



# EHR Go Guide: The Notes Tab

## Introduction

The Notes tab in the EHR contains narrative information about a patient’s current and past medical history. It is where all members of the health care team communicate about the patient during a hospital visit or while receiving outpatient care. Notes are documented on regular intervals about clinical events related to the diagnoses and treatment of the patient.

There are many types of notes in the EHR including: admission notes, assessments, SOAP notes, exams, reports, screening tools, progress notes, evaluations, and more. Notes are sometimes referred to as “Flow Sheets.” Most note options are templated, meaning specific fields or questions are built in to the note for the clinician to answer, while other notes allow for free-text narrative entry.

Case patients in EHR Go have existing notes in their chart. You may review these notes to gather detailed information about the patient’s condition. It is often helpful to review the patient’s notes first, to learn about the patient, before reviewing the information in the other EHR tabs.

In some activities, you’ll need to write a new note. This guide explains how to access and review existing notes, edit notes, and create new notes.

## Additional resources

Please refer to the *Student Guide to EHR Go* for information on logging in to Go and launching the EHR for an activity.

## FAQs about notes

1. **Can I edit a note after I have finished it?**
  - a. Yes. In EHR Go, you may edit any existing note as often as needed. See *Editing a Note* section.
2. **How do I submit my notes to my instructor?**
  - a. Your completed notes are submitted to your instructor through the Progress Report found under Download Work when reviewing the assigned chart (not in the EHR). See *EHR Go Guide to Completing and Submitting Work*.

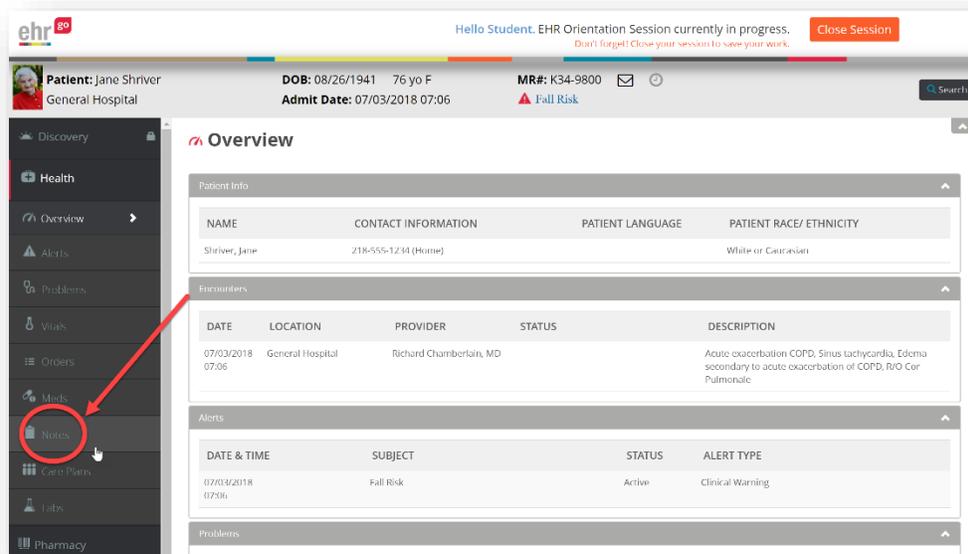


### 3. Will other users see notes that I have written?

- a. No. All users see their own instance of the chart. Your work is private.

## Accessing notes in the EHR

After launching the EHR for any patient chart, select the Notes tab on the left side of the screen:



The Notes list view shown below provides the Date & Time, Title, Author, and Location of each note that has been documented. By default, the notes are sorted by Date & Time with the most recent note at the top. You can tell this because the 'Date & Time' heading appears in blue with a small arrow pointing down, indicating a descending order.



