

Document New Note



Course Overview

Visit notes are used to record patient care and complete the encounter. Most visits begin within a workflow, but sometimes a visit needs to be entered manually. In those situations, you will document a new note to capture the visit from start to finish.

This guide walks you through how to complete the visit note and electronically sign the encounter.

Use This Guide When

- Starting a visit outside of a workflow
- Entering a visit that already occurred

What You'll Be Able to Do

- Create and complete a visit note manually
- Document patient information using the encounter template
- Initiate follow-up care or tasks from the visit
- Electronically sign the encounter

Document New Note



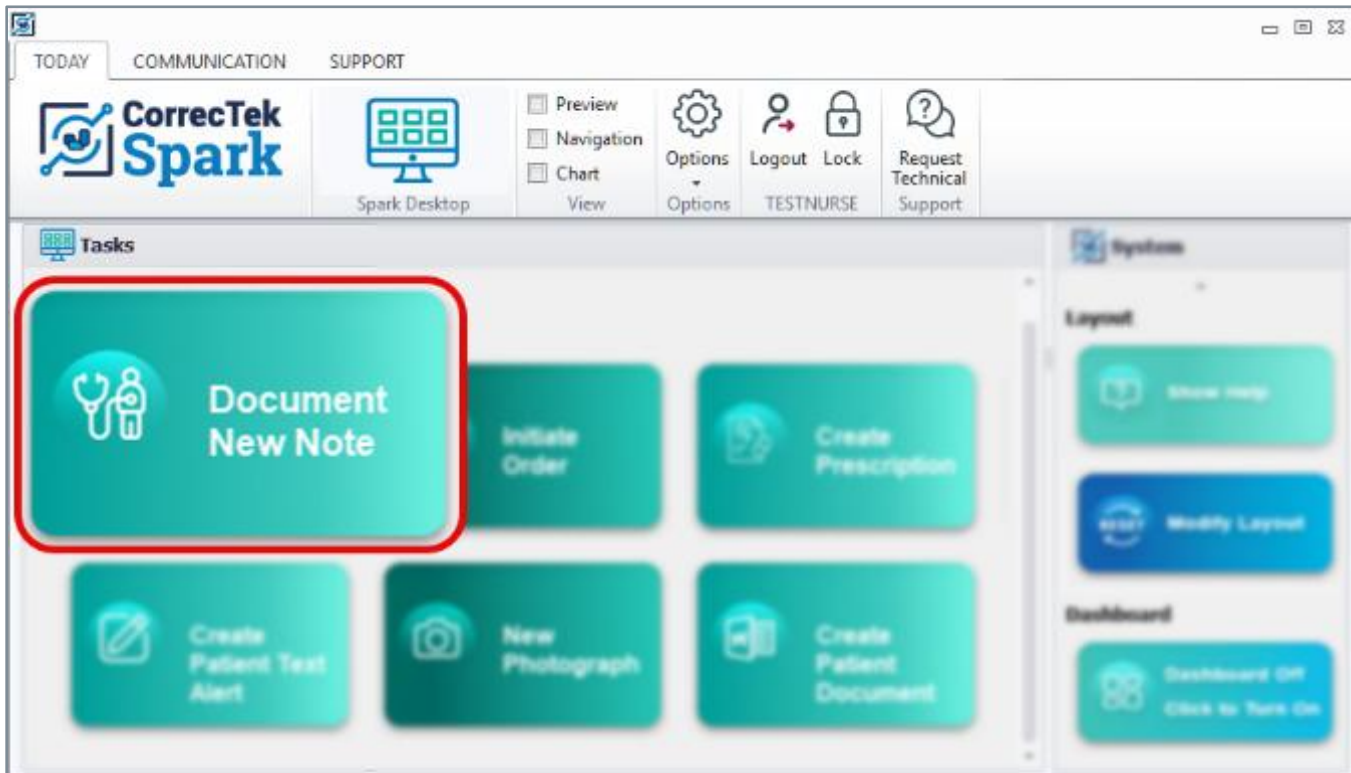
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Document New Note

Spark Desktop

From the Spark desktop, click **Document New Note**.



Select a Patient

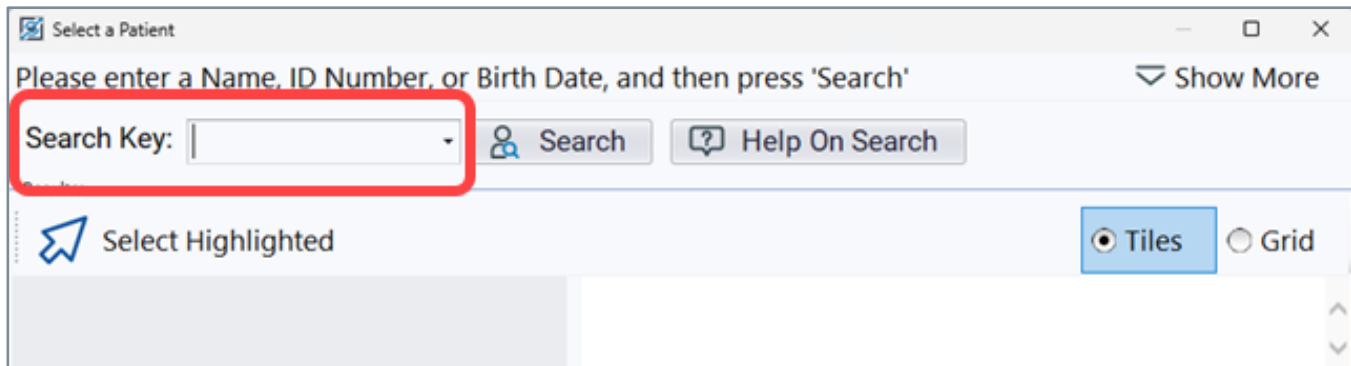
Once initiated, the Select a Patient dialog box opens.

Search Patient

Use the **Search Key** field to type identifiable information to locate a patient. Then, click **Search**.

| Tip: Identifiable information could include first and/or last name, ID number, or DOB.

