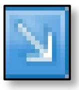
Viewing Progress Notes

1. Navigate to the client's **Case Record** (Clinical Portal – Client's View) screen.
2. On the left hand side, select **Progress Notes** under the **Case Record Menu** section.
3. The **Progress Notes** screen is displayed.

OR ALTERNATIVELY

4. At the top left hand corner click on the shortcut  menu to the left of the client's name and select **Progress Notes**.
5. The **Progress Notes** screen is displayed.

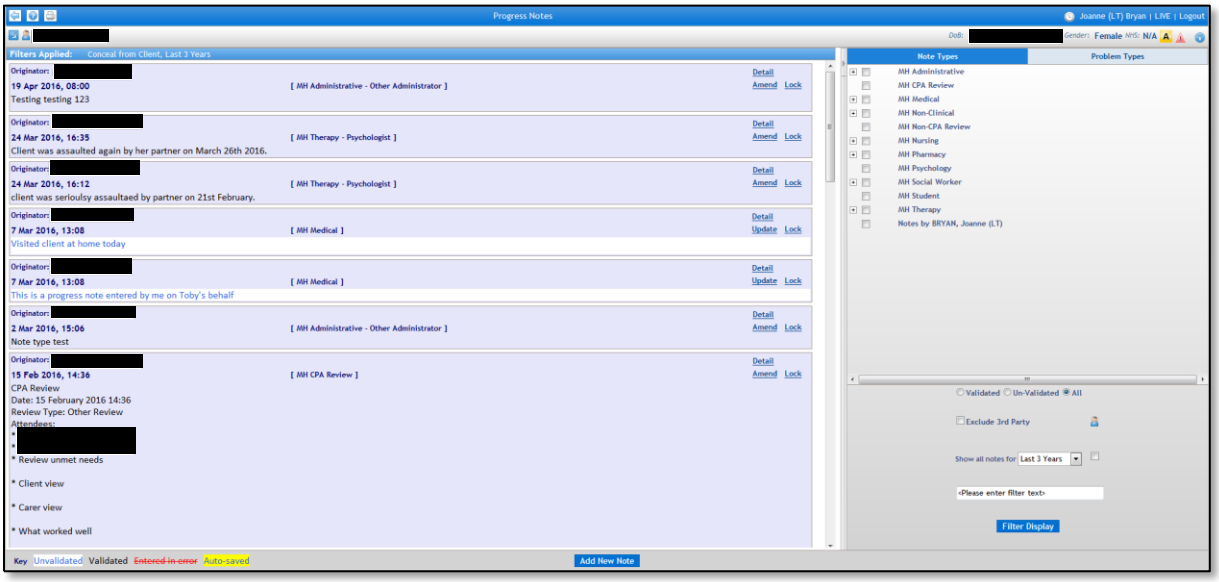


Figure 1- Progress Notes

6. The screen is divided into two sections:
   a. Progress Notes (left hand side of the screen)
   b. Note/Problem Type filters (right hand side of the screen)
7. By default, all progress notes written in the last 3 months on the client's record are displayed in chronological order.
8. The status of each progress note is determined by the colour of its text. An explanation of the different colours is located at the bottom left hand corner of the screen.

Figure 2 - Progress Notes key

Progress Note Status	Explanation
Unvalidated	The progress note has not been validated and can still be amended.
Validated	The progress note has been validated and cannot be amended any further.
Entered in error	The progress note has been validated but either part or the entire note has been entered incorrectly and the note cannot be amended any further.
Auto-saved	The progress note has been saved as a result of the application logging the user out.

9. The filters on the right hand side of the screen can be used to search for and view specific progress notes.
10. To view your own progress notes, place a tick in the check box adjacent to your name in the panel on the right hand side of the screen.
11. Click on **Filter Display** towards the bottom right hand corner.