Patient: Leeanne Brady  
OB/GYN

DOB: 03/01/1972 43 y.o F  
Admit Date: 03/22/2015 12:18:45

MR#: MR0323  
FALL RISK

Search

Discovery

Health

Overview

Alerts

Problems

Vitals

Orders

Medx

Notes

Care Plans

Labs

### Notes

DATE & TIME	NOTE TITLE	AUTHOR	LOCATION
03/22/2015 14:48:45	Nursing Progress Note	Kevin Harris, RN	OB/GYN
03/22/2015 14:18:45	Pain Screening Note	Kevin Harris, RN	OB/GYN
03/22/2015 13:30:45	Nursing Progress Note	Kevin Harris, RN	OB/GYN
03/22/2015 12:33:45	Acceptance Note	Kevin Harris, RN	OB/GYN
03/22/2015 11:45:45	Surgery Note	Richard Chamberlain, MD	OB/GYN
03/22/2015 10:30:45	Preoperative Checklist	Riam Vang, RN	OB/GYN
03/22/2015 10:23:45	Chest X-ray	David Collins, Radiologist	OB/GYN
03/22/2015 10:23:45	EKG Report	Fatima Mahad, Radiologist	OB/GYN

You can sort by any of the columns by clicking on the heading then the arrow that appears next to it.

Discovery

Health

Overview

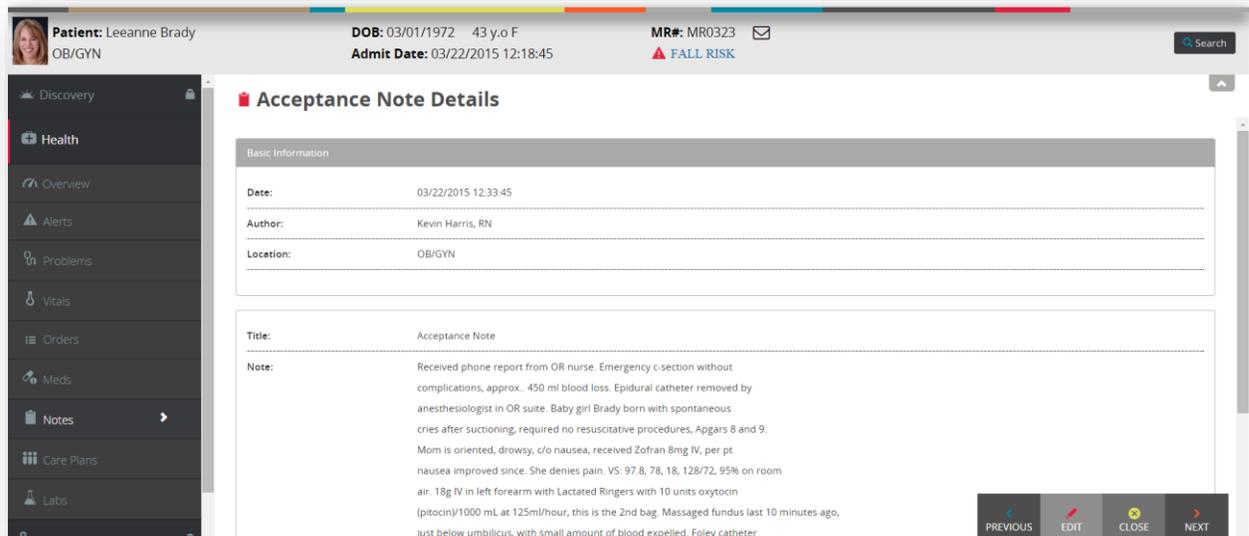
Alerts

Problems

### Notes

DATE & TIME	NOTE TITLE	AUTHOR	LOCATION
03/25/2015 12:53:14	Acceptance Note	Kevin Harris, RN	OB/GYN
03/25/2015 10:43:14	Chest X-ray	David Collins, Radiologist	OB/GYN
03/25/2015	EKG Report	Fatima Mahad, Radiologist	OB/GYN

Click on any note in the listing to access the details and read the full content:



Scroll down, if needed, to read the full contents of the note. From this details view, you may select from the following menu options found in the bottom right corner of the Note Details screen:

**Previous:** Brings you to the details screen of the previous note in the list if you're not already looking at the first note.

**Delete:** This option will appear only for notes you have authored yourself, allowing you to completely delete the note. Warning: Deleting the note completely removes it from the chart and it cannot be recovered.

