

How to Find, Edit and Delete Your Draft Progress Notes

Once you find your Draft notes, you have the option of deleting or completing the note. First, you must find your note and open it up. If you need to delete your draft note, see the next section in this document.

- To Find Your Draft Notes -

Look in Your My To Do's

The easiest way to complete a draft note is to open it up from your My To Do's Widget. If the note is there, simply click on the name of the form. The form will open up and you can complete it. However, you may have accidentally deleted this reminder from your My To Do's. If you have done this, follow the procedure below to find your drafts and complete them.

My Pending Note Widget

On your Home Console you will see a widget titled, "My Pending Notes – 60 Days." This Widget has all of your notes that are still in draft form, from the past 60 days only. If you have pending notes that are more than 60 days overdue, they will not appear in this widget and you will have to look in the chart.

You cannot open notes from this Widget. You will have to open these notes in the chart to complete them.



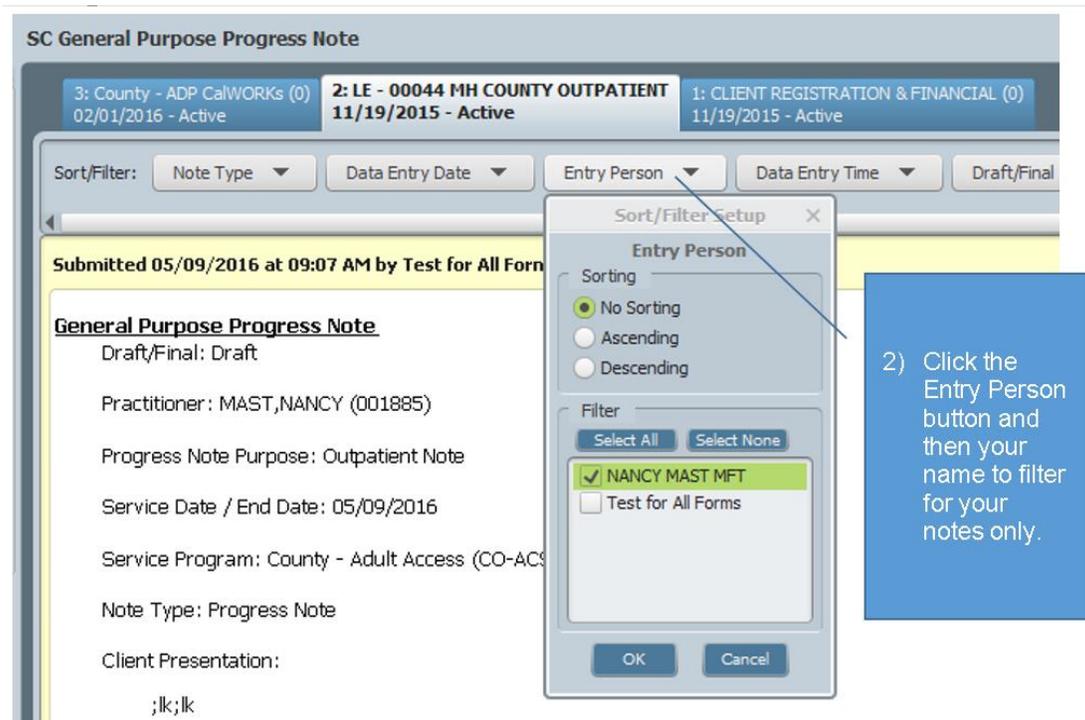
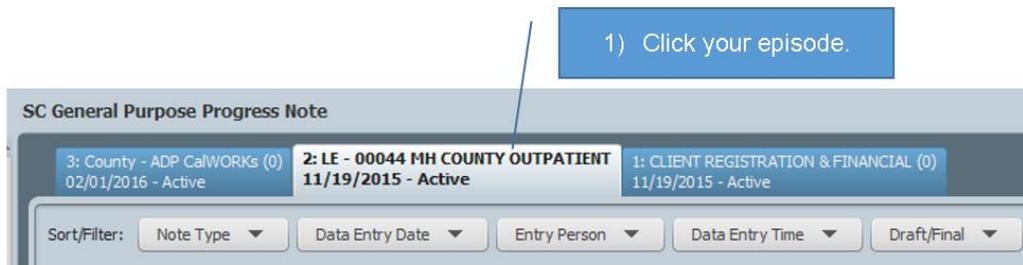
Note Date	Name	ID	Episode	Note Type
2016-06-23	TEST,TEST	103017	3	Progress Note
2016-06-23	TESTTEST,TEST	112510	4	Progress Note

Steps to finding and opening draft notes in client charts (not group scratch notes):