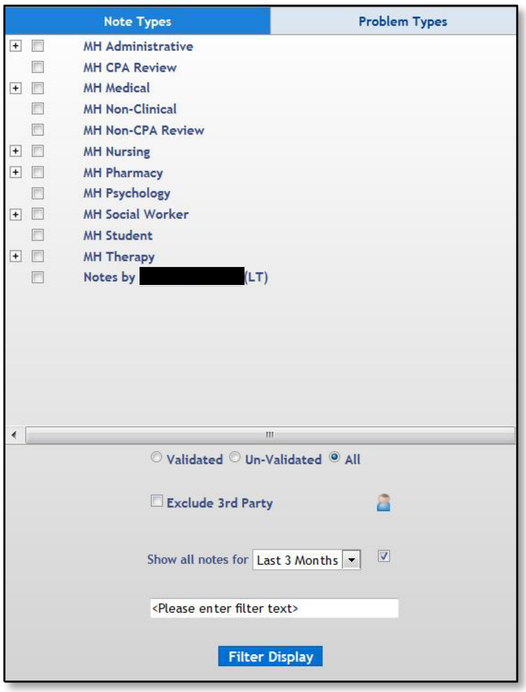


Figure 3 - Filter Options

12. The screen is filtered to display only those progress notes that you have written.
13. You can also filter the screen to display progress notes written by a particular staff role e.g. doctor or nurse.
14. Place a tick in the check box beside the staff role and click on **Filter Display**.
15. The screen is filtered to display only those progress notes written by the staff role selected.

If the staff role has a **plus** icon to the left of the check box, click on it to expand the section in order to make your selection.

16. The following filters can also be used:
    a. **Validated** or **Un-Validated** – select the required option and click on **Filter Display**.
    b. **Exclude 3rd Party** – place a tick in the check box and click on **Filter Display**.
    c. **Show all notes for** – select the required option and click on **Filter Display**.
    d. **Free text box** – enter a keyword or phrase and click on **Filter Display**. Additionally, you can use both **AND** and **OR** logical operators to find more than one keyword or phrase e.g. self-harm **OR** self-harming.

When using the **AND** and **OR** logical operators, ensured that they entered in capital letters otherwise RiO will treat them as part of the keyword or phrase you are searching for.

Adding a Progress Note

You **MUST** aim to enter a Progress Note into a client's record within 4 hours of the contact or event if you are ward based staff and within 24 hours if you are community based staff.

In the event that a progress note is entered within 24 hours of the event it is regarded as a contemporaneous record. Where necessary, progress notes made more than 24 hours after the event should be given the date and time of the contact of event but **MUST** specify the date and time of entry into the record with a clear explanation for the entry.

1. To add a new note, click on **Add New Note** at the bottom of the screen.
2. The **Progress Notes – Add New Note** screen is displayed.

