

THE INDIAN HEALTH SERVICE

# Quick Notes



Superior Health Information Management  
Now and for the Future

# Learning Objectives

- Define Quick Notes and their most appropriate use.
- Configure Quick Notes.
- Demonstrate set up and implementation of Flowsheets.
- Delineate steps for implementation and training of both Quick Notes and Flowsheets.

# Quick Notes



- Provides a shortcut for users from a button that can be placed on the toolbar.
- Clicking the quick note button opens a note and template (or reminder dialog template) based on predefined settings:
  - Can have several different quick notes that create the same note title but each quick note launches a different template or reminder dialog template.
- Can also be configured to create a visit. This is appropriate for the following type visits:
  - Chart review
  - Telephone calls
  - Telephone triage
  - Non-ambulatory case management

# Quick notes set up

Use parameter CIAOQN QNOTES MODIFY to assign access to the modify function.

Keep in mind that this allows the user to modify both personal and public quick notes.

- Consider restricting modify access to CAC and/or IT.
- You will need to provide temporary modify access for users to set up their personal quick notes.
- Recommend CAC provides assistance with general users in setting up any personal quick notes.
- After the user has created their personal quick notes, the CAC can remove access and the user can still use the quick notes.

Use parameter CIAOQN PROMPT COSIGNER to determine if the user will be prompted for a cosigner.

- This parameter controls whether or not a user will see the cosigner dialog when TIU reports that a cosigner is required. If set to NO and the user has a default cosigner, the user will not see the dialog.

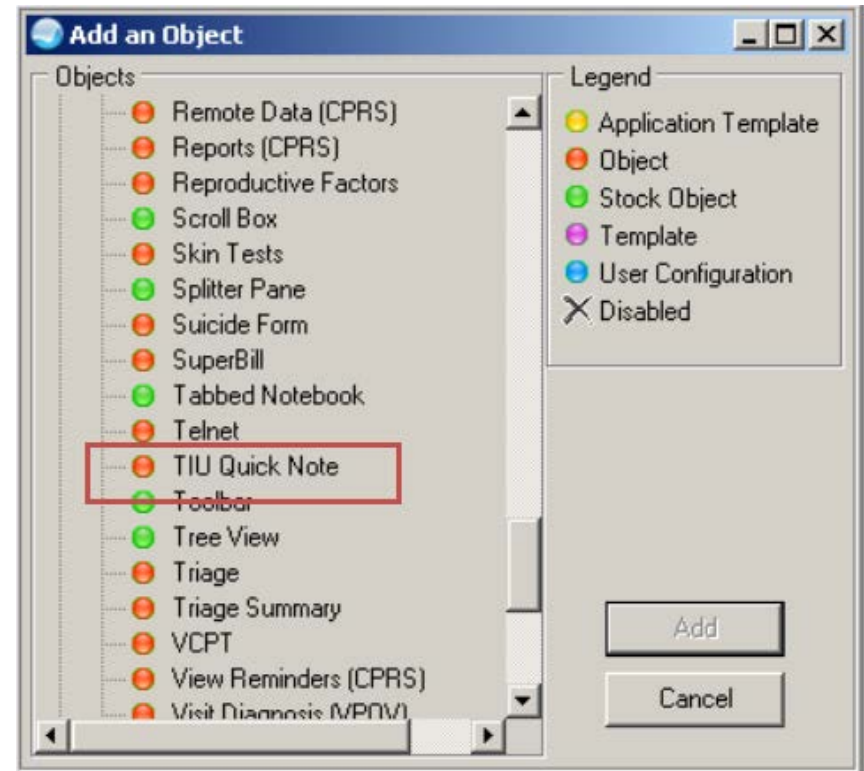
# Quick notes – set up

You need to know the following (write it down):

- What note titles you want a quick note to open.
- What template you want to populate the quick note (write down the template or reminder dialog template name – case sensitive).
- Do you want this quick note to create a visit and if so what kind:
  - Would be mostly chart review or telephone but could be “on the fly” ambulatory visits for users who see drop in patients like PHNs or DM educators.
- Will this be public or personal:
  - If personal, then the person who will use this needs temporary access to create and modify to make this one.

