on *Add visit note*



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



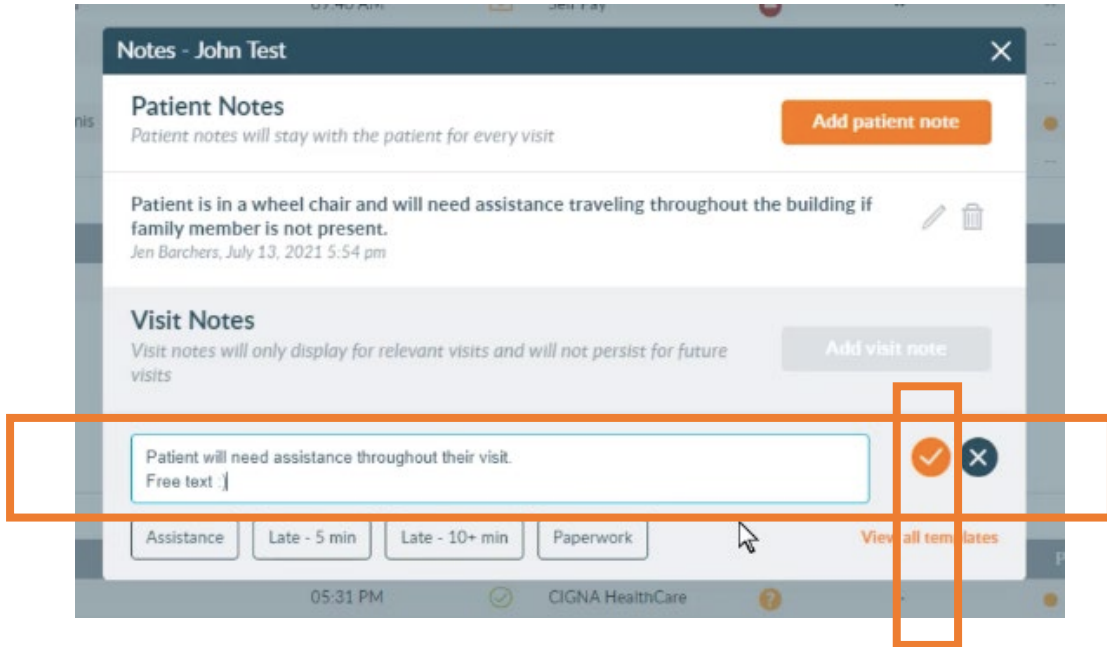
- ii. You can either chose to type the text or chose from the in-built templates.



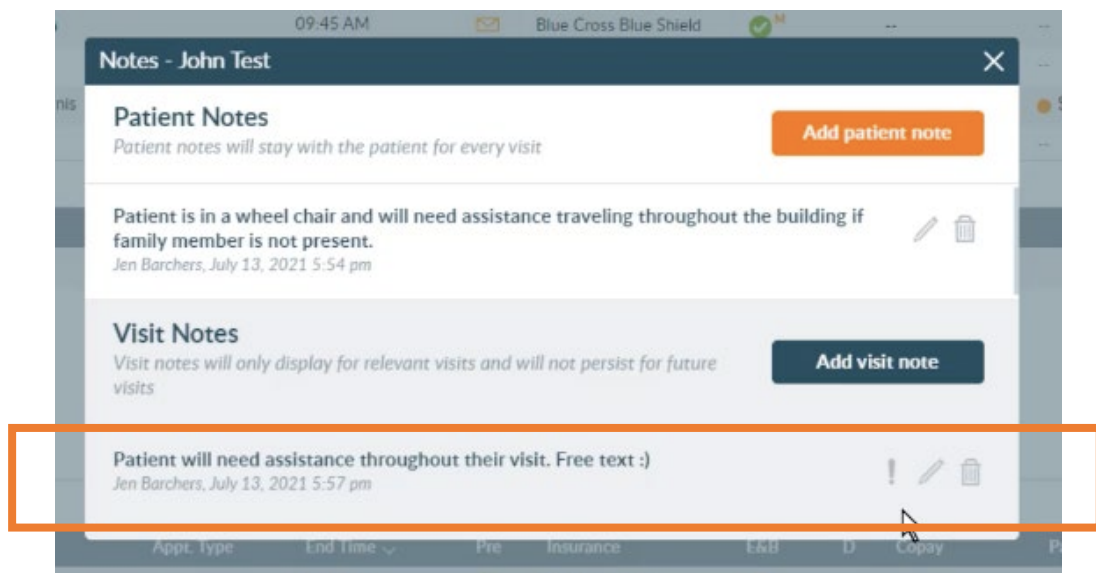
WRITE TO US.



