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| |  |  | | --- | --- | | Topic: | Advanced Practice Provider (APP) Student Sends Note to Preceptor for Endorsement | | Facility: | IU Health Facilities | | Audience: | APP Students and Preceptors | | | |  | | --- | | Effective Date | | TBD | | Contact | | IU Health Help Desk helpdesk@iuhealth.org | |
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| Overview: | This document provides a brief outline for the Advanced Practice Provider (APP) Student to preceptor note workflow. This workflow provides appropriate regulatory compliance to support the preceptor to sign notes written by APP Students. | |
| APP Student Workflow – Submit a Note to a Preceptor | | |
| Step | Action | |
|  | Click the **Sign/Submit** button.  Students are required to choose a preceptor for verifying signature. | |
|  | Select a **preceptor** to submit the note to for endorsement.   1. In **Dynamic Documentation** (**Dyn Doc**): | |

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| APP Student Workflow – Submit a Note to a Preceptor (continued) | |
| Step | Action |
| (continued) | 1. In **PowerNote**: |
|  | Click the **Submit** button (*there is no Sign button*).  When submitted by the APP Student, the note is placed in an **(Unauth)** – ”Unauthenticated” – status, remains visible to other users in Workflow and displays a “Preliminary Report” heading when opened. |
| Note Statuses Meanings  “**In progress**” – Author is still writing note.  “**Unauthorized**” – App Student has submitted note to preceptor.  “**Completed**” – Authentication signature from preceptor has been completed. | |

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| Preceptor Workflow – Make Changes and/or Corrections to a PowerNote     * When opened, the note header reads, “**\* Preliminary Report \***.” * The preceptor receives the submitted note in Message Center, as in the past, in the **Sign** folder. * The preceptor can now make direct **changes/corrections** to the note before signing.   **Important Notes:**  • If the preceptor wants to addend (NOT edit) the note, they may still do so. They must sign the note and then modify with an attestation statement. The attestation statement and signature line will separated by a bold line and additional time stamp.  • If the preceptor wants to make edits and also attestation statement, they should follow the workflow below. The attestation statement and signature line will **not** be separated by a bold line and time stamp. |

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| Preceptor Workflow – Make Changes and/or Corrections to a PowerNote (continued) | |
| Step | Action |
|  | Open the note in Message Center (*in the Sign folder*). |
|  | Click the **Correction** (  ) button on the toolbar.  The PowerNote re-loads for corrections. |
|  | Make any **changes** or **corrections**, as needed. |
|  | Click the **Sign/Submit**button.  The following screen shot illustrates how the note displays after it’s been verified. |

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| Preceptor Workflow – Make Changes and/or Corrections to a Dyn Doc | |
| Step | Action |
|  | Open the note in Message Center (*in the Sign folder*). |
|  | Click the **Modify** (  ) button on the toolbar. |
|  | Take action, with these three options.   1. **Edit** the document. 2. **Add new content** to the document. 3. Skip to Step 4 (Sign only). |
|  | **Sign** the document. |

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| Preceptor Workflow – Add an Addendum to a PowerNote  If the preceptor wants to addend (NOT edit) the note, they may still do so. They must sign the note and then modify with an attestation statement: the attestation statement and signature line will be separated by a bold line and additional time stamp. | |
| Step | Action |
|  | Open the note in Message Center (*in the Sign folder*). |
|  | Click the **OK** button.  This signs the note without any edits, and places it in a final, verified status. The note will now display in a “Final Report” status. |
|  | Click the **Modify** (  ) button on the toolbar.  The note opens and the cursor is positioned below the “Insert Addendum Here” heading. |

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| Preceptor Workflow – Add an Addendum to a PowerNote (continued) | |
| Step | Action |
|  | Enter an addendum.  All attestation statements are still present. |
|  | Click the **Sign** button.  The signed note remains in a “Final Report” status.  **Note:** The App Student remains the Author of the Note, and student and preceptor signatures are both present in the Signature Lines. |