# **Omitting and Recording Progress Notes**



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#### Overview

Progress Notes are included with every visit by default in Total Mobile and are used, if required to record the details of your interaction with the Client. Progress Notes will need to be either Omitted or Recorded depending on what happens during the visit. Progress Notes can only be Added or Omitted after the Visit has been marked as 'Arrived'.

### **Omitting a Progress Note on an iPad**

- Scroll to the bottom of the visit to locate the Progress Note
- Tap **Omit Progress Notes** icon (bottom, middle of screen)
- Tap Omit Remaining Tasks

The **Omit Remaining Tasks** message displays

Tap Yes

The Progress Notes **Omitted** icon now displays on the Progress Note

Progress Notes can also be omitted by swiping right to left on the Progress note

A red square will display on the far right of the Progress Note with Omit on it

Tap the red square

The Progress Notes **Omitted** icon will display on the Progress Note



## **Omitting and Recording Progress Notes**



### Adding a Progress Note on an iPad

• Tap the **Progress Notes** icon (near bottom of screen)

The Progress Notes screen will display

Mandatory fields are marked with an asterisk \*

- Tap Note Type Select as required
- Tap Speciality Select as required
- Tap Note Details
  - A white text box displays; type or dictate notes as required and tap Back (top, to left of the header Progress Notes - NOT the Back on the far left in Visits section)
- Tap Significant Event Select as required
  - True = Progress Note will display on Significant Events screen
  - False = Progress Note will not display on Significant Events screen
- · Tap This event contains third party information Select as required
  - True = Progress Note contains 3rd party information
  - False = Progress Note does not contain 3rd party information
- Tap Conceal from Client Select as required
- Tap Risks and add if required.
- Tap Do you want to add a photograph? And add if required.
- Tap **Do you wish to validate the Progress Note?** Select as required.
- Tap Submit icon to save the Progress Note form
- Tap Yes

The Progress Notes icon displays with a tick at the bottom of the screen

• Tap Status icon (top right)



Continue to add Appointment information as required



### **Omitting and Recording Progress Notes**



### **Omitting a Progress Note on a Smart Phone**

- Scroll to the bottom of the visit to locate the Progress Note
- Tap and hold the Progress Notes icon
- Tap Omit

The Progress Notes Omitted icon will display on the Progress Note



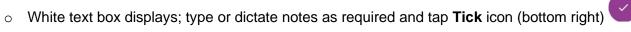
### Adding a Progress Note on a Smart Phone

• Tap the **Progress Notes** icon (near bottom of screen)

The Progress Notes screen displays

Mandatory fields are marked with an asterisk \*

- Tap Note Type Select as required
- Tap Speciality Select as required
- Tap Note Details





- Tap Significant Event Select Yes or No as required
  - Yes = Progress Note will display on Significant Events screen
  - No = Progress Note will not display on Significant Events screen
- Tap Is this third party? Select Yes or No as required
  - Yes = Progress Note contains 3rd party information
  - No = Progress Note does not contain 3rd party information
- Tap Conceal from client? Select Yes or No as required
- Tap Risks and add if required.
- Tap Validate the Progress Note? Select Yes or No as required
- to save the Progress Note form Tap **Submit** icon

displays with a tick at the bottom of the screen The Progress Notes icon

Tap **Status** icon (top right)

Continue to add Appointment information as required