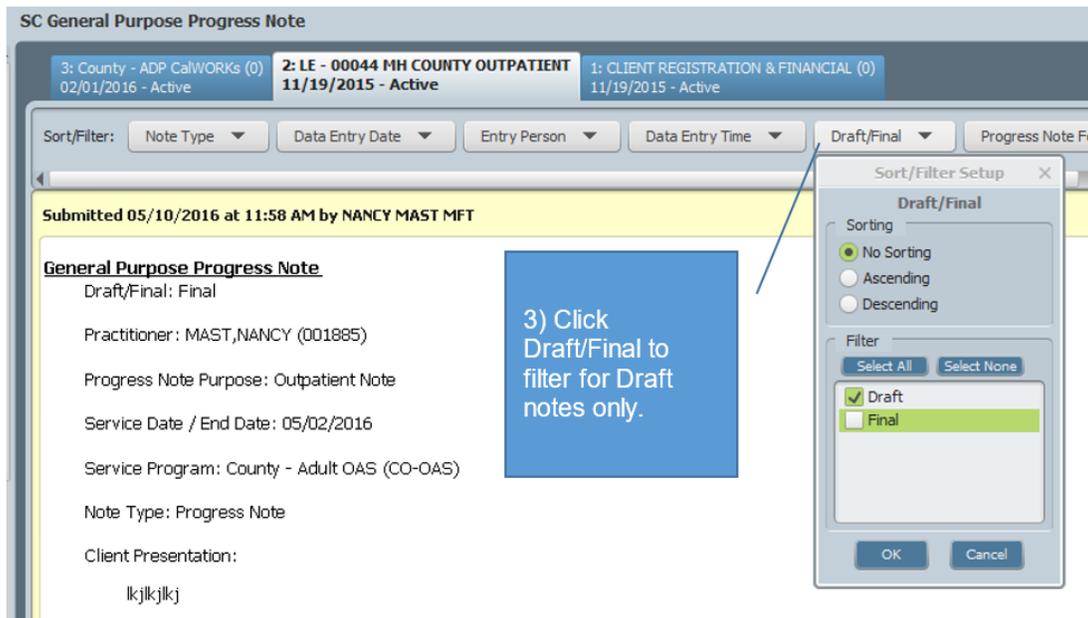
- 1) Open the chart.
- 2) Click on SC General Purpose Progress Note or SC Med Service Note link to open the Inquiry View. (If you have pending draft group progress notes, this procedure will work. If you have pending **scratch** Group Progress Notes, you will not be able to edit them this way. See the next section.)
- 3) Click on the episode tab for your Admission Program.
- 4) You will see an array of buttons that can be used to sort and filter notes.
- 5) Click to filter for your name – entry person

How to Find, Edit and Delete Your Draft Progress Notes

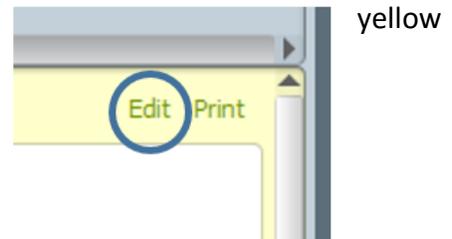
- 6) Click to filter for draft – Draft/final. You have now filtered out all of your draft notes in the chart.



How to Find, Edit and Delete Your Draft Progress Notes



Then, in the upper right corner of each note, in the bar, click “Edit.” This will launch your draft note for completion.



yellow

Group Scratch Notes: You will not be able to complete your individual scratch group notes in the manner described above. Your first step is to look in your My To Do's for any scratch notes that need completing. Next, check your charts for any notes that are not showing in your My To Do's. This will only have happened if your link to the note from your My To Do's was accidentally deleted before you completed the note. If you identify any scratch notes that are not in your My To Do's, you will need to send a message to askqi@santacruzounty.us so that the note can be deleted. You will then need to rewrite the note.

Use the same procedure described above to locate your incomplete Draft Group Progress Notes in the charts.

