

## New Group-By Option in the Notes tab

Added functionality enables a new **Group By** option in the Notes tab. Users can now sort notes according to categories defined by each customer site. Create new categories in OpenVista PuTTY and add note titles for sorting purposes in the Notes tab.

When the Notes tab view is grouped by the new grouping option **Category**, defined categories that include notes for the selected patient display according to sequence. Configure categories using the **MSC ADD/EDIT NOTE CATEGORIES** option. All note titles not included in a category, display under the category **Other**.

- In PuTTY, use **TEST AN OPTION NOT IN YOUR MENU** to access the **MSC CSA** menu. From the **MSC CSA** menu, select the **TIU IRM MAINTENANCE** menu, then the **MSC ADD /EDIT NOTE CATEGORIES** option to add new categories.

```
Select TIU Maintenance Menu QA720(GTM02) Option: MSC Note Categories File Maintenance
ADD/EDIT a NOTE CATEGORY: ?
Answer with MSC NOTE CATEGORIES NAME, or SEQUENCE
Do you want the entire 11-Entry MSC NOTE CATEGORIES List? y (Yes)
Choose from:
1 CATEGORY      30
CHILD           7
DISCIPLINARY NOTES  25
Lynne's         4
MEANINGFUL USE   15
MultiDisciplinary Tx Plans  8
NURSING NOTES   5
Note Assist     35
PAIN CLINIC    40
PARENT         6
PHYSICIAN NOTES  1

    You may enter a new MSC NOTE CATEGORIES, if you wish
    Answer must be 3-30 characters in length.

ADD/EDIT a NOTE CATEGORY: ADMINISTRATIVE DOCUMENTS
Are you adding 'ADMINISTRATIVE DOCUMENTS' as
a new MSC NOTE CATEGORIES (the 12TH)? No// Y (Yes)
MSC NOTE CATEGORIES SEQUENCE: 45
NAME: ADMINISTRATIVE DOCUMENTS Replace
SEQUENCE: 45//

ADD/EDIT a NOTE CATEGORY: █
```

Figure 1: The ADD/EDIT a NOTE CATEGORY option

- Add existing note titles to the newly configured categories using the **MSC ASSIGN TIU NOTE CATEGORY** option.

```
Select TIU Maintenance Menu QA720(GTM02) Option: TIU Note Category maintenance
Select a DOCUMENT DEFINITION: ADVANCED MU ADVANCED DIRECTIVES TITLE
CATEGORY: ADMINISTRATIVE DOCUMENTS 45
Select a DOCUMENT DEFINITION: █
```

Figure 2: The MSC ASSIGN TIU NOTE CATEGORY option

- In CareVue, choose **Custom View** from the **View** menu in the Notes tab; set the **Group By** drop down to **Category** and press OK.

