



RESOURCE AND PATIENT MANAGEMENT SYSTEM

RPMS

Quick Note

User Guide

Version 1.0
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Office of Information Technology (OIT)
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Preface

The Quick Note application provides clinical personnel with an easy way to create a note and attach it to an Electronic Health Record (EHR). This document provides the information necessary to use the application.

The primary function of quick notes is for those occasions where the same note and template is used over and over in a particular clinic. For example, a provider who sees both children and adults, sick and well, would probably use several different note titles and templates and therefore would not be a good candidate for a Quick Note. By contrast, a provider who only does telephone triage could create the visit, and start up the note and template all with one click.

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Introduction

The Quick Note component was created for users who frequently use the same note title and template.

System Set-up

To install QuickNotes, you will need to install the KIDS build in the appropriate namespace using the steps below.

1. In **TERMINAL EMULATOR**, at the **SYSTEM MANAGER MENU**, type **TEST**, then at the **option** prompt enter **XPAR** and choose entry number **3, XPAR EDIT PARAMETER**.
2. At the **PARAMETER** prompt, enter the following one at a time and complete the needed configuration for each parameter:
 - **CIAOQN QNOTES MODIFY** - To assign user access to create macros.
 - **CIAOQN FORCE VISIT** – To define force visit for a category.
 - **CIAOQN PROMPT COSIGNER** – To prompt user for cosigner.

Adding Quick Note to EHR

The Quick Note component can be added to an EHR template in the tool bar for access at any time. The component is called TIU Quick Note.

