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Progress Note Overview

Progress Notes are used to document activities between Clinicians and their Clients or Client’s representatives. The Progress Note can be added whilst outcoming an Appointment or directly from the Case Record in the Client’s Clinical Portal – Client’s View.

Adding a Progress Note

- Access the **Clinical Portal – Client’s View** and locate the **Navigation** Pane (right of the screen)
- Click **CR-Case Record** folder
- Click **Progress Notes**
- Click **Add New Note** (bottom centre)

The following fields will auto complete from the service and role information on the users smartcard.

Originator: the name of the person creating the note, this can be updated if required but only the named person can validate the note.

Date: (mandatory) The date/time of the note will automatically display as ‘now’. The date/time may need to be amended as it **must** reflect the date and time of the interaction with the Client.

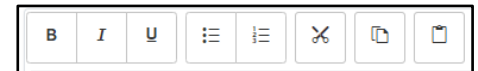


Specialty: (mandatory) will default to speciality of the user creating the note.

Note Type: (mandatory) will default to the usual type of note but can be amended as appropriate.

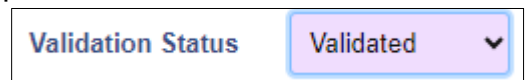
- Type the body of the note as required.

You may apply any formatting options from the toolbar if you wish.



Validating a Progress Note

If your role gives you Validation Rights then you will see the option to Validate the note, this is also a mandatory field.



Progress Notes can be saved without validating, allowing staff to edit the note. Once the note is validated and saved it cannot be changed.

Tick Box Options

You will see further options that can be applied to the note via a series of tick boxes.

Check your Standard Operating Procedure's (SOP's), to guide you and explain what quantifies a significant event and when to use it.

Conceal from Client is not currently used by our Trust.

An example of a third-party note is when a Clinician has a conversation with a representative of the Client.

<input type="checkbox"/> This is a significant event
<input type="checkbox"/> Conceal from Client

<input type="checkbox"/> This Note contains third party information
<input type="checkbox"/> Add to Risk History



Adding to Risk History

- When **Add to Risk History** is ticked, select an appropriate reason from the **Not Selected** list

Notable A&E Attendance Pre-EPR Concerns - see Hx Concerns Assessment and Safeguarding Supervision School Attendance Concerns	>> <<	
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- Click **>>** to move the reason into the **Selected** list

Notable A&E Attendance Pre-EPR Concerns - see Hx Concerns Assessment and School Attendance Concerns Significant Liaison	>> <<	Safeguarding Supervision
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- Click **Save Changes**

At the bottom left of the screen you will see the **Key**.

Filters Applied: All notes for Last 3 Months		
Originator: <u>TRAINER, IT</u>	[DIABETIC MEDICINE]	Detail
5 Jul 2021, 09:46	[Allied Health Professions - Health Visiting]	Amend Lock
When I visited Test this morning he seemed much better, definitely responding to treatment. Will continue to monitor on a daily basis for a week.		
Key Unvalidated Validated Entered-in-error Auto-saved		Add New Note

The note text is dark blue indicating that the note has been validated. Top right of the note you can see Detail, Amend and Lock.



Saved Progress Note Options

Detail

- Click **Detail**

The Progress Note displays the finer details including the date & time of entry.

Originator	TRAINER, IT	Date	5 Jul 2021, 09:46	Note Type	Allied Health Professions - Health Visiting
Originally Entered By	TRAINER, IT	Date	5 Jul 2021, 09:48	Specialty	DIABETIC MEDICINE
Last Updated By	TRAINER, IT	Date	5 Jul 2021, 09:48	Significant	No
Validated By	TRAINER, IT	Date	5 Jul 2021, 09:48	Contains Third Party Info	No
Added to Risk History	No				
Conceal from Client	Not Concealed				

When I visited Test this morning he seemed much better, definitely responding to treatment. Will continue to monitor on a daily basis for a week.

To return to the Progress Note screen

- Click **Back to Progress Notes**

Amend

- Click **Amend**

This will allow you to select any of the tick boxes that you may wish to include in the note. However, it will not allow you to add any further details to the body text of the note as the validation closes this option.

Lock

This option is not used by any service in BCHC.

Entered in Error Progress Notes

If a note has been added in error, it can't be removed or edited. The note can however be crossed through and re-written correctly.

- Click **Amend**
- **Entered in Error**
- Click **Save Changes**

Originator: TRAINER, IT	[DIABETIC MEDICINE]	Detail
5 Jul 2021, 09:46	[Allied Health Professions - Health Visiting]	Amend Lock

~~When I visited Test this morning he seemed much better, definitely responding to treatment. Will continue to monitor on a daily basis for a week.~~

The body of the note will be appear crossed through in a red font colour.



Autosaved Progress Notes

The Autosaved option automatically occurs if you have started to enter information into the body of the progress note and the internet connection to Rio is suspended. The body of the note displays Yellow. This can be re-accessed and continued from the point that the disconnection occurred.

