## PowerNote Templates -Precompleted Notes & Macros



Digital Health Quick Reference Guide

## This Quick Reference Guide will explain how to:

Save time with your documentation, by creating PowerNote templates using:

- Precompleted Notes for entire PowerNotes
- Macros for sections within a PowerNote

## Important

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#### Not all sections of PowerNotes can be included in templates.

<u>You can include</u>: text, selected answers, and staff members entered through a search. <u>Do not include</u>: images, diagnoses, procedures or CMBS codes.

To make adding diagnoses, procedures and CMBS codes quicker, consider saving them as favourites instead.

# Precompleted Notes: Templates for Entire PowerNotes

To save a Precompleted Note:

- 1. Fill in all the fields of your PowerNote you would like included in the template.
- 2. In the toolbar, select *Documentation* and then *Save as Precompleted Note..*
- 3. The Save As Precompleted Note window will open. Edit the Note Title and then click Save as New.
- The Precompleted Note will be saved. You can then discard the open PowerNote if you do not intend to document the note on the patient chart.

To use a Precompleted Note:

- 1. Open the PowerNote page.
- 2. Select the Precompleted tab.
- 3. Locate your Precompleted Note in the list and open.
- 4. Prefilled sections will be indicated by a .
- 5. Edit and fill in any remaining sections of your PowerNote prior to submitting.





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### Procedural Information < Show Structure> <Use Free Text>

Findings Test findings





Save As Precompleted Note

Save as shared precompleted no

\*Note title: Template Operation Report

Encounter pathway(s): Operation Report

Save as New Update Existing

Cancel

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#### To edit a Precompleted Note:

- 1. Open the Precompleted Note and edit as required.
- 2. Select Documentation and then Save as Precompleted Note..
- 3. The Save As Precompleted Note window will open. Click on Update Existing.

To delete a Precompleted Note:

- 1. Open the PowerNote page.
- 2. Select the Precompleted tab.
- 3. Locate the Precompleted Note you wish to delete, select, and click *Delete*.
- 4. A Confirm Precompleted Note Deletion window will open. Click Yes.

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#### Important

Please be careful when managing PowerNote templates.

It is NOT possible to recover accidentally deleted templates.



## Handy Hint

#### Precompleted Notes can be shared.

Units may wish to create shared Operation Report templates for commonly performed procedures in this way. To create a shared Precompleted Note, select the *Save as shared precompleted note* option when saving. Shared notes are visible in the *Precompleted* tab, indicated by a Y in the shared column.

Please be aware, <u>a shared note can be edited or deleted by any user</u>. We recommend keeping a backup.

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		Test 2 Operation Report Operation Report Y Cemertest, Medical Officer P2

Please adhere to the following naming convention when saving shared Precompleted Notes: [Unit/Team] [Procedure] +/- [Other required identifiers e.g., surgeon initials, protocol] For example: Ortho Total Knee Replacement DT





## Macros: Templates for Sections Within a PowerNote

Macros can be created for whole sections or subsections within a PowerNote (e.g., Procedural Information vs Findings).

To save a macro:

- 1. Enter the data you would like to save in the macro.
- 2. Right click on either the data or the section/subsection heading and select Save Macro As..
- 3. The Save As.. window will open. Enter a title for your macro and then click Create New.

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4. A <sup>M</sup> will appear next to what was just saved, indicating that there is now a macro that can be used.

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To use a macro:

- 1. Click on the <sup>M</sup> where you have saved the macro.
- 2. Select the name of the macro.
- 3. The macro will insert into your note.

To edit or delete a macro:

- 1. Insert the macro you would like to edit or delete into the note.
- 2. Edit the macro if required.
- 3. Right click on the macro and select Save Macro As..
- 4. The Save As.. window will open. Select either Update or Delete depending on your desired outcome.

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