



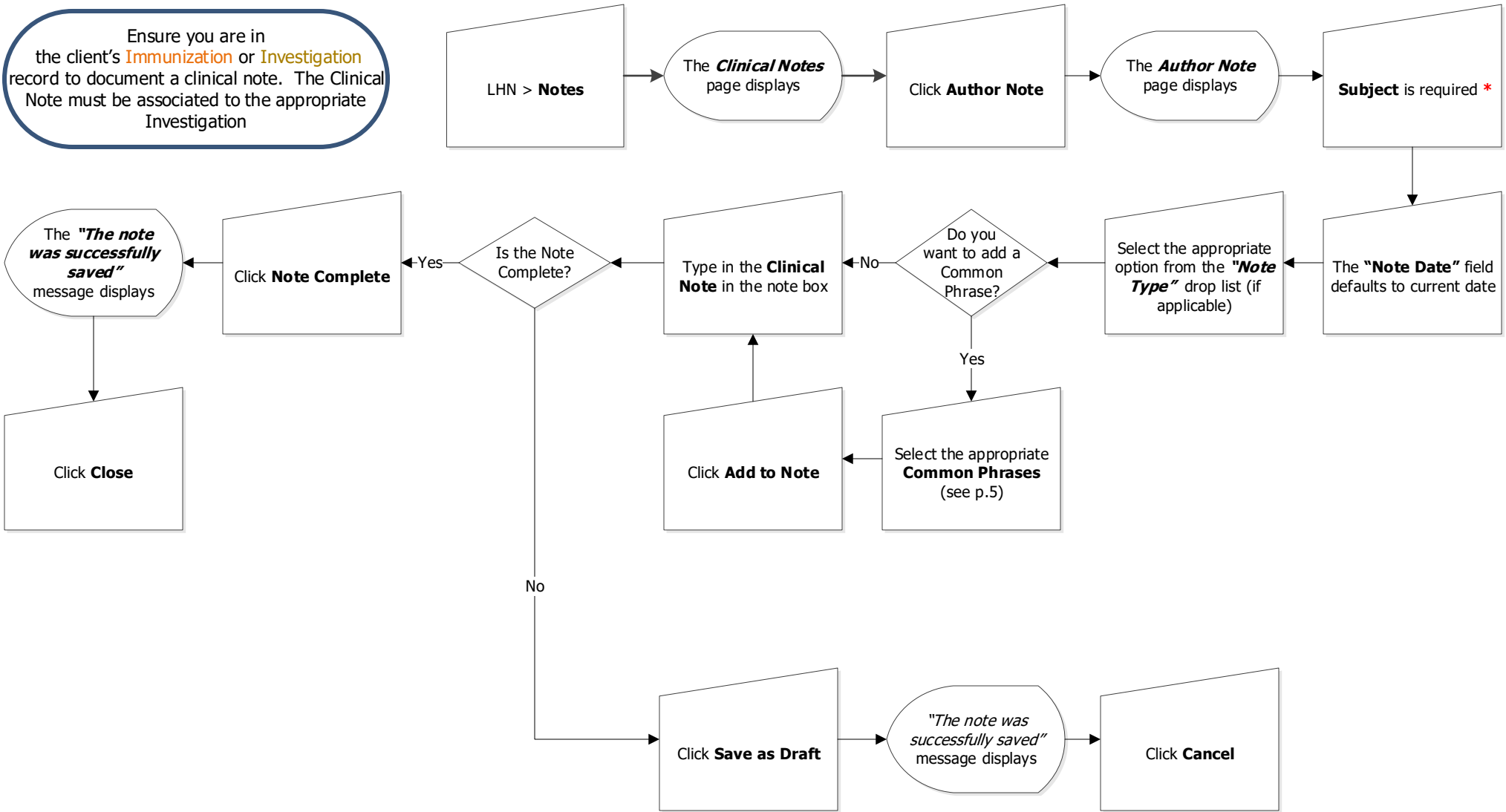
### Points to Remember:

- Clerks who add notes, should leave the “Note Type” field blank
- Document your name and designation at the end of your note (i.e. John Smith, Data Entry Clerk).
- Once a note has been created, a yellow triangle will display at the top of the Client Context header. The note will only be viewable to Communicable Disease Investigations users when created with an investigation in context.
- Notes can be “Saved as Draft” and completed at a later time.
- **The investigation must be in context or the Notes added to a client record can be viewed outside of the Investigations section of PHIMS.**
- If you are using the common phrases functionality, anything that displays in **BOLD** text will require user editing. You may need to add, delete or specify further information prior to saving the note.
- Listing of investigation common phrases is included on page 5 for your reference
- Clinical Notes can be corrected, once corrected and saved, the user will be able to View Notes Corrections.
- To view note corrections, click on the radio button beside the note and select **View Note Corrections**
- Once a Clinical Note is *saved*, it **can not** be deleted
- To view all notes associated with the client, Select Client: in **Display Notes For** drop list, click ‘**Display**’ this will:
  - Take the investigation out of context**
  - Display all notes created at the client level and for other investigations
  - Be sure to put the investigation back into context prior to authoring an investigation related note!**
- Only the Author of a Note can move a NOTE



# Client Records: Clinical Note - Create

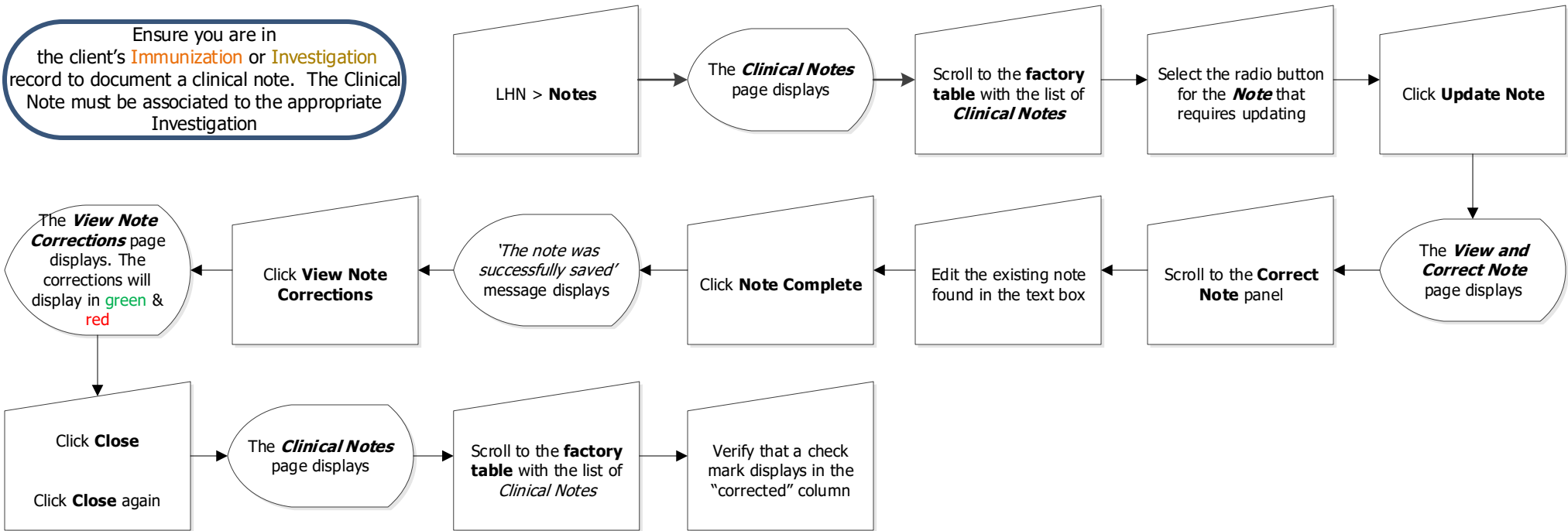
Ensure you are in the client's **Immunization** or **Investigation** record to document a clinical note. The Clinical Note must be associated to the appropriate Investigation