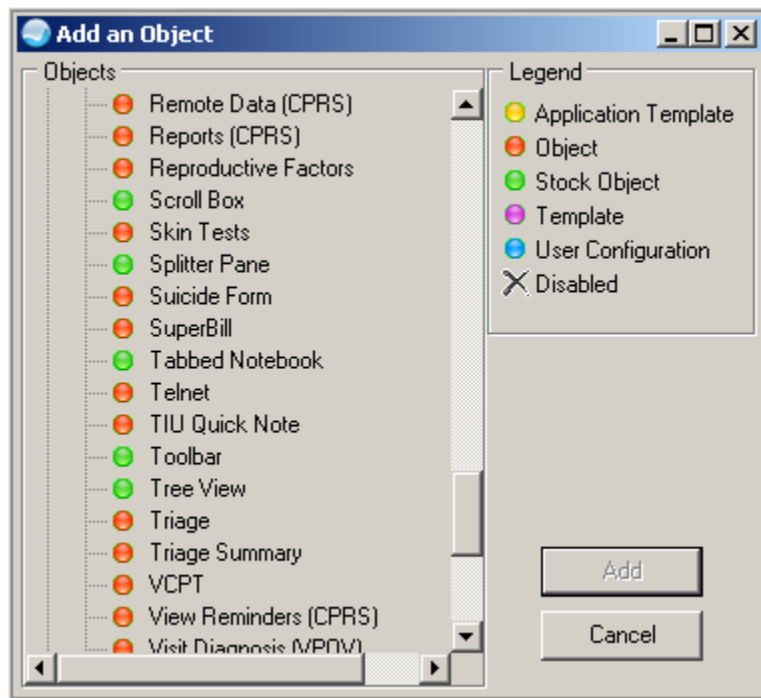


Figure 1. Add an Object Dialog Box- TIU Quick Note

Adding the vCQuickNote Object on the EHR Template

1. In **Design Mode**, go to the **Layout Manager**.

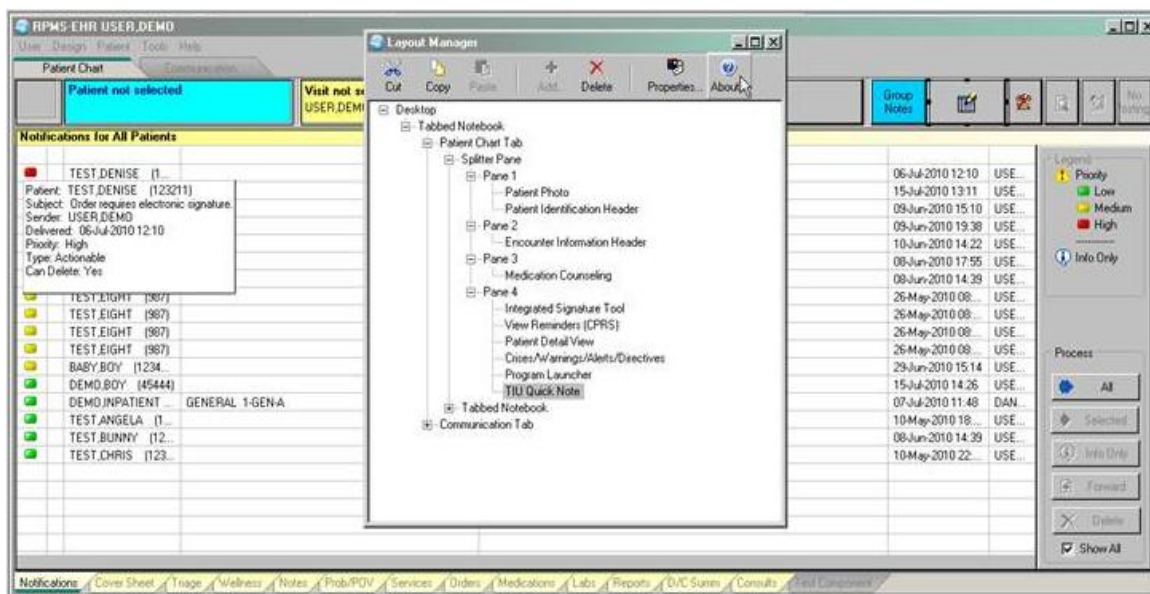


Figure 2. Layout Manager

2. Add the **TIU Quick Note Object** on the **Patient Chart** tab with the following properties:

Properties for TIU Quick Note	
Property	Value
TOP	0
LEFT	58
HEIGHT	46
WIDTH	80
ALIGN	All
ANCHORS	<input checked="" type="checkbox"/> Top; Left; Right; Bottom
<div style="border: 1px solid gray; height: 40px; margin-top: 10px;"></div>	
<div style="display: flex; justify-content: space-around; margin-top: 10px;"> OK Cancel Apply </div>	

Figure 3. Properties for TIU Quick Note

After exiting out of **Design Mode**, you will see the QuickNote icon on your desktop. See [Figure 4](#).

Creating a Quick Note

To create a Quick Note:

1. Select a **patient** and **visit**.
2. Click the **Quick Note** icon.

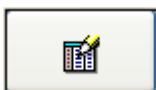


Figure 4. Quick Note Icon

The **Quick Note Selector** dialog box appears:

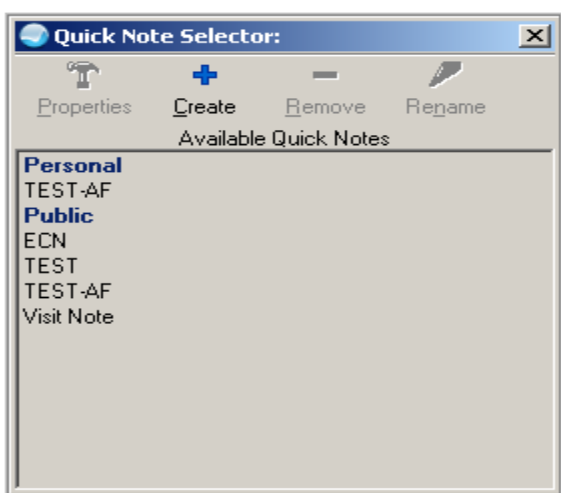


Figure 5. Quick Note Selector

3. Click **Create**. The **Create a New Quick Note** dialog box opens.

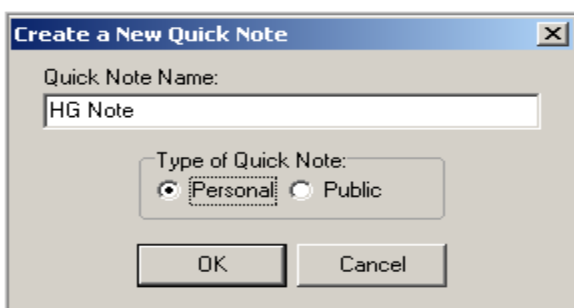


Figure 6. Create a New Quick Note Dialog Box

4. Type a name for the note in the **Quick Note Name** text box. There are two types of Quick Notes that can be created:

- **Public** – Open to everyone having access to the Quick Note component.
 - **Personal** – Can only be viewed by the person creating it.
5. Select **Personal** or **Public** in the **Type of Quick Note** group box, and then click **OK**. The **Quick Note Properties** dialog box opens.

