

QuicDoc Pro – How to create new note types

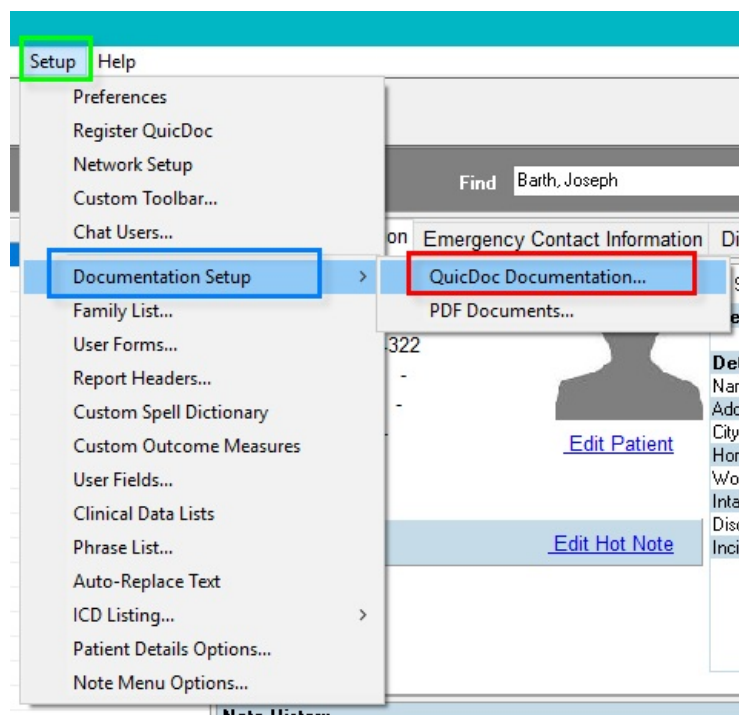
Reference Number: AA-00516 Views: 7426 Created: 10-16-2018 02:55 pm Last Updated: 10-16-2018 02:55 pm

0 Rating/ Voters ★★★★★

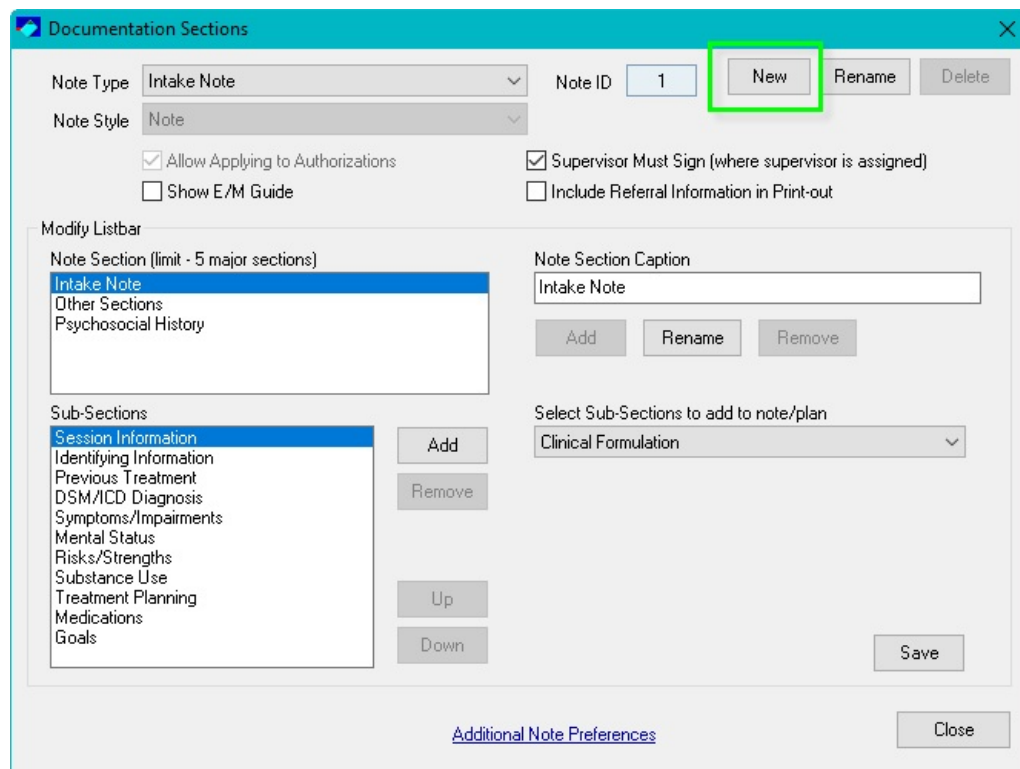
QuicDoc Pro – How to create new note types