# Client Records: Clinical Note - Correct/Update

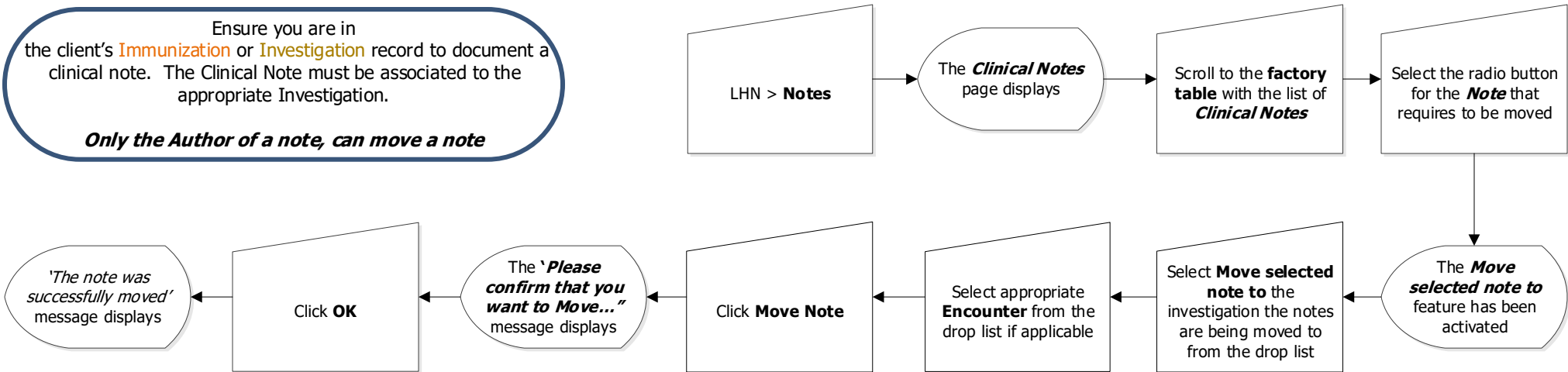
Ensure you are in the client's **Immunization** or **Investigation** record to document a clinical note. The Clinical Note must be associated to the appropriate Investigation





Ensure you are in the client's **Immunization** or **Investigation** record to document a clinical note. The Clinical Note must be associated to the appropriate Investigation.

