# Table Maintenance - Notes Admin

# Table Maintenance - Notes Admin



**Version** : 21

**Published** : March 2024

**TruBridge**
54 St. Emanuel Street
Mobile, AL 36602
T(877) 424-1777
trubridge.com

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## Chapter 9 Note Phrases

# Chapter 1 Introduction

## 1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. TruBridge Promoting Interoperability Program certified products, recommended processes, and supporting documentation are based on TruBridge's interpretation of the Promoting Interoperability Program regulations, technical specifications, and vendor specifications provided by CMS, ONC, and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client’s attestation, TruBridge bears no responsibility for attestation information submitted by the client.

## 1.2 What's New

This section introduces the new features and improvements for the **Table Maintenance - Notes Admin** for release Version 21. A brief summary of each enhancement is given referencing its particular location if applicable. As new branches of Version 21 are made available, the original enhancements will be moved to the Previous Work Requests section. The enhancements related to the most current branch available will be listed under the main What's New section.

Each enhancement includes the Work Request (WR) Number and the description. If further information is needed, please contact the Client Services Support.

***Notes 2.9.0***

The following updates have been made to the Notes application in Notes 2.9.0.

**Add Exclude from EHI and Exclude from CCDA to the Note Type -- CPSI-30868**

DESCRIPTION: New check boxes, **Exclude from EHI** and **Exclude from CCDA**, are available within the Note Type Table. Selecting the **Exclude from EHI** check box will exclude notes with the selected Note Type from the EHI Export Tool. Selecting the **Exclude from CCDA** check box will exclude notes with the selected Note Type from pulling to the CCDA.

DOCUMENTATION: See Add Note Type 5.

**Add Two New Columns in the Note Types Table -- CPSI-32352**

DESCRIPTION: New columns, **Exclude from EHI** and **Exclude from CCDA**, were added to the Note Type Table. This will allow users to quickly see when a Note Type has been excluded from the EHI Export Tool or from pulling to the CCDA.

DOCUMENTATION: See Note Type Table 4.

**Document Category to Add to the Note Type As Crosswalk for the CCDA -- CPSI-33848**

DESCRIPTION: A new field, **Document Category**, has been added to the Note Type table that will create a crosswalk for the CNCR table. This will allow Note Types to be assigned a Document Category so they will appear on the CCDA. When Notes 2.9.0 is loaded, if a LOINC code in the Note Type matches a LOINC code in the Document Category, the Document Category is automatically loaded. Newly created note types and note types with LOINC codes that do not match will require manual review and adjustment to populate the note to the CCDA.

DOCUMENTATION: See Add Note Type 5.

***Notes 2.8.0 - 21.03.10***

The Notes 2.8.0 environment is was included within the 21.03.10 update. This update is a maintenance update and will load during each site's scheduled maintenance window. Users will be automatically pointed to the Notes 2.8.0 environment when the server comes back up from the maintenance window.

The following updates have been made to the Notes application:

**Lab Filter Inverted Grid -- CPSI-22839**

DESCRIPTION: The Lab filter may now be set up as inverted so the user may see trends across a particular lab. In the filter toolbox, a new check box 'Inverted View' is available. Selecting this check box will invert the table so the Test will display vertically with the date/time displayed horizontally.

DOCUMENTATION: See Filters Split and Entry 14

**Vitals Custom Filter Inverted Grid -- CPSI-22909**

DESCRIPTION: The Vital Signs filter may now be set up as inverted so the user may see trends across a particular vital sign. In the filter toolbox, a new check box 'Inverted View' is available. Selecting this check box will invert the table so the vitals description will display vertically with the date/time displayed horizontally.

DOCUMENTATION: See Split and Entry 14

# Chapter 2 Overview

This User Guide describes the Notes Admin Tables that are maintained via Table Maintenance. The Notes application must be allowed on the user's login in order to have access to the Notes Admin Tables within Table Maintenance.

***NOTE:*** *HIPAA regulations require that Psychotherapy Notes be kept separate from the rest of the medical record and that only the originator of the document have access to them. The TruBridge EHR is built to be a collaborative tool and therefore does not have the ability to control access specifically to Psychotherapy Notes. For this reason, all Psychotherapy Notes should be stored outside the TruBridge EHR.*

***NOTE:*** *Facilities outside of the United States may choose a date format of MM/DD/YYYY or DD/MM/YYYY to be used on all date fields in the Notes Application. Whichever date format is selected will be reflected in all date fields and column displays throughout the application. A TruBridge Representative should be contacted in order for the date format to be changed.*

# Chapter 3 Note Types

## 3.1 Overview

The Note Type table will display all predefined note types available in the drop down menu when selecting a note type within the Create Note panel or within a template. This chapter will discuss creating note types and inactivating existing note types.

## 3.2 Note Type Table

The Note type table will display the current listing of all note types available within notes. The active notes will display by default.

A **Show Inactive** check box, when selected, will display all note types that are currently hidden from view and not selectable within the Create Note panel or Create Template panel.

