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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.

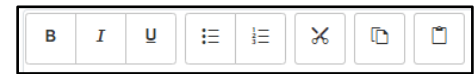


Specialty: (mandatory) will default to speciality of the user creating the note.

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

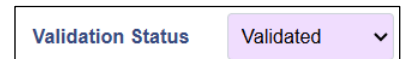
- Type the body of the note as required.

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.

This Note contains third party information: This is used, for example, when a Clinician has a conversation with a Patient's next of kin.

Conceal from Client: This option is not currently being used at BCHC

This is a significant event: Refer to your Standard Operating Procedure's (SOP's), to guide you and explain what quantifies a significant event and when to use it

☐ This Note contains third party information
☐ Conceal from Client
☐ This is a significant event
☐ 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 29 August 2016 8:00	[GENERAL MEDICINE] [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 29 August 2016 8:00	[GENERAL MEDICINE] [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 [List Icon] [Link Icon] [Image Icon] [ABC Icon] Test's diabetes is under control now with daily insulin. Hypo's are minimal in comparison to before. Last Auto Save: 11:56:06
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- Tick the required Care Plan
- Click **Save Changes** when you have completed the progress note



Filtering Progress Notes

Note Types*	Problem Types
☐ Administrative/Clerical	
☐ Allied Health Professions	
☐ Early Years (Non-Admin)	
☐ Early Years Admin	
☐ Health Visitor Admin	
☐ Health Visitor Nurse	
☐ LD CPA Review	
☐ Medical	
☐ Non Clinical Services	
☐ Nursing	
☐ Paediatric Sexual Assault Service*	
☐ Paediatrician	
☒ 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

▼ ▲

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
 Author*
 Document Title
 Document Date
 Document Type
 Description

Choose File | No file chosen



Please Select ▼

Draft Version ☐ Final Version ☒

Client Personal Contacts

Contact Name / NHS Number	Contact Type	Selected
Mr John SMITH	Next of Kin	☐



- 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**