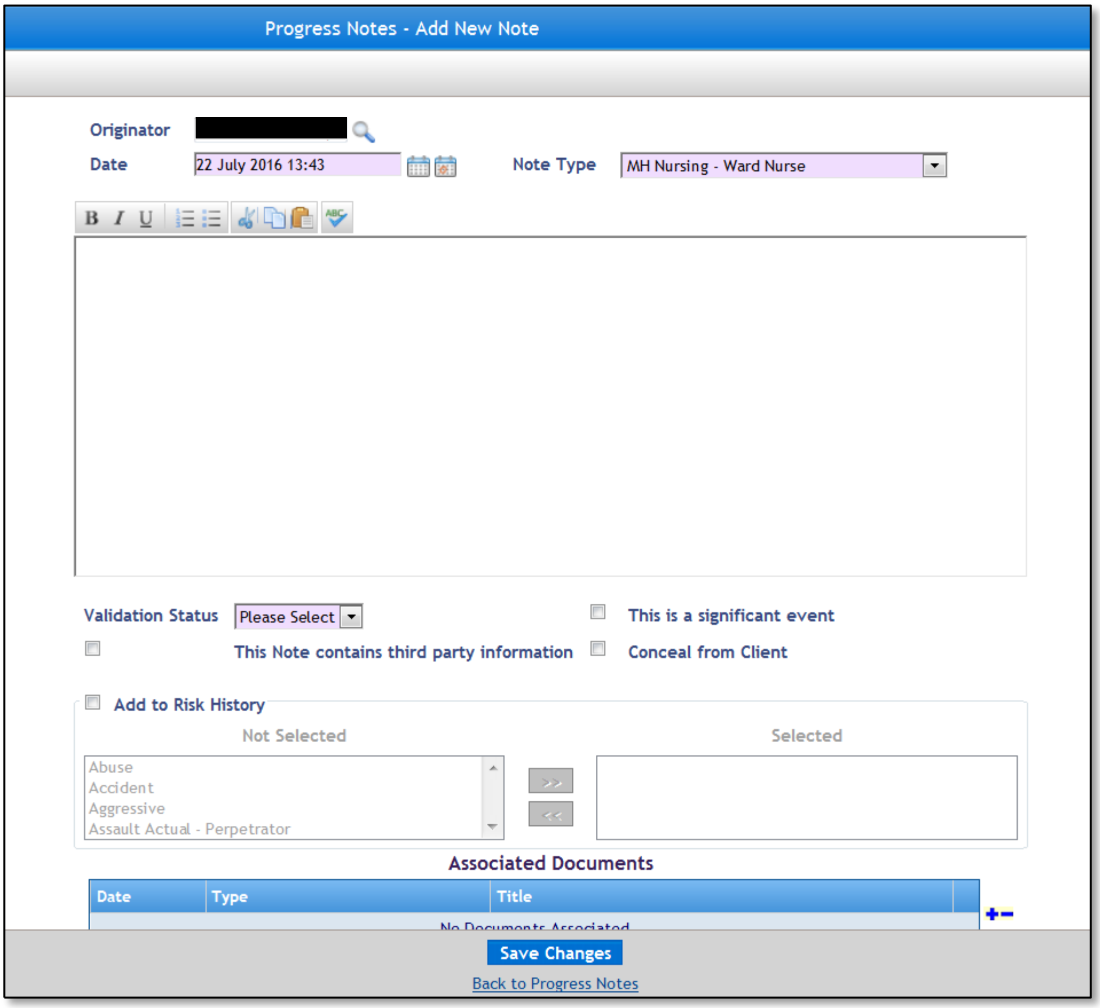


Figure 4 - Progress Notes - Add New Note

3. Alter the date and time in the **Date** field as appropriate.

The date and time of your progress note **MUST** always reflect the date and time that contact was made with the client rather than the date and time that the progress note is being entered.

4. Enter the details of the progress note in the free text area.
5. The following formatting options are available above the free text area:

Figure 5 - Formatting options

    a. **Bold**
    b. *Italic*
    c. Underline
    d. Numbered Lists
    e. Bulleted Lists
    f. Cut
    g. Copy
    h. Paste
    i. Spellcheck

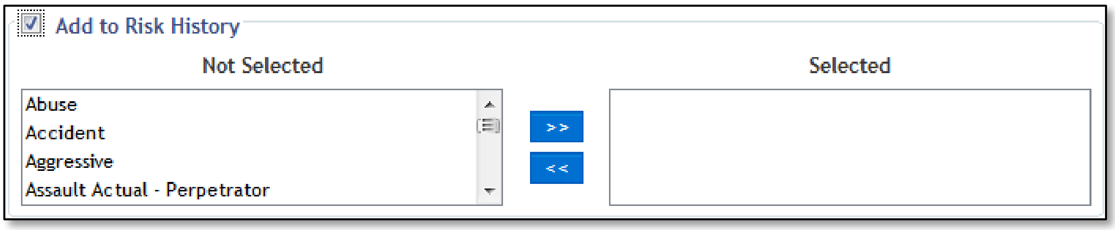
6. There are four check box options (below the free text area):

Progress Note Option	**Explanation**
This is a significant event	Places a copy of the progress note in the Significant Events screen. The Significant Events screen lists all of those events that are deemed to be important/significant within RiO and gives users the opportunity to view the patient journey via a chronological timeline.
This Note contains third party information	Marks the notes as containing information received from someone other than the client. In the event of the client requesting a copy of their progress notes, these notes will not be passed onto the client.
Conceal from Client	**FUNCTIONALITY NOT IN USE.**
Add to Risk History	Marks the note as containing an element of risk. A copy of the note is also placed in the Significant Events screen, the Risk Incidents screen and the Risk Overview – Current screen.

Table 1 – Progress Note checkbox options

7. To add the content of the progress note to the **Significant Events** screen, place a tick in the **This is a significant event** check box.
8. To mark this note as containing third party information, place a tick in the **This Note contains third party information** check box.

9. To add the content of the progress note to the **Significant Events**, **Risk Incidents** and **Risk Overview – Current** screens, place a tick in the **Add to Risk History** check box.
10. The **Add to Risk History** section becomes active.



