

How To Manage Patient Chart Notes

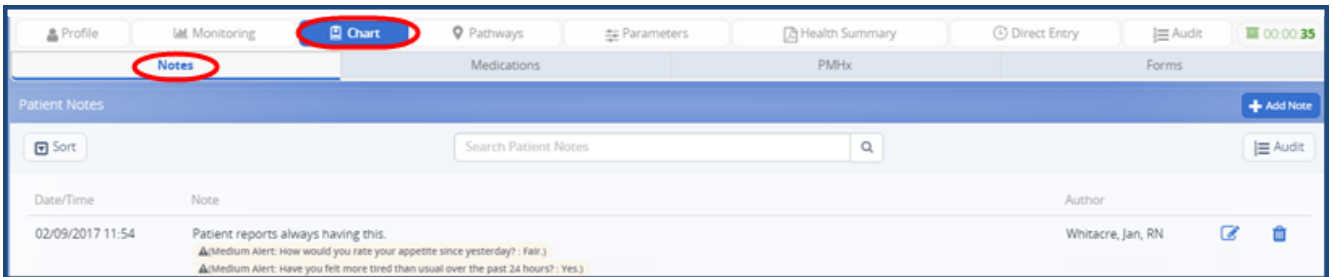
To manage chart notes for a Patient in the Care Team Portal, you can do the following:

Add a New Patient Chart Note

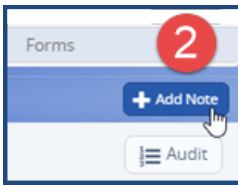
1. On the **Patients** page, click the right section of a Patient Header.



The **Patient Chart** page appears with the **Notes** tab selected by default.

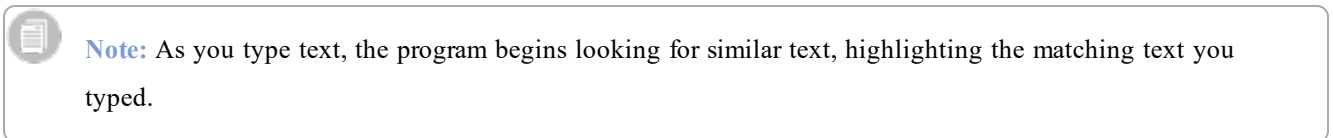


2. Click **+Add Note**.

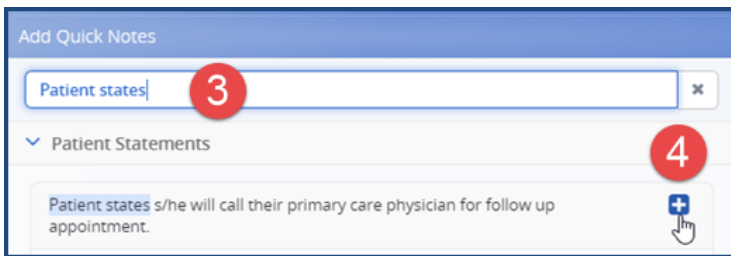


The Add Quick Notes area appears.

3. If you want to search for a quick note, begin typing text in the *Search Quick Notes* box. For our example, we type "Patient states...".

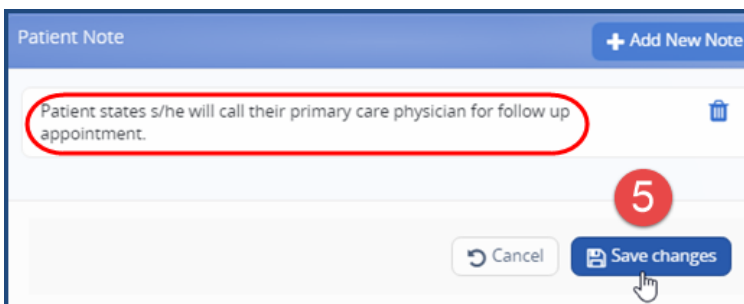


- If you find a quick note you want to use, click **+** to add it.

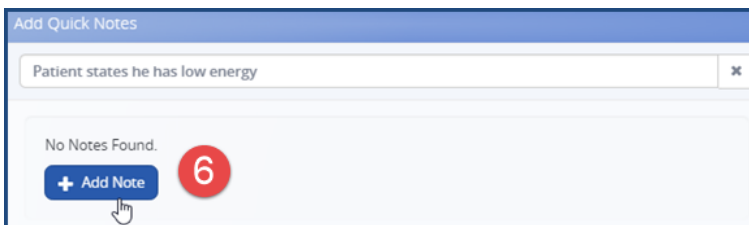


The note appears in the Patient Note box.

- Click **Save changes** to add your Patient note.

