

Managing Notes Script

Introduction

This HuBERT on-demand training module...

Intro1

... is provided by the MN Department of Health WIC Program. It provides an overview of Managing Notes in HuBERT.

Transition Slide

<transition to Participant Folder>

PF

Notes are used to document interactions with participants.

They can be written from anywhere within the Participant Folder...

CGS

...and within the Guided Scripts...

<Cert Guided Script displays>

MCAGS

<MCA Guided Script displays>

FP

...and when working with food prescriptions.

Open Notes

Go ahead and click the **Manage Notes** icon in Ida's folder.

<no audio> Click the **Manage Notes** icon>

Note Types

There are 3 types of note that we can write: SOAP, General and Breastfeeding.

System Notes are those auto-generated by HuBERT when certain functions are performed, including when an appointment reminder is auto-sent via email, an official notification is printed, a VOC Document is printed or high risk status is resolved by staff.

Filter

The checkboxes next to the note type allow us to filter the list of notes.

For instance, if we look at someone with a lot of notes...

<slide transitions to Katie Didd>

...and click the **General Notes** checkbox, it removes that type of note from the **Notes for Household Member** grid.

<no audio> Click the **General Notes** checkbox.

<grid no longer display any General Notes>

OK, back to Ida's notes.

<slide transitions back to Ida Soomso>

Notes Grid

The grid displays all the notes written for the household member whose participant folder we are in.

The details include the type, when the note was written (with the most recent note at the top), the subject selected for the note, what screen we were in when the note was written and the Staff ID of the person who wrote the note.

The content of the selected note displays below.

We can view the rest of the note by using the scroll bar or by clicking the Full Page View button.

<no audio> Click the **Full Page View** button.

Full View

<no audio> Click the **Close** button.

Add SOAP

Let's take a look at the user notes, starting with the SOAP Note.

<no audio> Click the **Add SOAP Note** button.

SOAP

The SOAP note is an optional template that our agency may choose to use to document nutrition contacts.

The Subject defaults to SOAP and is disabled.

Under the Objective section, it displays the anthropometric measurements and risk factors assigned during the most recent cert period.

Under the Plan section, it displays referrals provided during the most recent cert period.

Modify

We can modify the template by highlighting and overwriting or deleting the text just like any Word document.

Transition Slide

<transition back to SOAP note>

Completing SOAPs

SOAP Notes, which can take some time to write, must be completed before closing the Add SOAP window.

Since this isn't always possible, we can either:

If working in other participant folders, keep the note open in the background until we are able to finish it.

Or, cut the unfinished text, cancel out of the note and paste it into a Word document. We can finish our note in Word and cut/paste it into a new SOAP Note.

Just as a side note, the SOAP template can be copied and pasted into any General Note. Like, for example, the High Risk general note (which we'll take a look at in a minute).

<transition back to SOAP note>

Protected

The Protected checkbox locks a note and is **not** a feature we use.

Clicking OK will save the note.

Let's click Cancel to exit without saving.

Add General

Next is the General Note. Click the button.

<no audio> Click the **Add General Note** button.

Subject

The general note is a free-text field.

The Subject is required for a general note since its contents can be about any number of topics.

Go ahead and open the Subject drop-down then click below the scroll bar until we've viewed all the topics.

<no audio> Click the **Subject** drop-down.

Subject 1

<no audio – failure hint> Click below the scroll bar.

Subject 2

<no audio – failure hint> Click below the scroll bar.

Select SOAP

Notice that one of the options in this list is also SOAP.

Go ahead and select it.

<no audio> Select **SOAP**.

Type Note

And that there isn't a template with the SOAP-General Note.

We'll just type a quick note.

<Note: This SOAP does not have a template.>

Save Note

Go ahead and save our general note.

<no audio – failure hint> Click the **OK** button or press the Enter key.

New Note

Our new note displays at the top of the list.

Next note type is the Breastfeeding Note.

Click that button.

<no audio> Click the **Add BF Note** button.

BF Msg

A message displays that reads: Do you want to use the Breastfeeding Note template.

This is an optional template that may be helpful in documenting an assessment for a young infant.

If we click No, the template will not display and it will be an empty text field like the General Note.

Let's click Yes and take a look at the template.

<no audio> Click the Yes button or press the Enter key.

BF Subject

The Subject is also required for this type of note.

If we click the drop-down...

<no audio> Click the **Subject** drop-down.

BF Subject 1

...we can see that it's the same list of topics as the General Note.

There are two topics specific to breastfeeding but any topic can be selected.

<no audio> Click the drop-down again to close it.

BF Template

Like the SOAP template we can modify the text just like any Word document.

Go ahead and exit by clicking the Cancel button.

<no audio> Click the **Cancel** button.

Which Note?

Our Agency may dictate when we should use which type of note.

If not, we should just ask ourselves which type of note makes the most sense.

If SOAP Notes are used by our Local Agency to document nutrition contacts, then we should add a SOAP Note. If we are documenting information that will help provide continuity of care for our breastfeeding participants, we should write a Breastfeeding note.

Print

The last function in this screen is to print a note.

To do so, we simply click on the note we want to print to highlight it and click the button.

Let's print the General note we just created.

<no audio> Click the **Print Note** button.

Transition Slide

<transition to printed SOAP Note>

Printed

The printed note includes: the type of note, the participant's name, the subject, the date written and the name of the staff person who wrote the note, along with the note text.

Remember, notes provide personal data since they include the participant's name.

Take care when printing and only print if absolutely necessary for participant care.

Transition Slide

<transition to printed SOAP Note>

Close Notes

That is all there is to notes. Click the **Close** button to exit.

End

Thank you for reviewing this HuBERT on-demand training module provided by the MN Department of Health WIC Program.