

# Progress Notes

## Admin Set Up



Any time you need to make notes regarding a patient you would do so in a progress note. Progress notes are a way for everyone in the office to document and view notes regarding a patient's care. There are two basic types of progress notes: standard and surgical. Most users will use standard notes – physicians may use both standard and surgical notes. Progress notes do not require any set-up in order to be used at a basic level, but there are features that can make your progress notes more powerful tools.

## Templates

Templates can simply be standard blocks of text, but they can also take the form of outlines and can also include items such as dropdown lists and date pickers to allow for easy data entry/customization. Templates can be set up as group defaults and users can also create personal templates.

### Default Template Editor

Templates in the Default Template Editor are based on users Template group as defined in the User Manger. From the Maintenance menu, select Admin, User Manager. Select a user and click Edit – their user account will appear. In the Groups section, under the listing of Member groups, is a Template dropdown. The entry in this field determines what default templates a user will have access to.

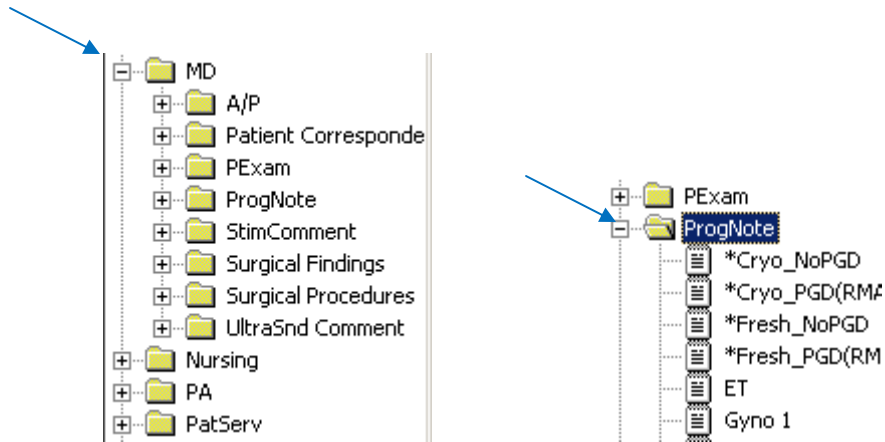
The screenshot shows the 'RESource User Account <2000, Immulte>' window. The 'Groups' section is expanded, showing a list of member groups on the left and a list of not member groups on the right. A red arrow points to the 'Template' dropdown menu, which is currently set to 'Andrology'. Other sections include 'User Information', 'Identifiers', 'External Interfaces', 'Authentication Mode', and 'Options'.

To create a default template:

- 1 – From the main toolbar, select Maintenance, Admin, Default Template Editor. The Default Template Editor window will appear with the available template groups listed with folders.

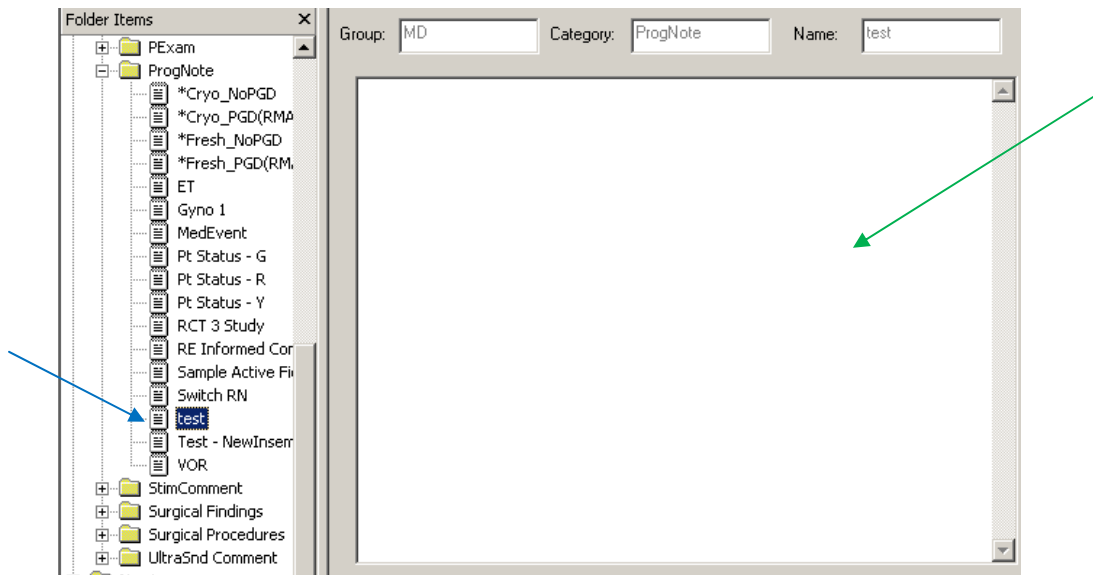
2 – Select the group you want to create a template for. For example, MD

