Copying a Task to Note

To take a task and copy to note so that it is available in the patient chart viewer:

The last person to update the task, copies to note when necessary.

View the task details

1. Add any additional comments necessary and then click ok
2. If no additional comments, then simply click cancel

The task remains highlighted on the task list.

3. Select Copy To Note in the bottom right hand corner of the task list.

Created by: Health and Clinical IT Learning and Development

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updated 8/2/2012
4. The encounter selector screen may come up
   a. If there is a recent appointment to related to this task, choose it under existing encounters
   b. If there is not a recent appointment, choose new encounter with today’s date and type as Chart Update
   c. Select OK

5. The Note Selector screen displays, fill in appropriate details
   a. Specialty – clinic
   b. Visit type – either Communication (telephone note) or Clinical Staff Note
   c. Owner – The person Creating the Note
   d. Select OK
All of the task details entered on the task are transferred to the note. A user can free text any additional items if necessary directly into the note. **(Remember to hit tab after typing in this area to populate information in the note)**
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Once note is compiled and all details display. Select the Sign at the bottom and finalize the note.

6. The note signature box will display
   a. User Name - Net id will auto-populate
   b. Password - Enter blue password
   c. Sig Type – Always Author
   d. Make final – Always Checked
   e. Select OK
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The encounter selector will display again. This screen is asking what charge encounter to tie note to, select **cancel** unless billing for the phone call.

Users may need to select chart in the vertical toolbar to return to the daily schedule page.

Navigate to the task list, highlight the newly created task, and select **done**.