11. Select the appropriate risk type e.g. *Aggressive* from the **Not Selected** area on the left hand side.

You can make multiple selections by holding down the **Ctrl** key on your keyboard whilst clicking on your selections.

12. Click on  to move your selection(s) from the **Not Selected** area to the **Selected** area.
13. Click on  to remove your selection(s) from the **Selected** area if you have made an error.
14. If you wish to associate a document with this progress note, click on the icon to the right of the **Associated Documents** section.

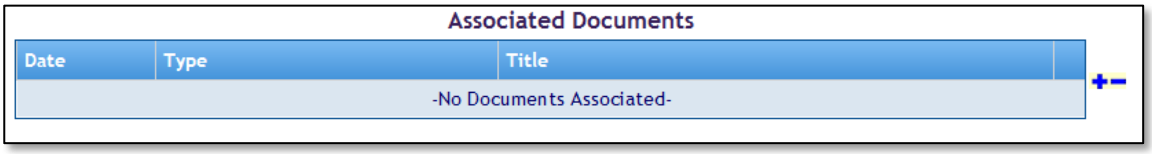


Figure 6 - Associated Documents section

15. The **Set Associated Documents** screen is displayed.

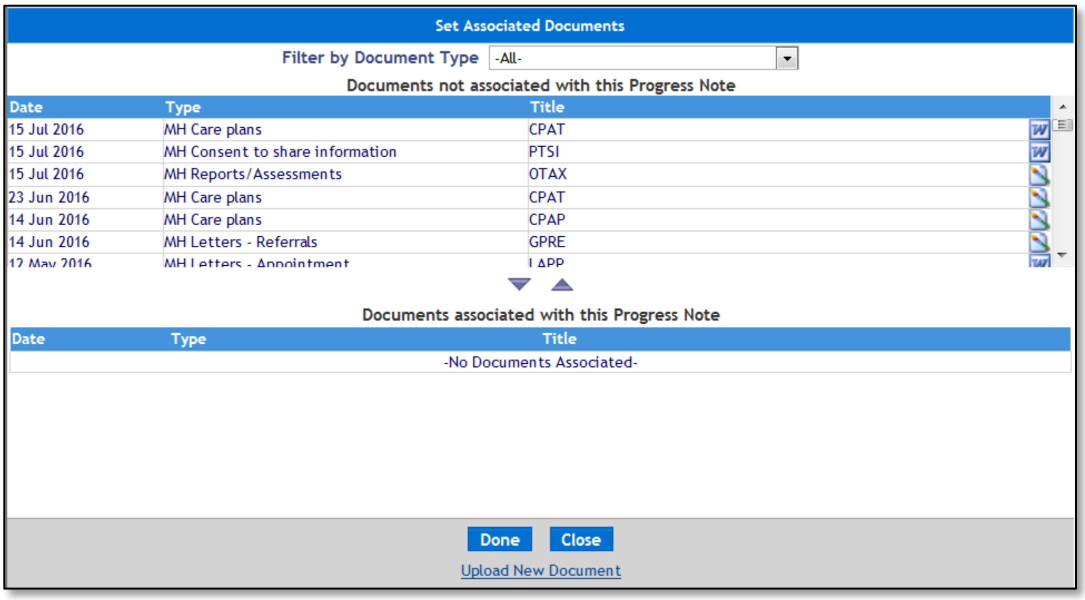


Figure 7 - Set Associated Documents

The **Set Associated Documents** screen displays all documents that have been previously uploaded to the client's record. Users can also upload a new document to the client's record from this screen by clicking on Upload New Document at the bottom of the screen. See the **Document Upload** cribsheet for further details.

16. Scroll through the **Documents not associated with this Progress Note** section to locate the document that you wish to associate with this progress note.
17. Once found, click on the entry to select it; the entry changes colour to denote that it has been selected.
18. Click on the ▼ to move the document to the **Documents associated with this Progress Note** section.
19. If you have made an error, click on ▲ to move the document back to the **Documents not associated with this Progress Note** section.
20. Click on **Done**.
21. The **Associated Documents** section is updated to display the document that has been associated with the progress note.

