

Job Aid

propel Rx



How To Guide on Clinical Notes

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Overview of Clinical History

Clinical Notes can be accessed from the **Clinical History** section in the **Patient Folder Clinical** tab.

Here are some of the key features of the **Clinical History** section as it pertains to **Clinical Notes**:

- 1) **Grid** – displays the last 90 days worth of Clinical History records.
- 2) **Add** – adds a Clinical Note entry.
- 3) **Detail** – allows more information to be viewed about the entry.
- 4) **Print** – prints the Clinical Note which can be given to the prescriber as a notification.
- 5) **Expander** – allows you to view additional Clinical History records (created over 90 days ago) and display them by day, week, or month.
- 6) **Filter** – filters the grid using the keywords entered.

The screenshot displays the 'propelRx' interface for a patient named Huang, Fae. The interface is divided into several sections:

- Patient Information:** Name (Huang, Fae), Gender (Female 33), PHN, Plans (CA), Allergies (No Known), Conditions (DIABETES MELLITUS), and MPR (-% / -/365).
- Observations:** Height (5 ft 0 inches / 152.0 cm), Weight (98.0 lbs / 44.5 kg), IBW (45.5 kg), AJBW, and BMI (19.26). Buttons for 'Lab Results' and 'Creatinine' are visible.
- Clinical Information:** A table showing 'No Known Medical Allergies' and 'No Known Medical Conditions'. A table lists 'Medical Type' (Condition), 'Medical Items' (DIABETES MELLITUS), 'Effective' (May 10, 2023), and 'Note'. Buttons for 'Add', 'Remove', and 'Detail' are present.
- Clinical History:** A grid titled 'Viewing last 90 days' with columns: Entered Date, User, Type, Description, Medical Condition, Rx #, DIN, Trade Name, and Strength. A single record is shown for May 10, 2023, by user TT, describing 'Drug Related' 'GI discomfort afte' with condition 'DIABETES MELLITUS', Rx # 504308, DIN 2385341, Trade Name METFORMIN FC, and Strength 500MG. A 'Filter' input field is located above the grid.

Numbered callouts (1-6) highlight specific features: 1) Grid, 2) Add, 3) Detail, 4) Print, 5) Expander, and 6) Filter.

Overview of the Clinical Notes Window

The Clinical Notes window is where you can document consultations with a patient, follow ups with a patient or prescriber, or immunizations. The appearance of the Clinical Notes window varies depending on the type of note you're entering.

Immunization

Propel Rx - Clinical Notes - Immunization - Huang, Fae PHN

Clinical Note

Date: May 19, 2023 Type: Immunization

Description: Comirnaty bivalent second booster

Medical Allergy				Medical Condition			
Description	Severity	Effective Date		Description	Severity	Effective Date	
				DIABETES MELLITUS	M	May 10, 2023	

Rx #: 504356 DIN: 2531461 Drug: COMIRNATY BIVALENT Strength: 15&15MCG

Immunization Event

Vaccine: COMIRNATY BIVALENT (ORIGINAL &OMICRON BA.4/BA.5) 15&15MCG

Immunization Date: 05/19/2023

Lot# / Exp: DF1245 07/31/2023 Qty: 0.3

Site: Left Arm Route: Intramuscular (IM)

Refusal: Sequence: Second Booster

Comments:

Immunization/Booster Follow-Up

Follow-Up 1 Follow-Up 2

User: TT 1/1 OK Cancel

All Other Clinical Note Types

Propel Rx - Clinical Notes - Huang, Fae PHN

Clinical Note

Date: May 10, 2023 Type: Drug Related Proble Duration: 5 mins or less Service Level: Standard Interventi

Description: GI discomfort after starting metformin.

Medical Allergy				Medical Condition			
Description	Severity	Effective Date		Description	Severity	Effective Date	
				DIABETES MELLITUS	M	May 10, 2023	

Rx #: 504308 DIN: 2385341 Drug: METFORMIN FC Strength: 500MG

Data

Signs: Symptoms: Bloating, upset stomach Lab Results

Comments: Symptoms started the day after starting metformin 500mg.

Assessment

Therapy: Appropriate/Safe Comments: Patient was taking metformin on an empty stomach.

Plan

Treatment: I patient to take metformin with food (i.e., after breakfast and dinner). Monitor: Effectiveness Allergic Reaction Adherence Side Effects

Comments:

Patient Follow Up: 05/12/2023 11:46 AM Patient: Huang, Fae

Prescriber Follow Up: Prescriber:

User: TT 1/1 OK Cancel

Overview of the Clinical Notes Window: Non-Immunization Types

For non-Immunization Clinical Notes, the window is structured like a DAP (Data, Assessment, Plan) note. In addition to freeform fields for entering your consultation notes, features are available to support clinical documentation and patient care. Here are some of them:

- 1) **Description** – appears in the Clinical History grid and can be used to filter and quickly retrieve records.
- 2) **Medical Allergy** and **Condition** – the medical allergies and conditions entered in the Patient Folder Clinical tab. This is read-only.
- 3) **Rx #** and **DIN** – cross-reference the note by entering the prescription number or DIN that it applies to.
- 4) **Lab Results** – view lab results entered in the Patient Folder Clinical tab and add new entries.
- 5) **Disease State expander** – highlight a medical condition at the top and select this button to open a list of pre-entered goals, recommendations, and monitoring parameters that can be used in the Comments section.