**Add Note Type** allows new type to be created. See Add Note Type 5 for additional information

The Note Type screen will display several columns to identify a note type. The following columns are available to display:

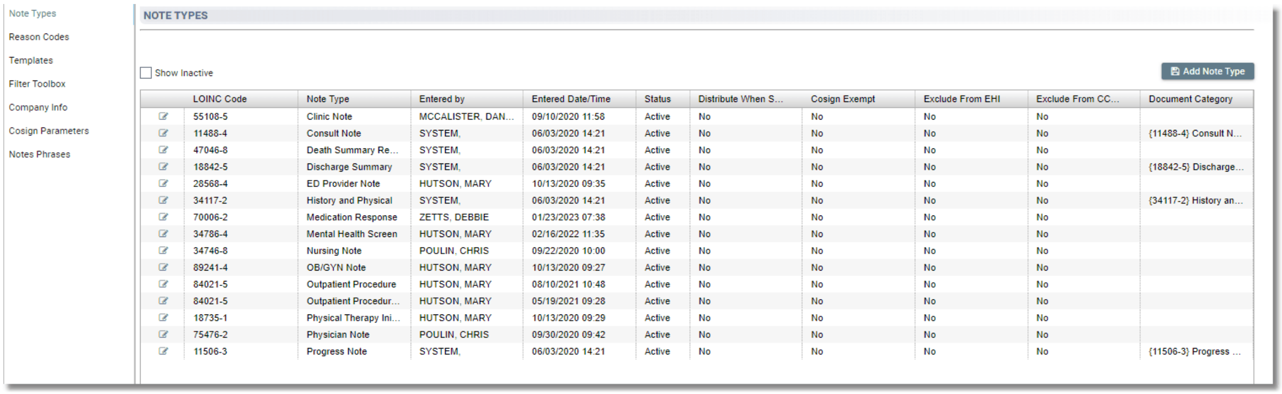
- **LOINC Code**: Displays the LOINC code associated with the note type.
- **Note Type**: Displays the note type that will display in the note type listing.
- **Enter By**: Displays the name of the user who entered the note type.
- **Entered Date/Time**: Displays the date and time the note type was entered within the listing.
- **Status**: Displays whether the note type is active or inactive. Inactive codes will not display in a note type listing within the Create Note panel or Template Library panel.
- **Distribute when signed**: Displays if a note type has been marked as Auto Distribute if signed. When the check box has been selected, a status of Yes will display within the column. If the check box has not been selected a status of No will display.
- **Cosign Exempt**: Displays if a note type has been marked as Cosign Exempt. When the check box has been selected, a status of Yes will display within the column. If the check box has not been selected a status of No will display.
- **Exclude from EHI**: Displays if a note type has been marked as Exclude from EHI. When the check box has been selected, a status of Yes will display within the column. If the check box has not been selected, a status of No will display.
- **Exclude From CCDA**: Displays if a note type has been marked as Exclude from CCDA. When the check box has been selected, a status of Yes will display within the column. If the check box has not been selected, a status of No will display.

- **Documentation Category**: Displays the document category selected if available within the note type.

The grid may also be personalized to display the view using the same options listed within the Reason Codes Table. Please see the Reason Codes Table 7 for additional information on column sorting options.

To make a note type inactive, select the edit icon. A pop up window will display the note type and the LOINC code and a check box for active. Deselecting the **Active check box** will change the note type status to inactive. Once **Save** is selected, a confirmation will display, "Are you sure you want to Inactivate this Note Type?" Selecting **Yes** will change the status to inactive and selecting **No** will leave note type as active. The note type and LOINC may not be edited once a note type has been used within a note.

Select **Web Client** > **Tables** > **Notes Admin** > **Note Types**




| LOINC Code | Note Type | Entered by | Entered Date/Time | Status | Distribute When S... | Cosign Exempt | Exclude From EHI | Exclude From CC... | Document Category |
|---|---|---|---|---|---|---|---|---|---|
| 55108-5 | Clinic Note | MCCALISTER, DAN... | 09/10/2020 11:58 | Active | No | No | No | No | |
| 11488-4 | Consult Note | SYSTEM, | 06/03/2020 14:21 | Active | No | No | No | No | {11488-4} Consult N... |
| 47046-8 | Death Summary Re... | SYSTEM, | 06/03/2020 14:21 | Active | No | No | No | No | |
| 18842-5 | Discharge Summary | SYSTEM, | 06/03/2020 14:21 | Active | No | No | No | No | {18842-5} Discharge... |
| 28568-4 | ED Provider Note | HUTSON, MARY | 10/13/2020 09:35 | Active | No | No | No | No | |
| 34117-2 | History and Physical | SYSTEM, | 06/03/2020 14:21 | Active | No | No | No | No | {34117-2} History an... |
| 70006-2 | Medication Response | ZETTS, DEBBIE | 01/23/2023 07:38 | Active | No | No | No | No | |
| 34786-4 | Mental Health Screen | HUTSON, MARY | 02/16/2022 11:35 | Active | No | No | No | No | |
| 34746-8 | Nursing Note | POULIN, CHRIS | 09/22/2020 10:00 | Active | No | No | No | No | |
| 89241-4 | OB/GYN Note | HUTSON, MARY | 10/13/2020 09:27 | Active | No | No | No | No | |
| 84021-5 | Outpatient Procedure | HUTSON, MARY | 08/10/2021 10:48 | Active | No | No | No | No | |
| 84021-5 | Outpatient Procedur... | HUTSON, MARY | 05/19/2021 09:28 | Active | No | No | No | No | |
| 18735-1 | Physical Therapy Ini... | HUTSON, MARY | 10/13/2020 09:29 | Active | No | No | No | No | |
| 75476-2 | Physician Note | POULIN, CHRIS | 09/30/2020 09:42 | Active | No | No | No | No | |
| 11506-3 | Progress Note | SYSTEM, | 06/03/2020 14:21 | Active | No | No | No | No | {11506-3} Progress ... |

**Note Type Table**

### *Add Note Type*

To add a new note type:

1. Select **Add Note Type**.

2. A popup will display that will allow a new note type to be entered within the ***Note Type** field that will display in the Note Type listing.