3 – Click the (+) sign to the left of the folder to expand the group and display the available template areas. Select ProgNote and click the (+) sign to the left of the ProgNote folder to expand it (to view any templates that may already exist)



4 – Go to the File menu and select New Template

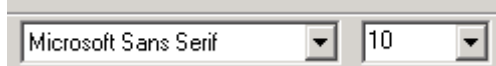
5 – Enter a name for the template when prompted and click OK. The new template will now appear under the ProgNote folder with a blank text area for the template (green arrow)



6 – Enter the text of the template in the space provided. Note the formatting options available:



• **Dropdowns**



The first drop down represents the font type  
 The second drop down represents the font size

• **Buttons**

- = bold
- = italic
- = underline
- = left aligned
- = right aligned
- = center
- = right and left aligned
- = add numbers to each line
- = add bullets to each line

To apply an option from the drop downs or buttons, simply click on the desired option(s) and continue typing your progress note. If the text already exists, highlight the text (with your mouse) that you would like to apply the option(s) to, and then click on the desired option(s). These features work very similar to how they would work in Microsoft Word.

The arrows that appear above the “ruler” represent the tab stops – when entering text, each time you hit the <Tab> key the cursor will move to the next arrow/tab stop. To adjust the position of the stops, click on the arrow/tab stop you wish to move and drag it to the left or right. To remove a tab stop completely, drag it all the way to the left or right side of the ruler until it disappears. To add another type of tab (besides the default type) use the buttons listed below – simply select the type of tab you would like and then click on the ruler where you would like the tab stop to be.

Use the following buttons to add new types of tab stops.

- = the text typed at this tab stop will continue to the right of the tab (this is the default type) – the first letter of the word being typed will align with the tab stop
- = the text typed at this tab stop will move to the left - the last letter of the word being typed will align with the tab stop



=



= the text typed at this tab stop will center – the center of the word being typed will align with the tab stop

- **Right-click Menu**

Right clicking within a progress note displays a menu:

**Undo** – undo your last edit

**Redo** – redo your last undo

**Cut** – cut the selection, removing it from the note, with the option to paste it elsewhere

**Copy** – copy the selection, while leaving it in the note, with the option to also paste it elsewhere

**Paste** - paste a cut or copied selection

**Delete** – delete the selection

**Select All** – select the entire text of the note

**Back Color** – selecting this will bring up a color grid. Select the desired color from the options – all text typed after this point (within the current note) will appear with that color in the background (like using a highlighter)

**Fore Color** – selecting this will bring up a color grid. Select the desired color from the options – all text typed after this point (within the current not) will appear with that color (the font color will change)

### Dropdown List

To create a dropdown list in the template you need to enter the text in a specific way. If you wanted to create a dropdown list labeled “Favorite Color”, for example:

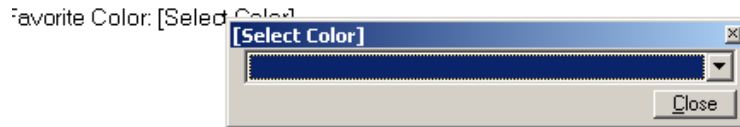
Favorite Color: <![**Select Color**]]Red^Orange^Yellow^Green^Blue^Purple>!

