

Excuse Note

We suggest utilizing the "**Blank Note**" and creating a Global template for this note format to include all the details you need to add. To customize your dropdown list, open a note, click on the dropdown arrow and select Customize. This will open the library of note types in the system. Select notes that you would frequently use and click SAVE.

TO CREATE A GLOBAL TEMPLATE

Step 1: Be in a test patient with NO data, (no notes, no data in patient management under meds, allergies, social history, medical conditions, family hx)

Step 2: Create a new note in the test patient

Step 3: Be in the note type you want to use the templates (GLOBAL TEMPLATES ARE NOTE TYPE SPECIFIC)

Step 4: Create the note with as much or as little data as you want. Make sure you clear out the HPI of the age/gender. Address each page of the note as much or as little as you want

Step 5: Hit the blue TEMPLATE button, name the template, hit PREVIEW, hit CREATE.

TO USE A GLOBAL TEMPLATE

Global templates do not overwrite any information that has been carried forward from previous notes. This means that if a note already has data under ROS/PE, information from the templates will only add those fields/boxes that do not have any content yet. If you want to add all data from the template, you would need to "Clear all fields" first before applying the template or proceeding with Step 2, or clear only the fields that are applicable.

Step 1: Open a note in the patient you want to use the template

Step 2: Hit the blue TEMPLATE button

Step 3: Choose the template you want to use from your list (remember templates are note type specific)

Step 4: Hit PREVIEW to view the contents to be applied in the note. Hit APPLY. Now your template is applied to this note for this patient.

The administrator must give access to the provider. The administrator may provide the permissions in Resource Management > Resource Setup > click [name of provider] > Permission > check boxes of the areas needed with access > SAVE.

Please log out and log back in to save changes.