

Panorama Tips & Tricks #32

IOM



There are times that a note may have been entered in error. This may include situations like:

- Correct client but incorrect information
- Information inputted on the incorrect client (see comment below regarding Personal Health Information)

To Delete a Note you would follow these steps:

Go to the Notes section and click on the radio button next to the note you wish to delete. Once you do this, the Update Note button is enabled.- click Update Note

	1 resu	Its found. To view a Note below, click on its Note Date. The list reflects the records you have a						ecords you have acc	ess to:	
Row Actions: View All Notes in Table Update Note				te View No	View Note Corrections			Author Note Transcribe Note		
Move selected note to					~	Move Note				
		Created Date/Time	Note Date/Time	Note Type	Subject Line 🔻	Author	▼ <u>Attached</u> ▼ <u>To</u>	<u>Status</u> ▼ <u>Correc</u>	<u>:ted</u> ▼	
	۲	2019 Sep 19 09:32 ADT	2019 Sep 19 09:30 ADT	Investigation	follow up with client	Benjamin, Kimberly	<u>Inv 1594</u>	Complete		
Total: 1 Jump to page:							Jump to page:	2		

When the note opens, you can change the Subject to "Entered in Error" and delete the contents of the note. You can then add a note to say "Note entered in error" and click Note Complete.

* Subject: entered in error											
*	Note Date:	2019 19 Note Time: 09 30 ADT   yyyy mm dd hh mm									
	Note Type:	Investigation									
	Common Phrases:	✓ Add to Note									
*	* Note:										
	T Normal ∨ T Arial ∨ 7pt ∨ b i u ≧ ≧ ≧ ≟ ≔ →≣€≣										
	note entered in error.										

Your note will then be changed. To view any corrections click the View Note Corrections tab and you will see your corrections.



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The note was successfully saved.										
Note is associated with Investigation ID 1594										
Note ID:	428	Status:	Complete							
Author:	Benjamin, Kimberly	Note Date:	2019 Sep 19 09:30 ADT							
Role:	NS_IMMS_IOM_NURSE	Completed Date:	2019 Sep 19							
Note Type:	Investigation									
Subject:	entered in error									
note entered in error.										
		C	orrect Note View Note Corrections Close							
Correction #1:										
Corrector:	Benjamin, Kimberly	Correction Date: 2019 Sep 19 09:36 ADT								
Note Date:	2019 Sep 19 Note Time: 09:30									
Note Type:	Investigation									
Subject:	follow up with cliententered in error									
Note:										
Spoke to clien	tnote entered in error. <del>Very argumentative an</del>	d refuses to answer questio	ane.							
			-							

## Addional steps- Personal Health Information:

In the event you enter personal health information another client in a note, you can submit an IT Assyst Ticket to have that note removed by application support. Be sure to include the client ID, Investigation ID and the Note Date and Time and Subject title you want to have removed.