From the Office of Health Informatics

Quick Reference Guide (QRG)

PowerNotes

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

Common Buttons & Icons

⊞ +	**Plus** icons

Modify	**Modify** button
↻	**Refresh** icon

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.

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**.