Document New Note



Select a Patient

Please enter a Name, ID Number, or Birth Date, and then press 'Search' Show More

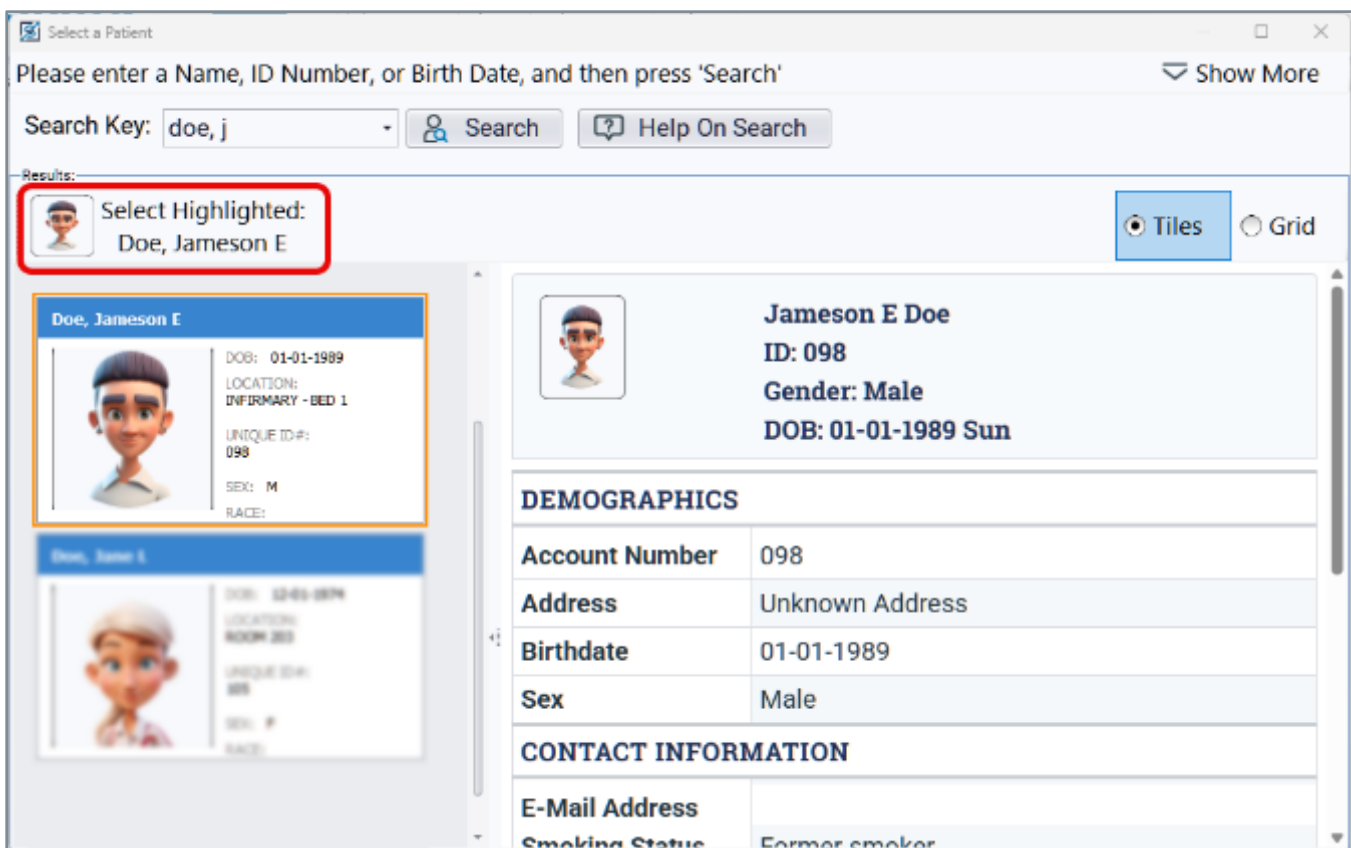
Search Key: Search Help On Search

Select Highlighted Tiles Grid

Select Patient

Locate and select the correct patient in the search results. Click **Select Highlighted** to open the template screen.

| Tip: Demographic and Contact Information displays to the right when a patient is highlighted.



Select a Patient

Please enter a Name, ID Number, or Birth Date, and then press 'Search' Show More

Search Key: Search Help On Search

Results:

Select Highlighted: Doe, Jameson E Tiles Grid

Doe, Jameson E

DOB: 01-01-1989
LOCATION: INFIRMARY - BED 1
UNIQUE ID#: 098
SEX: M
RACE:

Jameson E Doe
ID: 098
Gender: Male
DOB: 01-01-1989 Sun

DEMOGRAPHICS

Account Number	098
Address	Unknown Address
Birthdate	01-01-1989
Sex	Male

CONTACT INFORMATION

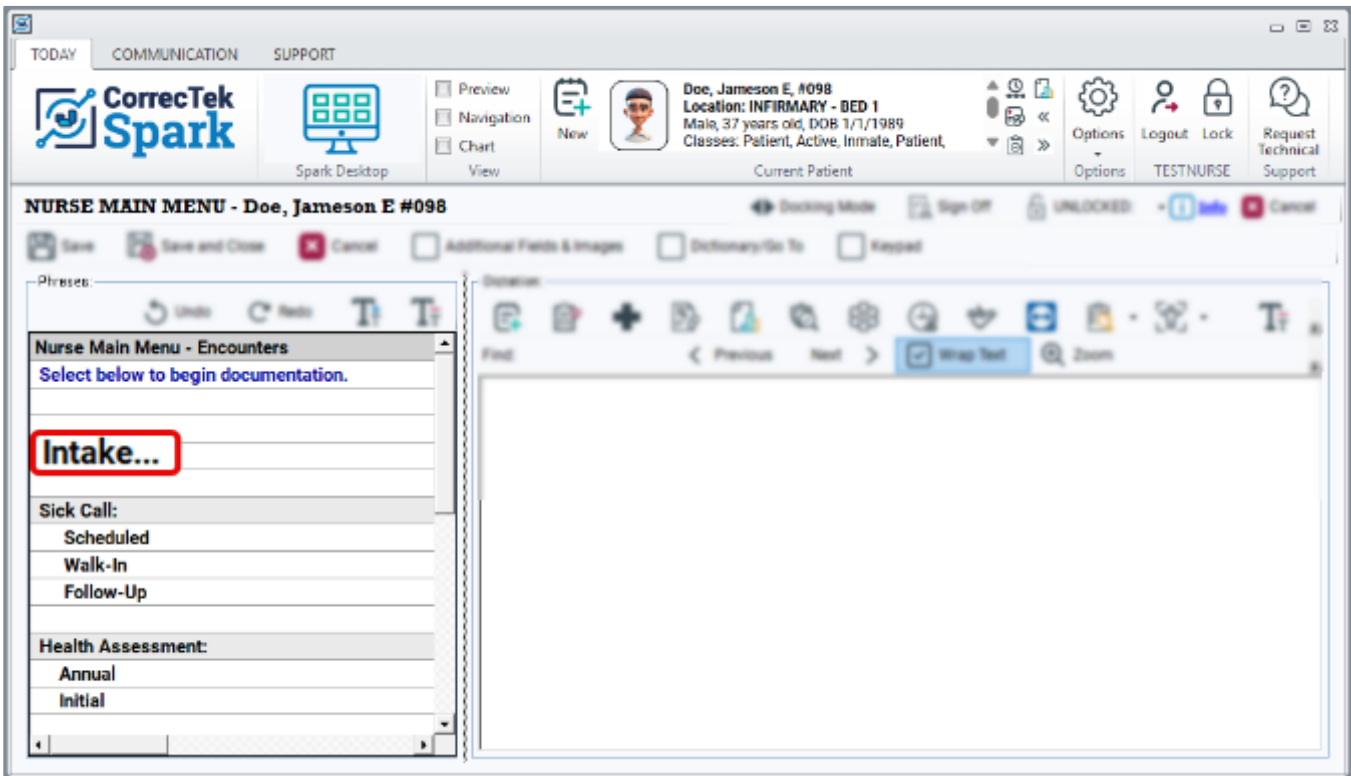
E-Mail Address	
Smoking Status	Former smoker

Document New Note

Document a Visit

The template screen opens. Select a visit type from the **Phrases** column to begin documentation.

In this example, **Intake** is selected.



The screenshot displays the CorrecTek Spark software interface. At the top, there are tabs for 'TODAY', 'COMMUNICATION', and 'SUPPORT'. Below these, the 'CorrecTek Spark' logo is visible. The main area is titled 'NURSE MAIN MENU - Doe, Jameson E #098'. On the left, under the 'Phrases' column, there is a list of encounter types: 'Nurse Main Menu - Encounters', 'Select below to begin documentation.', 'Intake...' (highlighted with a red box), 'Sick Call:', 'Scheduled', 'Walk-In', 'Follow-Up', 'Health Assessment:', 'Annual', and 'Initial'. On the right, there is a large text area for documentation, with a toolbar above it containing various icons for editing and formatting.

Tip: Prompts display in blue. Click a response in black to add it to the note.

Each selection adds to the **Dictation**.

For more information, see the [Templates](#) and [Phrases Column](#) references.

Document New Note

NURSE MAIN MENU - Doe, Jameson E #098

Save Save and Close Cancel Additional Fields & Images Dictionary Go To Repeat

Phrases

Intake Screening - Allergies
Select the phrase below to review/document the patient's allergies.

Allergies - Review and Insert

INTAKE RECEIVING AND SCREENING

Name: Jameson E Doe
ID#: 098
Additional ID#:
DOB: 01-01-1989
Gender: Male

Race:
Classification: Active, Inmate, Patient,
Date/Time: 03-03-2026 Tue / 10:11

Able To Complete Intake:
Yes

For more information on this section, see [Dictation Column](#).

Recording Vitals

Click Record Vital Signs.

NURSE MAIN MENU - Doe, Jameson E #098

Dictating Mode Sign Off UNLOCKED Info Cancel

Save Save and Close Cancel Additional Fields & Images Dictionary Go To Repeat

Phrases

Intake Screening - Vital Signs
Select phrase to record vital signs.

Record Vital Signs

INTAKE RECEIVING AND SCREENING

Name: Jameson E Doe
ID#: 098
Additional ID#:
DOB: 01-01-1989
Gender: Male

Race:
Classification: Active, Inmate, Patient, Patient, Active, Inmate, Patient,
Active, Inmate, Patient, Active, Inmate
Date/Time: 03-05-2026 Thu / 09:54

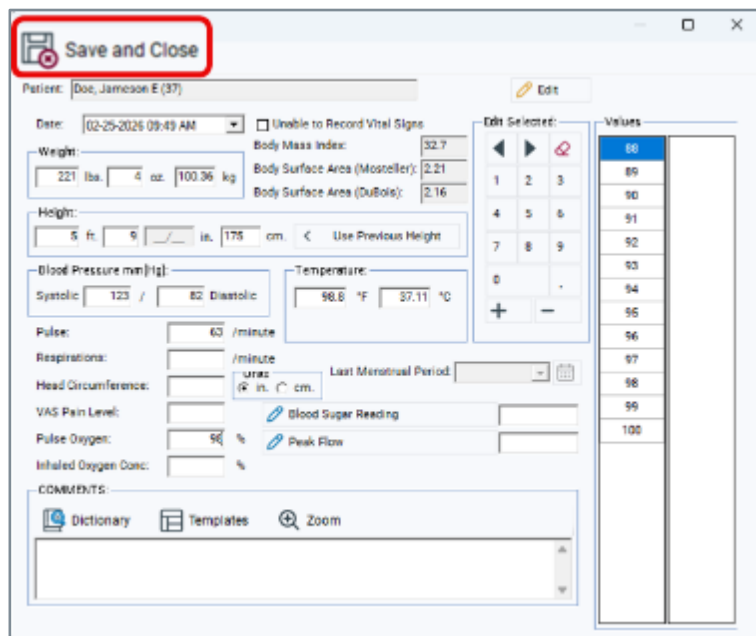
Able To Complete Intake:
Yes

Document New Note

The Vital Signs window opens.

Enter the required vital signs in the fields or select Values from the list.

Click Save and Close to return to the template.