**Only the Author of a note, can move a note**



Drop list value	Clinical note
ACCESS_ECHART	Echart accessed to assess demographics, additional lab results and treatment information.
CLIENT_INTERVIEW	O: New investigation received and reviewed. Assessed as per regional priority guidelines. P: Hold file for clinic contact to confirm client care details
CLINIC_PNT	Phone call to <b>SPECIFY</b> . Spoke with <b>SPECIFY</b> . Confirmed demographics. Clinic indicates client is positive, no treatment. Client <b>IS/IS NOT</b> pregnant, EDC is <b>SPECIFY</b> . Clinic states client did not attend appointment. They are currently trying to reach client at <b>SPECIFY</b> . They are unable to reach client and are requesting public health assistance.
CLINIC_TREATED	Phone call to <b>SPECIFY</b> . Spoke with <b>SPECIFY</b> . Confirmed demographics, diagnosis, and treatment. Provincial surveillance form not completed, contact interview not completed. Client <b>IS/IS NOT</b> pregnant, EDC is <b>SPECIFY</b> . See investigation summary for details.
CLN	File received from PHN for intake details from clinic. Faxed request for info to <b>CLINIC NAME</b> at <b>FAX NUMBER</b> . PLAN: Hold for 2 days and re-attempt clinic contact.
CLN_NO_CLINIC	O: No reply from clinic x2. P: Return to PHN for further assessment.
CLOSURE_COMPLETE	Investigation summary reviewed. Communicable disease investigation completed as per provincial protocol. Plan: Close Investigation.
CLOSURE_INCOMPLETE	Investigation summary reviewed. Communicable disease investigation incomplete. Unable to complete <b>SPECIFY treatment/testing/contact/interview/follow-up</b> . Client <b>SPECIFY aware/unaware</b> of <b>SPECIFY contact/positive results</b> . Unable to locate client, not responsive to requests for contact. Plan: Close Investigation.
ED_RESOURCES	Declined resources. <b>OR</b> Given pamphlets, safer sex supplies and on line resources.
FOCUSED_HEALTH_HISTORY	As part of conversation with client the following aspects of a focused sexual health history were discussed. The client identified the following strengths and resources: <b>SPECIFY</b> the client identified the following concerns or issues: <b>&lt;b&gt;SPECIFY&lt;/b&gt;</b> Condom use: <b>SPECIFY FREQUENCY</b> . Used with: <b>SPECIFY All/Some/No partners</b> . See risk factors section for further detail.
HARM_REDUCTION	Safe injection practices discussed. Client aware where to access harm reduction supplies. Client provided with harm reduction supplies.
HV_NFI	Home visit to <b>INSERT ADDRESS</b> . Client not found in. Letter left.
INF_CONT_GUIDANCE	Advised named as a contact. Guidance regarding current infection given as it relates to transmission, incubation, complications, signs and symptoms, risk to newborn and epi treatment tolerance. Encouraged to eat prior to treatment to improve tolerance. Re-exposure discussed. Re-screening recommended. Encouraged re-screening in 6 months.
INFECTION_GUIDANCE	Notified of results. Guidance regarding current infection given as it relates to transmission, incubation, complications, signs and symptoms, risk to newborn, treatment tolerance. Encouraged to eat prior to treatment to improve tolerance. Re-infection discussed. Test of cure recommended. Partner notification plan discussed.
INITIAL_PLAN	P: Hold for <b>SPECIFY: investigation form/contact follow up/results</b> . <b>OR</b> PHN to follow up with client regarding treatment/interview/education/testing.
INTRODUCTION	O: Client contacted by <b>SPECIFY</b> visit. ID and Privacy confirmed. Role of PHN reviewed.
INV_FORM_ASSESSMENT	O: Fax received from health care provider, see investigation summary for transcribed details <b>OR</b> investigation returned by CLN and reviewed by writer.
PC_NFI	Phone call to <b>SPECIFY NUMBER</b> . Message left. Phone number not in service. Customer unavailable. Wrong number.
PRE_FIELD_CHECK	Request placed by PHN for pre-field check. EIA check results: COMS check results: WPS check results
SEXUAL_HEALTH_ED	General sexual health education given regarding STBBI including chlamydia, gonorrhea, syphilis, HIV, HPV, Herpes, Hepatitis A, B, C, Trichomonas/BV. Education given regarding condoms and oral barriers. Risk reduction discussed. Discussed impact of stigma. Immunizations recommended. Discussed the importance of STBBI testing. Advised of referrals to <b>SPECIFY</b> . Discussed contraception.
TESTING	Client meets eligibility criteria for testing. Risks, benefits and limitations for testing discussed. Informed consent obtained. Pre-test counselling provided. <b>SPECIFY</b> sample collected. Samples processed and sent to Cadham Provincial Laboratory for testing.
TRANSLATOR	Identified that client requiring communication in <b>SPECIFY LANGUAGE</b> . Phone call to MCIS language solutions at 1-888-990-9014. Spoke with customer service associate to request 3rd party call with a <b>SPECIFY LANGUAGE</b> interpreter. Connected to <b>SPECIFY LANGUAGE</b> interpreter, ID number <b>SPECIFY</b>
TREATMENT	Client meets eligibility criteria for treatment. Risks, benefits and limitations for treatment discussed. Informed consent obtained. Allergy assessment completed. Client provided directly observed treatment, see treatments summary for details.