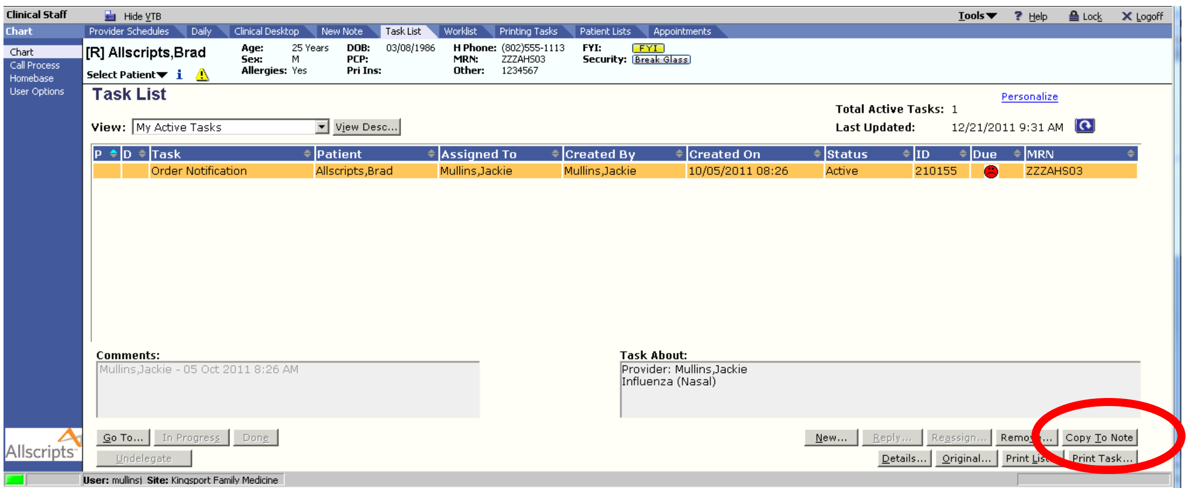
Update: Nursing Notes Workflow

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:

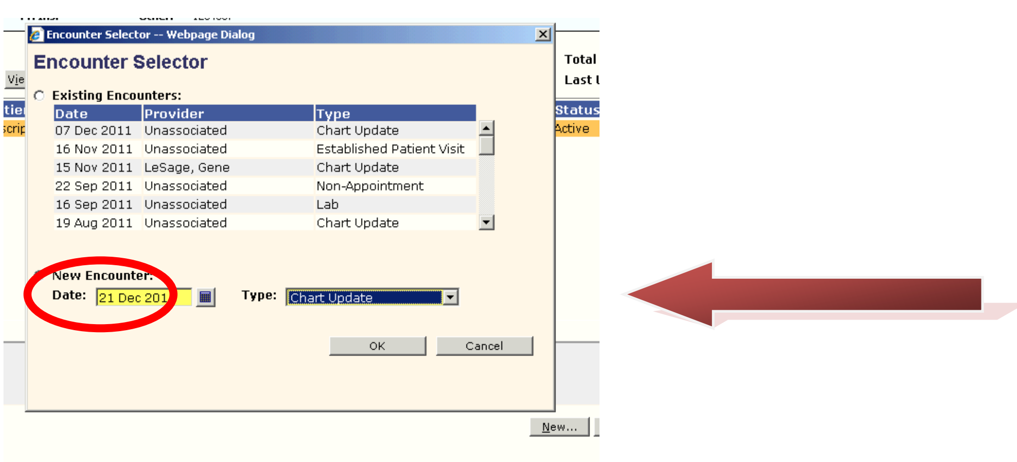
<u>Step One</u>

Highlight the Task that needs to be copied to a note. Click on **"Copy to Note."**