- 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.



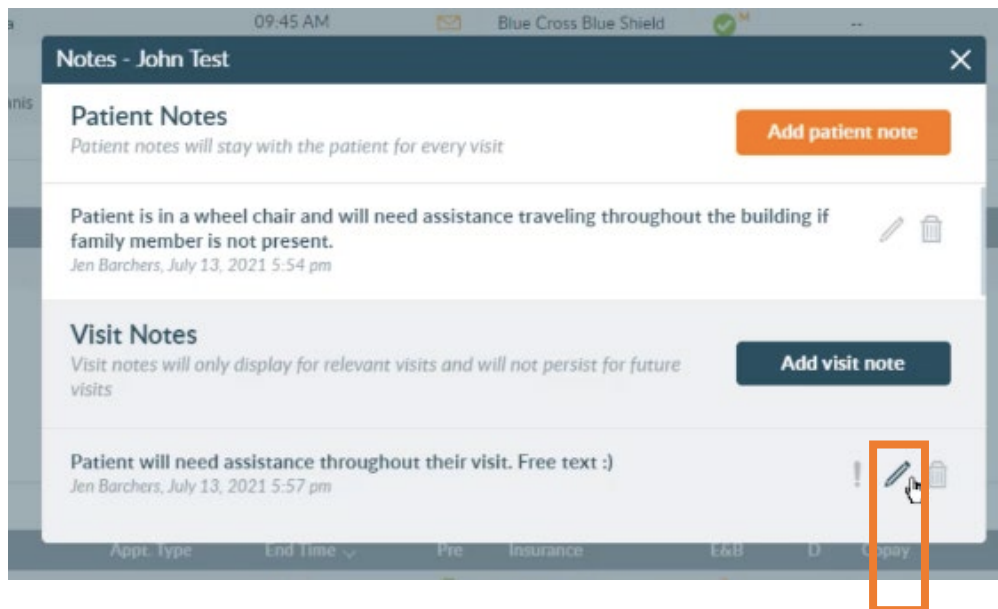
WRITE TO US.



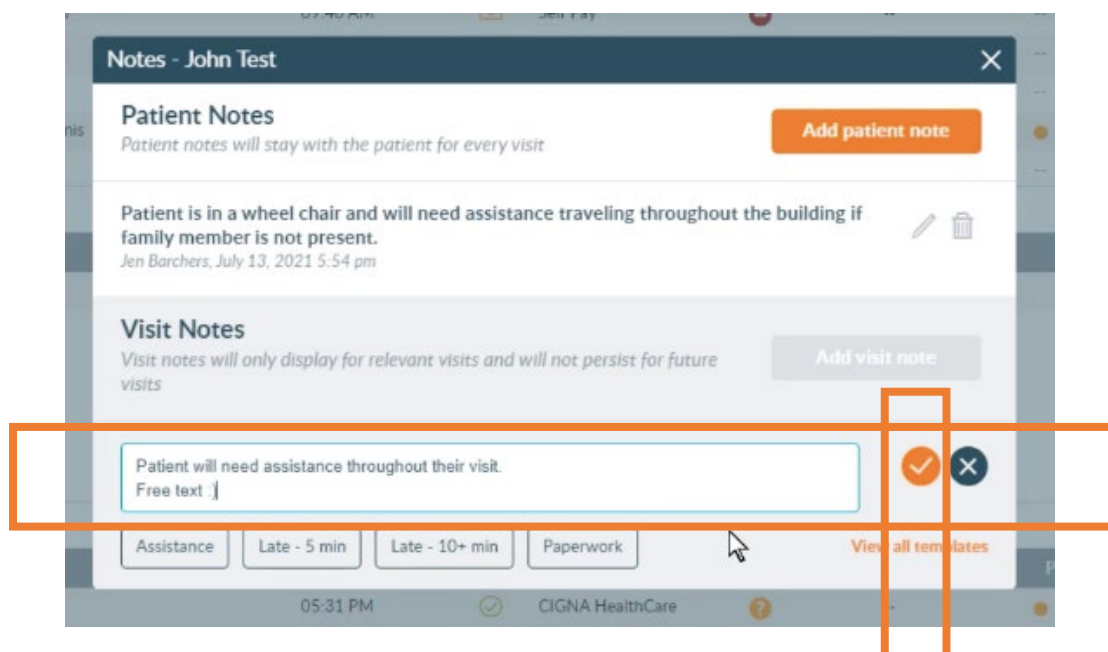
How to edit a visit note?