Save and Close

Patient: Doe, Jameson E (37)

Date: 02-25-2025 09:49 AM ☐ Unable to Record Vital Signs

Weight: 221 lbs 4 oz 100.36 kg

Height: 5 ft 9 in 175 cm ☐ Use Previous Height

Blood Pressure (mmHg): Systolic 123 / Diastolic 82

Temperature: 98.8 °F 37.11 °C

Pulse: 63 /minute

Respirations: /minute

Head Circumference: 18 in 46 cm

VAS Pain Level: ☐ Blood Sugar Reading

Pulse Oxygen: 98 % ☐ Peak Flow

Inhaled Oxygen Conc: %

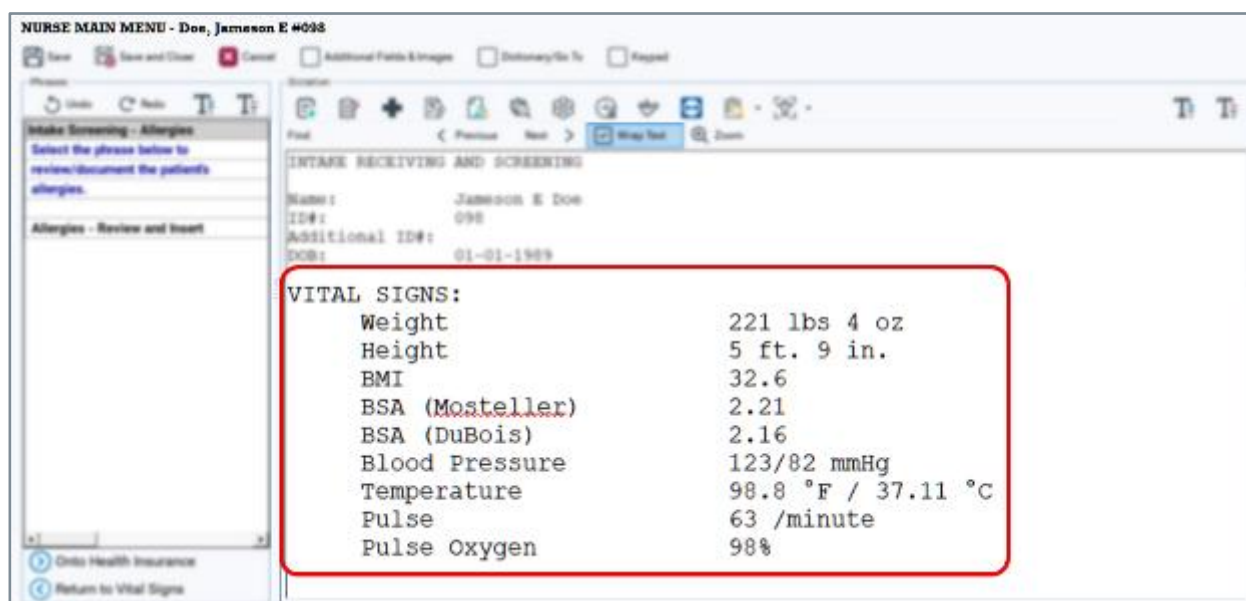
COMMENTS:

Dictionary Templates Zoom

Values

88
89
90
91
92
93
94
95
96
97
98
99
100

The recorded vital signs appear in the Dictation.



NURSE MAIN MENU - Doe, Jameson E #098

Save Save and Close Cancel Additional Fields & Images Dictionary Go To Repeat

Intake Screening - Allergies

Select the phrases below to review/document the patient's allergies.

Allergies - Review and Insert

INTAKE RECEIVING AND SCREENING

Name: Jameson E Doe

ID#: 098

Additional ID#:

DOB: 01-01-1989

VITAL SIGNS:

Weight	221 lbs 4 oz
Height	5 ft. 9 in.
BMI	32.6
BSA (Mosteller)	2.21
BSA (DuBois)	2.16
Blood Pressure	123/82 mmHg
Temperature	98.8 °F / 37.11 °C
Pulse	63 /minute
Pulse Oxygen	98%

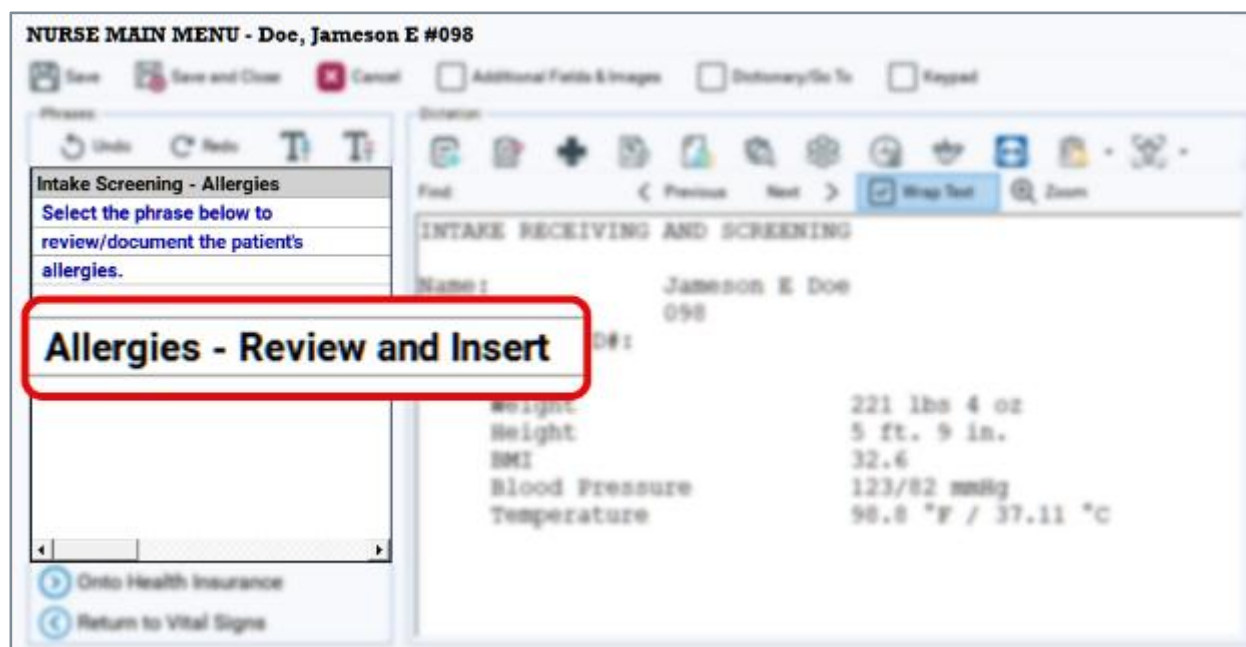
Ortho Health Insurance

Return to Vital Signs

Document New Note

Allergies

Click Allergies – Review and Insert.