Log into QuicDoc using an Admin account

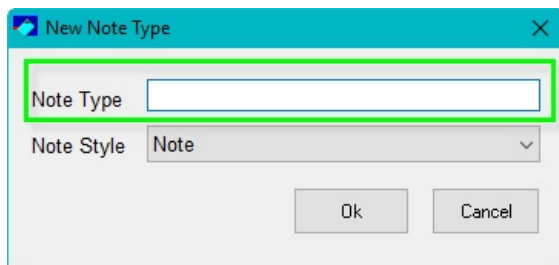
Under the **Setup** menu, select **Documentation Setup**, and click on **QuicDoc Documentation**



Click on **New**

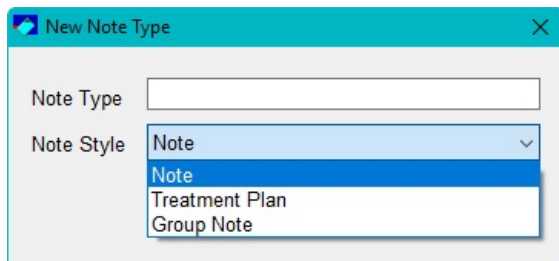


Enter a name for the **Note Type**



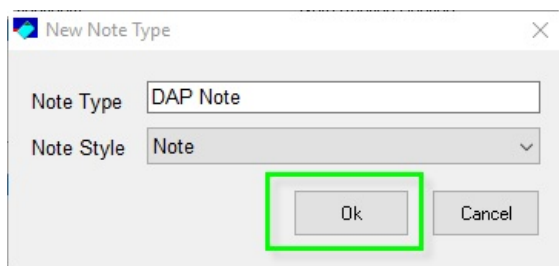
The 'New Note Type' dialog box has a title bar with a close button. It contains two input fields: 'Note Type' (a text box) and 'Note Style' (a dropdown menu currently showing 'Note'). At the bottom are 'Ok' and 'Cancel' buttons. A green rectangle highlights the 'Note Type' text box.

Under the **Note Style**, select the type of note



The 'New Note Type' dialog box is shown with the 'Note Style' dropdown menu open. The menu lists four options: 'Note' (highlighted in blue), 'Treatment Plan', 'Group Note', and an additional unlabeled option. The 'Note Type' text box remains empty.

Click **Ok** when finished

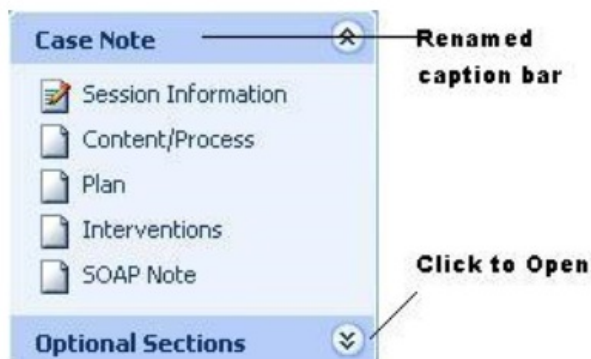


The 'New Note Type' dialog box now has 'DAP Note' entered in the 'Note Type' text box. The 'Note Style' dropdown is still set to 'Note'. The 'Ok' button is highlighted with a green rectangle.

Note Sections:

The note sections are your caption bars. You may add more sections in this note.

You may use these instructions to customize existing note types.



The 'Case Note' form is shown. It has a title bar 'Case Note' with a maximize button. Below the title bar is a list of sections: 'Session Information', 'Content/Process', 'Plan', 'Interventions', and 'SOAP Note'. At the bottom is a section titled 'Optional Sections' with a collapse/expand icon. Two annotations with arrows point to the form: 'Renamed caption bar' points to the title bar, and 'Click to Open' points to the 'Optional Sections' icon.

To add caption bars:

Enter a name for the **Note Section Caption** and the click on **Add**

The screenshot shows the 'Documentation Sections' window. At the top, there are fields for 'Note Type' (DAP Note), 'Note ID' (12), and buttons for 'New', 'Rename', and 'Delete'. Below these are 'Note Style' (Note) and several checkboxes: 'Allow Applying to Authorizations', 'Show E/M Guide', 'Supervisor Must Sign (where supervisor is assigned)', and 'Include Referral Information in Print-out'.

The 'Modify Listbar' section contains a 'Note Section (limit - 5 major sections)' list with 'Data' and 'Assessment' items. To the right, the 'Note Section Caption' field is highlighted with a green box and contains the text 'Plan'. Below this field are 'Add', 'Rename', and 'Remove' buttons, with the 'Add' button highlighted by a blue box.

Below the 'Note Section' list is a 'Sub-Sections' list with 'Add', 'Remove', 'Up', and 'Down' buttons. To the right of this is a 'Select Sub-Sections to add to note/plan' dropdown menu showing 'Treatment Planning'. A 'Save' button is located at the bottom right of the main content area.

At the bottom of the window, there is a link for 'Additional Note Preferences' and a 'Close' button.