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

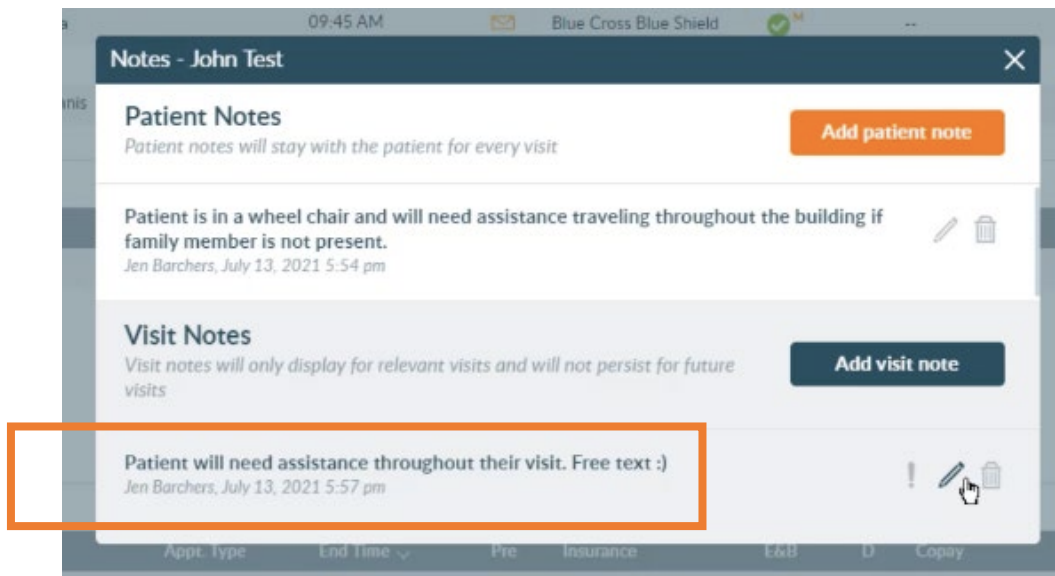


WRITE TO US.

CHAT WITH US



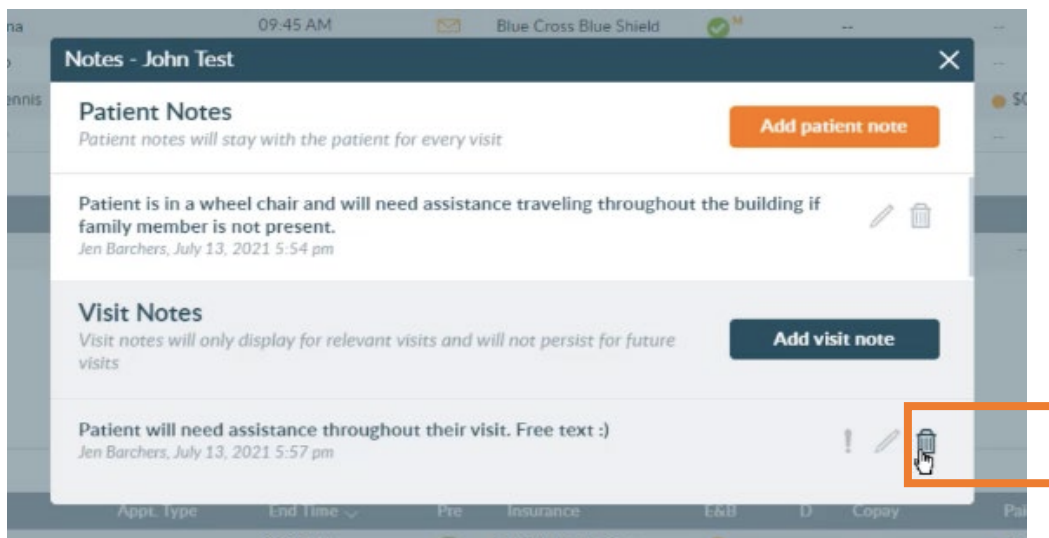
The edited note will appear with the time-stamp