The blue arrow indicates the label, the red arrow indicates the initial dropdown text/instruction, and the dropdown items are listed with a (^) sign separating them. The <, !, [, |, , and > symbols should be inserted exactly as shown.

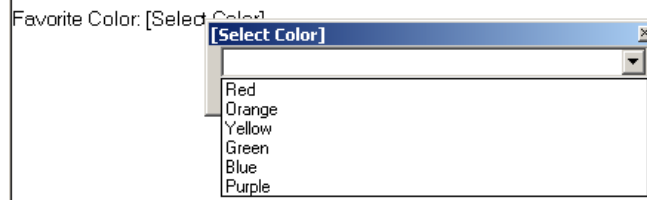
When the template is inserted in a progress note it will appear like:

Favorite Color: [Selected Color]

The user will click on the ‘Select Color’ text and a dropdown will appear:



Selecting the dropdown will display the choices:



The user will select the desired option and click Close. The text will now appear in the progress note as:

Favorite Color: Green|

#### Date Picker/Calendar

As with the dropdown list, in order for a date-picker field to appear in a progress note it must be created in a specific way in the template. If you wanted to create a date field for an initial consult progress note, for example:

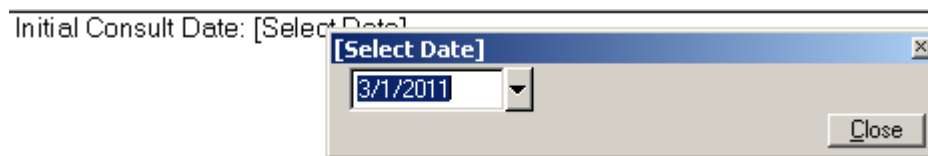
Initial Consult Date: <![Select Date]|MM/DD/YYYY|Date>!>

The blue arrow indicates the label, the red arrow indicates the initial calendar text/instruction, and the date format follows. The <, !, [, |, and > symbols should be inserted exactly as shown.

When the template is inserted in a progress note it will appear like:

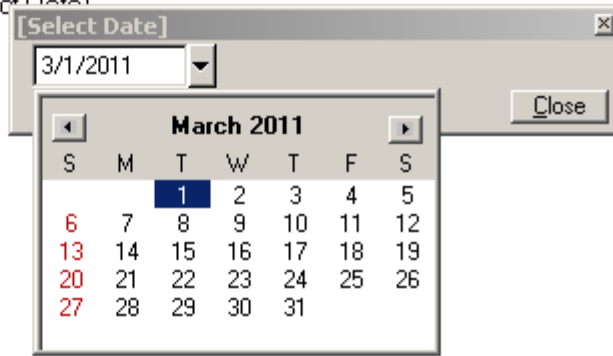
Initial Consult Date: [Select Date]

The user will click on the 'Select Date' text and a date-picker will appear:



Selecting the date-picker will display a calendar:

Initial Consult Date: [Select Date]



The user will select the desired date and click Close. The text will now appear in the progress note as:

Initial Consult Date: 03/01/2011

### Checkbox

You can also program checkboxes to appear in a progress note template. For example, you could have one to indicate if the patient is a smoker:

Smoker?: Yes <!<[ ]|CheckBox>!>      No <!<[ ]|CheckBox>!>

The blue arrows indicate the labels; the red arrows indicate the checkbox format. The <, !, [ , | , and > symbols should be inserted exactly as shown.

When the template is inserted in a progress note it will appear like:

Smoker?: Yes [ ]      No [ ]

