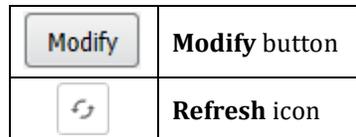
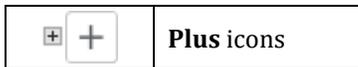


This Quick Reference Guide (QRG) demonstrates the process for documenting with PowerNotes.

### Common Buttons & Icons



### Create a PowerNote

➤ From the provider workflow tab:

**STEP 1:** Click **Documents**.

**STEP 2:** Click + icon.

**STEP 3:** Click the **Type** dropdown arrow; then, select the note type.

**STEP 4:** Select the appropriate tab below the Title field to find the right template.

**STEP 5:** Select the right template; then, click **OK**.

- The Auto Populate Document window displays.

**STEP 6:** Select the information to auto populate in the note; then, click **OK**.

- The note displays.

**STEP 7:** Document necessary information. There are multiple ways to enter and view documentation in a PowerNote.

- Select **Show Structure** to use a template or use **Use Free Text** to enter documentation.
- When documenting in a section template, click once to select an option, displaying bold with a circle around it. Click twice to document a pertinent negative, which will display with a red strikethrough.
- Fields with numeric responses will activate a numeric keypad when clicked.
- Use the **OTHER** option to use free text to enter documentation.
- Click **Hide Structure** to preview what the section will look like in the final note.

### Use Auto Text

➤ From a PowerNote:

**STEP 1:** Click **Use Free Text** in the section header.

**STEP 2:** Start typing the appropriate abbreviation, such as **/pe**.

- A dropdown menu of options matching what was entered displays.

**STEP 3:** Double-click the template to populate it in the field.

### **Save a PowerNote**

➤ **From a PowerNote:**

**STEP 1:** Click **Save & Close**.

- The Save Note window displays.

**STEP 2:** Confirm the Type and Title fields are correct; then, click **OK**.

- The Note is now saved as In Progress. The note can be accessed from the Documents component or the Notes page.

### **View Notes in the Documents Component**

➤ **From the Documents Component**

**STEP 1:** Navigate to the **Documents** component of the workflow MPage.

**STEP 2:** Change the Filters, if necessary, to find the note.

**STEP 3:** Click the desired note.

**STEP 4:** Click **View Document** to open the note in a new tab.

### **View Notes in the Notes Page**

➤ **From the Notes Page**

**STEP 1:** From the patient's chart, navigate to the left side **Menu**.

**STEP 2:** Click **Notes**.

**STEP 3:** Confirm the Date Range in the top gray bar is correct for the desired note. If not, follow these steps to update the date range:

- Right-click the gray bar.
- Click **Change Search Criteria**. The Document Lookup window displays.
- Adjust the From and To fields as necessary; then, click **OK**.

**STEP 4:** Double-click the appropriate folder in the left pane.

**STEP 5:** Click + icon on the subsequent folder(s).

**STEP 6:** Double-click the note to open.

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## **Sign and Submit a PowerNote**

➤ **From a completed PowerNote:**

**STEP 1:** Click **Sign/Submit**.

- The Sign/Submit window displays.

**STEP 2:** Confirm the Type, Title, and Date fields.

- Use the Endorsers section to add or remove an endorser as needed.

**STEP 3:** Click **Sign**.