How to delete a visit note?



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



WRITE TO US.

CHAT WITH US



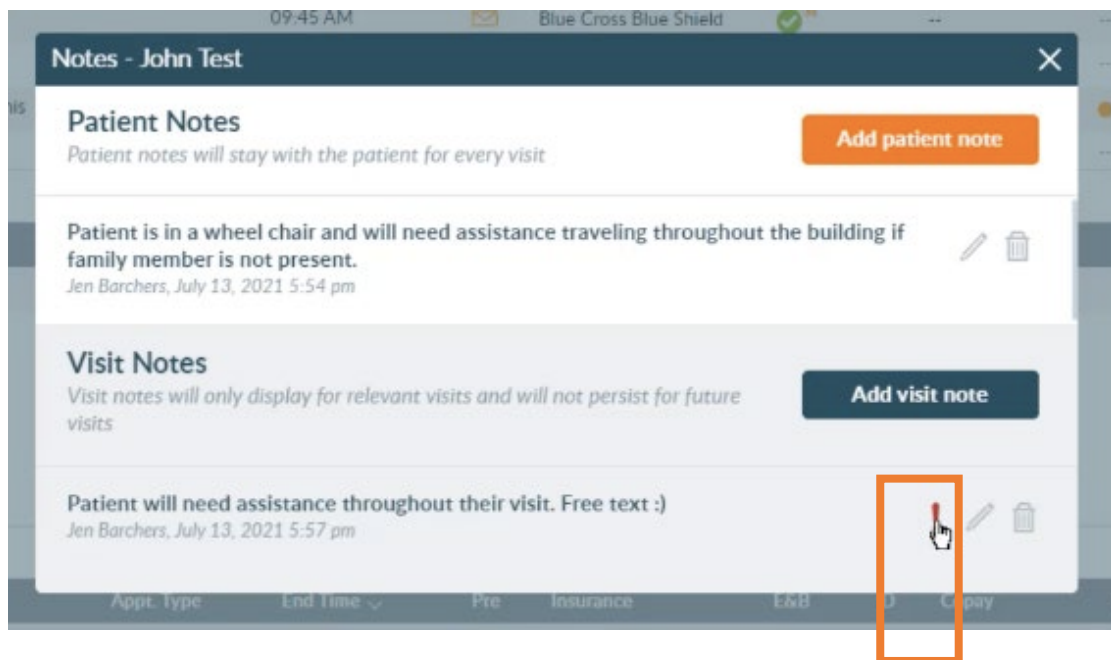
WORKING ON URGENT NOTE



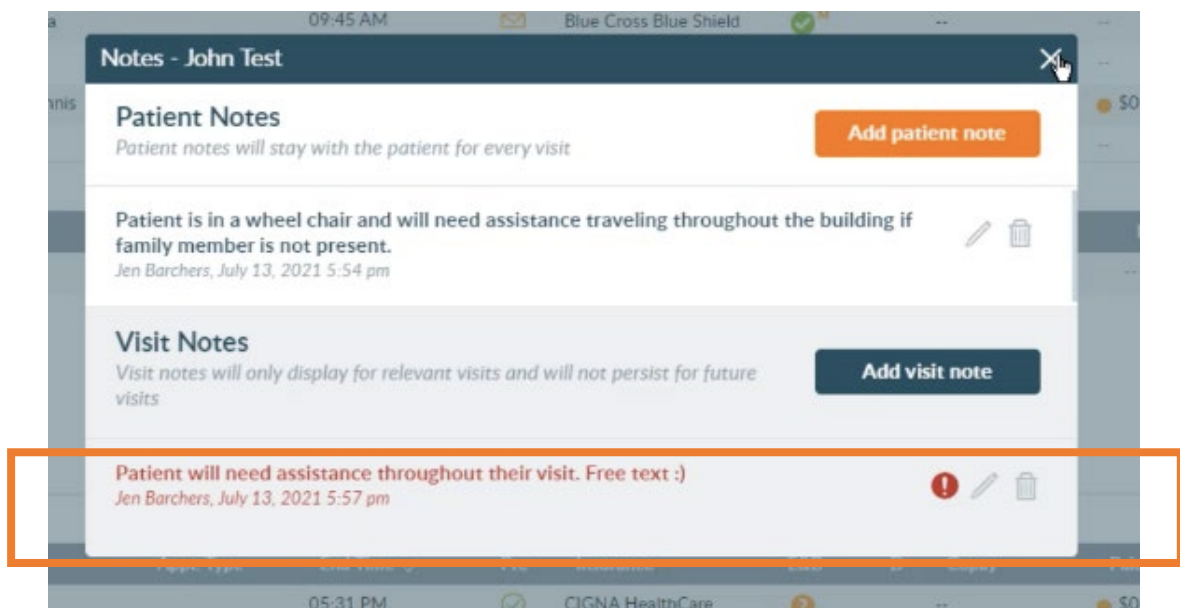
How to add an urgent note?



For an already existing 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.

Patient Name	DOB	Provider	Appt. Type	Appt. Time	Pre	Insurance	E&B	D	Copay	Paid	Balance
David Maclean	05/03/1932	Titcher, Susan		08:00 AM		Medicare			\$0.00		\$80.00
John Test	01/01/1980	Eksson, David		09:40 AM		Self Pay			--	--	\$0.00
Sarah Gold	06/24/1984	Brown, Jacob		09:45 AM		CIGNA HealthCare			\$20.00		\$35.00
Demotwo Phre...	01/01/1990	Davidson, Dennis		10:15 AM		AETNA			\$2.00	\$0.00	\$402.00
Fred Robinson	05/26/1954	Tendler, Amy		10:15 AM		United Healthcare			\$20.00		\$160.00

How to delete an urgent note?



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

Notes - John Test

Patient Notes
Patient notes will stay with the patient for every visit

Add patient note

Patient is in a wheel chair and will need assistance traveling throughout the building if family member is not present.
Jen Barchers, July 13, 2021 5:54 pm

Visit Notes
Visit notes will only display for relevant visits and will not persist for future visits

Add visit note

Patient will need assistance throughout their visit. Free text :)
Jen Barchers, July 13, 2021 5:57 pm