The new Note Section Caption will now be listed

This screenshot shows the 'Documentation Sections' window after the 'Plan' section has been added. The 'Note Section (limit - 5 major sections)' list now includes 'Data', 'Assessment', and 'Plan', with 'Plan' highlighted in blue. The 'Note Section Caption' field still contains 'Plan', and the 'Add', 'Rename', and 'Remove' buttons are still present.

The 'Sub-Sections' list and the 'Select Sub-Sections to add to note/plan' dropdown menu remain unchanged, showing 'Treatment Planning'. The 'Save' button is still at the bottom right of the main content area.

The 'Additional Note Preferences' link and the 'Close' button are still at the bottom of the window.

To add sub-sections:

Now you will want to add your sub-sections. The sub-sections will be for the data you will need to enter for the session.

Please note that you cannot add the same sub sections multiple times in one note.

You may use these instructions to customize existing note types.

Select the **Note Section Bar**. Please note that by default **Session Information** is already listed. This sub-section cannot be removed.

Documentation Sections

Note Type: DAP Note | Note ID: 12 | [New] [Rename] [Delete]

Note Style: Note

☐ Allow Applying to Authorizations | ☐ Supervisor Must Sign (where supervisor is assigned)

☐ Show E/M Guide | ☐ Include Referral Information in Print-out

Modify Listbar

Note Section (limit - 5 major sections)

- Data
- Assessment
- Plan

Note Section Caption: Data

[Add] [Rename] [Remove]

Sub-Sections

- Session Information

[Add] [Remove]

[Up] [Down]

Select Sub-Sections to add to note/plan

Treatment Planning

[Save]

[Additional Note Preferences](#) [Close]

Under **Select Sub-Sections**, select the form, and click add

Documentation Sections

Note Type: DAP Note | Note ID: 12 | [New] [Rename] [Delete]

Note Style: Note

☐ Allow Applying to Authorizations | ☐ Supervisor Must Sign (where supervisor is assigned)

☐ Show E/M Guide | ☐ Include Referral Information in Print-out

Modify Listbar

Note Section (limit - 5 major sections)

- Data
- Assessment
- Plan

Note Section Caption: Data

[Add] [Rename] [Remove]

Sub-Sections

- Session Information

[Add] [Remove]

[Up] [Down]

Select Sub-Sections to add to note/plan

Content/Process

[Save]

[Additional Note Preferences](#) [Close]

You will now see the form added to the Sub-section. If a form is added by mistake, select the form and click on remove.

Documentation Sections

Note Type: DAP Note Note ID: 12 [New] [Rename] [Delete]

Note Style: Note

☐ Allow Applying to Authorizations ☐ Supervisor Must Sign (where supervisor is assigned)

☐ Show E/M Guide ☐ Include Referral Information in Print-out

Modify Listbar

Note Section (limit - 5 major sections)

- Data
- Assessment
- Plan

Sub-Sections

- Session Information
- Content/Process

[Add] [Remove]

Up Down

Note Section Caption: Data

[Add] [Rename] [Remove]

Select Sub-Sections to add to note/plan: Content/Process

[Save]

[Additional Note Preferences](#) [Close]

Continue with the above steps for each Note Section and Sub-sections. Once completed, click on **Save** and then click on **Close**.

Documentation Sections

Note Type: DAP Note Note ID: 12 [New] [Rename] [Delete]

Note Style: Note

☐ Allow Applying to Authorizations ☐ Supervisor Must Sign (where supervisor is assigned)

☐ Show E/M Guide ☐ Include Referral Information in Print-out

Modify Listbar

Note Section (limit - 5 major sections)

- Data
- Assessment
- Plan

Sub-Sections

- Plan
- Goals

[Add] [Remove]

Up Down

Note Section Caption: Plan

[Add] [Rename] [Remove]

Select Sub-Sections to add to note/plan: Goals

[Save] [Close]

[Additional Note Preferences](#)

The new note is now ready to be used. Use the above steps to make any modifications to the notes such as adding and removing note sections and sub-sections.

DAP Note - Barth, Joseph [Note ID:35]

File

Help

Note

Preview

Signature(s)

abc

Data

Session Information

Content/Process

Developmental History

Medical Information

Assessment

Summary

Problems/Objectives

Plan

Plan

Goals

00:00:00

Start

Set 45 mins.

User: Dodson, Sarah

DAP Note

10/16/2018

Session Information, DAP Note

Apply Session to Authorization(s)

Date10/16/2018Session #CalculateStart TimeEnd TimeLength (mins)

ProviderDodson, SarahProgramServices

LocationMy location

Type of Visit

Scheduled VisitEmergency Visit

Others Present

Next Appointment

Enter Date or Click down button for calander.

Use the list to the left to complete sections you want to address. Click the question mark icon for Help.