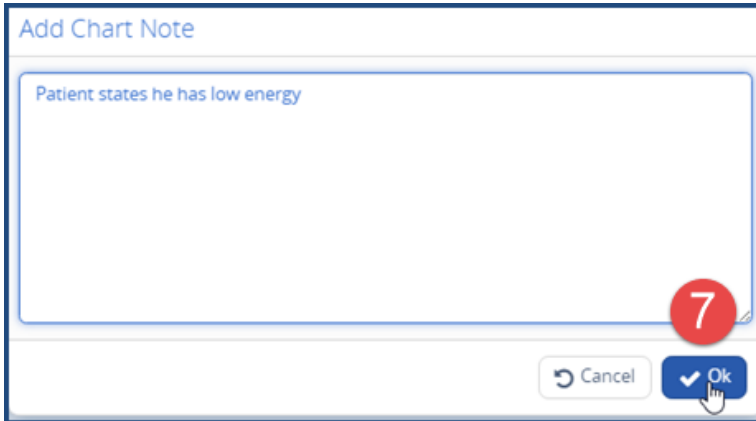


- If you do not find your desired note, click **+ Add Note**. For our example, we type "Patient states he has low energy."

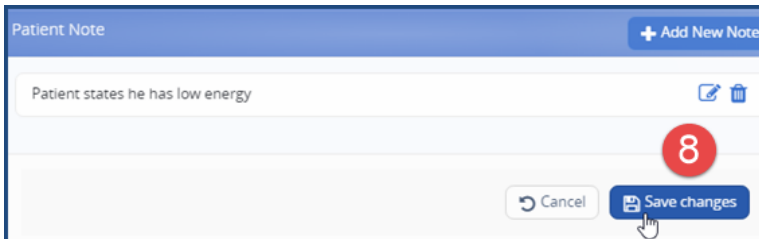



The Add Chart Notes dialog box appears, and you can edit the note before you save it.

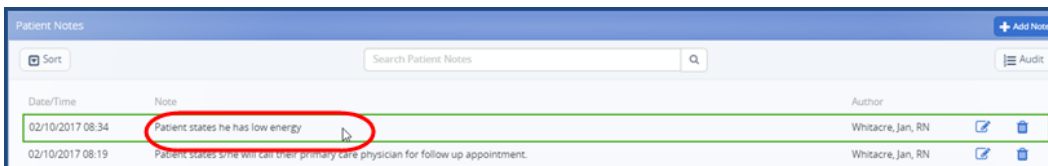
7. Revise the note or leave as is, and then click **Ok**.



8. In the **Patient Note** panel, click **Save changes**.



 **Note:** The most recent note is surrounded by a green border.



Search for Patient Notes

1. On the **Patient Notes** page, in the **Search Patient Notes** box, type any identifying information.

2. Click .

The results appear highlighted in the table.

Patient Notes

Sort Q

Date/Time	Note
02/20/2017 09:55	Alert(s) reviewed and accepted: ▲(High Alert: My chest pain was associated with the following symptoms. : Nausea and vomiting.) ▲(Medium Alert: My chest pain was associated with the following symptoms. : Radiates to the jaw, back and or down left arm.)

Sort Patient Notes

On the **Patient Notes** page, click **Sort**.

The information in the list is sorted by date based on the up or down arrow.

If the image is	Then
	The information in the list is sorted in ascending order. This means that earlier values precede later ones, for example, 1/1/2016 will sort ahead of 1/1/2017.
	The information in the list is sorted in descending order. This means that later values precede earlier ones, for example, 1/1/2017 will sort ahead of 1/1/2016.

View Patient Note History (Audit)

You can use the audit functionality to view information about the history of your chart notes.

On the **Patient Notes** page, click **Audit**.



Note: Additions are shown in green text. Deletions are shown in red text.

Patient Notes + Add Note

Sort Q Audit

Date/Time	Note	Author						
02/10/2017 08:34	Patient states he has low energy	Whitacre, Jan, RN						
<table border="1"> <thead> <tr> <th>Date</th> <th>Changes</th> <th>Author</th> </tr> </thead> <tbody> <tr> <td>02/10/2017 08:34</td> <td>Patient states he has low energy</td> <td>Whitacre, Jan, RN</td> </tr> </tbody> </table>			Date	Changes	Author	02/10/2017 08:34	Patient states he has low energy	Whitacre, Jan, RN
Date	Changes	Author						
02/10/2017 08:34	Patient states he has low energy	Whitacre, Jan, RN						
02/10/2017 08:19	Patient states s/he will call their primary care physician for follow up appointment.	Whitacre, Jan, RN						
<table border="1"> <thead> <tr> <th>Date</th> <th>Changes</th> <th>Author</th> </tr> </thead> <tbody> <tr> <td>02/10/2017 08:19</td> <td>Patient states s/he will call their primary care physician for follow up appointment.</td> <td>Whitacre, Jan, RN</td> </tr> </tbody> </table>			Date	Changes	Author	02/10/2017 08:19	Patient states s/he will call their primary care physician for follow up appointment.	Whitacre, Jan, RN
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