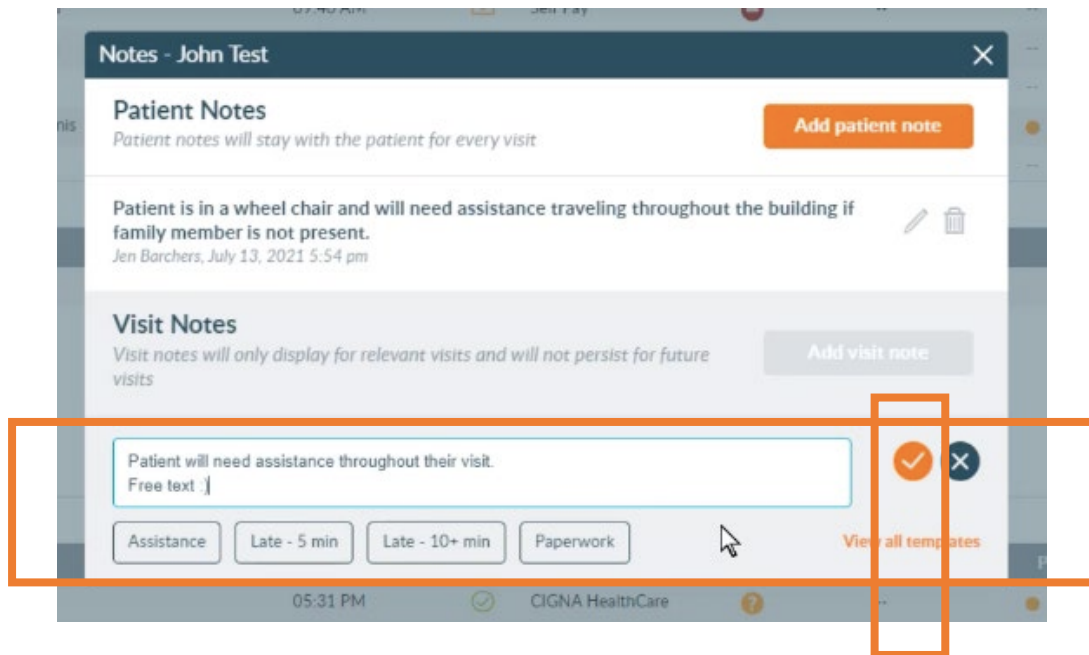


WRITE TO US.