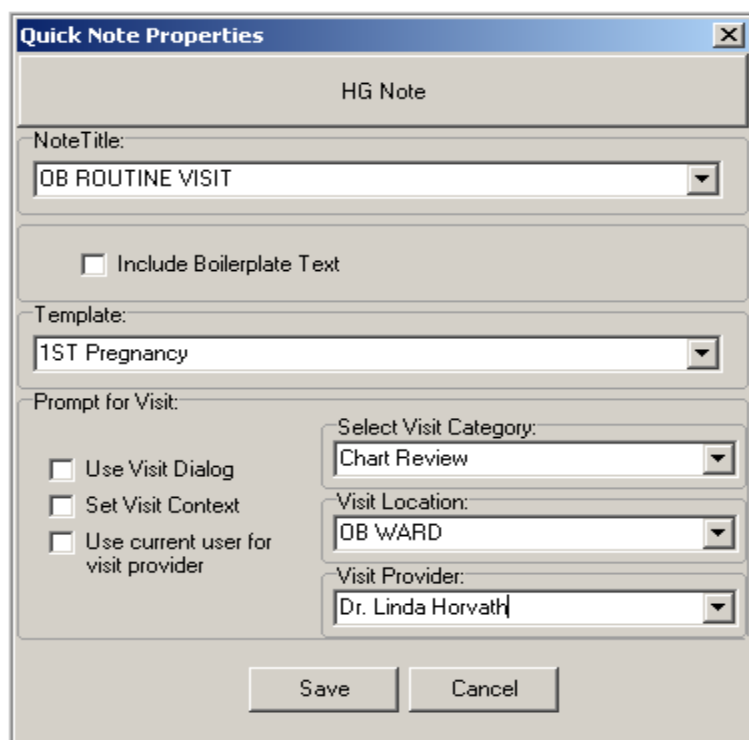


Figure 7. Quick Note Properties Dialog Box

6. Perform the following tasks in the **Quick Note Properties** dialog box:
- a) In the **Note Title** group box, select the applicable title from the drop-down menu. **OB Routine Visit**, for example.
 - b) Select the **Include Boilerplate Text** check box, if applicable. This applies the applicable fields to the template.
 - c) In the **Template** group box, select the applicable template from the drop-down menu (for example, **1st Pregnancy**). Be aware that all templates appear in this search.
 - d) In the **Prompt for Visit** group box, select the applicable check box:
 - **Use Visit Dialog**: If selected, the **Select Visit Category**, **Visit Location**, and **Visit Provider** drop-down fields become disabled and the visit dialog box is used.

Select the box to force the **Visit Context Dialog** to be used. Otherwise, a visit is created for NOW using the specified criteria. The **Use Current User for Visit Provider** check box remains active.

Note: If the Quick Note is going to be a Public Note, it is best to use the Visit Context versus a Personal Quick Note, which is better suited to setting the context automatically and eliminates several keystrokes for the user.

- **Set Visit Context:** When selected, the content in this dialog box will automatically make a visit of this type, this location, and this provider every time you start a Quick Note of this type.
 - **Use Current User for Visit Provider:** When selected, the visit is created with the current user as the provider.
- e) In **Select Visit Category**, select the visit category from the drop-down menu. **Chart Review**, for example.
- f) In **Visit Location**, select the visit location from the drop-down menu. **OB Ward**, for example.
- g) In **Visit Provider**, type a name or select it from the drop-down menu. **Dr. Linda Horvath**, for example. Or, click the **Use Current User for Visit Provider** check box.
7. Click **Save**. The note appears in the **Quick Note Selector** window.

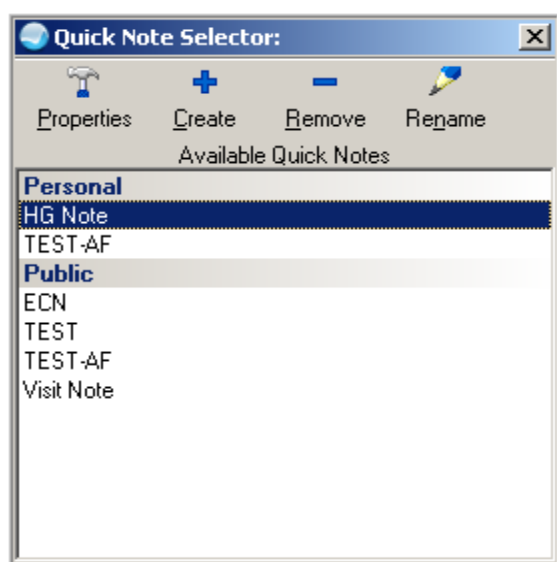


Figure 8. Quick Note Selector Dialog Box

Note: An **Error** message appears if one or more fields are not defined.