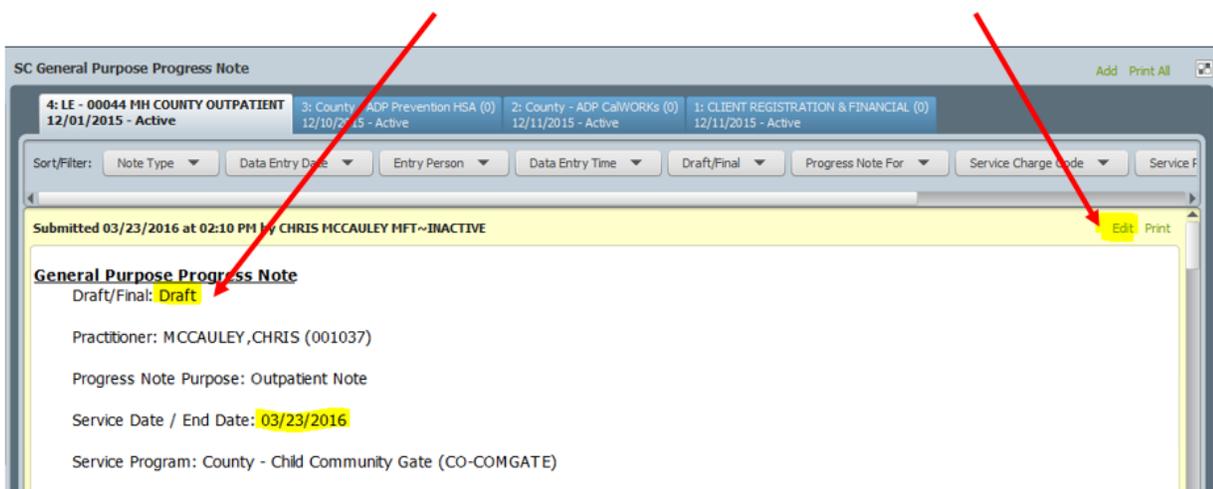
How to Find, Edit and Delete Your Draft Progress Notes

- How to Delete a SC General Purpose Progress Note or Med Service Progress Note -

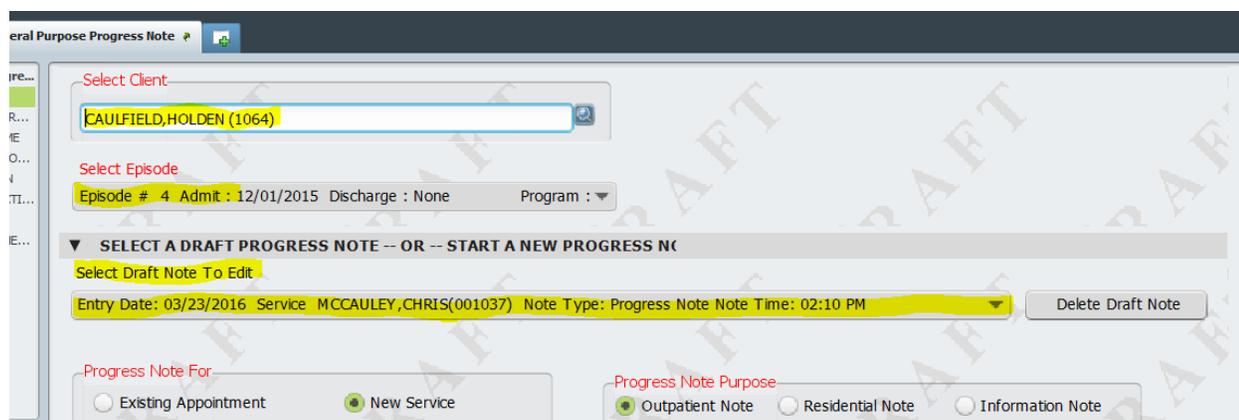
If you need to delete your draft note, follow the procedure below.

(Note that this will not work with a draft Group Progress Note, since there is no button to click to delete the note. If you need to delete a draft Group Progress Note, you will have to send a message to QA to request that the note be deleted.)

1. Find the Draft Progress Note you would like to delete in the chart, as described previously.
2. Select "Edit" to open the note.



3. Observe the highlighted areas and verify that this is the Draft Progress Note you would like to delete.



How to Find, Edit and Delete Your Draft Progress Notes

4. Select "Delete Draft Note" to delete.

The screenshot shows a software interface for managing draft progress notes. The window title is "General Purpose Progress Note". The interface includes several sections:

- Select Client:** A dropdown menu showing "CAULFIELD,HOLDEN (1064)".
- Select Episode:** A dropdown menu showing "Episode # 4 Admit : 12/01/2015 Discharge : None Program :".
- SELECT A DRAFT PROGRESS NOTE -- OR -- START A NEW PROGRESS NOTE:** A section with a dropdown menu for "Select Draft Note To Edit" showing "Entry Date: 03/23/2016 Service: MCCAULEY,CHRIS(001037) Note Type: Progress Note Note Time: 02:10 PM". To the right of this dropdown is a yellow button labeled "Delete Draft Note". A red arrow points from the instruction above to this button.
- Progress Note For:** Radio buttons for "Existing Appointment" and "New Service" (which is selected).
- Progress Note Purpose:** Radio buttons for "Outpatient Note" (which is selected), "Residential Note", and "Information Note".