Update: Nursing Notes Workflow

When creating any type of Nursing Visit Note (except for Nurses Telephone Note), nurses will be prompted to have these co-signed by a provider. While this requires an extra step for the nurse in the workflow, the signature is required for compliance purposes.

Use the following step-by-step for creating a note from the Task List:

**Step One**

Highlight the Task that needs to be copied to a note. Click on “Copy to Note.”

**Step Two**

If an Encounter Selector pops up, choose “New Encounter” and “Chart Update” from the drop-down list.
Step Three

A Note Selector should appear with the Specialty, Visit Type, and Owner automatically populated. If any of these are incorrect, they can be changed by clicking on the drop-down arrows. A Nurses Note WILL REQUIRE a co-signer. A Nurses Telephone Note will not require a co-signer.

Step Four

After composing the note and signing it, nurses will be prompted with a Task Details box. Make sure to choose the correct User (the provider who needs to co-sign) from the Assign To: field. Make sure the User radio button is highlighted before searching for the provider. You can write any pertinent information in the comments section if needed. Click on “Ok” and the Co-Sign Note Task will be automatically sent.

***Important: If you have previously personalized your default Task type, the Task type will need to be manually changed to Co-Sign note before being sent to the Provider.