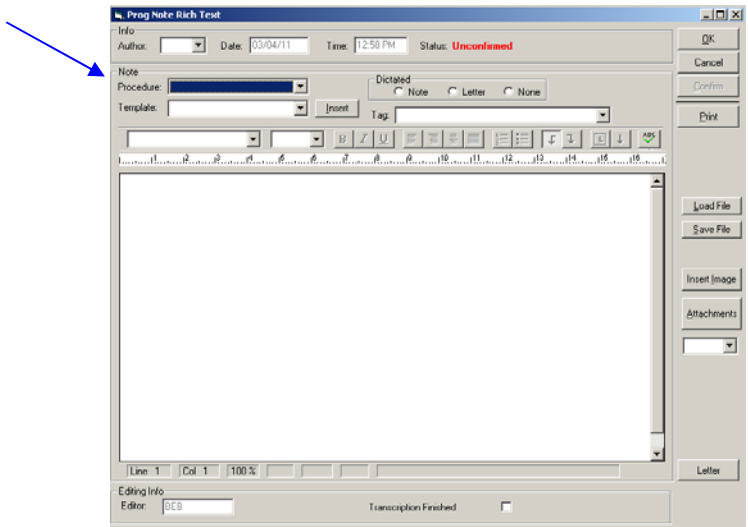
The user will click on the desired checkbox:

Smoker?: Yes [ ]      No [x]

In addition to dropdown lists, date-picker calendars and checkboxes, progress note templates can also be programmed to insert items from the patient record such as (but not limited to) most recent height and weight (from PE), last menses (from stim sheet) and last gnd date (from stim sheet). Please contact Med Software for more information on this functionality if you are interested.

## Procedure

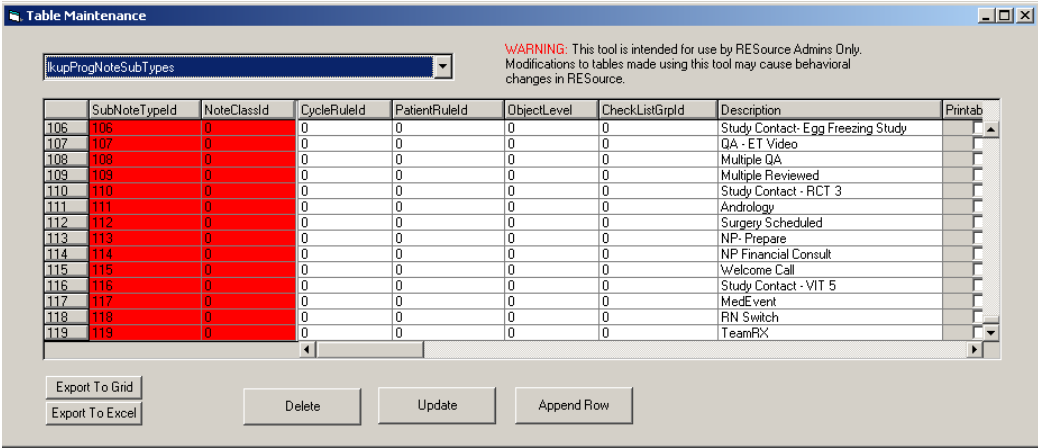
The Procedure field in a progress note allows to “label” a progress note. It is required in cycle status notes that are to be included in a cycle checklist and it can be used as a tool to query specific progress notes.



For use in a checklist, for example, you may want to require that the physician enter an “insemination and transfer plan” note for reference by clinical staff and the laboratory. Or maybe a medication class is required for certain cycles – a progress note could be entered to document that the patient attended and what was covered.

To create a new Progress Note Subtype (aka Procedure):

- 1 – In the main toolbar, select Maintenance – Admin – Lookup Table Manager
- 2 – In the Table Maintenance form that appears, select lkupProgNoteSubTypes from the dropdown



- 3 - Click Append Row
- 4 – Enter the next consecutive SubNoteTypeID (first red column)
  - **NoteClassID** – leave as 0
  - **CycleRuleID** - the ID of a cycle rule associated with a stored procedure – leave as 0
  - **PatientRuleID** – leave as 0

- **ObjectLevel** – leave as 0
- **CheckListGrpID** – leave as 0
- **Description** – the name of the subtype/label
- **Printable** – can be used to make a note non-printable
- **DefaultSecurityLevel** – leave as 0
- **Required** - Check off the Required field. If Required is not checked it can still be a checklist item but it will indicate “not required” and will not prevent the checklist from progressing through color statuses.
- **Retired** – leave unchecked in order to have the subtype available for use
- **ViewLevel** – can be used to further filter the progress note history window (‘View’ dropdown) – leave as 0 or contact Med Software for more details.

5 – Click Update