3. A LOINC code must be selected to save the note type. From the list in the ***LOINC Code** field, add a LOINC Code that closely describes the note type that is created.

4. If the note type should be used to pull a signed note to the Clinical Notes section of the CCDA, adding a **Document Category** to the note type creates a crosswalk for the Clinical Note Classification Reporting (CNCR) table. Assigning a document category allows the note type to pull a signed note within the Clinical Notes section of the CCDA.

5. Select the **Distribute when signed** check box if the note type should auto-distribute the note

once it has been signed.

6. Select the **Cosign Exempt** check box if the note type should be designated as cosign exempt. When this is selected on a note type, the Cosign drop-down will not display for users who require a cosignature.

7. Select the **Exclude from EHI** check box if the note type should be excluded from the EHI Export Tool.

8. Select the **Exclude from CCDA** check box if the note type should be excluded from pulling to the CCDA.

***NOTE****: The ability to excluded a note using the above exclude check boxes (#7 & #8) is intended for Psychotherapy Notes. EHI does not include Psychotherapy Notes or any information compiled in a reasonable anticipation of, or for use in, a civil, criminal, or administrative action or proceeding. Exclusion of items other than psychotherapy notes or information for legal proceedings could have information blocking implications, unless permitted under applicable state or federal privacy law or specified in an information blocking exception.*

9. Once the Note Type and LOINC Code fields have been addressed, select **Save** to create the new note type. Selecting **Cancel** will return the user to the Note Type screen without saving.

Both the Note Type and LOINC Code fields are required in order to save. A note type may be edited by selecting the edit icon as long as the note type has not been used within a note. Once the note type has been used within a note, the Note Type and LOINC Code may not be edited.

***NOTE****: The Clinical Note Classification Reporting table (Tables > Control > Clinical Note Classification Reporting) will also display a signed note in the Clinical Notes section of the CCDA if one of the 8 LOINC code classifications are used within the note type. For more information on the CNCR LOINC code classifications, see the Clinical Note Classification Reporting chapter in the Table Maintenance - Control User Guide.*

***NOTE****: The ability to excluded a note using the above exclude check boxes is intended for Psychotherapy Notes. EHI does not include Psychotherapy Notes or any information compiled in a reasonable anticipation of, or for use in, a civil, criminal, or administrative action or proceeding. Exclusion of items other than psychotherapy notes or information for legal proceedings could have information blocking implications, unless permitted under applicable state or federal privacy law or specified in an information blocking exception.*

# Chapter 4 Reason Codes

## 4.1 Overview

The Reason Code table will display all predefined reasons available in the drop down menu when selecting a reason for cosign return, or marking a signed note erroneous. This chapter will discuss creating new reason codes, editing existing codes and assigning them to a reason code area.

## 4.2 Reason Codes Table

The Reason code table will display the current listing of all reason codes available within notes.

A **Show Inactive** check box, when selected, will display all reason codes that are currently hidden from view and not selectable within a reason code listing.

To add a new reason, select **Add Reason Code**. A pop up will display to create a new reason code. The reason that should display in the listing will be entered within the **Code** field. An entry must be added to the code field in order to be able to select Save.

The **Area** designates which reason code listing the code will display in. The options are: Mark Erroneous and Cosign Return. A reason code may only have one area associated with it, but the same reason code may be created to list for both areas.

The option '**Other'** is a default listing for the Mark Erroneous listing and does not need to be created. Selecting Other from the Mark Erroneous listing will allow a free text reason for marking a note erroneous.

The **Require 'Other' reason** check box should only be used when the code: *Other* is manually created for the Area: *Cosigned Return*. Selecting the check box will allow a free text box after the option from the listing has been selected to allow additional information to be entered for a reason to return a cosignature.

The Reason Code screen will display several columns to identify a reason. The following columns are available to display:

- **Reason Code**: Displays the code that will display in the reason code listing.
- **Area**: Displays the table that the reason code will display within. There are currently two options: Mark Erroneous and Cosign Return.
- **Enter By**: Displays the name of the user who entered the reason code.
- **Entered Date/Time**: Displays the date and time the reason code was entered within the listing.
- **Status**: Displays whether the reason code is active or inactive. Inactive codes will not display in a reason code listing.

The grid may also be personalized to display the view using the options listed below:

- **Change the Column Order**: The columns may be placed in any desired order by selecting a column and dragging it to the desired order number. For example, if the **Created Date Time** field should display in the first column, select Created Date Time and drag it in front of the Visit # column.

