



# Pediatric Heart Transplant Society

## Sticky Notes

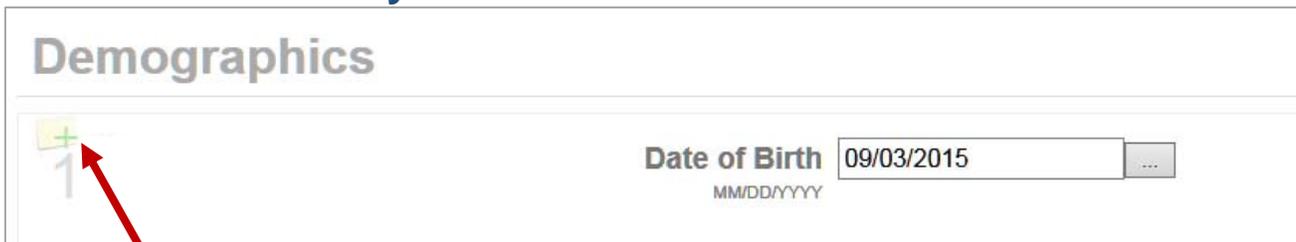
WBDE Release 1.1.3

Released 10/08/2018

Sticky notes can now be added by both the user and the Data Coordinating Center (DCC). The DCC will use this feature to send data integrity checks to the sites. The sites may use this to send questions to the DCC or to send questions to other users at their site. This document will detail all of the functions of the sticky notes such as:

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### How to Add a Sticky Note:



Every question on every form has a small sticky note above the question number. If a sticky note has not been added, there will be a green plus sign. If a sticky note from the user site has been added, this will appear solid yellow. If a sticky note from the DCC has been added, this will appear with a red exclamation mark (!).

Once the sticky note is clicked, a box will expand to allow the user to type their message. A list of users at the site will also appear. By default, the user that saved the form last will be checked. If the form was uploaded at the time of the launch of the web based data entry system (Fall 2015) and a user has not edited the form since, no names will be checked. All users at a site will be able to see all the sticky notes created. However, only user's with their name checked will receive a system generated email notifying them a sticky note has been added.



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Once the question or comment has been added, click “create sticky” to generate the sticky note. A new text box will appear on top to provide a space for another user to respond.

Question 1 - Date of Birth ✕

Type your message here

**Create Sticky**

Notify these users when replying

- Bruce Wayne (b.wayne)
- Diana Prince (d.prince)
- Clark Kent (c.kent)
- Arthur Curry (a.curry)

*Please do not enter PHI. Notifications are sent through unsecured email.*

Any user may view the sticky note at one site and may respond to the sticky note. However, only the user that created the sticky note may delete, resolve, or archive it.

Question 1 - Date of Birth ✕

Update status or delete **Resolve** **Delete**

|

**Reply**

Hey Clark, can you double check this date of birth? I think the year might be incorrect.

Posted by d.prince on September 22, 2017 1:27pm

Notify these users when replying **Remove me from notifications**

- Bruce Wayne (b.wayne)
- Diana Prince (d.prince)
- Clark Kent (c.kent)
- Arthur Curry (a.curry)

*Please do not enter PHI. Notifications are sent through unsecured email.*

### System Generated Emails

The users selected in the box will receive an automated email displaying the text of the sticky note. They can click the blue hyperlink to navigate directly to the form in which the sticky note was added and the specific sticky note will be opened automatically once the user enters their login credentials.



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This sticky note messaging system does not send the automatic emails through secure email so it is important to not include PHI in sticky notes.

By default, the last user that updated the form will have their name checked in the grid. The user adding the sticky note may choose to check or uncheck whichever names they wish. (The user that is adding the sticky note will not receive a system generated email.)

The screenshot shows an email client window titled "PHTS Sticky Note notification from slende\_dcc - Message (HTML)". The interface includes a ribbon with "FILE" and "MESSAGE" tabs, and various action buttons like Delete, Reply, Forward, Move, and Zoom. The email content is as follows:

Fri 9/22/2017 11:16 AM  
noreply@uab.edu  
PHTS Sticky Note notification from slende\_dcc  
To: slende@uab.edu

---

**PHTS Sticky Note Notification**

---

A new message was posted on the following Form in PHTS:  
[Form Demographics / Question: Date of Birth](#)

Thanks Ann, the year was wrong. I will correct it.

Posted by **slende\_dcc** at 11:15 AM 9/22/2017



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### Deleting Sticky Notes

To delete a sticky note, first navigate to the sticky note on the patient summary and open the form. Once the form is open, click on the sticky note that you want to delete to expand it. The sticky note will open and there will be a “resolve” and a “delete” option at the top.

Only the user that created a sticky note may delete it. Once a sticky note has been deleted, it is permanently removed from the system. There is not a way to view deleted sticky notes.