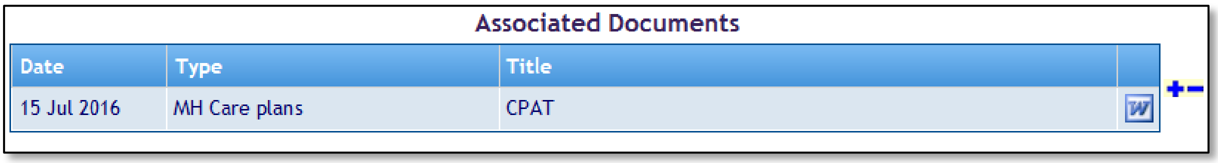


Figure 8 - A document associated with a progress note

22. If you have completed the progress note and will not be adding any further detail, select *Validated* from **Validation Status** and click on **Save Changes**.
23. If you have not completed the progress note and wish to return to complete it later, select *Unvalidated* from **Validation Status** and click on **Save Changes**.

24. You will be returned to the **Progress Notes** screen.
25. Any unvalidated note can be accessed by clicking on Update to the far right of the progress note.

The option to validate your own or another user's progress notes are specified as part of your RiO user account. **Once a note has been validated and saved, it cannot be edited**. Trust policy states that all unqualified staff, Community Support Workers and admin staff (certain bands) must have their progress notes validated by a line manager or supervisor.

Validating Progress Notes

Figure 9 - An unvalidated progress note

1. An unvalidated progress note can be identified by its turquoise text.
2. An unvalidated progress note can also be edited.
3. To add to or edit the progress note, click on Update to the right hand side of the note.
4. To validate the note, select *Validate* from **Validation Status**.
5. Click on **Save Changes**.

Figure 10 - A validated progress note

1. A validated note can be identified by its black text.
2. The content of the progress note cannot be changed, however a limited number of changes can be made within the screen.
3. A validated note can be amended to mark it as a **Significant Event**, or as containing **Third Party Information** or adding it to **Risk History** or as **Entered in error**.

Marking a Progress Note as Entered in Error

1. From the client's **Progress Notes** screen, click Amend to the right hand side of the note.

Figure 11 - An unvalidated progress note

2. The **Progress Note – Add New Note** screen is displayed.
3. Place a tick in the **Entered in Error** check box.
4. The colour of the text in the progress note changes to red with a strike through effect.
5. Click on **Save Changes**.
6. The **Progress Notes** screen is displayed.
7. The progress note is displayed with red text and a strike through effect.

Figure 12 - Progress Note - Entered in Error

Autosaved Progress Notes

If you are inadvertently logged out of RiO whilst writing a progress note, the note will be automatically saved and you will be able to continue writing once you log back onto RiO.

1. Navigate to the client's **Progress Notes** screen.
2. The **Progress Notes** screen is displayed.

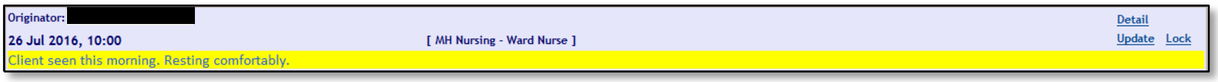


Figure 13 - Autosaved Progress Note

3. Click on Update to the far right hand side of the progress note.
4. The **Progress Notes – Add New Note** screen is displayed.
5. Continue writing the note as required.
6. Select *Validate* (if you have the rights to do so) from **Validation Status**.
7. Click on **Save Changes**.

Viewing Progress Notes Details

All staff can see the details for each progress note written on a client's record.

1. Navigate to the client's **Progress Notes** screen.
2. The **Progress Notes** screen is displayed.
3. Click on Detail to the far right hand side of the progress note.
4. The **Progress Notes Details** screen is displayed.