- **Show/Hide Columns**: In any column, select the  hamburger icon, then select the  column icon. This area determines what columns display. A check mark means the column is displaying. The default grid and column options display as listed above within Note List grid.

- **Change the Width and Sort Columns**: There are several sorting and column width options. The first sort option is to select a column which will auto sort with an arrow displayed. When the arrow is pointing down it sorts the data in ascending order. When the arrow is pointing up it sorts the data in descending order. Selecting the column again will remove the arrow. Selecting the hamburger icon is another way to further perform column setup. The following sorting and column width options are available:
  - **Pin Column:** Allows the column to be moved to the far right or left of the grid. The following options are available:
    - **Pin Left**: Pins the column to the far left of the grid, displaying in the first column.
    - **Pin Right**: Pins the column to the far right of the grid, displaying in the last column.
    - **No Pin**: Removes the selected pin and places the column back in its original location.
  - **Autosize This Column**: Allows the selected column to autosize the width of the information displaying.
  - **Autosize All Columns**: Allows all columns to autosize the width of the information displaying.
  - **Group by**: Allows the columns to be sorted by whichever column is selected. For example, if **Area** is selected, then Group by will display as Group By Area. It will sort the columns by the Area adding a plus sign icon to the first column, that when selected, will expand a listing of reason codes associated with the selected Area. Selecting the minus sign icon will close the listing.
  - **Reset Columns:** Allows the Thrive default setting of the columns to be reapplied.
  - **Tool Panel**: Allows the column Tool Panel to display on the right hand side of the Note List screen for easy access to edit the grid display. To re-hide the tool panel, select any column and reselect **Tool Panel**. The following options are available within the Tool Panel:
    - **Show/Hide Columns:** See Show Hide Columns above for more information.
    - **Row Groups:** Allows the rows to be grouped by the column that is dragged to the Row Group area. For example, dragging Entered By to the Row Group area will sort the rows into single rows of each user have created a reason code. See Group by above for more information.
    - **Values:** Currently TruBridge use only.

- **Search the Columns**: Select the hamburger icon and then select the  filter icon. This allows the notes to be searched via the following search options:
  - Alphabetical/Numerical Columns:
    - Equals

- Not Equal
- Starts With
- Ends With
- Contains
- Not Contains

o Date/Time Columns

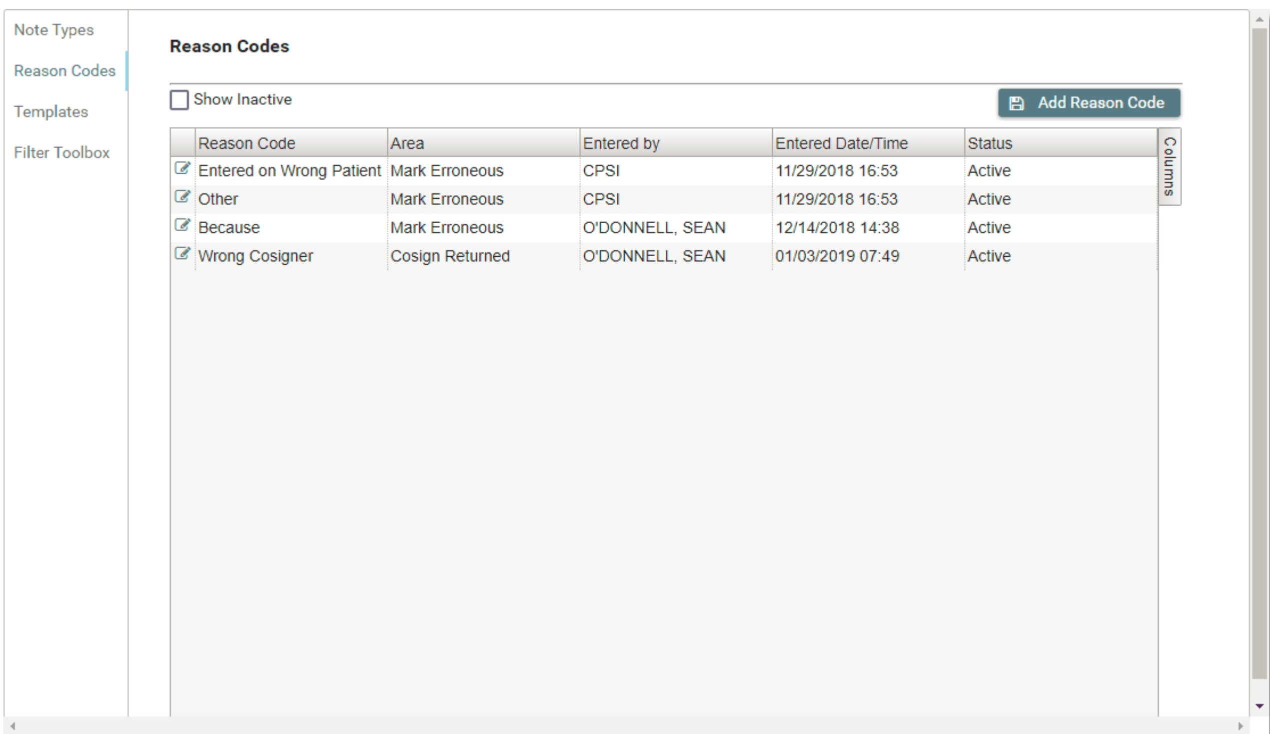
- Equals
- Greater Than
- Less Than
- Note Equal
- In Range

***NOTE****: All changes made to the Reason Code grid will save automatically to the users UBL.*

To make a reason code inactive select the edit icon. A pop up window will display the area the code is designated to and a check box for active. Deselecting the **Active check box** will change the code status to inactive. Once **Save** is selected a confirmation will display, "Are you sure you want to Inactivate this Reason Code?" Selecting **Yes** will change the status to inactive and selecting **No** will mark the code as active. The code and area may not be edited.

