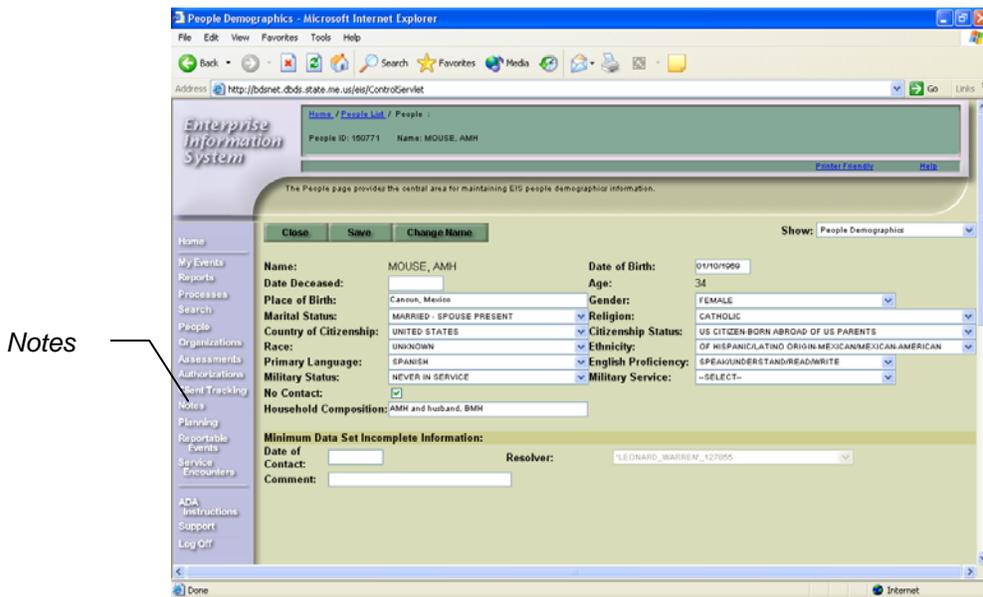


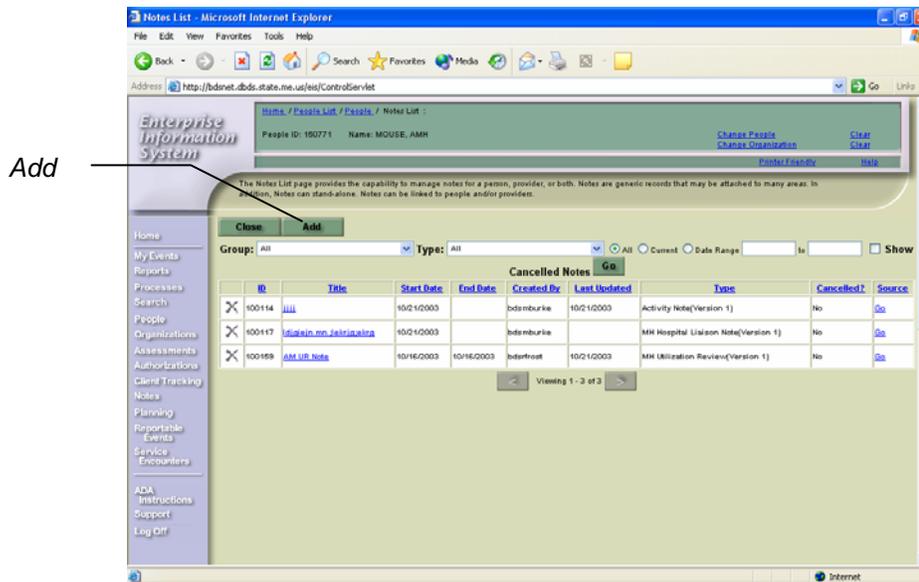
# Initiating a Note: ie. Activity, Clinical Authorization, Hospital Liaison, ISP Review, Plan, General, Jail Liaison, Supervisory, Utilization Review, Vocational

**MH Note:** All stand-alone notes use the following steps when being initiated.

1. Anchor your person (see instructions in the *Anchoring a Person* handout for more information).
2. Click **NOTES** in the EIS menu.