Unvalidated Progress Notes

Light Blue text indicates that the Progress Note is not Validated.

Originator: [ASTON, Deidre](#) [GENERAL MEDICINE]
29 August 2016 8:00 [Allied Health Professions]

[Detail](#)
[Update](#)
[Lock](#)

Patient complaining of knee pain

Note the **Update** link.

Updating a Progress Note

- Click **Update**

The note displays for you to edit or add any additional information and validate the note

- Click **Save Changes** when you have completed the progress note

Originator: [ASTON, Deidre](#) [GENERAL MEDICINE]
29 August 2016 8:00 [Allied Health Professions]

[Detail](#)
[Amend](#)
[Lock](#)

Patient complaining of knee pain. GP prescribed Paracetamol.

The additional information has been added. The colour of the text is now dark blue.

Linking a Progress Note to a Care Plan

Progress Notes can be linked to an existing Care Plan. Locate the Current Problem Types pane (top left), any Care Plans that have been created in the Client's record are visible here.

Current Problem Types
Types associated with current careplans

- Learning Disabilities
- Manage Conditions

B I U [icons]

Test's diabetes is under control now with daily insulin. Hypo's are minimal in comparison to before.

[Detail](#)
[Amend](#)
[Lock](#)

Last Auto Save: 11:56:06

- Tick the required Care Plan
- Click **Save Changes** when you have completed the progress note



Filtering Progress Notes

Note Types*	Problem Types
<input type="checkbox"/>	Administrative/Clerical
<input type="checkbox"/>	Allied Health Professions
<input type="checkbox"/>	Early Years (Non-Admin)
<input type="checkbox"/>	Early Years Admin
<input type="checkbox"/>	Health Visitor Admin
<input type="checkbox"/>	Health Visitor Nurse
<input type="checkbox"/>	LD CPA Review
<input type="checkbox"/>	Medical
<input type="checkbox"/>	Non Clinical Services
<input type="checkbox"/>	Nursing
<input type="checkbox"/>	Paediatric Sexual Assault Service*
<input type="checkbox"/>	Paediatrician
<input checked="" type="checkbox"/>	Specialist Nurse

Validated Un-Validated All
 Exclude 3rd Party
 Date Range: Last 3 Months

A Client may have many Progress Notes recorded in their Rio record. It may be difficult at times to find the information you are looking for. Progress notes can be filtered in a variety of ways.

The **Note Types*** check boxes allow you to filter by type of note e.g., Admin, Medical, Clinical etc.

Clicking the plus will expand the options to display specific services.

There is also a 'Notes by' check box to filter notes created by 'you'.

- Click the required **check box**
- Click the **Filter Display** button to apply the filter

To remove the filter:

- Remove the tick from the check box
- Click the **Filter Display** button to remove the filter

You can also filter for **Validated** and **Un-Validated** notes using the radio buttons.

Date ranges can be set using the Date Range drop-down list.

- Click the **Filter Display** button to apply the filter

Validated Un-Validated All
 Exclude 3rd Party
 Date Range: Last 3 Months

Validated Un-Validated All
 Exclude 3rd Party
 Date Range: Last 1 Week

You can also type a specific keyword in the **filter text** box

- Click the **Filter Display** button to apply the filter



Associated Documents


You can associate a document with a specific progress note.

Once notes have been added

- Click the  next to Associated Documents

Associated Documents

Date	Type	Title
-No Documents Associated-		



A new window will display.

Set Associated Documents

Filter by Document Type -All-

Documents not associated with this Progress Note

Date	Type	Title
1 Jul 2013	Referral Document	Referral letter from GP W

▼ ▲

Documents associated with this Progress Note


Date	Type	Title
-No Documents Associated-		

Done
Close

[Upload New Document](#)

- Click **Upload New Document** link

Complete the mandatory fields.

File	Choose File No file chosen
Author*	<input style="width: 95%;" type="text"/>
Document Title	<input style="width: 95%;" type="text"/>
Document Date	<input style="width: 95%;" type="text"/> 
Document Type	Please Select ▼
Description	<div style="border: 1px solid #ccc; height: 40px; width: 95%;"></div>
<input type="radio"/> Draft Version <input checked="" type="radio"/> Final Version	

Client Personal Contacts

Contact Name / NHS Number	Contact Type	Selected
Mr John SMITH	Next of Kin	<input type="checkbox"/>



- Click Choose File

Locate file to be uploaded.

- Add name of Author of document

Note, if this is not filled in the name of person logged into RiO will auto record

- **Document title** Enter name of document following Trust Naming Convention
- **Document Date** Enter as required
- **Document Type** Select as required from drop down list
- **Description** Enter as required
- **Draft Version Final Version** Will default to Final Version but can be changed if required
- Click **Upload Document**

The Set Associated Documents window will display with the chosen document in the bottom half of the window

- **Click Done**

The document will display under Associated Documents in Progress Notes

- Click **Save Changes**