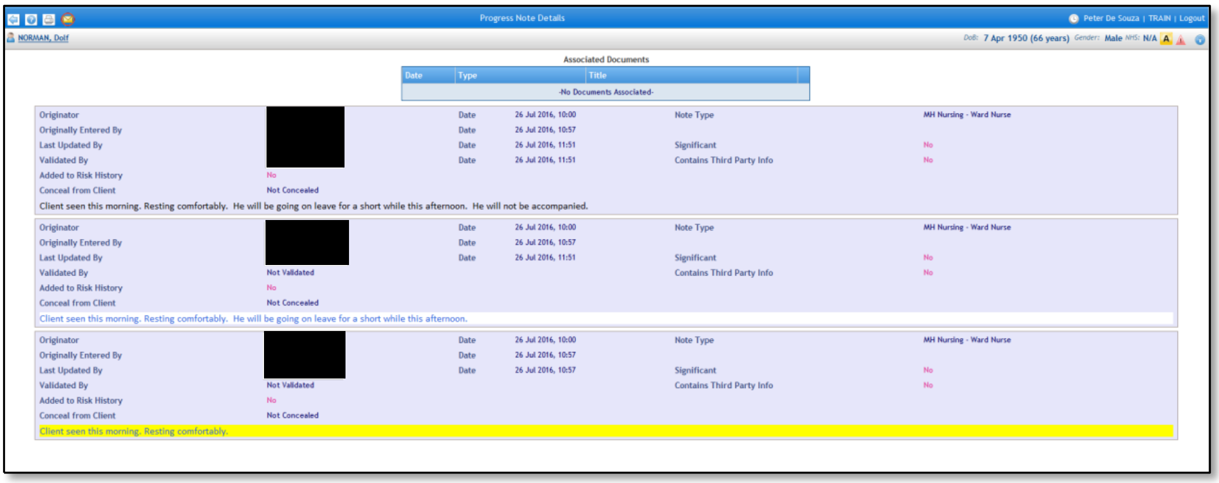


Figure 14 - Progress Note Details

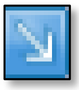
5. The screen displays the different stages of the progress note as changes are made, as follows:

   a. **Originator** – the author of the note
   b. **Originally Entered By** – the person who physically entered the note
   c. **Last Entered By** – the last person to update the note
   d. **Validated By** – the person that validated the note
   e. **Added to Risk History** – indicates whether the note has been added to the **Risk History**, **Risk Overview – Current** & **Significant Events** screens
   f. **Conceal from Client** – **FUNCTIONALITY NOT IN USE**
   g. **Note Type** – displays the note type assigned to the user
   h. **Significant** – indicates whether the note has been added to the **Significant Events** screen
   i. **Contains Third Party Info** – indicates whether the note contains information received from someone other than the client.

Entering Progress Notes on Behalf of another person

1. Navigate to the client's **Case Record** screen.
2. On the left hand side, select **Progress Notes** under the **Case Record Menu** section.
3. The **Progress Notes** screen is displayed.

OR ALTERNATIVELY

4. At the top left hand corner click on the shortcut  menu to the left of the client's name and select **Progress Notes**.
5. The **Progress Notes** screen is displayed.
6. Click on **Add New Note**.
7. The Progress Notes – Add New Note screen is displayed.
8. Click on the  icon to the right of the **Originator** field.
9. The **Search For User** dialog box is displayed.

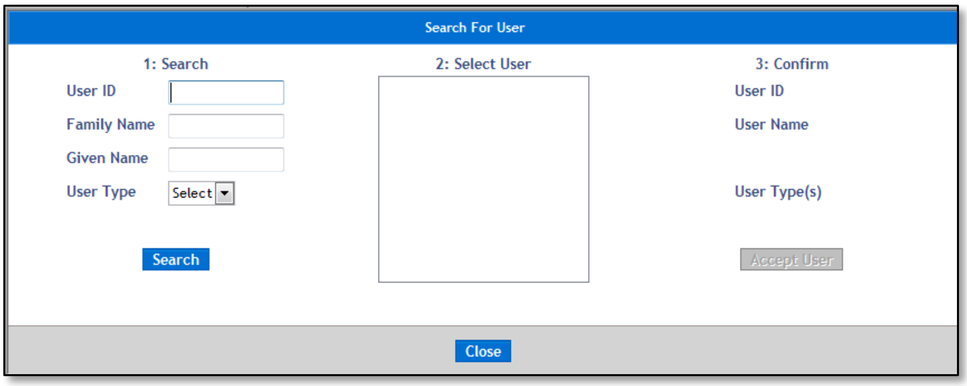


Figure 15 - Search for User

10. Enter the name of the person on whose behalf you are entering the progress note.
11. Click on **Search**.
12. The search results are displayed in the **2: Select User** section.
13. Select the required name.

