Chapter 3: Client Processes
Section 4: First Nutrition Education Contact
Lesson: Progress Notes

Objectives:

Upon the completion of this lesson all users will be able to:
- utilize and interpret the "Progress Notes" tab; and
- distinguish between "Progress Notes" and other "Notes" in TWIST.

Oregon Policies:

♦   830   Nutrition Education: Documentation

Overview:

It is important to document information on each client and TWIST provides you
with a variety of screens and pop-ups to ensure all pertinent information is
recorded.

There are several "notes" functions in TWIST. Most pertain specifically to the
area where they are found. For instance, notes on the anthropometrics screen
refer specifically to information found on that screen. Notes in the intake area are
available to all staff and would be similar to the sticky notes that we find in all
paper charts.

"Progress Notes," however, are free-form medical-record notes in the traditional
SOAP format (subjective, objective, assessment, plan) and are to be used
primarily by a high-risk counselor for a care plan or by the certifier to note
information specific to a person's risk criteria or certification. Information
entered in Progress Notes should be information that would not normally be
entered in a regular TWIST field.

Instruction:

Documenting Progress Notes

The starting point for this section is:
       Client Processes ⇨ Certification ⇨ Woman ⇨ Progress Notes
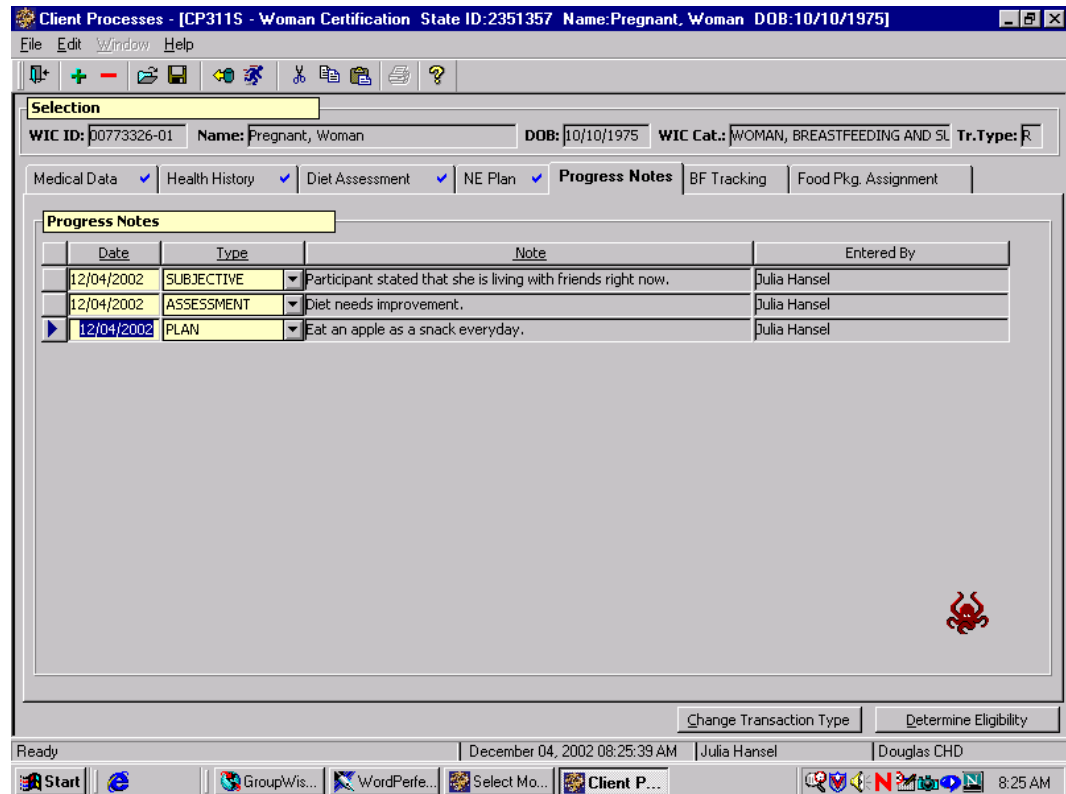
Figure 1: "Progress Notes" Screen

1. **Retrieve the client for whom you want to document a progress note.**

2. **Click in the "Date" field.**

    This field defaults to the current date but may be modified.