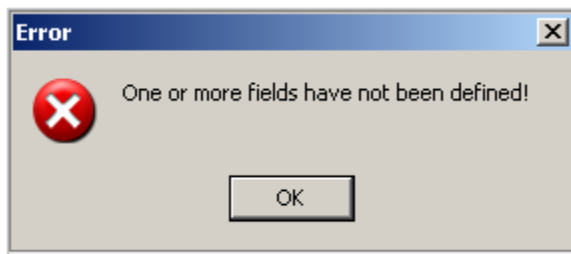


Figure 9. Incomplete Field(s) Error Message

Using a Quick Note

1. After selecting a patient, click the **Quick Note** icon.
2. Double-click the **Quick Note** you want to use.
 - If the Visit context was set in the Quick Note, the Visit is created, the note is opened, and the template is ready to be used.

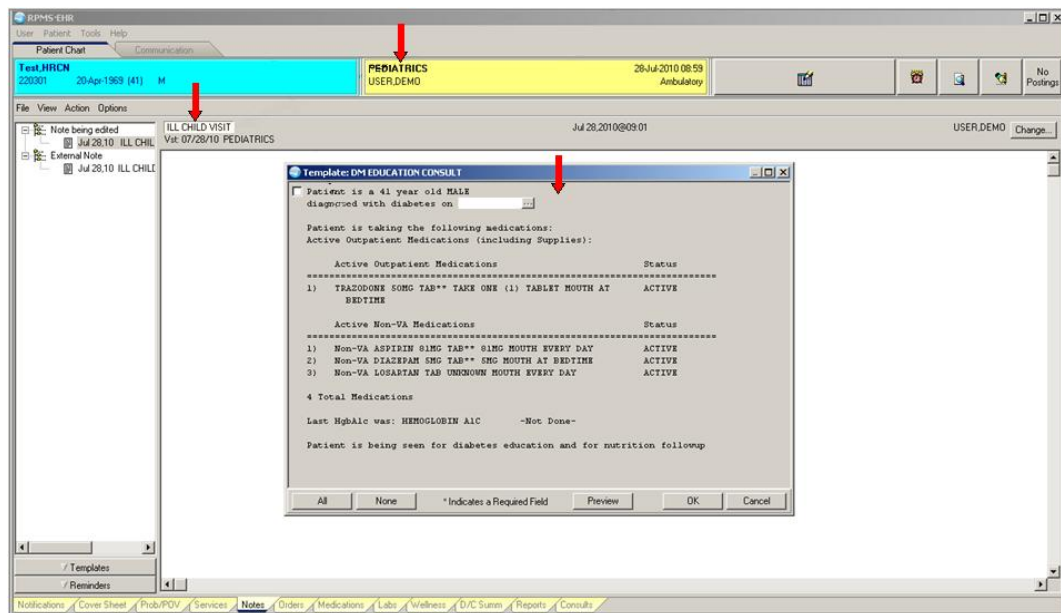
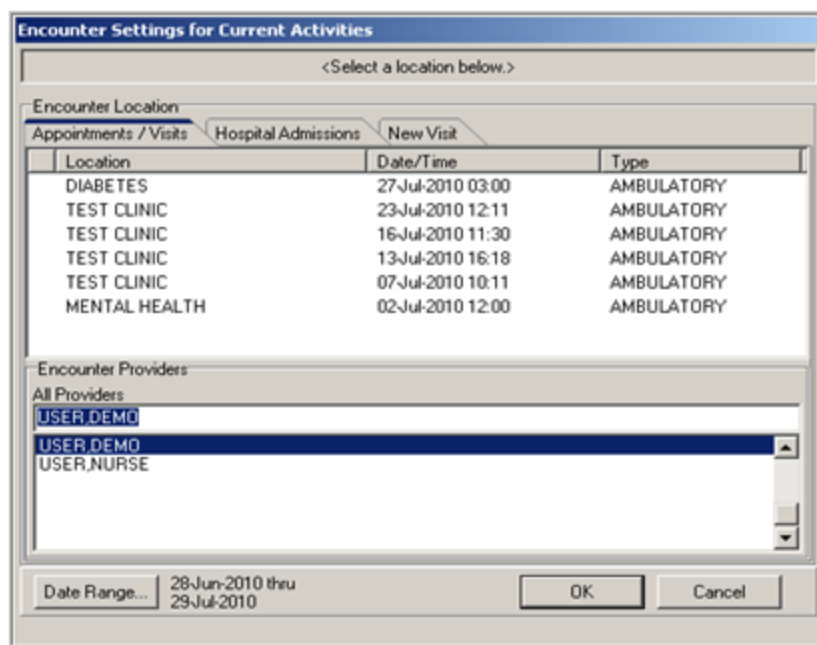