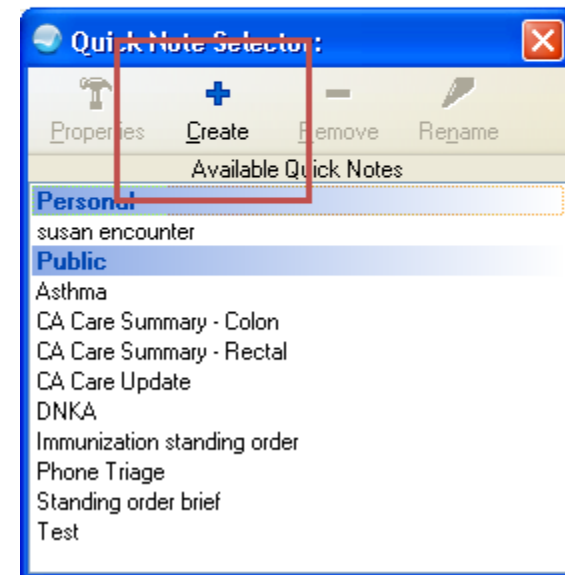
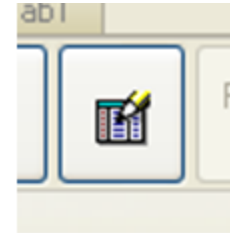
# Quick notes – add to EHR GUI

Super simple – add like any object. Best suited to toolbar so users can launch from anywhere in chart.



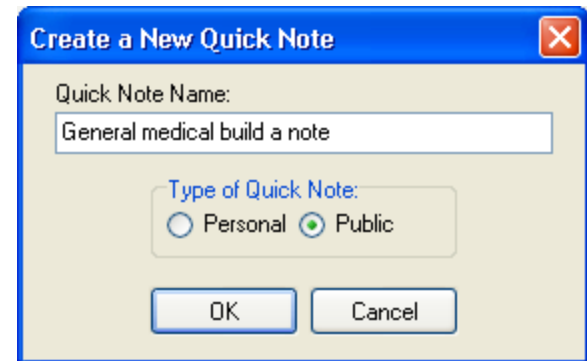
# Creating a quick note

1. Click the quick notes button.
2. Click **Create**.



# Creating a quick note

3. Name the quick note.
4. Select **Personal** or **Public**



# Creating a quick note

5. Begin typing the **Note Title**; it will search with part of the name.

Quick Note Properties

General medical build a note

NoteTitle:

GENERAL ENCOUNTER

GENERAL ENCOUNTER  
GENERAL ENCOUNTER - PONEMAH  
GENERAL INITIAL ENCOUNTER  
GENERAL PHYSICAL

Template:

Prompt for Visit:

Use Visit Dialog  
 Set Visit Context  
 Use current user for visit provider

Select Visit Category:

Visit Location:

Visit Provider:

Save Cancel

# Creating a quick note

6. Type the template or reminder dialog name.
  - BE SPECIFIC – it searches all templates.
  - Remember that the system sees each part of a dialog as an individual template!

Quick Note Properties

General medical build a note

NoteTitle:  
GENERAL ENCOUNTER

Include Boilerplate Text

Template:  
Build a Note TEMPLATED  
Build a Note TEMPLATED  
Build a Note TEMPLATED  
Build a Note TEMPLATED bundled

Use Visit Dialog  
 Set Visit Context  
 Use current user for visit provider

Visit Location:  
Visit Provider:

Save Cancel

# Creating a quick note

- For a note written by a user during an ambulatory visit, you will have a visit created already and the user will be logged in. Selecting **Use Visit Dialog** and **Use current user for visit provider** will allow the user to quickly launch the note from within the visit.

7. Click Save.

Quick Note Properties

General medical build a note

NoteTitle:  
GENERAL ENCOUNTER

Include Boilerplate Text

Template:  
Build a Note TEMPLATED

Prompt for Visit:

Use Visit Dialog  
 Get Visit Context

Select Visit Category:  
Visit Location:  
Visit Provider:

Use current user for visit provider

Save Cancel

# Creating a quick note

For common on-the-fly type documentation such as phone triage, you can force the creation of the visit when the note is launched.

In this example:

- **Select Visit Category = Telephonic**
- **Visit Location = Phone-Redlake**

Clicking **Use current user for visit provider** to pick up the logged in user as provider; this would be most common

**Set Visit Context** – this is important because if you need to add any other visit data or orders the visit context will be set.

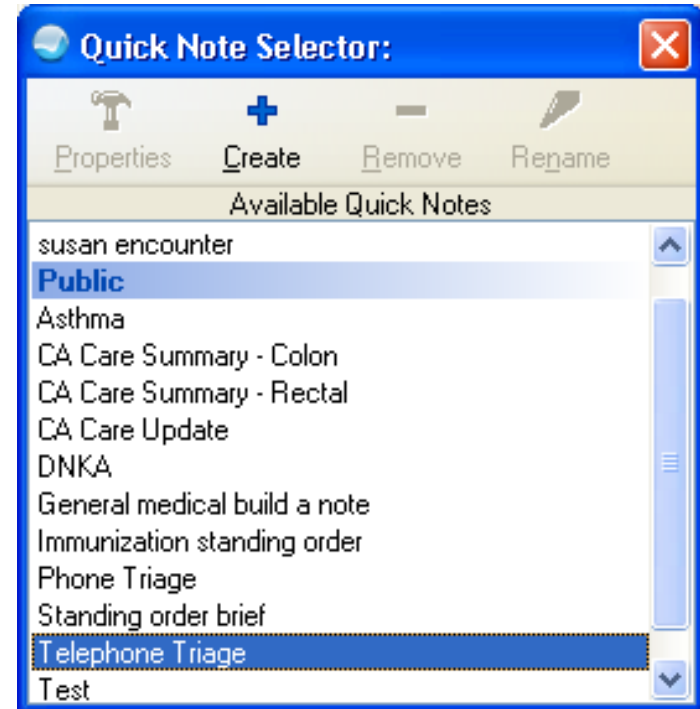
The screenshot shows a dialog box titled "Quick Note Properties" with a close button in the top right corner. The dialog is for "Telephone Triage". It contains the following fields and options:

- NoteTitle:** A dropdown menu with "PHONE CALL" selected.
- Include Boilerplate Text
- Template:** A dropdown menu with "Phone Triage v1.0" selected.
- Prompt for Visit:**
  - Use Visit Dialog
  - Set Visit Context
  - Use current user for visit provider
- Select Visit Category:** A dropdown menu with "Telephonic" selected.
- Visit Location:** A dropdown menu with "PHONE - REDLAKE" selected.
- Visit Provider:** A dropdown menu that is currently empty.

At the bottom of the dialog are "Save" and "Cancel" buttons. A red box highlights the "Set Visit Context", "Use current user for visit provider", "Select Visit Category", "Visit Location", and "Visit Provider" sections.

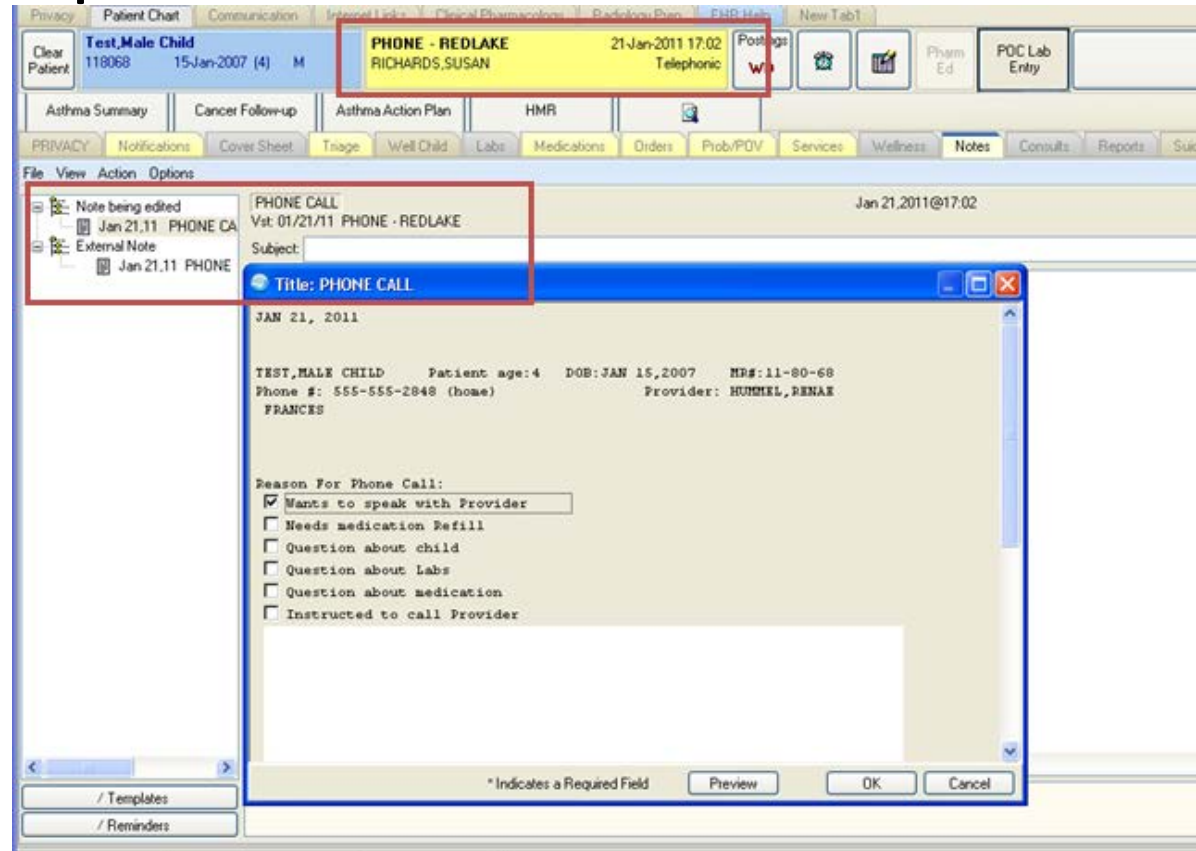
# Using quick note

1. Click the Quick Notes button.
2. Select the desired Quick Note and double click.



# Using quick notes

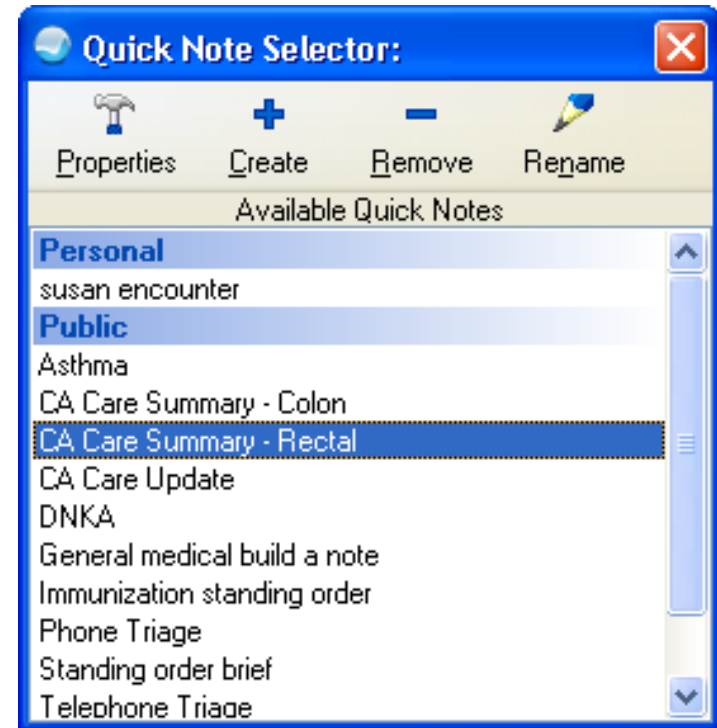
This Quick Note creates a visit, starts a note, and opens the template:



# Editing quick notes

Launch quick notes and click Quick Notes.

- Click Remove to delete.
- Click Rename to change name.
- Click Properties to bring up the configuration dialog again



# Launch from Toolbar Button

The screenshot displays an EHR application window for a patient named Test, Male Child (118068). The interface includes a top navigation bar with menus like 'User', 'Patient', 'Imaging', 'Tools', 'Help', 'Community Alerts', and 'New Menu'. Below this is a toolbar with various icons, including a red circle around a notepad icon. The main content area is divided into several panels: 'Chief Complaint', 'Vitals', 'Immunization Record', 'Contraindications', 'Reminders', and 'Adverse Reactions'. A 'Quick Note Selector' dialog box is overlaid on the 'Immunization Record' panel. The dialog has a title bar with a close button and a toolbar with icons for 