***NOTE****: Reason codes entered by SYSTEM may not be edited.*

Select **Web Client** > **Tables** > **Notes Admin** > **Reason Codes**




**Reason Code Table**

# Chapter 5 Templates

## 5.1 Overview

The Template table within the Table Maintenance - Notes Admin will function the same as the Template Library within Notes. Please see the Template Library chapter within the Notes User Guide for the current functionality of this table.

# Chapter 6 Filter Toolbox

## 6.1 Overview

The Filter Toolbox allows the ability to customize the patient data elements that may be pulled into a note. The custom filters may define how they are grouped, what data elements display and the format in which they display within the note. The filter toolbox may be accessed from within the Filter Toolbox table in the Notes Admin area of Table Maintenance, a create note panel or a create template panel by selecting  filter icon within a data set.

There are several different views for the Filter Toolbox: List, Split and Entry. To toggle between views, select one of the following:

- **List**: Displays a listing of all filters and the dataset drop down will default to blank which allows all filters to display. List is the default view for the Filter Toolbox.

- **Split**: Displays a split screen with the listing of the filters and preview of the selected filter. A dataset must be selected from the drop down prior to selecting Split.

- **Entry**: Displays a full screen preview of the selected filter, where the filter may be edited. A dataset must be selected from the drop down prior to selecting Entry.

**NOTE**: *It is recommended to setup a new test patient with a full set of data to be utilized within this area.*

## 6.2 List

The Filter Toolbox displays the current listing of customized filters.

A **Dataset** must first be selected prior to selecting Create New Filter or to preview a filter using the Split/Entry option(s). If a dataset is not selected, a notification '*Dataset is required*' will display within the listing. Select the dataset drop down to choose a dataset.

To create a new custom filter select the **Create New Filter** option. Please see Entry 14 for additional information.

The **Patient** look up allows the ability to choose a patient account to assist in building a custom filter. Please see Patient 13 for additional information.

**NOTE**: *It is recommended to setup a new test patient with a robust amount of data within the chart to be utilized when building custom filters.*

The **Search** field allows the content in the columns to find specific word(s).

Selecting the **Show Deleted** check box will display deleted filters.

The Filter Toolbox screen will display several columns to identify a filter. The following columns are available to display:

- **Edit**: Allows the selected filter to be edited. The entry screen will display, allowing modifications to the existing filter. Please see Split and Entry 14 for additional information. The edit icon is only available if the user is the original creator of the filter, otherwise the copy icon displays in its place.

- **Copy**: Allows the selected filter to be copied into a new filter. The entry screen will display a copy of the existing filter data. Please see Split and Entry 14 for additional information.

- **Insert Into Note**: Allows the selected filter to be inserted into the current note. This option is only available if the filter toolbox is accessed from the filter icon within the Create Note panel on a patient account.

- **Filter Detail**: When hovered, a preview of the details in the filter will display. The detail that will display is the filter name, custom title, format of the filter, filters, the columns included to display, creator of the filter and the date it was last modified.

- **Star**: When selected, allows the filter to be added to the My Favorites View of filters, within the Create Note Panel.

- **Name**: Displays the name of the filter.

- **Display Title**: Displays the display title, if entered, of the filter.

- **Dataset**: Displays the dataset the filter was created within.

- **Format**: Displays the type of format that the filter will display.

- **Create By**: Displays the name of the user who created the filter.

- **Favorited**: Displays the number of users who have selected the filter as a favorite filter.

The grid may also be personalized to display the view using the same options listed within the Reason Codes Table. Please see the Reason Codes Table 7 for additional information on any column sorting options.

***NOTE****: System created filters may not be edited. The filter format may be copied and a new custom filter may then be created.*

***Patient***

The Patient look up within the the List and Entry screens is available to search for a patient visit to use their data as an example for building custom filters.