Figure 10. Note Template

- If the Visit context was not set, the user is asked to select the Visit at this time if it has not yet been created.



Encounter Settings for Current Activities

<Select a location below.>

Encounter Location

Appointments / Visits Hospital Admissions New Visit

Location	Date/Time	Type
DIABETES	27-Jul-2010 03:00	AMBULATORY
TEST CLINIC	23-Jul-2010 12:11	AMBULATORY
TEST CLINIC	16-Jul-2010 11:30	AMBULATORY
TEST CLINIC	13-Jul-2010 16:18	AMBULATORY
TEST CLINIC	07-Jul-2010 10:11	AMBULATORY
MENTAL HEALTH	02-Jul-2010 12:00	AMBULATORY

Encounter Providers

All Providers

USER.DEMO

USER.DEMO

USER.NURSE

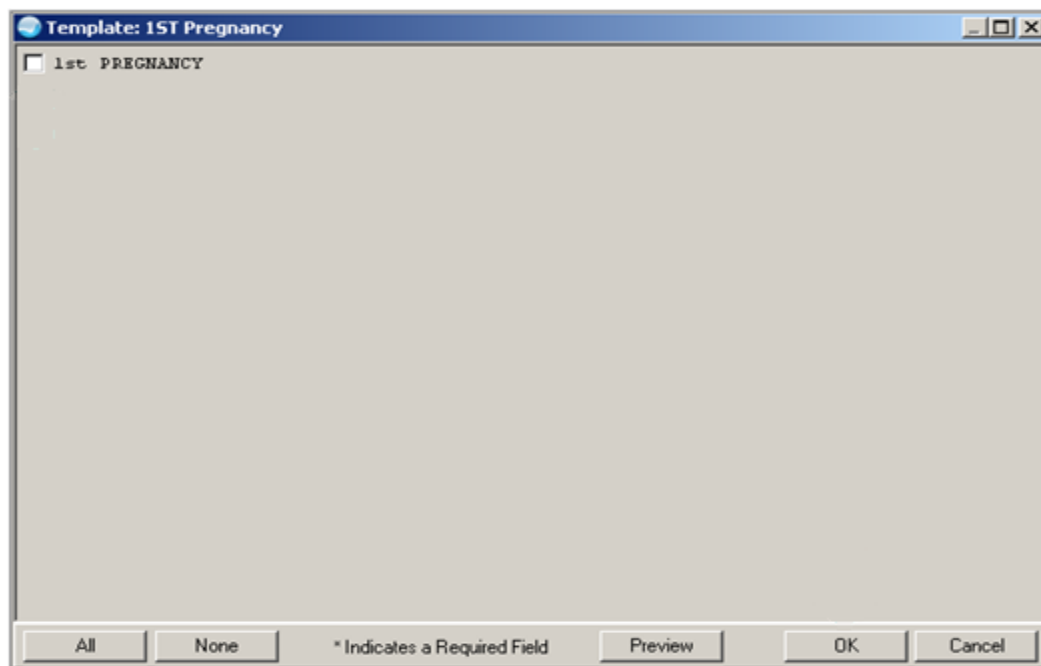
Date Range... 28-Jun-2010 thru 29-Jul-2010

OK Cancel

Figure 11. Encounter Settings for Current Activities Dialog Box

The user is returned to the **Notes** tab, the note is started, and the template is opened.

3. Process the template as any **TIU template**.
4. The **Notes** tab opens with the **Template** dialog box for the visit. Select the check box.