'Properties', 'Create', 'Remove', and 'Rename'. Below the toolbar, it lists 'Available Quick Notes' under the 'Personal' category: 'Test', 'Public', 'Asthma', 'Creates visit', 'Immunization standing order' (highlighted), 'Phone Triage', and 'Standing order brief'. The status bar at the bottom shows the user 'RICHARDS,SUSAN', the location 'DEMO-HO BEM.IHS.GOV', and the date '08-Sep-2010 13:48'.

# Launch from Toolbar Button (cont.)

Quick Notes launches note

and:

TIU template (creates text note)

or:

Reminder Dialog template (enters RPMS data and creates text note).

- Can be configured to auto-populate clinic, hospital location, and provider.

Reminder Dialog Template: Imm standing order

Immunizations Due: IPV (past due)  
HEP A PED (past due)  
PCV-13 (due)

Allergies/ADR: Patient has answered NKA

<http://www.immunize.org/catg.d/p4065.pdf>  
<http://www.immunize.org/catg.d/p4060.pdf>

S.) Chief complaint: Patient presents for immunization update

Pre Vaccination Screening  
Reviewed SCREENING QUESTIONNAIRE FOR ADULT IMMUNIZATION  
(www.immunize.org)

NO contraindications to vaccines due reported.

Adverse Reactions to vaccines reported  
 The following reasons for delaying vaccine administration were reported:

0.) CEF:50, CEF:75

GENERAL:  
Alert & oriented x3  
Well appearing, in no acute distress.

A/P.) Immunization update

Adult immunizations administered today

MMR (VFC) immunization administered today \*  
 per standing order and sent to provider below for authentication  
 per provider order

7441704  
Left thigh sq  
0.50  
13-Mar-2008

\* Indicates a Required Field

S.) Chief complaint: Patient presents for immunization update

Pre Vaccination Screening  
Reviewed SCREENING QUESTIONNAIRE FOR ADULT IMMUNIZATION

Procedures: MMR VACCINE, SC  
Immunizations: MMR

Finish Cancel



Questions?