NURSE MAIN MENU - Doe, Jameson E #098

Save Save and Close Cancel Additional Fields & Images Dictionary/Go To Keypad

Process: Undo Redo T T

Intake Screening - Allergies
Select the phrase below to review/document the patient's allergies.

Allergies - Review and Insert

Find: < Previous Next > Wrap Text Zoom

INTAKE RECEIVING AND SCREENING

Name: Jameson E Doe
ID#: 098

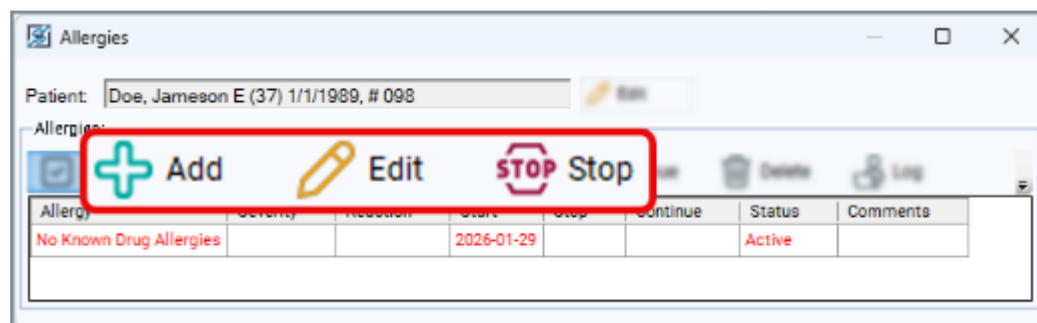
Weight: 221 lbs 4 oz
Height: 5 ft. 9 in.
BMI: 32.6
Blood Pressure: 123/82 mmHg
Temperature: 98.6 °F / 37.11 °C

Onto Health Insurance
Return to Vital Signs

The patient's recorded allergies will display.

If no changes are needed, click X to close the window and insert the list into the Dictation.

If updates are needed, select Add, Edit, or Stop as appropriate.



Allergies

Patient: Doe, Jameson E (37) 1/1/1989, # 098

Allergies:

+ Add Edit STOP Stop

Allergy	Severity	Reaction	Start	Stop	Continue	Status	Comments
No Known Drug Allergies			2026-01-29			Active	

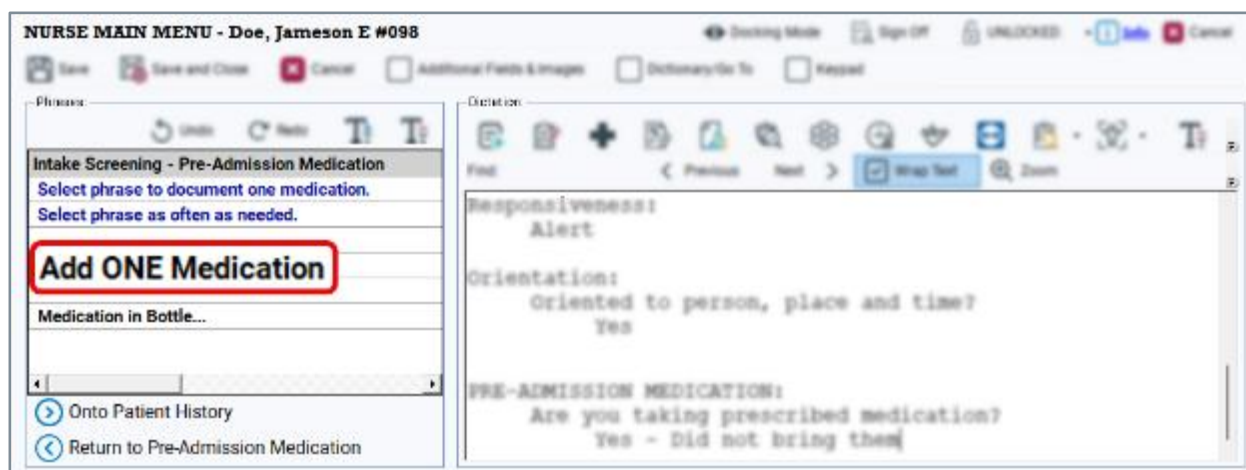
Continue selecting responses in the Phrases column as the template advances.

For details about moving through prompts, see [Using Prompts](#).

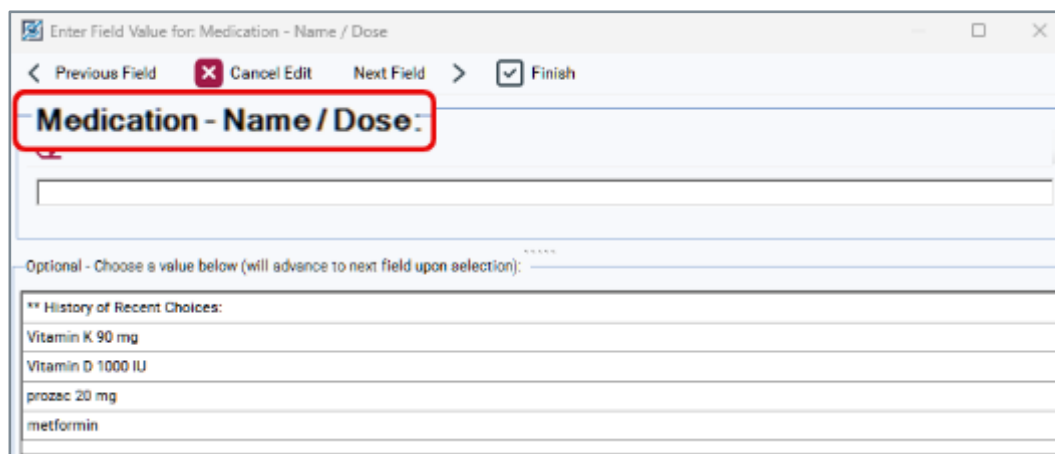
Document New Note

Reported Medications

To document, click **Add ONE Medication** in the **Phrases** column.