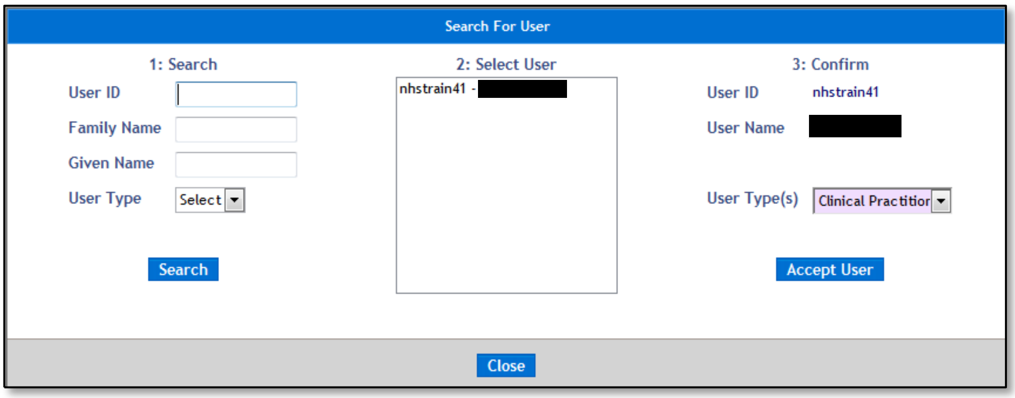


Figure 16 - Search For User (displaying search results)

14. The user's details are displayed in the **3: Confirm** section.
15. Click on **Accept User**.
16. The **Search For User** dialog box is closed and the user's name is displayed in the **Originator** field.
17. Complete the **Progress Notes – Add New Note** screen as previously instructed.

Printing Progress Notes

1. Navigate to the client's **Case Record** screen.
2. On the left hand side, click on the **Client Related Data-Views** folder under the **Case Record Menu** section.
3. The folder is expanded to display its content.
4. Click on Progress Note View.
5. The **Progress Notes** dialog box is displayed.

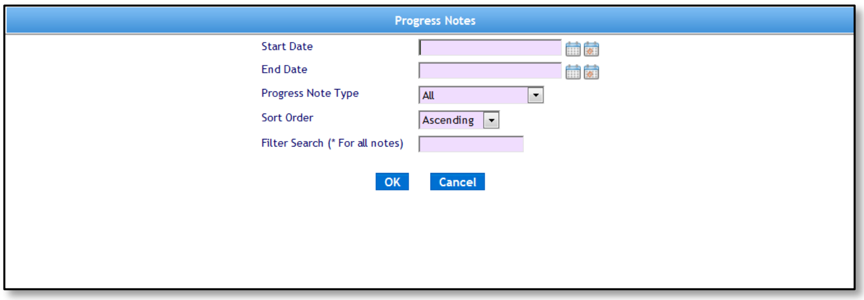


Figure 17 - Progress Notes dialog box

6. Enter a **Start Date**.
7. Enter an **End Date**.

> If a time is not entered in the date fields, RiO will enter a default time of 00.00 hours.

8. If you wish to view all of the progress notes written during the date period stated, leave the **Progress Note Type** setting as *All*.
9. Enter an asterisk (*) in **Filter Search**.
10. Click on **OK**.
11. All progress notes written during the specified period will be displayed.

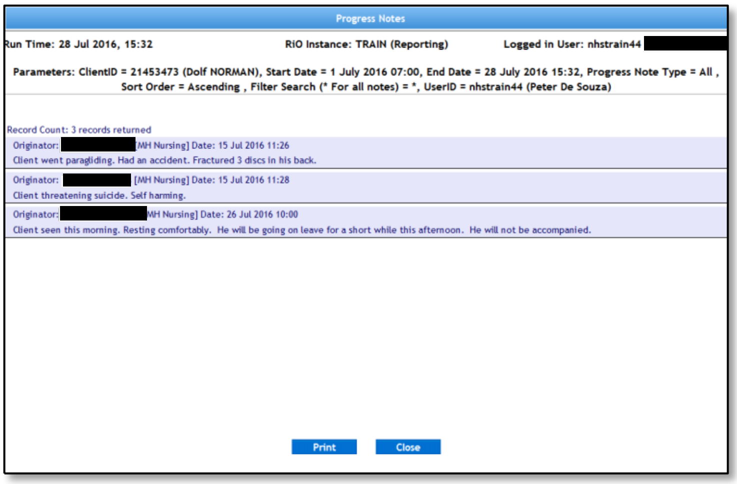


Figure 18 - Progress Notes (print screen)

12. Click on **Print** at the bottom of the screen.
13. Click on **Close**, once printing has been completed.

Unvalidated HCP Progress Notes Report

1. Click on the  **RiO Report** menu and select **Unvalidated HCP Progress Notes**.
2. The **Caseload** screen is displayed.
3. The Unvalidated HCP Progress Notes dialog box is displayed.