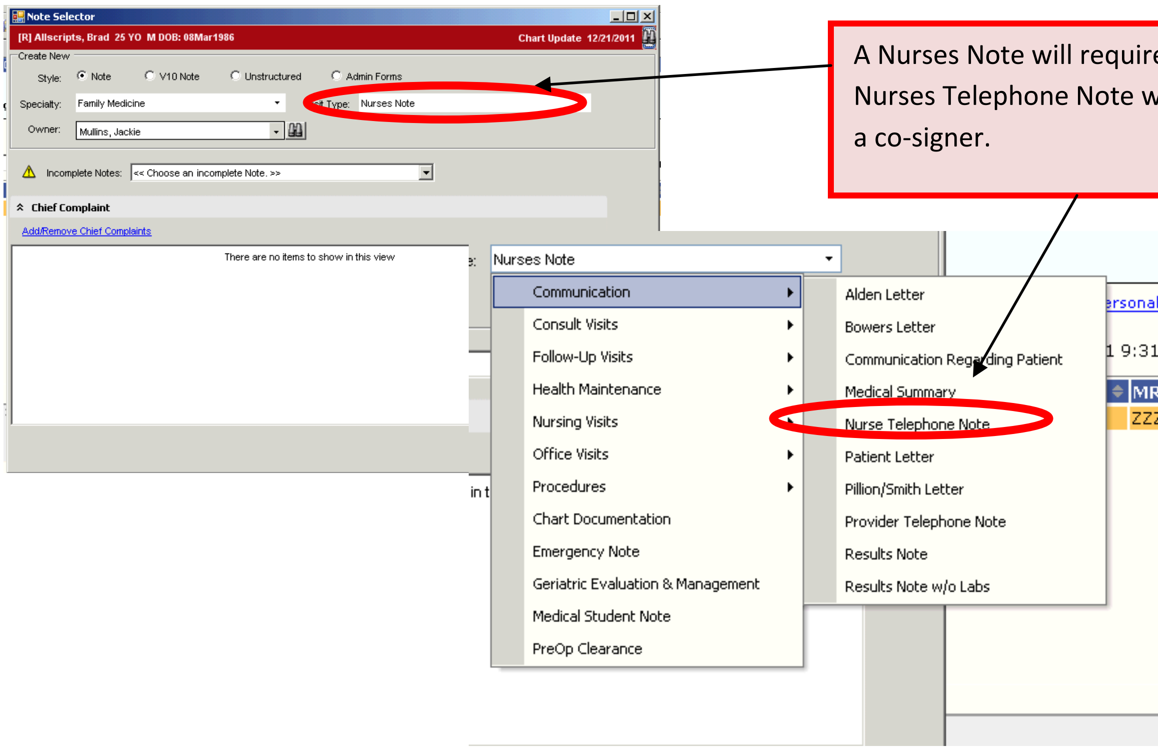
<u>Step Two</u>

If an Encounter Selector pops up, choose "New Encounter" and "Chart Update" from the drop-down list.



Step Three

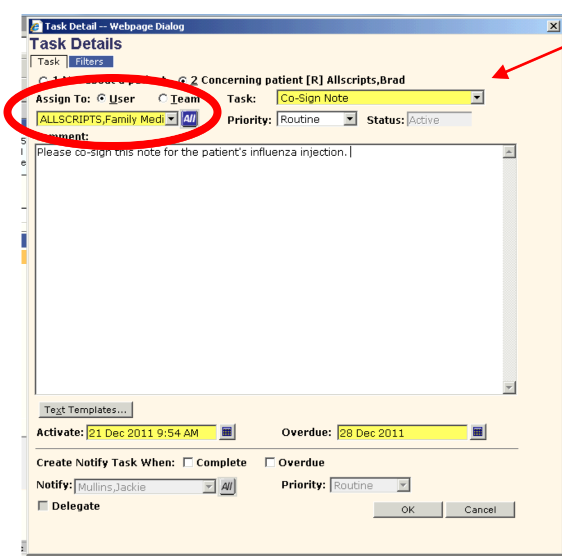
A Note Selector should appear with the Specialty, Visit Type, and Owner automatically populated. If any of these are incorrect, they can be changed by clicking on the drop-down arrows. A **Nurses Note** WILL REQUIRE a co-signer. A **Nurses Telephone Note will not require a co-signer.**



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.**