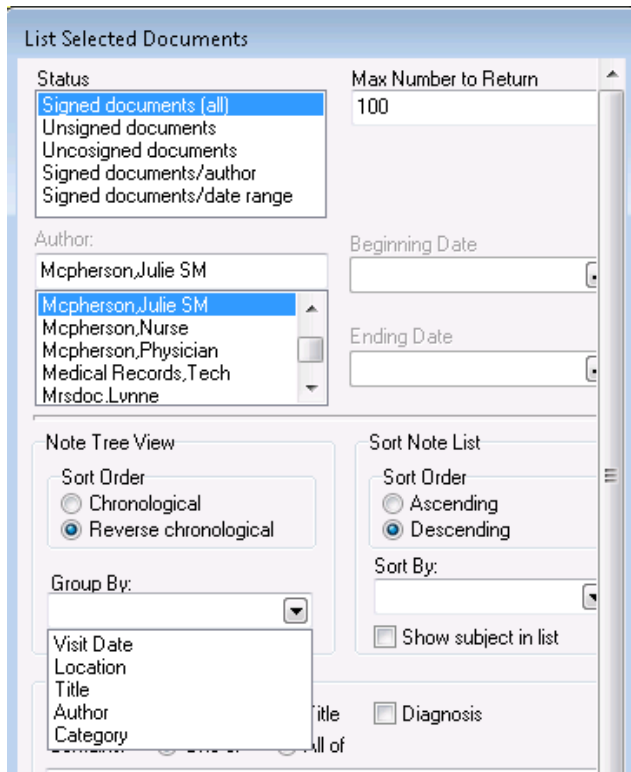


Figure 3: The Group By drop down in the List Selected Documents dialog

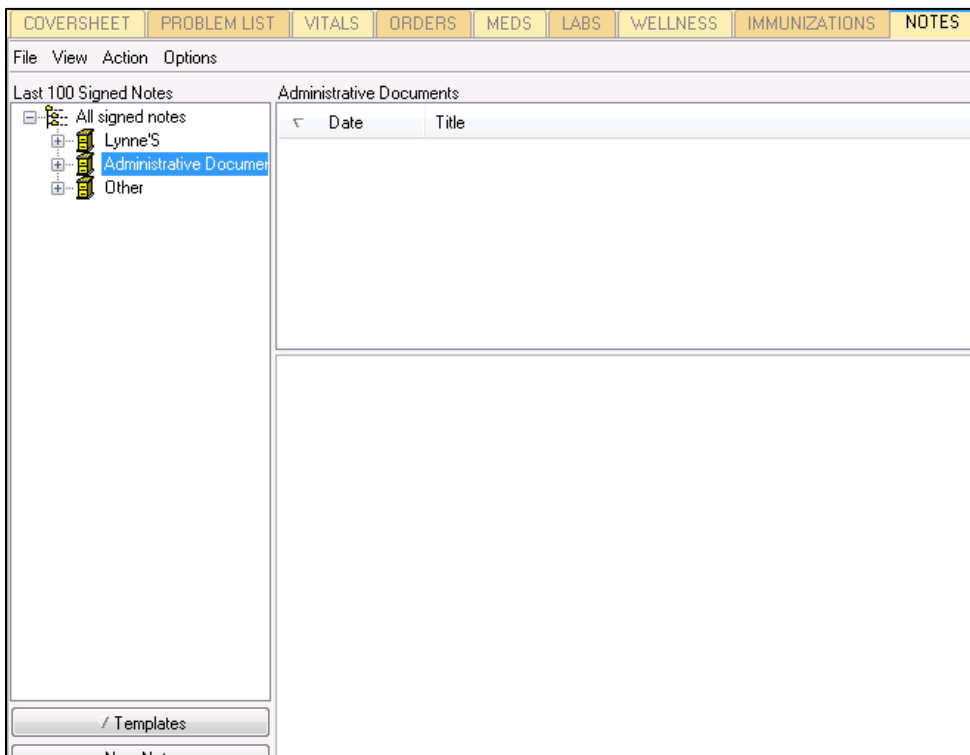
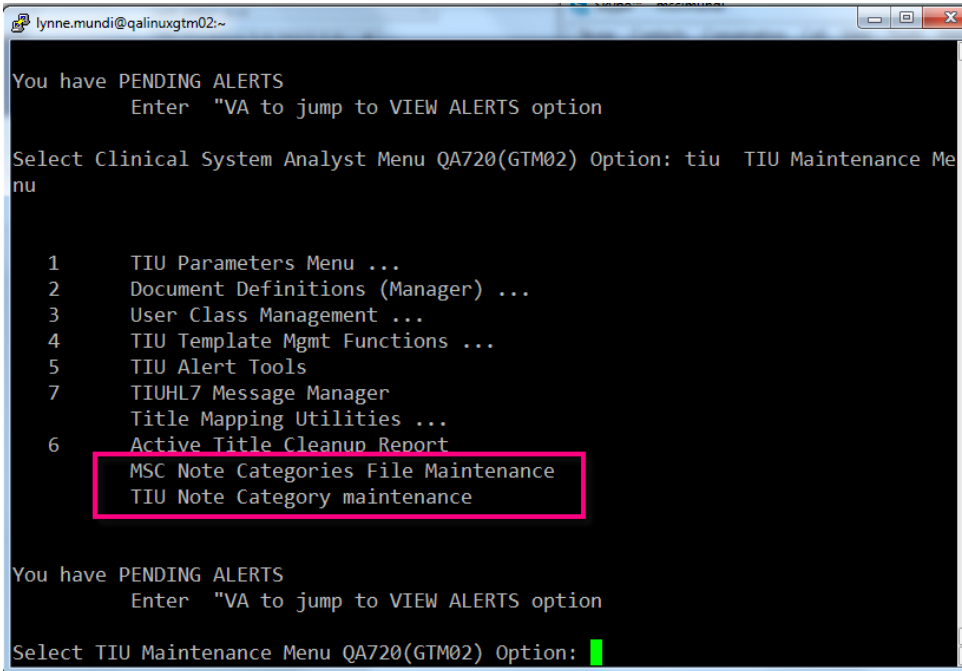


Figure 4: Administrative Documents in the Notes tab

## New Menu Options

The **TIU Maintenance Menu [TIU IRM MAINTENANCE MENU]** now includes new menu options:

- **MSC Note Categories File Maintenance [MSC ADD/EDIT NOTE CATEGORIES]**
- **TIU Note Category maintenance [MSC ASSIGN TIU NOTE CATEGORY]**



```
lynne.mundi@qalinuxgtm02:~  
You have PENDING ALERTS  
Enter "VA to jump to VIEW ALERTS option  
  
Select Clinical System Analyst Menu QA720(GTM02) Option: tiu TIU Maintenance Me  
nu  
  
1 TIU Parameters Menu ...  
2 Document Definitions (Manager) ...  
3 User Class Management ...  
4 TIU Template Mgmt Functions ...  
5 TIU Alert Tools  
7 TIUHL7 Message Manager  
Title Mapping Utilities ...  
6 Active Title Cleanup Report  
MSC Note Categories File Maintenance  
TIU Note Category maintenance  
  
You have PENDING ALERTS  
Enter "VA to jump to VIEW ALERTS option  
  
Select TIU Maintenance Menu QA720(GTM02) Option: █
```

Figure 5: New options available in the TIU Maintenance Menu