**Edit:** Allows you to modify an existing note. See next section on Editing a Note for more information.

**Close:** Exits the details view of the specific note and returns to the summary list.

**Next:** Brings you to the next note in the list if you're not already looking at the last note.



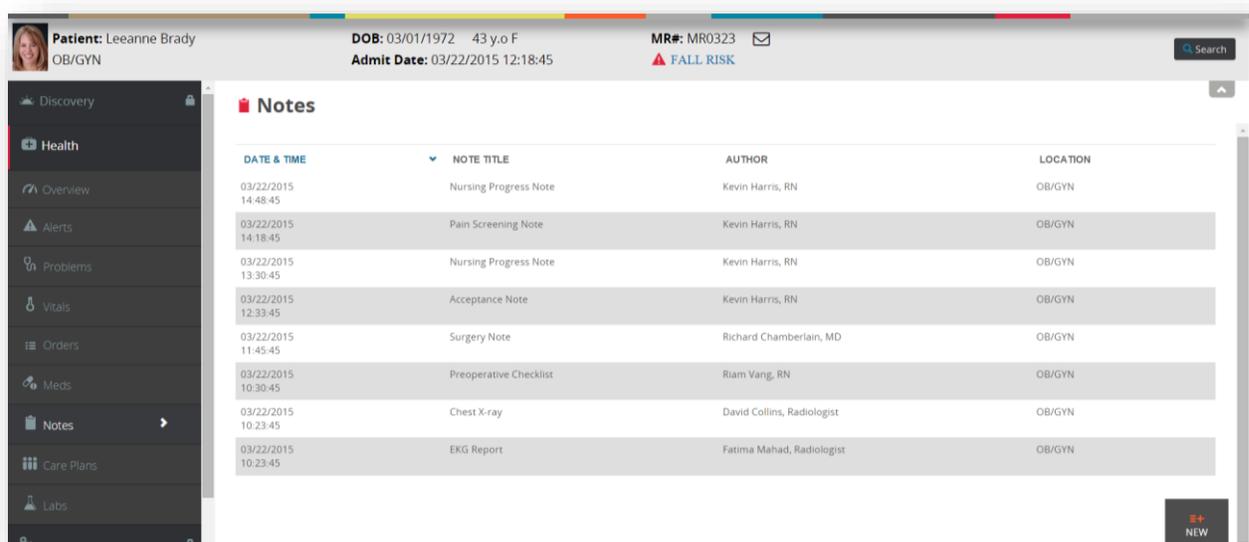
## Editing a note

You may edit an existing note after selecting it from the summary list and selecting **Edit**. Most commonly, this function will be used to edit a note you had previously started but didn't complete or that you want to update.

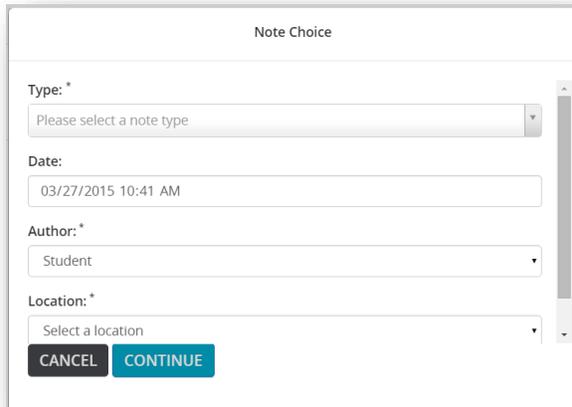
In the edit mode, the date, author, location, title, and note contents may be modified. Once the changes are complete, select **Save**. The note edits are only applied to your instance of the chart and no other users will see your changes. Further, the note edits are specifically tracked in the EHR session and the corresponding Progress Report and can be submitted to your instructor for review. The Progress Report is found under Download Work for the specific EHR session (see *EHR Go Guide to Completing and Submitting Work*).

## Writing a new note

After selecting the Notes tab in any patient chart, select **New** in the bottom-right corner to author a new note in the chart.



The following fields will appear:

A screenshot of a 'Note Choice' dialog box. The title bar reads 'Note Choice'. It contains four fields: 'Type:' with a dropdown menu showing 'Please select a note type'; 'Date:' with a text field containing '03/27/2015 10:41 AM'; 'Author:' with a dropdown menu showing 'Student'; and 'Location:' with a dropdown menu showing 'Select a location'. At the bottom are two buttons: 'CANCEL' and 'CONTINUE'.

**Type:** Select the type of note from the list of available options. Refer to the assignment or your instructor if you're unsure which type of note to select. You may begin typing the name of the note in the field to be brought to that selection option rather than scrolling through the list. **Hint:** For a free-text style note, select the *Progress Note* or *Free Text Note*.