3. View the *Notes List* page.



4. Click the **ADD** button.

5. Type in an appropriate title for the note in **TITLE**.

The screenshot shows a web browser window titled 'Add Note - Microsoft Internet Explorer'. The page content includes the instruction 'Enter the Note information below and press the Next button.' Below this are several input fields: 'Title' (containing 'RM General Note'), 'Start Date' (containing '03/10/2004'), 'End Date' (containing '03/10/2004'), 'Originator' (containing 'RACHEL FROST'), 'Person' (containing 'Mouse, Rachel'), and 'Organization' (containing 'BDS / CENTRAL OFFICE'). At the bottom of the form are two buttons: 'Next' and 'Cancel'. On the left side of the image, there are labels with arrows pointing to the 'Title' field, the 'Start Date' and 'End Date' fields, and the 'Next' button.

**MH Note:** You should not put the client's name in the note title, as a person may be able to view the note list and should not have access to names of clients.

6. Edit the **START DATE** if necessary.

7. Type in an **END DATE** (date format is **MM/DD/YYYY**).

**Note:** In most cases, the **START DATE** and **END DATE** are the same.

8. Select the appropriate **ORGANIZATION** (if you need to change it from the default, see the *Selecting an Organization* handout for further instructions).

9. Click **NEXT**.

10. Select the appropriate **TYPE** for your note (specifics for each type follow this section).

The screenshot shows the same web browser window, but now the information entered in the previous step is displayed as text: 'Title: RM General Note', 'Start Date: 03/10/2004', 'End Date: 03/10/2004', 'Originator: RACHEL FROST', 'Person: Mouse, Rachel', and 'Organization: BDS / CENTRAL OFFICE'. Below this information is a 'Type:' label followed by a dropdown menu. At the bottom of the form are three buttons: 'Previous', 'Finish', and 'Cancel'. On the left side of the image, there are labels with arrows pointing to the 'Type' dropdown menu and the 'Finish' button.

11. Click the **FINISH** button.

## 12. View the *Notes General* page.

The screenshot shows a web browser window titled "Notes General - Microsoft Internet Explorer". The address bar displays the URL: `http://hdinet.dbsd.state.me.us/iej/ControlServlet`. The page header includes the "Enterprise Information System" logo and a navigation menu with items like Home, My Events, Reports, Processes, Search, People, Organizations, Assessments, Authorizations, Client Tracking, Notes, Planning, Reportable Events, Service Encounters, ADA Instructions, Support, and Log Off.

The main content area is titled "Notes General" and contains the following information:

- People ID: 150771 Name: AMH MOUSE
- Organization ID: 1 Name: BOS

Below this is a message: "The Notes General page provides the capability to add, read, or update notes. Notes are actually never updated, only additional note descriptions can be added." A toolbar contains buttons for "Close", "Save", "Add Description", "Cancel Note", "Add Service Note", and "Link to Process".

The form fields are as follows:

- Title:** AM General Visit
- Type:** General Note(Version1)
- Start Date:** 11/24/2003
- End Date:** 11/24/2003
- Originator:** indomst
- Domains:** A list of domains is shown, with "MENTAL HEALTH" selected. Available domains include: LIVING SKILLS, FAMILY SUPPORT, HEARING HEALTH, TRANSPORTATION, and CULTURAL/GENDER.
- Source:** (Empty field)
- Description:** This is where I type the note text.
- Staff Person:** RACHEL FROST
- Organization:** BOS

At the bottom, there is a table with columns for "Date", "Description", and "CreatedBy". The table is currently empty, and a status bar at the bottom indicates "Viewing 0 - 0 of 0".