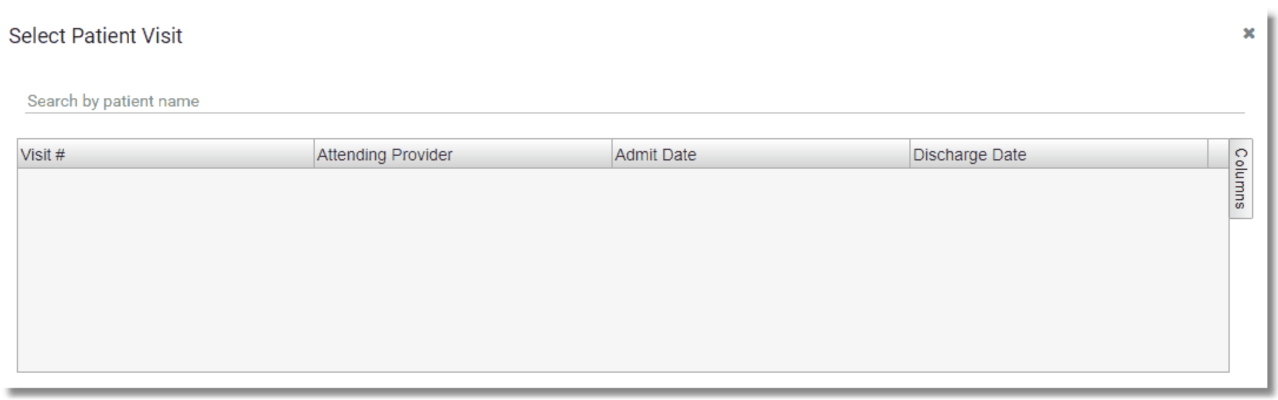
The search criteria is the patients first or last name and after two characters have been entered, results will begin to display. The patients that meet the criteria within the field will display the following information: first/last name, date of birth and medical record. The listing will be sorted alphabetically by last name. Once a patient is selected from the listing, all visits for that medical record will display within the grid. The following columns will display:

- **Visit #** : Displays the account number for the patient's visit.
- **Attending Provider**: Displays the provider listed as the attending physician for that patient's visit.
- **Admit Date**: Displays the admit date for the patient's visit.
- **Discharge Date**: Displays the discharge date for the patients visit.

***NOTE**: The order will display by discharge date, newest to oldest, with visits that do not have a discharge date displaying at the top of the list.*

Select the appropriate account to use as an example of patient data to assist in building custom filters. The patient's name will display where the Patient look up previously displayed. When the patient name is hovered over the account number selected will display as a tool tip. To switch patient accounts, select the  **double arrow** icon or select the **X** icon to remove the patient from the patient look up.

Select **Web Client** > **Tables** > **Notes Admin** > **Filter Toolbox** > **Patient**




**Patient Look Up**

## 6.3 Split and Entry

Selecting **Split** displays a split screen with the listing of the filters and a preview of the selected filter

Selecting **Entry** expands the preview of the filter to a full screen and also allows the creation of custom filters that will display within the selected data set. If the entry screen is accessed via a patient account, that patient's data will be used to assist in setting up custom filters. If the entry screen is accessed from the Filter Toolbox within Notes area of Table Maintenance, a patient may be selected to assist in setting up a custom filter. Please see Patient 13 for additional information.

In step 1, the name of the selected dataset will display.

In step 2, enter a **Filter Name** and a **Display Title** to display within the filter toolbox grid. The filter name is a required field and must be unique. If the filter should display a different name other than what is in the filter name field, this may be entered within the Display Title field. The Display Title field is optional.

In step 3, use the table that displays to filter, sort, group or hide data. Select on the appropriate column to be modified.

- **To Filter** specific data within a column, select the menu icon and then the filter icon if it does not display by default.
  - o Select the type of comparison operator for the filter. A comparison operator helps filter data in the selected column by displaying data that contains, does not contains, equals, etc. If a comparison operator is not selected all data for the column will display. The options available will vary by column type. Selecting the plus sign icon will allow multiple filters to be setup for one column and selecting the undo icon will clear the last filter set up.
    - **Text** columns: Select the operator from the drop down and enter the criteria that should be filtered in the field next to the drop down based on the text contained within the column. For example, if delimiting a particular lab test, A1c, select the panel column, select contains and enter the lab name in the text field. If additional labs need to be included, select the plus sign and add the additional labs that should display.
    - **Date/Time** columns: Select the operator from the drop down and enter the number that should be searched in the field next to the drop down per the selection of the drop down: days, months, weeks, hours and minutes. For example, if delimiting the problem list to see only recent problems addressed for the ED, select last, enter 1 in the text field and select days from the drop down. Only problems addressed within the last day will display.
    - **Numeric** columns: Select the operator from the drop down and enter the number the data should be filtered by based on the data contained in the column. If a range is selected enter the beginning number of the range in the first text field and the ending number for the range in the second text field.

- **To Sort** a column, select the column title to sort by ascending or descending order. Selecting the X by the column title listed in step 3 or selecting the column title again on the grid will clear the sort.

- **To group data** within a column, select the menu icon within that column and select the menu icon within the table that displays. This listing uses the same options listed within *Change the Width and Sort Columns* of the Reason Codes Table. Please see the Reason Codes Table 7

for additional information on column sorting options.

- **To hide data** select the menu icon within any column. Then select the table icon and deselect the check box of any column that does not need to display within the filter. A **Show Hidden** check box is available to be selected. All columns set to be hidden will display listed out within step 3. Selecting the red X will display to column within the table. Deselecting the check box will remove the hidden columns from being listed out in step 3.

- Data may be inverted within the Labs, Vital Signs and Input/Output filters by selecting the **Inverted View** check box. When selected the grid becomes inverted. The Intake/Output is inverted by default. The Lab filters will display in the inverted grid with the test displaying vertically and the date/time displaying horizontally. The Vital Signs filter will display in the inverted grid with the description displaying vertically and the date/time displaying horizontally.

