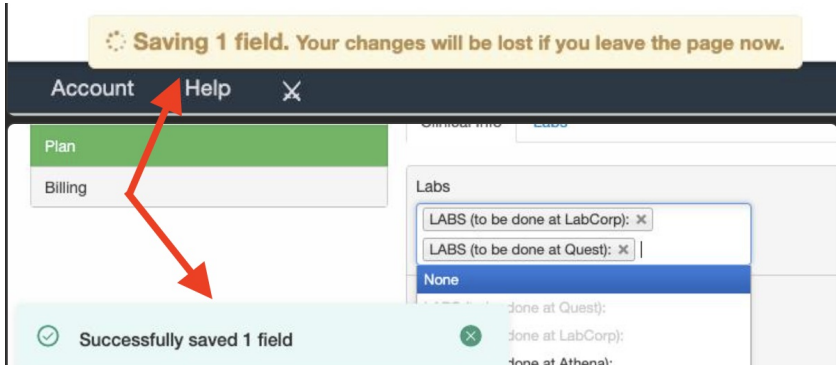


Clinical Notes Auto Save Indicator

Last modified on 12/13/2024 3:58 pm EST

To improve the clinical notes experience, an auto-saving indicator feature has been added to address users' issues when leaving a form before completing the clinical note field update-saving process. This update replaces the notification that typically appears in the bottom left corner of the screen, as well as the older notification that used to display in the center.



Auto-Save Indicator Workflow

When a form is exited before the clinical note field update process is complete, the following issues may occur:

- Out-of-Sync Data: Data between forms may become inconsistent.

(Example) If a user enables a switch linked to billing codes and navigates to the billing tab, they may find that the billing codes were not applied.

- Data Loss: Exiting the window or tab completely may result in the loss of unsaved data.

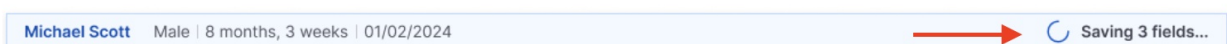
Web

Once a user modifies a form field, the auto-save process begins, and an indicator will appear in the clinical note header.



The indicator is responsive and will update according to the status of the auto-save process:

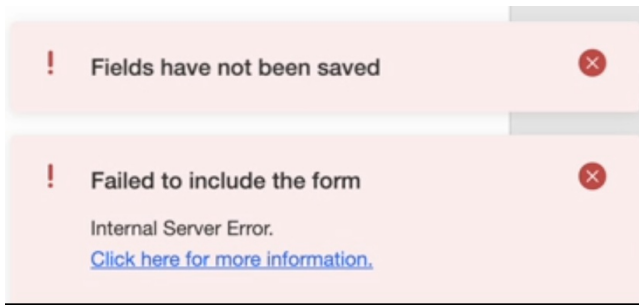
Save in progress



Save completed successfully

Save failed to complete

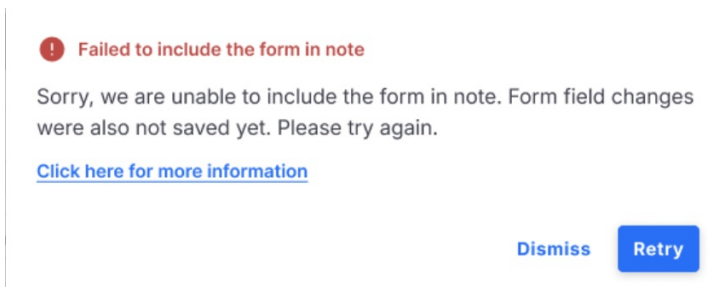
If the save encounters an error, the user will see a notification in the bottom left corner of the screen, allowing them to copy diagnostics related to the issue.



Include in note error

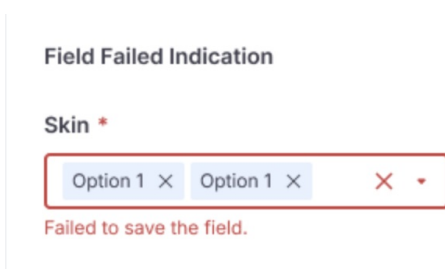
If the "Include in Note" request fails, any updated field value requests will not be sent, potentially resulting in data loss within the clinical note if the user navigates to a different form.

A. In the event of a failure to include in the note, a pop-up notification will appear, providing the user with instructions on how to proceed.



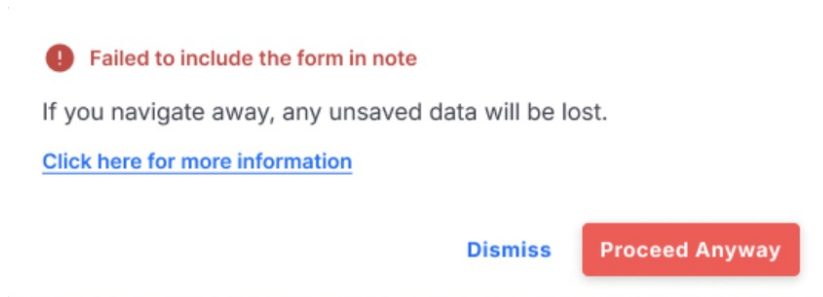
Retry: The "Include in Note" request will be retried, and the form field change requests will remain in the queue.

Dismiss: The pop-up notification will close, and the user will stay on the same form. Any fields that did not save will have a red border around them, with a message saying, "Failed to save the field," to show which updates were not saved.



B. If the user attempts to click on another form, a pop-up notification will appear, providing the user with

instructions on how to proceed.

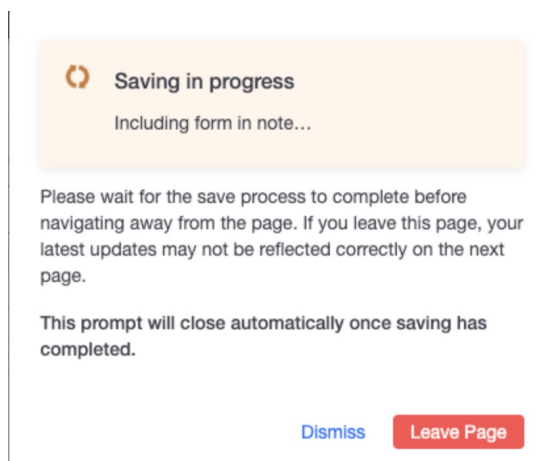


Dismiss: The pop-up notification will close, and the user will stay on the same form.

Proceed Anyway: The pop-up notification will close, and the user will be redirected to the form they selected. This will result in data loss.

Saving in progress

If the user tries to move to another form before the auto-save process is completed, they will see the following pop-up window:



- **Dismiss:** Close the modal, and the user will remain on the current clinical notes form. The saving process will continue to run.
- **LeavePage:** Close the modal and the user will be redirected to the next form selected. The latest updates may not be reflected correctly on the next page.

iOS

The following auto-indicator will appear when form fields are saving.