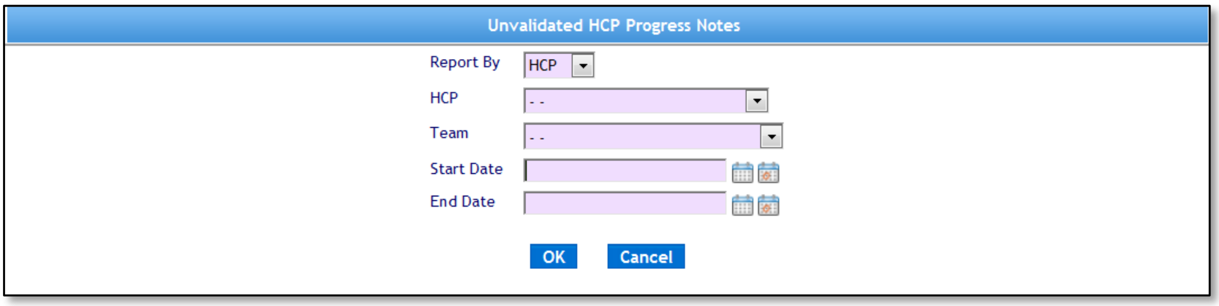


Figure 19 - Unvalidated HCP Progress Notes dialog box

4. From **Report By** select either *HCP* or *Team*.
5. Select an **HCP** if required.
6. Select a **Team** if required
7. Enter a **Start Date**.
8. Enter an **End Date**.
9. Click on **OK**.
10. The unvalidated progress notes that match the criteria entered are displayed.

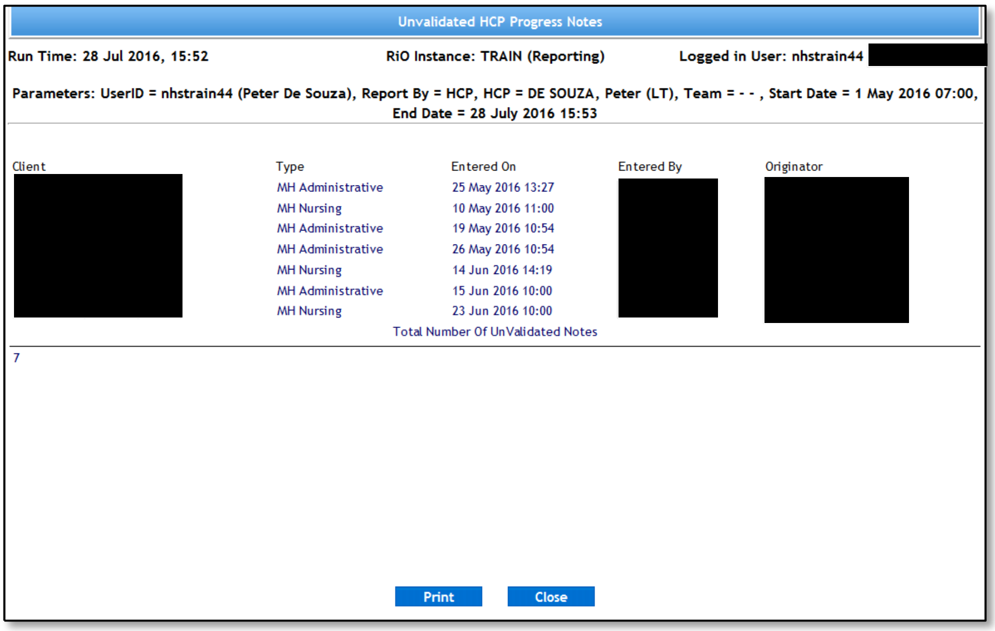


Figure 20 - Unvalidated HCP Progress Notes Report

11. Click on the client's name to navigate to the progress notes screen in order to validate the progress note.
12. Repeat step 11 to access each client's record.
13. Click on **Print** (if you wish to print the list).
14. Click on **Close**.