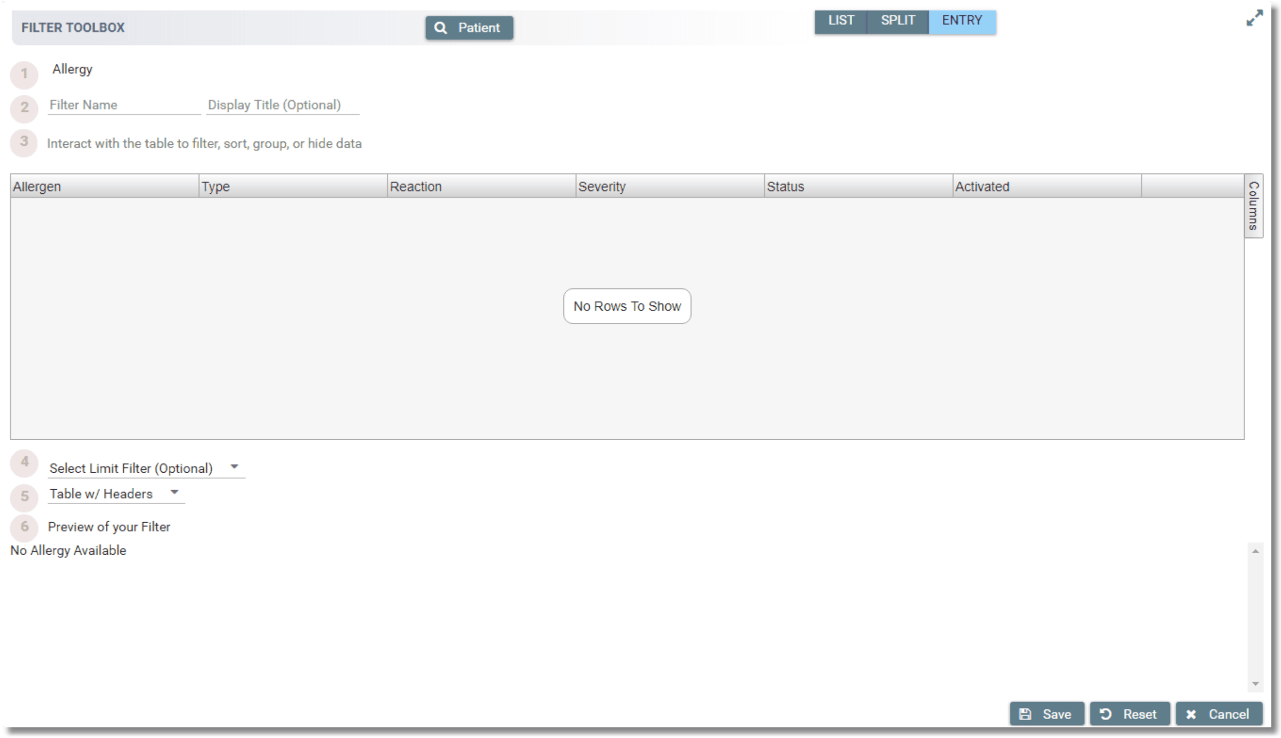
In step 4, **Select a Filter Limit**, this is an optional step. Select the drop down and limit the amount of data that displays within the filter. Data may be limited by displaying the last # of entries or by limiting the number of rows of data that display. If limited by the last # of entries, the information may be further grouped and sorted. Select **Add** to save the new delimiter to the filter.

In Step 5, select the format type that will display the selected criteria for the filter.

In Step 6, a preview will display of the criteria met from steps 1-5 if a patient is selected to display the data.

Once the filter is complete, select **Save**. When a new filter has been saved it will automatically be selected as a favorite. To clear the selected criteria for the filter without saving, select **Reset.** If copy was selected to open Entry for the filter, selecting reset will return the filter to its original copied state. Selecting **Cancel** will exit without saving.

Select **Web Client** > **Tables** > **Notes Admin** > **Filter Toolbox** > **Entry**