3. **Tab to the "Type" field and select the type of note you want to make.**

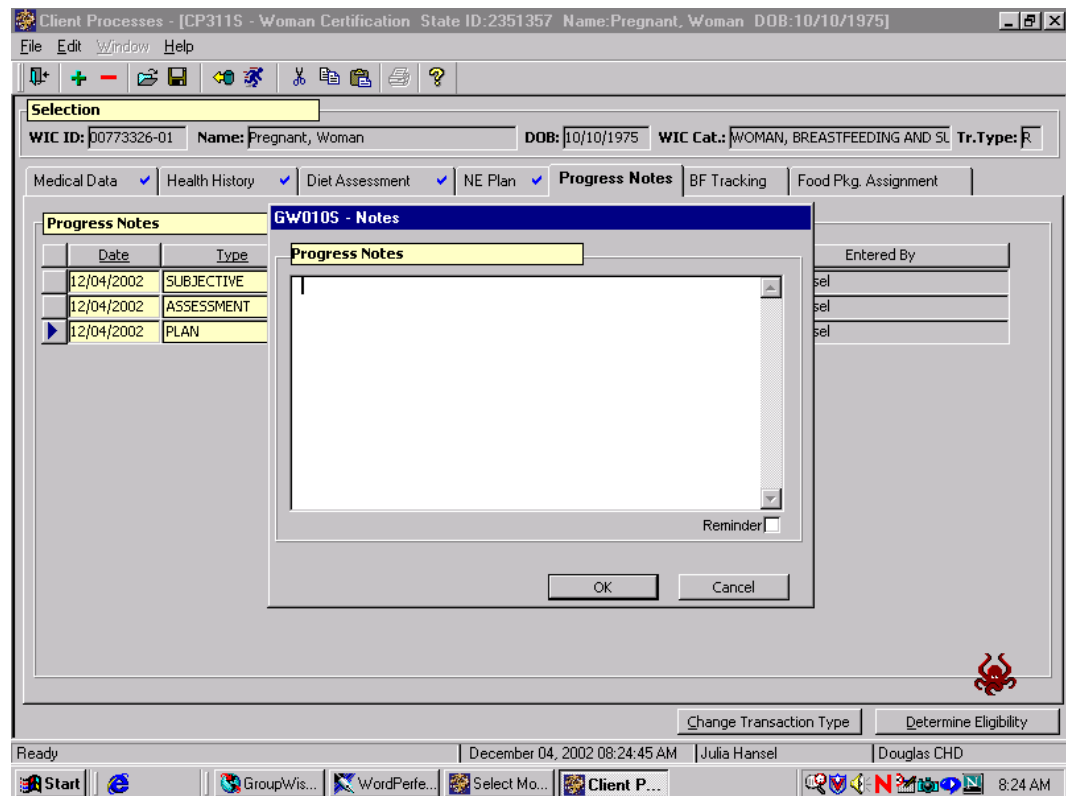4. **Double click in the "Notes" field to open the "Notes" pop-up**.

Figure 2: "Notes" Pop-Up

5.   **Enter your note.**

- The note is entered in free-form text.
- Once a progress note has been entered, the "Progress Notes" tab will automatically be flagged with a **blue note** as a visual reminder to the user.
- The screen also has a confidentiality feature that hides the text of the note if the information is "sensitive."
- To mark a note as sensitive, click the "Reminder" box in the lower right-hand corner.
- When a note has been recorded as sensitive, the blue note on the "Progress Notes" tab turns **red**.

6.   **Click "OK" to save the note and close the pop-up.**

Click "Cancel" to close the pop-up without saving the note.

♫ NOTE: The "**Entered By**" field is system generated with the user's log on name. This is another good reason not to share your password.

♫ NOTE: To review a note, you can double click in the field. However, to add a note, you must use the insert icon.

7.   **Save.**

8.   **Exit.**

✂ *Tips and Shortcuts:*

•   To add additional rows of information click the "Insert" icon.

•   Once a row has been saved it may not be removed.

•   Use the Progress Notes Summary Report to print a client's progress notes.

↪ *Practice Activities:*

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this section is:
        Client Processes ⇨ Certification ⇨ Woman ⇨ Progress Notes

1.   Click on the "Open" icon to access "Client Search" and find your client.
2.   Click the "Return with Client" button.
3.   Leave the date as **today's date**.
4.   Tab to "Type" and select **Assessment**.
5.   Tab to "Notes" and double click to open the "Notes" pop-up.
6.   Enter the following: "Doing a great job learning the new system!"
7.   Click "OK" to save and close the pop-up.
8.   Save your work.
9.   Exit back to the "Client Processes" window.

You're doing great! Let's try another note before we move on.

✓ *Skill Check:*

For this exercise you will enter a note for a client.

This will be a sensitive note. The note should be dated yesterday and indicates that the client is involved in a domestic violence situation. Write the note.

Do a screen print of the window with the "Notes" pop-up opened. Write your name on the screen print before turning it in to the instructor.