TIP: To select multiple entries, hold down the **CTRL** key while making your selections.

- 6) **Patient and Prescriber Follow Up** – a Follow up activity will be automatically generated for the specified date and time in the Activities tile.

Overview of the Clinical Notes Window: Immunization Types

Immunization Clinical Notes allow you to document immunization details such as the lot and expiry, dosage sequence, date, etc. Here are some of the features that support your immunization documentation:

- 1) **Description** – appears in the Clinical History grid and can be used to filter and quickly retrieve records.
- 2) **Medical Allergy** and **Condition** – the medical allergies and conditions entered in the Patient Folder Clinical tab. This is read-only.
- 3) **Rx #** and **DIN** – cross-reference the note by entering the prescription number or DIN that it applies to.
- 4) **Refusal** – pre-populated list of reasons for not administering a vaccine.
- 5) **Immunization/Booster Follow-Up** – a Followup activity will be automatically generated for the specified date and time in the Activities tile.

The screenshot shows the 'Propel Rx - Clinical Notes - Immunization - Huang, Fae PHN' window. It contains several sections:

- Clinical Note:** Includes a 'Date' field (May 19, 2023) and a 'Type' dropdown menu (Immunization).
- Description:** A text field containing 'Comirnaty bivalent second booster'.
- Medical Allergy:** A table with columns 'Description', 'Severity', and 'Effective Date'.
- Medical Condition:** A table with columns 'Description', 'Severity', and 'Effective Date', containing one entry: 'DIABETES MELLITUS' with severity 'M' and effective date 'May 10, 2023'.
- Rx # and DIN:** Fields for 'Rx #' (504356) and 'DIN' (2531461).
- Drug and Strength:** Fields for 'Drug' (COMIRNATY BIVALENT) and 'Strength' (15&15MCG).
- Immunization Event:**
 - Vaccine:** COMIRNATY BIVALENT (ORIGINAL &OMICRON BA.4/BA.5) 15&15MCG
 - Immunization Date:** 05/19/2023
 - Lot# / Exp:** DF1245 / 07/31/2023
 - Qty:** 0.3
 - Site:** Left Arm
 - Route:** Intramuscular (IM)
 - Refusal:** A dropdown menu.
 - Sequence:** Second Booster
 - Comments:** A text area.
- Immunization/Booster Follow-Up:** Fields for 'Follow-Up 1' and 'Follow-Up 2' with date pickers.
- User:** TT
- Navigation:** Back, Forward, and page indicators (1/1).
- Buttons:** OK and Cancel.

Adding Clinical Notes

- 1) Open the **Patient Folder**.
- 2) Select the **Clinical** tab.
- 3) Under **Clinical History**, select **Add**. The **Clinical Notes** window opens.
- 4) From the **Type** dropdown, select the type of clinical note being added.
- 5) Enter information in the remaining fields of the window, as needed.



TIP: The **Type** is required for non-Immunization notes. The **Immunization Date** and **Qty** are required for Immunization notes.

- 6) Select **OK**. The Clinical Notes window closes.
- 7) Select **Save**. If a follow up was scheduled, it is placed on the Activities tile for the date specified.

The screenshot shows the PropelRx Clinical Notes interface. It is divided into two main windows: a patient profile window and a clinical note entry window.

1 Points to the patient profile window, which shows patient information for Huang, Fae (Female, 33, PHN: (416) 111-2222, English). The **CLINICAL** tab is selected.

2 Points to the **CLINICAL** tab in the patient profile window.

3 Points to the **Add** button in the **Medication** section of the patient profile window.

4 Points to the **Type** dropdown menu in the clinical note entry window, which is set to "Drug Related Problem".







5 Points to the **Description** field in the clinical note entry window, which contains "GI discomfort after starting metformin".

6 Points to the **OK** button at the bottom right of the clinical note entry window.

7 Points to the **SAVE** button at the bottom of the patient profile window.

The clinical note entry window includes fields for Date (May 10, 2023), Duration (5 mins or less), Service Level (Standard Interventi...), Description (GI discomfort after starting metformin), Medical Allergy, Medical Condition (DIABETES MELLITUS, M, May 10, 2023), Rx # (504308), DIN (2385341), Drug (METFORMIN FC), Strength (500MG), Signs, Symptoms (Bloating, upset stomach), Comments (Symptoms started the day after starting metformin 500mg), Assessment (Therapy: Appropriate/Safe, Comments: Patient was taking metformin on an empty stomach), and Plan (Treatment: I patient to take metformin with food (i.e., after breakfast and dinner), Monitor: Effectiveness, Allergic Reaction, Adherence, Side Effects, Patient Follow Up: 05/12/2023, 11:46 AM, Patient: Huang, Fae, Prescriber Follow Up, Prescriber).