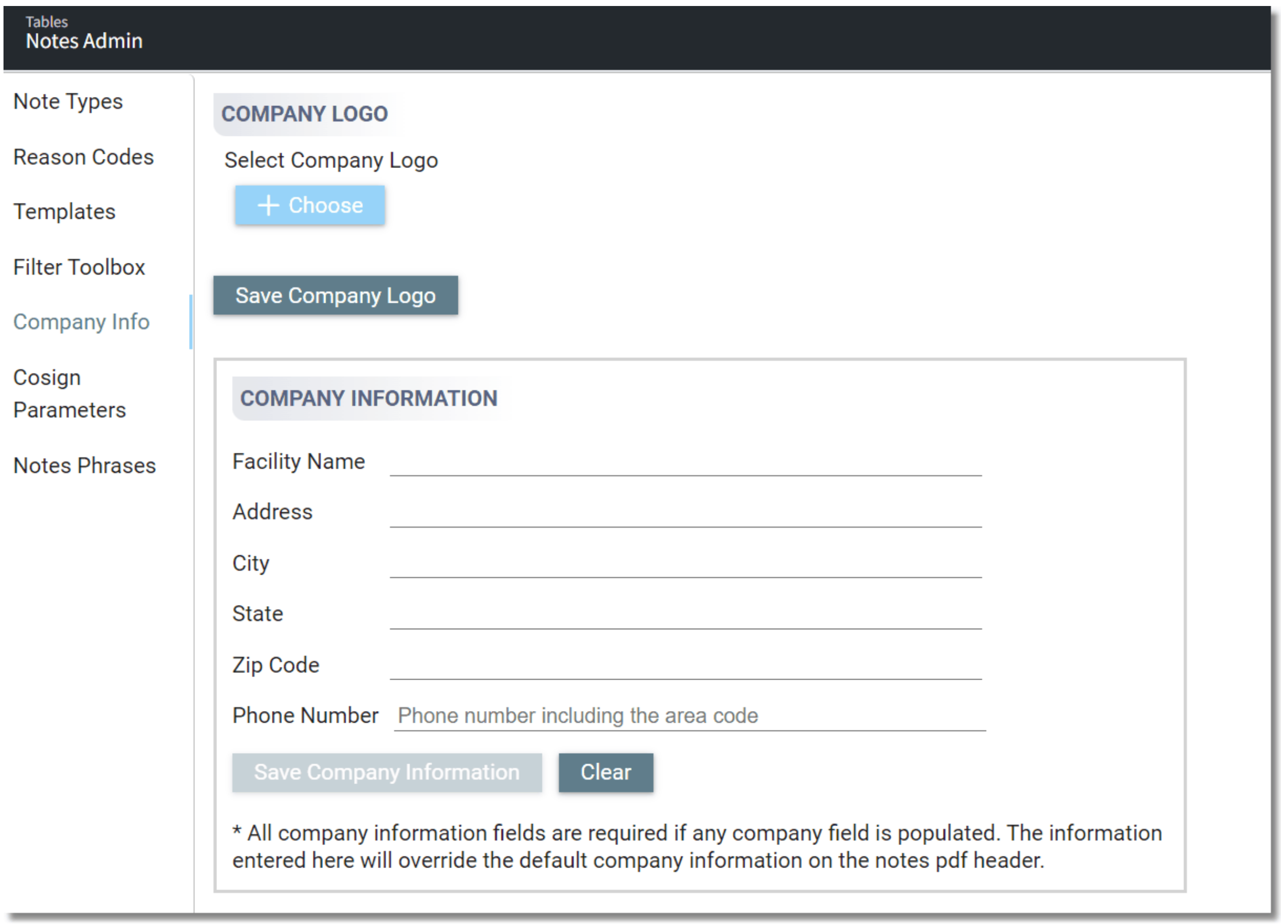

**Entry - Custom Filter**

# Chapter 7 Company Info

## 7.1 Overview

The Company Info will allow a facility to add a site-specific logo and facility information to the Notes PDF Header. This chapter will discuss how to add and remove a site-specific info to the Notes PDF Header.

Select **Tables** > **Notes Admin** > **Company Info**




**Company Info**

## 7.2 Logo

The Company Logo will allow a facility to add a site-specific logo to the Notes PDF Header.

To Add a Logo that will display within the Notes PDF Header:

1. Select **Choose**.

2. Select **the file from the local PC**. The image must be in a jpg or jpeg format. The file size may

be up to 4MB with an image height/width maximum of 128x650.

3. Select **Open** to insert the image.

4. Select **Save Company Logo** to add the selected image to the Notes PDF Header.

To Remove a Logo:

1. Select the **Clear Company Logo** icon.

2. To add a new logo repeat the steps listed above.

## 7.3 Info

Company Info may be entered to display within the default Notes Header. The Facility Name, Address, City, State, Zip Code and Phone Number (with the area code) are required to be populated prior to saving. Entering information within the new Company Information fields will over write the facility/organization level information that currently displays in the Notes Header for all patient care settings.

***NOTE**: When Company Information is entered, this becomes the default information that displays in the Notes Header for the entire facility.*

# Chapter 8 Cosign Parameters

## 8.1 Overview

The Cosign Parameters table allows a default cosigner to display in the cosigner listing within the Create Note, Add Addendum and Cosign panel. This setting is facility wide and will update all users to have the same setting.

## 8.2 Selecting a Facility Cosign Parameter

The following options for selecting a cosign parameter are available to set as a default facility wide:

- **Default**: Allows the cosigners to display in the order that they are listed within the user's events screen with the first provider listed displaying as the default provider. This is the previous functionality of the Cosigner listing.

- **Blank**: Allows the Cosigner listing field to display empty and will require the user to make a selection from the listing.

- **Attending**: Allows the patient's Attending provider to display within the cosigner listing. If the Attending provider is not listed in the list of cosigners for the user then 'Select cosigner' will display and the user will need to select a cosigner from the drop-down.

- **Previous Cosigner**: Allows the user's previous cosigner selection to display as the selected cosigner. When a facility first selects this option, 'Select Cosigner' will display on the initial note that a user creates, but once they have selected a cosigner, that cosigner will display moving forward as the selected cosigner.

# Chapter 9 Note Phrases

## 9.1 Overview

The Notes Phrases table within the Table Maintenance - Notes Admin will function the same as the Phrase Library within Notes. Please see the Phrase Library chapter within the Notes User Guide for the current functionality of this table.