Template: 1ST Pregnancy

☐ 1st PREGNANCY

All None * Indicates a Required Field Preview OK Cancel

Figure 12. Template Selection Dialog Box

The **All**, **None**, and **Preview** buttons are optional:

- a) Click **All** to expand all of the fields.
- b) Click **None** to suppress all of the fields.
- c) Click **Preview** to preview the dialog text. The font size of the text can be changed using this dialog box.

The **Template** dialog box refreshes with the applicable open fields for data entry.

Template: 1st Pregnancy

☒ 1st PREGNANCY

YEAR: 2004

WEEKS OF PREGNANCY: 39 weeks

SEX: female

BIRTHWEIGHT: 6 lb, 2 oz.

PROBLEMS: none

CHILD'S NAME: Harriet

LENGTH OF LABOR: 20 hrs

DELIVERY TYPE: * ☒ Vaginal ☐ Cesarean

☒ REASON FOR CESAREAN: Petal distress

All None * Indicates a Required Field Preview OK Cancel

Figure 13. Template Dialog Box

8. Complete the text boxes in the **Template** dialog box. For example, in the 1st Pregnancy template, complete the following:
 - **Year**
 - **Weeks of Pregnancy**
 - **Sex**
 - **Birthweight**
 - **Problems**

- **Child's Name**
 - **Length of Labor**
 - **Delivery Type:** Select **Vaginal** or **Cesarean**
 - If you selected the **Cesarean** box, select the **Reason for Cesarean** check box, and select the applicable reason from the drop-down menu.
9. Click **OK**. Your notes appear in the **Notes** tab.

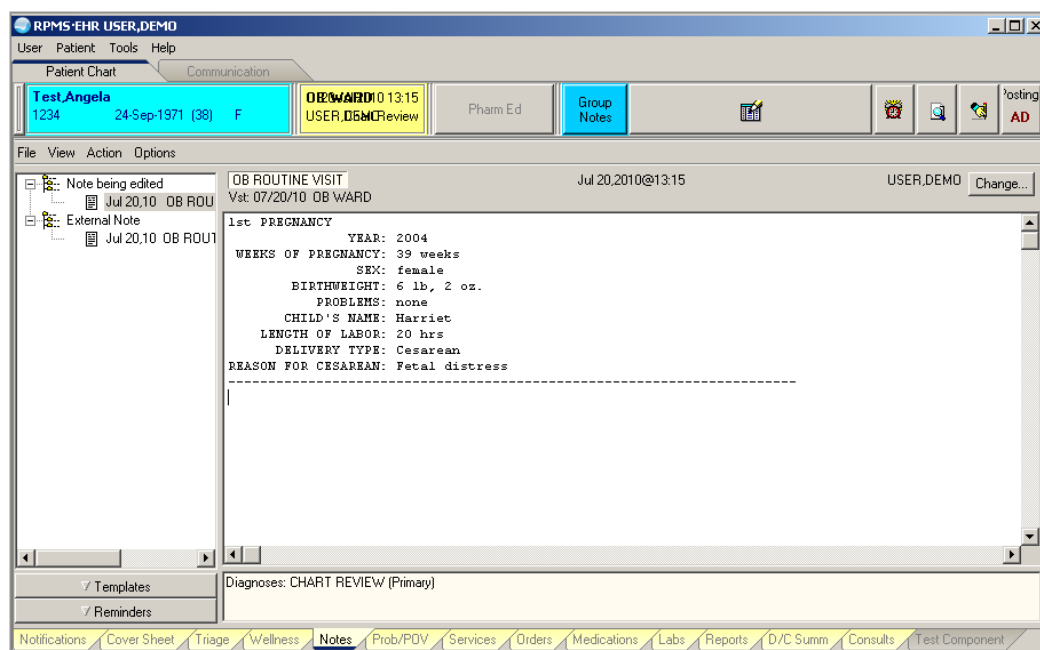


Figure 14. Quick Note Screen in Notes Tab

Status Changes

When starting a TIU note using the normal functions, the status of a note in progress is New Note in Progress.