Pointers on Locating Clinical Notes

- If the Clinical Note was created within the **last 90 days**, it appears in the **Clinical History** grid. Otherwise, you can detail older notes by selecting the expander button  in the Clinical History section.
- Enter **Descriptions** for your Clinical Notes so you can filter by keywords in your Description and quickly retrieve your notes.
- If you want to locate Clinical Notes entered for a particular day, week, or month, select the expander button  in the Clinical History section. Calendar controls, like those located on the Workbench, allow you to view Clinical Notes by day, week, or month.
 -  = updates the view to the current day, week, or month.
 -   = updates the view to the previous or next day, week, or month.
 -  = opens the Calendar window to select a particular day, week, or month.
- Highlight a Clinical Note and select **Detail** to view the information that was entered.



TIP: You can hover over the Description field of a completed Clinical Note and a tool tip will appear with all the information entered in the field. This is useful if you entered a long description that extends beyond the field displayed.



NOTE: Once a Clinical Note is saved, it cannot be edited. If you need to enter more information, create another Clinical Note.

Printing Clinical Notes

You can print a Clinical Note to provide to the patient or prescriber. The Clinical Note report includes:

- Patient identifiers (PHN, birth date, etc.)
- Pharmacy information (name, address, phone number)
- Content from the Clinical Notes window

To print a Clinical Note:

- 1) Highlight the Clinical Note in the **Patient Folder Clinical** tab. If you can't locate the note, refer to our [pointers](#).
- 2) Select the **Print** button.

propel^{Rx} Patient

Huang, Fae
Female (33)
PHN:

HUANG, FAE THIRD PART

Observations
Height: 5 ft 0
Weight: 98.0 lbs

Clinical Information
✓ No Known Medical Allergies

Medical Type	Medic
Condition	DIABE

Clinical History
Viewing last 90 days

Entered Date	User	Type	Description	Rx#	DIN	Drug Name	Strength
May 10, 2023	TT	Drug Related	GI discomfort afte	504308	2385341	METFORMIN FC	500MG

Clinical Notes Date: May 19, 2023

Name: Huang, Fae
Gender: Female
Date of Birth: Jan 02, 1990
Address: 100 Dockson Rd MARKHAM, Ontario, M1W4P2

PHN: (416) 111-2222
Email:
Description: GI discomfort after starting metformin.

Pharmacist Name: Team, Training
License #: 027
Entry Date: May 10, 2023
Service Level: Standard Intervention
Service Duration: 5 mins or less
Patient Follow-up: May 12, 2023

Clinical Information			
Allergy	Reaction	Condition	Severity
No Known Medical Allergies		DIABETES MELLITUS	Moderate

Prescription/Drug Information
Rx#: 504308 Fill Date: May 10, 2023 TP Bill: CA
Drug Name: METFORMIN,METFORMIN FC Strength: 500MG DIN: 2385341

Data

Signs:

Symptoms: Bloating, upset stomach
Comments: Symptoms started the day after starting metformin 500mg.

Assessment
Therapy: Appropriate/Safe
Comments: Patient was taking metformin on an empty stomach.

Plan
Treatment: Advised patient to take metformin with food (i.e., after breakfast and dinner).
Monitor: _ Effectiveness _ Allergic Reaction X Adherence X Side Effects
Comments:

Huang, Fae
Community Pharmacy, (800) 387-6093
2300 Meadowvale Blvd., Mississauga, Ontario, L5N 5P9

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9940 WS2 X1.4-02

SEARCH REPORTS SAVE CLOSE REVERT

Clinical Note Follow Up Activities

When a Patient, Prescriber, or Immunization Follow Up is entered in the **Clinical Notes** window, a **Followup** Activity is placed in the **Activities** tile for the specified date. Once you are ready to follow up with the patient or prescriber, you can document your notes from the Activity.

To complete a Followup Activity:

- 1) On the **Activities** tile, highlight the **Followup** Activity.



TIP: Use the calendar controls at the top right to change the view if needed. By default, only current day and overdue Activities are displayed.

- 2) Select **Complete**. The Clinical Notes window opens with the following information pre-populated:
 - **Type** = Follow Up (Patient), Follow Up (Doctor), or Immunization depending on the Type selected for the original Clinical Note
 - **Description** = FOLLOW-UP #1 or #2 (Immunization Followups only)
 - **Rx #** or **DIN** = same as the original Clinical Note
- 3) Complete the remaining fields in the window where applicable.
- 4) Select **OK**. The Activity is removed from the tile and a row is added to the **Patient Folder Clinical History**.