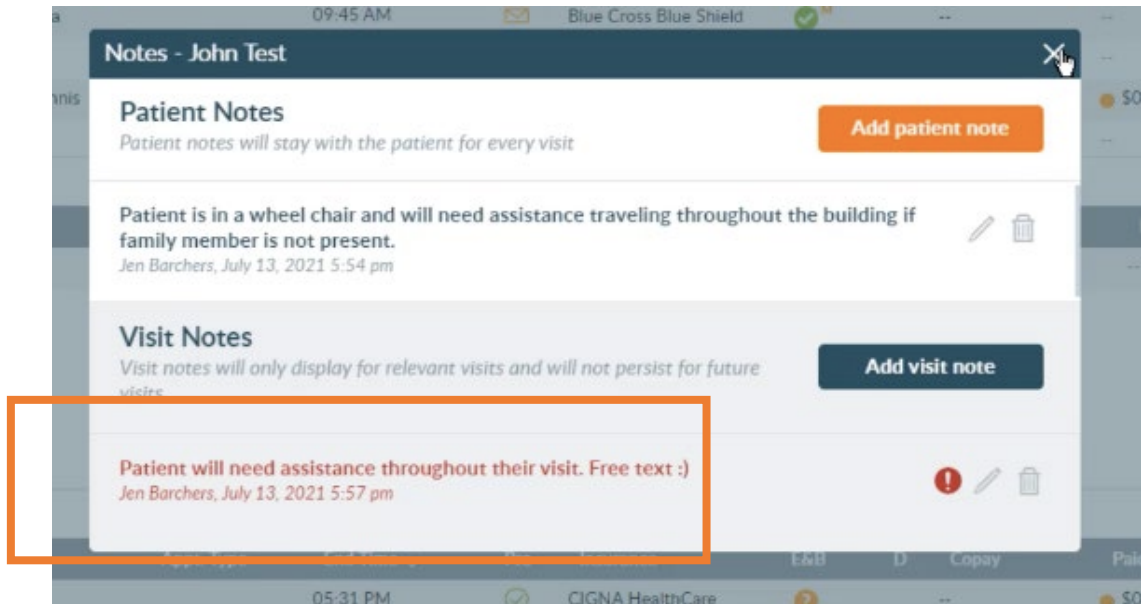
CHAT WITH US



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



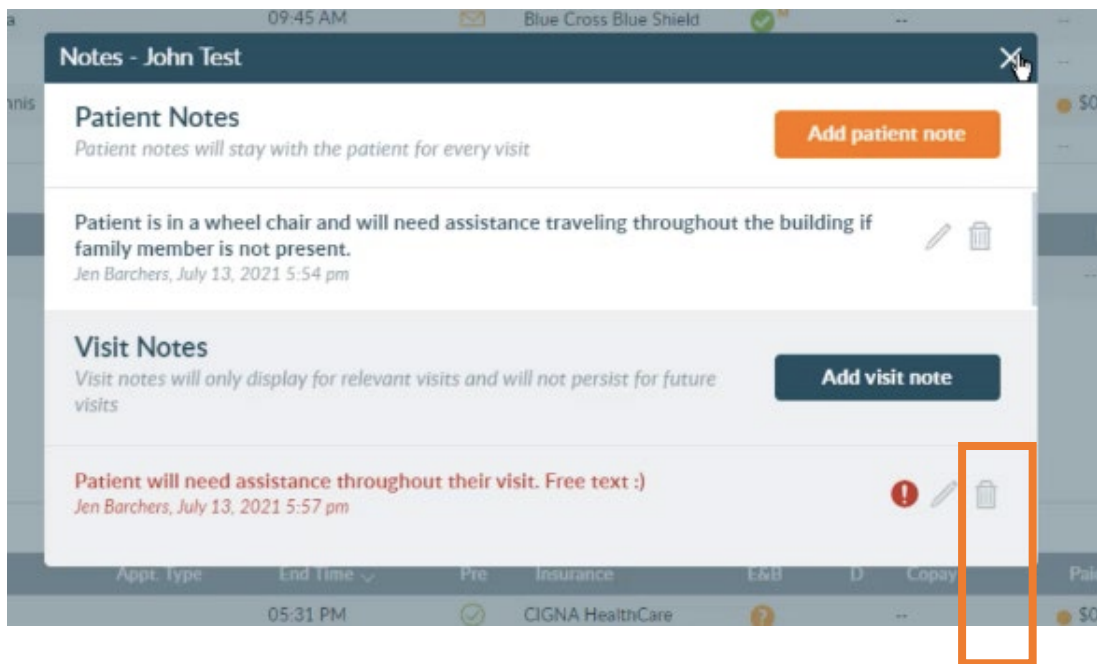
WRITE TO US.



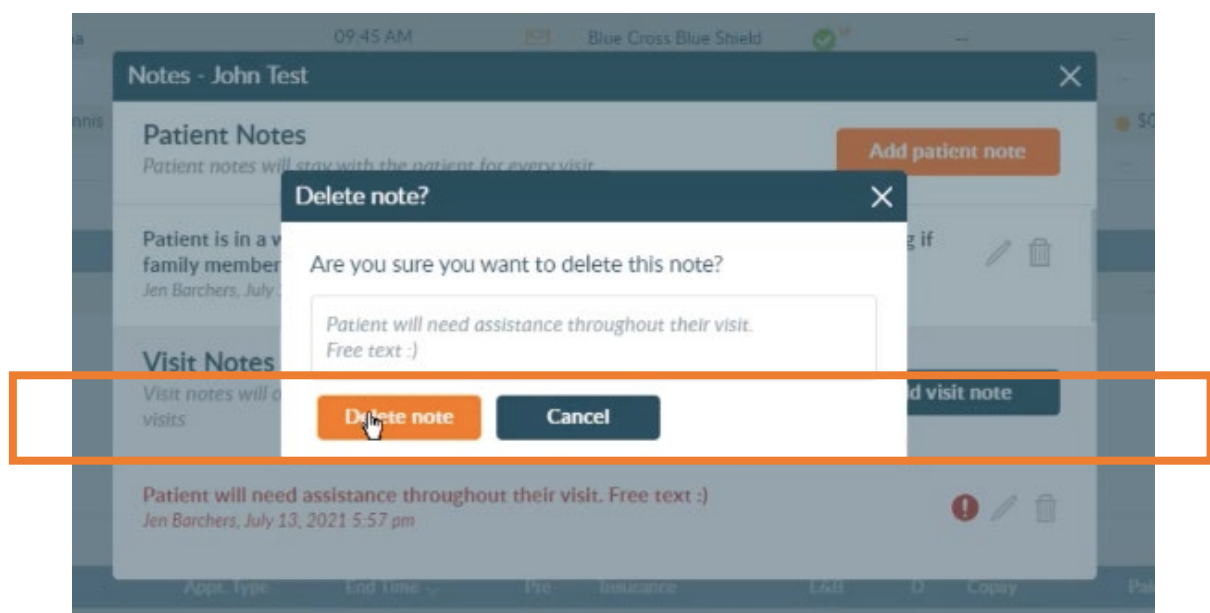
How to delete an urgent note?



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.



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 grab the attention for instant resolution.



WRITE TO US.