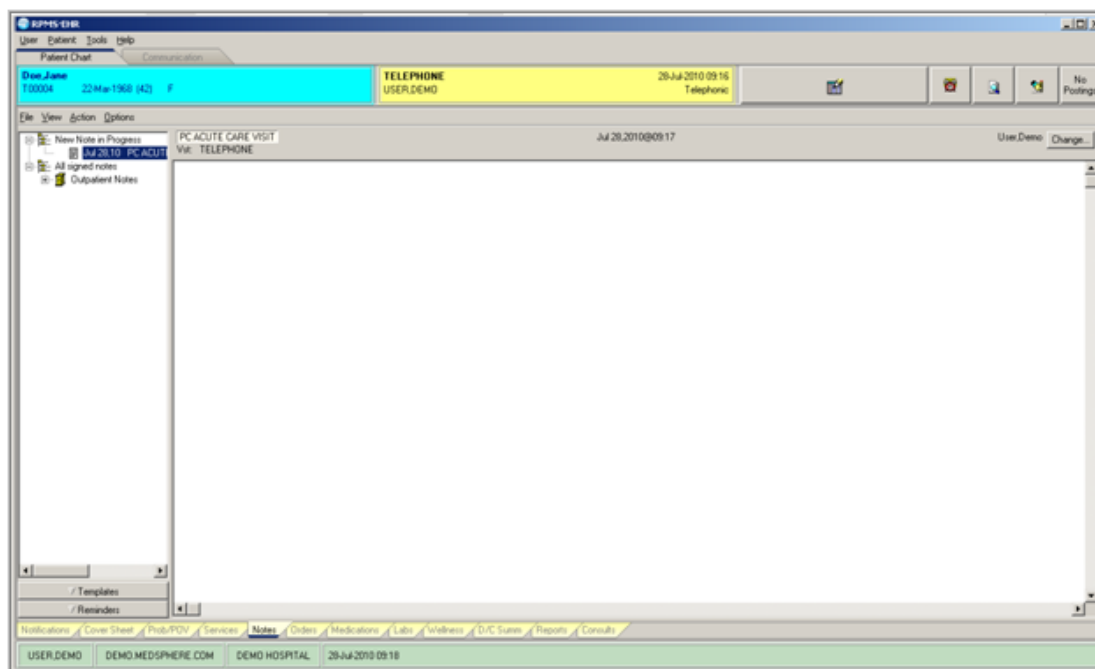


Figure 15. New Note in Progress Status Changes

With Quick Notes, you will notice it is called an External Note and it creates two entries in the status until it is saved. It then appears in Progress Notes as any normally entered Note.

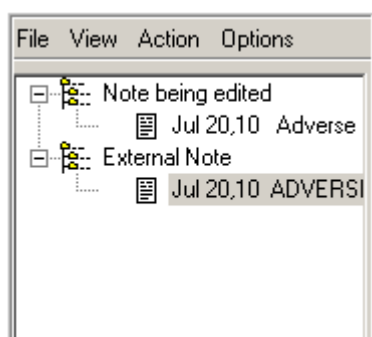


Figure 16. Note Status

Editing a Quick Note

To edit an existing Quick Note:

1. Select a **patient** and **visit**.
2. Click the **Quick Note icon**.

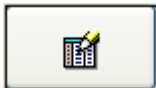


Figure 17. Quick Note Icon

The **Quick Note Selector** dialog box appears:

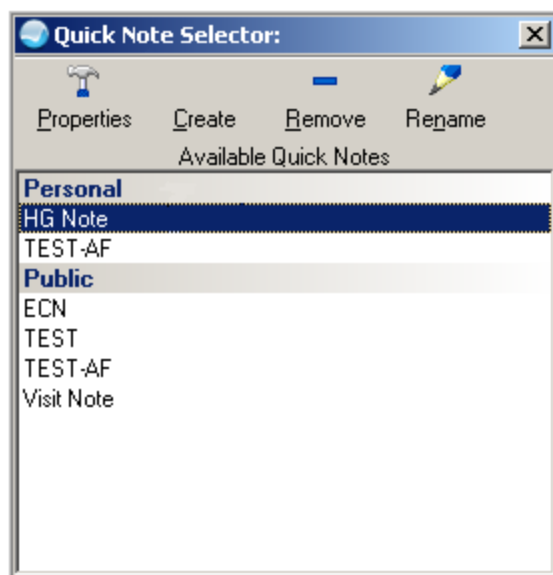


Figure 18. Quick Note Selector Dialog Box

3. Click the **Quick Note title** and then **Properties**. The note opens.
4. Make your changes to the **Quick Note**. Save your changes before exiting the note.
5. Click the **Remove** button to remove an existing Quick Note.
6. Click the **Rename** button to rename an existing Quick Note.