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## Overview

Progress Notes are used to document the interactions which take place between Health Care Professionals and their Clients.

## Adding a Progress Note

- Display your Ward in **Bed View**
- Locate the **Client** you want to record a Progress Note for
- Click the **Progress Notes** link in the Client information displayed to the right of the bed icon

Progress Notes can also be recorded via the Patients Clinical Portal – Client’s View screen

- Access the **Clinical Portal – Client’s View** screen
- Locate the **Navigation** Pane (right of the screen)
- Click **Case Record** folder
- Click **Progress Notes**

**The Progress Notes** screen will display

Progress Notes are displayed in date/time order, the most recent note will be at the top, it is **very important to make sure that the date/time of any note recorded, accurately reflects the time of the interaction with the Patient.**

- Click **Add New Note** (bottom centre)

# Inpatient Progress Notes



At the top of the progress note you will see Five fields

- **Originator** Your name, but can be amended
- **Date** Defaults to today/now, **update** it to time of the interaction
- **Specialty** Your speciality
- **Note Type** Will default to your role, but can be amended
- **Validation** Select as required (see below for information on Validating a Progress Note)
- **Type** or paste your **notes** in the text box

If your role gives you Validation Rights then you will see the option to **Validate** the note, this field is pink indicating it is mandatory and must be completed.

Validation Status	Validated ▼
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Progress Notes can be saved without validating, allowing you to edit the note at a later time. Once the note is validated and saved it cannot be changed.

You will see check box options below the note area

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

<input type="checkbox"/>	This Note contains third party information
<input type="checkbox"/>	Conceal from Client
<input type="checkbox"/>	This is a significant event
<input type="checkbox"/>	Add to Risk History

**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

**Add to Risk History:** Refer to your Standard Operating Procedure's (SOP's), to guide you and explain if and when to use Add to Risk History

- When you have finished writing your note, click **Save Changes**

Your Progress Note will display on the Progress Notes screen

If the note has been validated, to the top right of the note you can see Detail, Amend and Lock.

**Detail** will display details of the date & time of entry

**Amend** allows you to select any of the tick boxes that you may wish to include in the note or to mark the note as Entered in Error. However, it will not allow you to add any further details to the body text of the note as the validation closes this option.

Filters Applied: All notes for Last 3 Months			
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.			
Key Unvalidated Validated Entered-in-error Auto-saved			
Add New Note			

**Lock** is not used by any service in BCHC.

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

**Unvalidated Progress Notes** display the text in light blue and include an **Update** link. Clicking the Update link will allow you to amend the body text of the Progress Note.



## 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: <a href="#">TRAINER, IT</a>	[ DIABETIC MEDICINE ]	<a href="#">Detail</a>
5 Jul 2021, 09:46	[ Allied Health Professions - Health Visiting ]	<a href="#">Amend</a> <a href="#">Lock</a>
<del>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.</del>		

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

## Filtering Progress Notes

A Client may have many Progress Notes recorded in their Rio record and sometimes it is difficult 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 Note Type check box to filter by notes created by 'you'.

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

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
<input type="radio"/> Validated <input type="radio"/> Un-Validated <input checked="" type="radio"/> All	
<input type="checkbox"/> Exclude 3rd Party	
Date Range Last 3 Months <input type="checkbox"/>	
<input type="text" value="&lt;Please enter filter text&gt;"/>	
<b>Filter Display</b>	

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.

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

<input type="radio"/> Validated <input checked="" type="radio"/> Un-Validated <input type="radio"/> All	
<input type="checkbox"/> Exclude 3rd Party	
Date Range Last 3 Months <input checked="" type="checkbox"/>	
<input type="text" value="&lt;Please enter filter text&gt;"/>	
<b>Filter Display</b>	