Type or select the **Medication Name** and **Dose**. The field name appears at the top of the window as you move through each step.



Complete each section using **Next Field** or **Finish** to move forward.

After completing the medication entry, you are returned to the template.

Repeat as needed to document additional medications, otherwise click **Onto Patient History**.

Document New Note

Patient History

Click Review Past Medical History.



The screenshot shows the 'NURSE MAIN MENU' for 'Doe, Jameson E #098'. On the left, under 'Phrases', the 'Intake Screening - Past Medical History' option is selected. A red box highlights the 'Review Past Medical History' button. The main area displays a form with questions like 'Does inmate have or use any physical aids?' and 'Are you taking prescribed medication?'. Navigation buttons like 'Previous', 'Next', and 'Wrap Text' are visible.

The Edit Text window opens.

Review the information and update as needed by typing directly in the text field.

Click Save and Close to return to the template.



The screenshot shows the 'Edit Text' window. The 'Save and Close' button, represented by a floppy disk icon, is highlighted with a red box. The text area contains medical history notes, including '03-08-2018 Thu 01:34:39 PM Hx of Suicide Attempts' and 'FAMILY HISTORY: Mother Cancer - Colon'.

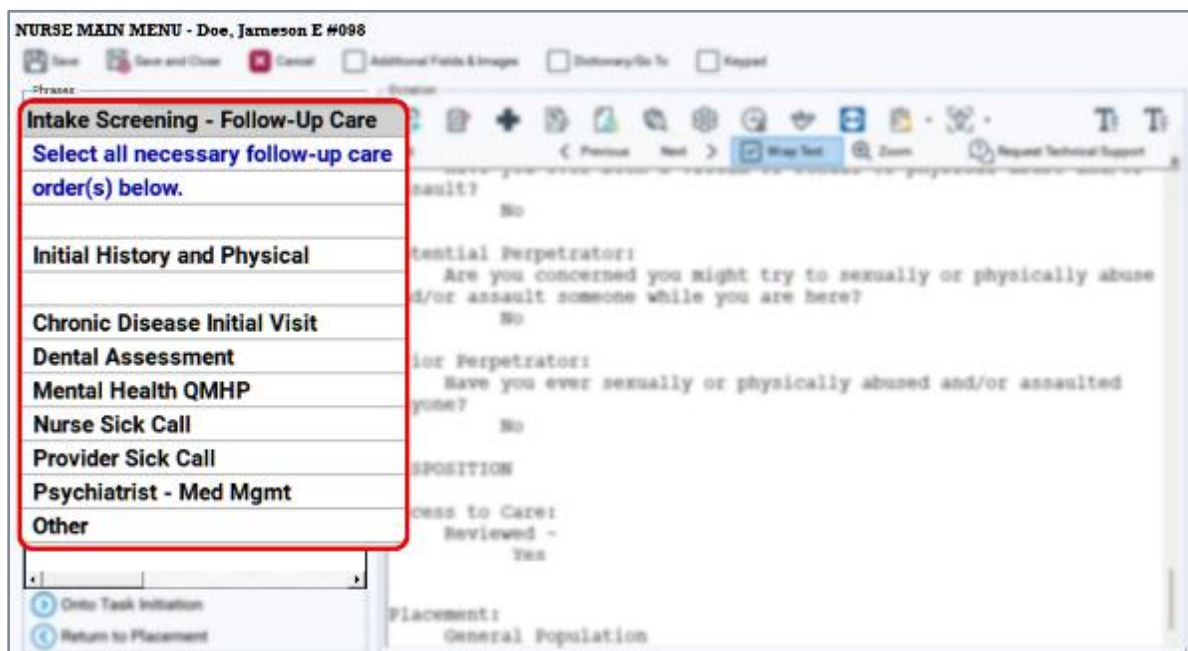
Additional questions may appear as you progress through the template.

Continue responding as prompted.

Document New Note

Initiate Follow-Up Care

Based on the visit, some template selections can initiate orders or prescriptions for follow-up care. Select the appropriate prompt to begin the process.



NURSE MAIN MENU - Doe, Jameson E #098

Save Save and Close Cancel Additional Fields & Images Dictionary Go To Repeat

Phrase: Intake Screening - Follow-Up Care
Select all necessary follow-up care order(s) below.

- Initial History and Physical
- Chronic Disease Initial Visit
- Dental Assessment
- Mental Health QMHP
- Nurse Sick Call
- Provider Sick Call
- Psychiatrist - Med Mgmt
- Other

Onto Task Initiation Return to Placement

Question: Assault?
Answer: No

Question: Potential Perpetrator:
Are you concerned you might try to sexually or physically abuse and/or assault someone while you are here?
Answer: No

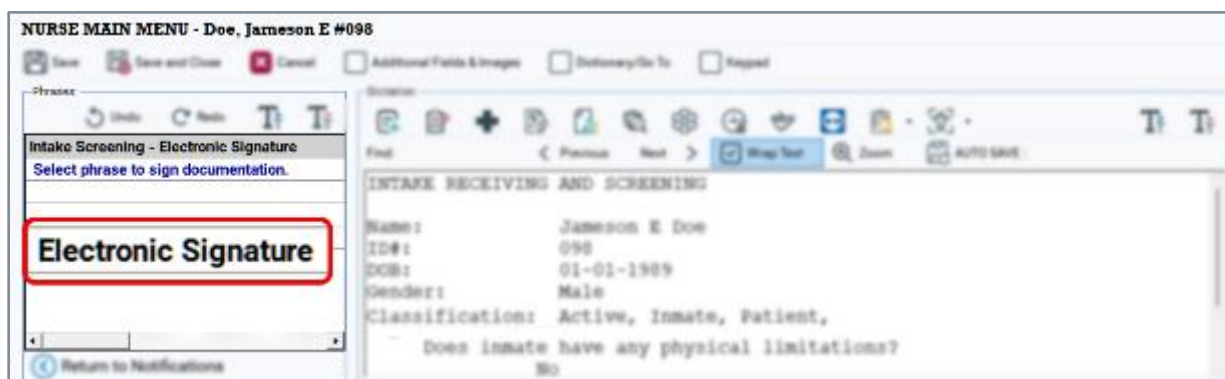
Question: Prior Perpetrator:
Have you ever sexually or physically abused and/or assaulted anyone?
Answer: No

Question: DISPOSITION
Access to Care:
Reviewed - Yes

Question: Placement:
Answer: General Population

Sign the Dictation

Click **Electronic Signature**.



