PowerNote Templates - Precompleted Notes & Macros

Digital Health
CONNECTING BEST CARE

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

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.

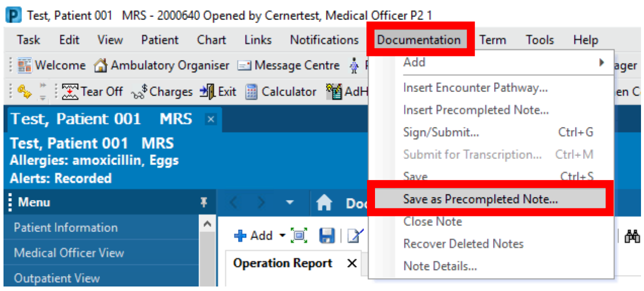
<u>Do not include</u>: images, diagnoses, procedures or CMBS codes.

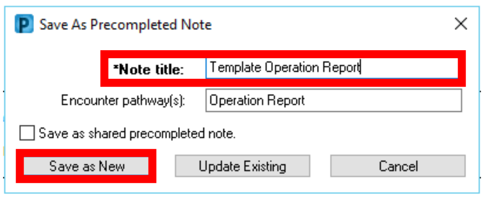
To make adding diagnoses, procedures and CMBS codes quicker, consider saving them as favourites instead.

Precompleted Notes: Templates for Entire PowerNotes

To save a Precompleted Note:

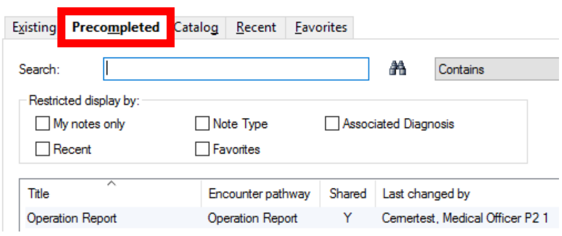
1. Fill in all the fields of your PowerNote you would like included in the template.
2. In the toolbar, select *Documentation* and then *Save as Precompleted Note..*
3. The *Save As Precompleted Note* window will open. Edit the *Note Title* and then click *Save as New.*
4. The Precompleted Note will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

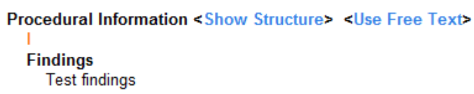




To use a Precompleted Note:

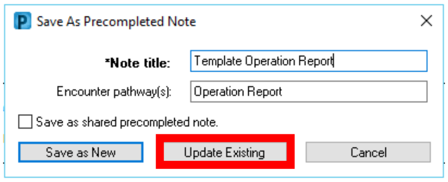
1. Open the PowerNote page.
2. Select the *Precompleted* tab.
3. Locate your Precompleted Note in the list and open.
4. Prefilled sections will be indicated by a | .
5. Edit and fill in any remaining sections of your PowerNote prior to submitting.





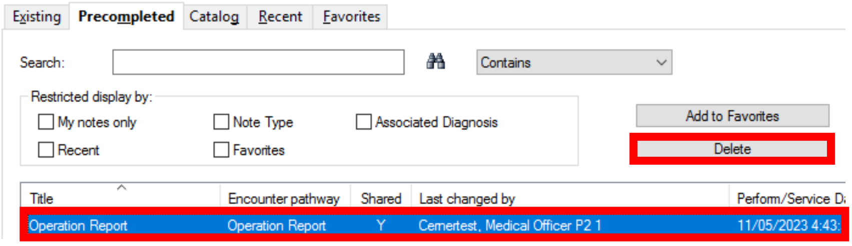
To edit a Precompleted Note:

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*.



Important

Please be careful when managing PowerNote templates.

It is NOT possible to recover accidentally deleted templates.

Handy Hint

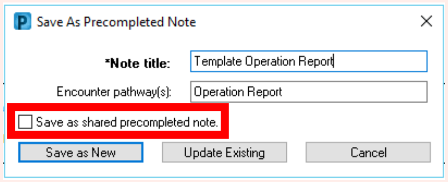
Precompleted Notes can be shared.

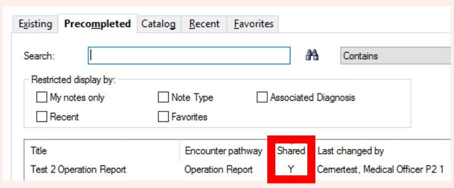
Units may wish to create shared Operation Report templates for commonly performed procedures in this way.

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.





Please adhere to the following naming convention when saving shared Precompleted Notes:

[Unit/Team] [Procedure] +/- [Other required identifiers e.g., surgeon initials, protocol]

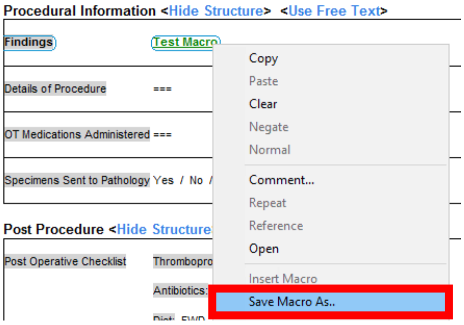
For example: Ortho Total Knee Replacement DT

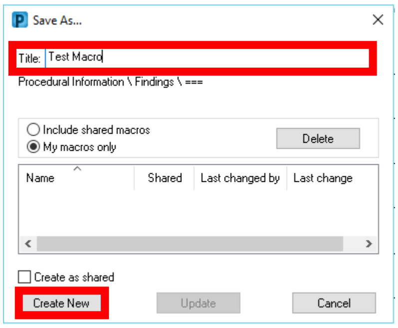
Macros: Templates for Sections Within a PowerNote

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

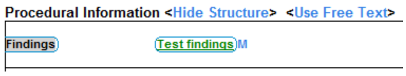
To save a macro:

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*.



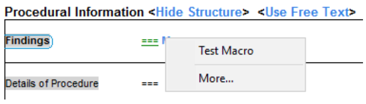


4. A M will appear next to what was just saved, indicating that there is now a macro that can be used.



To use a macro:

1. Click on the M 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.