Is there a way to auto-save the Note draft?

- Yes. Notes has a built-in auto-save feature that will save the Note draft every 30 seconds. If the user closes the patient's chart or Thrive without manually saving the draft, the last auto-saved draft will be available in the Notes List.

Why are the Home Medications not pulling into the Notes Home Meds filter?

- The Notes application will only pull in Home Medications that have been confirmed. Please review Medication Reconciliation for the patient and verify that the Home Meds are confirmed. These medications will appear with a green check mark next to the medication name. If the Note was created prior to the Home Meds being confirmed, the user can refresh the filter to pull in the recently confirmed medications.

How can a user re-pull in the Notes filter data after the Note is created?

- A user can refresh the Notes filter in two ways:
  - The user can right click the filter data within the Note draft and then select "Refresh Filter". This option will refresh this filters data within the Note.
  - The user can select the "Refresh Filters" button in the Notes draft tool bar. This option will refresh all the filters within the Note.

Is there a way to require a user to address a question/area of the Note?

- The Notes application has an option to set anchors within the Note template. These anchors must be removed from the Note before the user is able to sign. To remove the anchor, the user must select the anchor and delete. This will allow the site to indicate a particular question/area of the Note that the user should review and address.

How does a user know that there are anchors that need to be addressed?

- When the user is in the Create Note panel, the system will display a red action bar that will indicate the number of unresolved anchors remaining. If the user selects sign while there are unresolved anchors, the system will display a message that the anchors must be acknowledged.

Is there an easy way for the user to jump to the next unresolved anchor?

- Yes. The user has two options to navigate to the next unresolved anchor:
  - The user can use the F2 key on the keyboard.
  - The user can select the word "anchor(s)" in the red action bar. You have **3** unresolved **anchor(s)**

Is there a way to locate key information in previous Notes?

- Yes. When a user is in the Note List panel, there is an option for "Filter…". If the user types in a key word/words, the system will search all documents in the Note List for any document that contains that data. Any document that contains the key word/words will appear in the list and all others will filter out. When the user selects the document to review, the key word/words will appear in the document highlighted.

Is there a way to save a template as a favorite?

- Yes. When a user is in the Template Library, there is a star icon next to each template. Select the star icon next to each template the user wants to add to their favorites list. Once a template is saved as a favorite, it will now appear under the Templates header in the Create Note panel. This will allow for easy access to the common templates. The user still has the ability to search all available templates using the "search across name" option.

If a user needs to add additional information to a signed Note, does the Note have to be edited?

- No. If a user needs to add additional/clarifying information to a signed Note, the user has the ability to insert an addendum into the Note. The addendum will appear at the top of the Note with an indication it is an addendum and include the username, date and time it the addendum was signed.
- PATH: Select pt chart > Notes > Note List > select the appropriate signed Note > select "Add Addendum" > enter any needed information in the available area > Sign Addendum
    - ***NOTE****: The original note information cannot be edited/changed when inserting an addendum.*

Why is the Notes application not available in the patient's chart?

- For a user to see the Notes application in the application panel, the Notes application has to be activated and the user/role has to have the Notes application permission.
    - To activate Notes for your facility, please contact an Evident representative.
    - To review access to the Notes application, please follow the path: Thrive UX-System Administration-select UBL/ROLE-Application
        - The UBL/ROLE must have allowed access to "NT Notes".

How does Report Distribution work for the Notes Application?

- Report Distribution has basically the same setup as Documentation and Physician Documentation. The only difference is there is a checkbox on the Note Type itself that needs to be selected in order for to be setup for Report Distribution. For more info about Report Distribution, please review the Report Distribution for Notes 2.4.2 document on CPSIQ.

Is there a Notes header that needs to be set up for all Templates/Notes Titles like there is in Documentation and Physician Documentation?

- Facility Name and address pulls from the 99999 physician in the physician tables. If it is a department with a clinic code then it is the name and address that is set up in the Clinic Table.

We had many prebuilt "instructions" in Documentation and Physician Documentation. How do I get these into NOTES?

- Hopefully the user will not need the abundant Instructions as that information can be built directly into the Notes templates. Sites have built additional Note templates to function like Instructions for common phrases/inserts (i.e., Strep Discharge Plan).