NURSE MAIN MENU - Doe, Jameson E #098

Save Save and Close Cancel Additional Fields & Images Dictionary Go To Repeat

Phrase: Intake Screening - Electronic Signature
Select phrase to sign documentation.

Electronic Signature

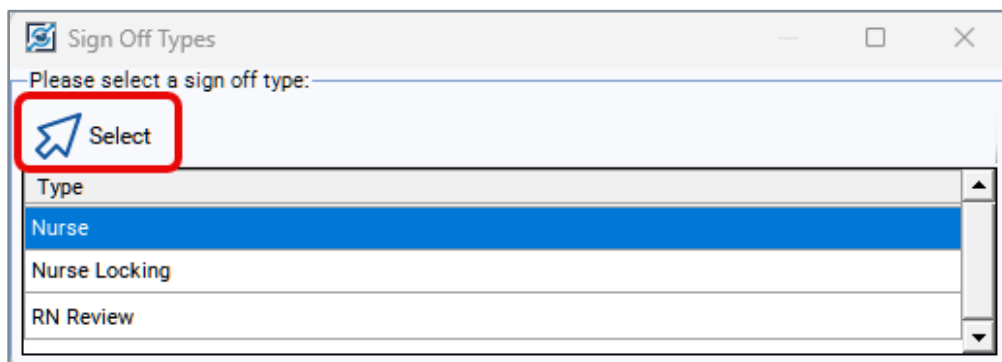
Return to Notifications

Question: INTAKE RECEIVING AND SCREENING

Name: Jameson E Doe
ID#: 098
DOB: 01-01-1989
Gender: Male
Classification: Active, Inmate, Patient,
Does inmate have any physical limitations?
Answer: No

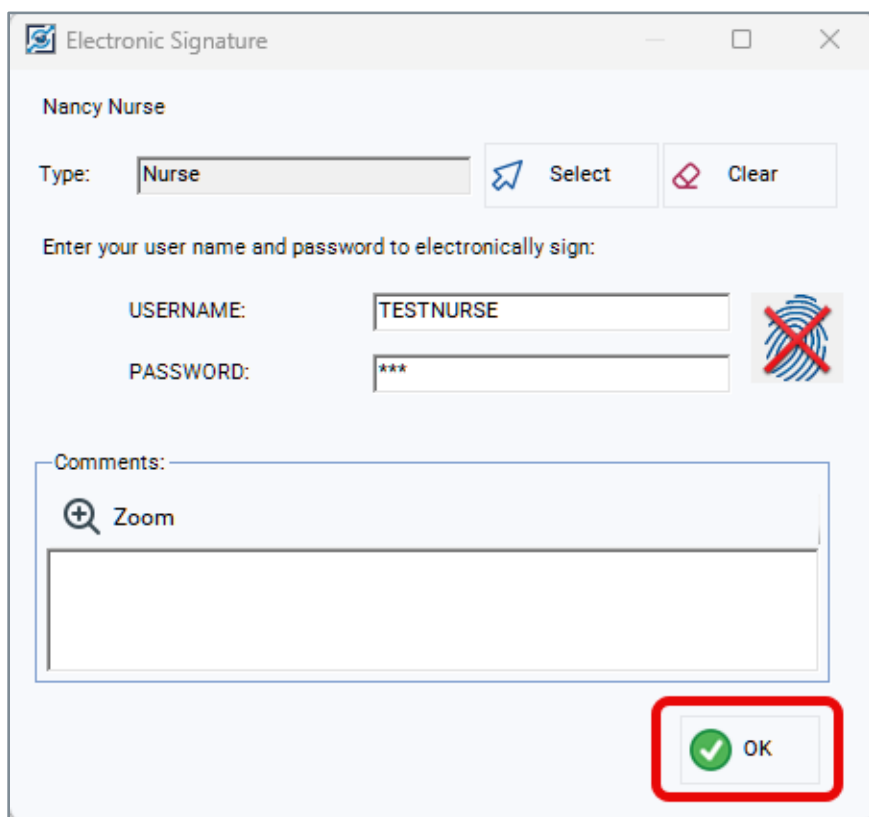
Document New Note

Click to highlight the signature type, then click **Select**.



| Tip: Sign off types that include 'locking' prevent further changes to the dictation.

Enter your **Spark password**, then click **OK**.

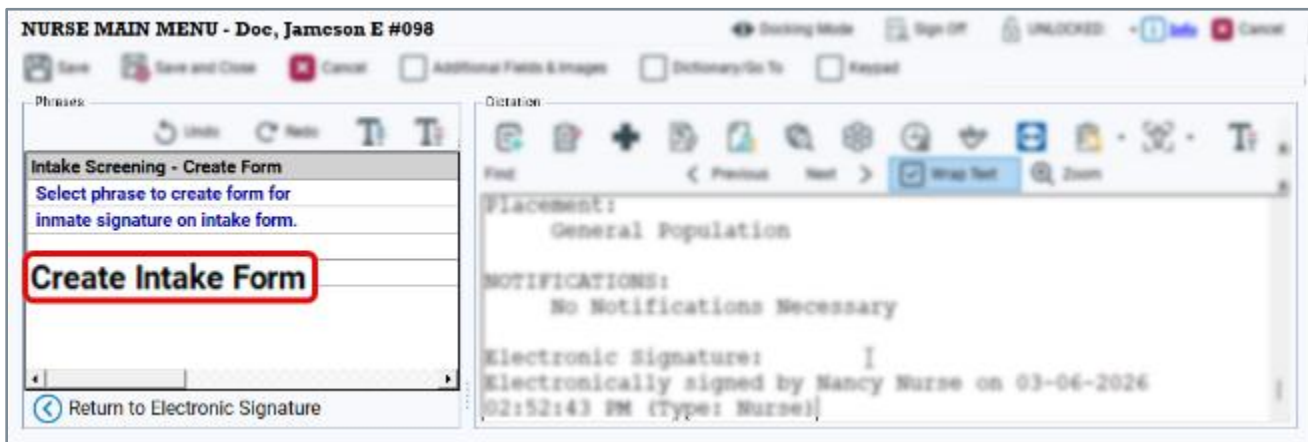


Document New Note

Create Form

Some templates include a form at the end of the visit.