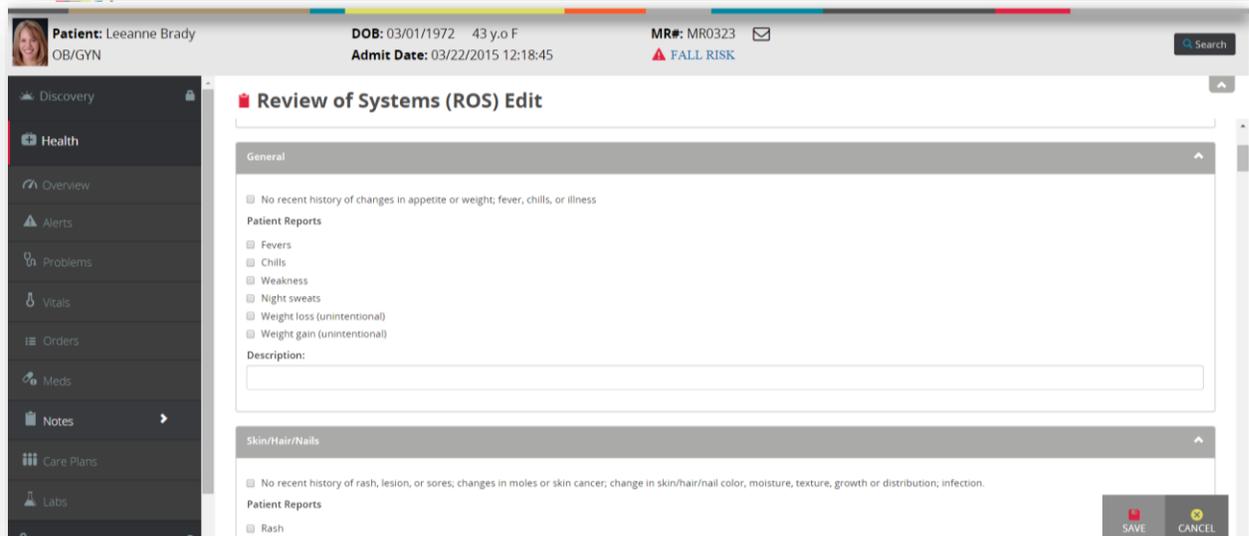
**Date:** By default, the current date and time will automatically appear. This may be adjusted to another date or time, if needed.

**Author:** You will be listed as the author by default. The author may be changed to another provider in the list, if needed.

**Location:** The location of the patient's current admission will appear by default. No location will be listed by default if the patient is not currently admitted. A location can be selected or changed, as appropriate.

Once all fields are populated, select **Continue**.

If you have selected a note that contains templated fields, they will appear automatically as shown in this *Review of Systems (ROS)* note:



If you have selected the wrong note type or want to exit the note without saving your work, select **Cancel** in the bottom right corner of the screen.

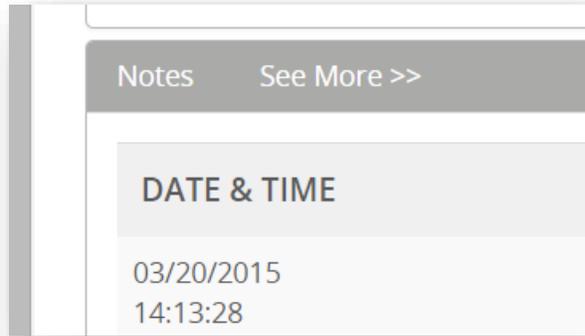
Otherwise, complete some or all of the note sections then select **Save**. Keep in mind, you can edit and continue your note at a later time (see *Editing a Note* section).

When you are finished in the patient chart, select **Close Session**. **Important!** This is how your work is saved. Do not close your browser window or tab without clicking Close Session.

The Progress Report for this EHR session will be updated with the new note and you may submit the report to your instructor when you have completed the assignment. If you make edits to the note in the future, the Progress Report will be updated accordingly.

## Notes on the Overview tab

The Overview tab of the patient chart includes the summary list view of the five most recent notes. If there are more than five notes in the patient chart, you may select **See More** to be brought to the Notes tab to see the full list of notes or to edit or add new notes.



It is not possible to view, edit, or create a new note from the Overview tab. You must go to the Notes tab for those actions and to read the full contents of the notes.