Click **Create Intake Form**.



The screenshot shows the 'NURSE MAIN MENU - Doc, Jameson E #098' interface. On the left, under the 'Phrases' section, the 'Intake Screening - Create Form' option is selected, and the text 'Select phrase to create form for inmate signature on intake form.' is displayed. Below this, the 'Create Intake Form' button is highlighted with a red rectangular box. At the bottom left of the left panel is a 'Return to Electronic Signature' button. The right panel shows a 'Dictation' area with a toolbar and a text field containing the following text: 'Placement: General Population', 'NOTIFICATIONS: No Notifications Necessary', and 'Electronic Signature: I Electronically signed by Nancy Nurse on 03-06-2026 02:52:43 PM (Type: Nurse)'.

The form opens. Click **Start Signature**.

Using a signature pad, obtain the patient's signature. If an additional signature is required, e.g., witness, click **Next**.

After all signatures are obtained, click **Finish**.

| Tip: You must click **Finish** to apply the signature(s) to the form.

Document New Note



View Document

OK Save and Close Print Print Preview Show Signature Pad Sig Pad Default Disabled

 **CLEARVIEW HEALTH GROUP**

Clearview Health Group
2901 Medical Park Drive
WATER VALLEY, KY 42085
Phone: 270-555-0404 | Fax: 270-555-0606

INTAKE RECORD

INTAKE RECEIVING AND SCREENING

Name: Jameson E Doe
ID#: 098
Additional ID#:
DOB: 01-01-1989
Gender: Male

Start Signature Unable to Sign Clear

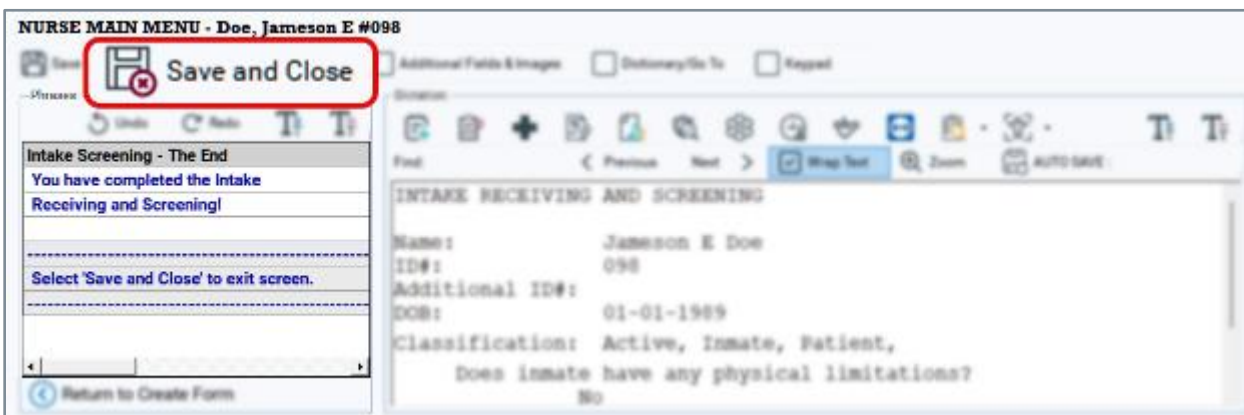
Finish

Patient Signature:
Jameson Doe

Click **Save and Close**.

Complete the Visit

Click **Save and Close** to finish the visit and return to the Spark desktop.



NURSE MAIN MENU - Doe, Jameson E #098

Save Save and Close Additional Fields & Images Dictionary Go To Reprint

Intake Screening - The End
You have completed the Intake Receiving and Screening!
Select 'Save and Close' to exit screen.

Return to Create Form

INTAKE RECEIVING AND SCREENING

Name: Jameson E Doe
ID#: 098
Additional ID#:
DOB: 01-01-1989
Classification: Active, Inmate, Patient,
Does inmate have any physical limitations?
No

Document New Note



Related Courses

- View Chart
- Create Patient Document
- Initiate Order
- Encounter Image

Document New Note



Reference Page

Templates

Templates provide a structured format for documenting patient information during an encounter.

The documentation process is consistent across departments, though the information recorded may vary.

Return to [Document a Visit](#) section.

Phrases Column

Headers or additional instructions: Highlighted in gray.

Questions/prompts: Displayed in blue text.

Responses: Displayed in black text.

Undo: Removes the most recent answer.

Redo: Restores a removed answer.

T+: Increases text size.

T-: Decreases text size.

Return to Document a Visit section.

Dictation Column

Dictation: Updates as responses are selected in the Phrases column.

T+: Increases text size.

T-: Decreases text size.

(Continued...)

Document New Note

Dictation Buttons

The following buttons appear near the top of the Dictation Column (left to right).



Add a New Timeline Entry: Adds a timeline item and inserts it into dictation.

Assign a New Diagnosis: Adds a current problem to the patient's chart and dictation.

Assign a New Procedure: Adds a procedure to the current encounter.

Add a New Prescription: Adds a prescription to the patient's MAR and inserts it into dictation.

Display Patient Report: Displays a patient report and optionally inserts it into dictation.

Audit the Dictation: Checks dictation for required audit information.

Insert Medical Information: Displays patient information from previous days and optionally inserts it into dictation.

Date and Time: Inserts the current date and time.

Spell Check: Checks spelling in the dictation.

CorrecTek Remote Support: Opens the CorrecTek Remote Support window.

Review Button: Use the drop-down menu to review Allergies, Problems, or Prescriptions.

Image: Adds an image to the encounter.

Return to [Document a Visit](#) section.

Using Prompts

Onto: Moves to the next section.

Return to: Returns to a previous section.

Return to [Allergies](#) section.