**SML**  
ID: 12352  
Date of Birth: 09/03/2014  
Gender: Female

Listing Date:

**Demographics** Print View Complete

**Question 1 - Date of Birth**  
Update status or delete **Resolve** **Delete**  
Type your message here Reply

Thanks for catching that Diana! I will fix it right away.  
*Posted by d.prince on September 22, 2017 1:32pm*

Hey Clark, can you double check this date of birth? I think the year might be incorrect.  
*Posted by d.prince on September 22, 2017 1:27pm*

Notify these users when replying **Remove me from notifications**

- Bruce Wayne (b.wayne)
- Diana Prince (d.prince)
- Clark Kent (c.kent)
- Arthur Curry (a.curry)

*Please do not enter PHI. Notifications are sent through unsecured email.*

of Birth: 09/03/2014

Sex:  Female  
 Male

Race:  African-American or Black  
 American Indian or Alaskan Native  
 Asian  
 Hawaiian or other Pacific Islander  
 Unknown/Undisclosed  
 White  
 Other, specify

Hispanic or Latino:  No  
 Yes  
 Unknown

### Resolving Sticky Notes

Once the question in the sticky note has been resolved, the sticky note can be removed from the question by using the ‘resolve’ button. This way the user can just view the open sticky notes on their forms.

**Question 1 - Date of Birth**  
Update status or delete **Resolve** **Delete**  
Type your message here Reply

Thanks for catching that Diana! I will fix it right away.  
*Posted by d.prince on September 22, 2017 1:32pm*

Hey Clark, can you double check this date of birth? I think the year might be incorrect.  
*Posted by d.prince on September 22, 2017 1:27pm*

Notify these users when replying **Remove me from notifications**

- Bruce Wayne (b.wayne)
- Diana Prince (d.prince)
- Clark Kent (c.kent)
- Arthur Curry (a.curry)

*Please do not enter PHI. Notifications are sent through unsecured email.*

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When a sticky note has been resolved, it will appear at the top of the form for reference. If the sticky note no longer needs to be available on the form for reference, it can be 'archived' which will remove it from the form, but not from the system.

The 'resolve' button will be used when the issue has been addressed and there is no longer a question about the data entered for a specific field. The conversation within the sticky note will remain in the system, but it will no longer indicate on the screen as one that needs to be addressed. For example, if a patient has a lab value out of range the DCC can add a sticky note questioning the lab value. If the user double checks the value and it is in fact correct, this comment can be added to the sticky note so for future integrity checks, this particular value is not questioned again.

The delete option will permanently delete a sticky note and it will no longer be viewable in the system. This option is for when a sticky note is added by mistake to a question or to the wrong patient.



The screenshot shows a patient form for a patient named JAP (ID: 12349, Date of Birth: 09/03/2015, Gender: Female). A red arrow points to a grey bar at the top of the form labeled "Resolved sticky notes" with a yellow sticky note icon. Below this bar is the "Demographics" section, which includes a "Date of Birth" field (09/03/2015) and a "Sex" field (Female selected, Male unselected). There are "Print View" and "Complete" buttons in the top right of the demographics section.

## Archiving Sticky Notes

To archive a sticky note, it must first be resolved. Once it has been resolved and appears at the top of the form, the user may open the sticky note and select either 'archive' or 'delete'. Archiving a sticky note will remove it from view on the form, but it will still be viewable on the site dashboard and in the reporting tab.



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**SML**  
ID: 12352  
Date of Birth: 09/03/2014  
Gender: Female

Listing Date:

**Question 1 - Date of Birth** \*

Update status or delete: **Archive** **Delete**

Thanks for catching that Dianal I will fix it right away.

Posted by d prince on September 22, 2017 1:32pm

Hey Clark, can you double check this date of birth? I think the year might be incorrect.

Posted by d prince on September 22, 2017 1:27pm

Date of Birth:

Sex:  Female  Male

Print View Complete

## Patient Summary

On the patient summary view, the user can see if any forms have a sticky note. The red exclamation mark (!) indicates that the sticky note was added by the DCC and is a data integrity check. A sticky note without an exclamation mark indicates it was added by a user at the site. The number in parentheses (1) after each sticky note on the patient summary indicates how many sticky notes are open on that form. This will only show open sticky notes and will not include resolved, deleted or archived.

**JAP**  
ID: 12349  
Date of Birth: 09/03/2015  
Gender: Female

Listing Date: 03/02/2016

### Patient Summary

ADD FORM >>

**Complete** Screening Log Updated By slende, 7/26/2017 2:22:06 PM

2015 **Complete** Demographics **!** (1) Date of Birth **09/03/2015**  
Updated By slende, 9/22/2017 8:56:58 AM

2016 **In Progress** Listing **!** (1) Date of Listing **03/02/2016**  
Updated By slende, 9/22/2017 10:35:50 AM

## Site Dashboard

The site dashboard now has a new grid under the "Pending and In Progress Forms" grid that is called "Sticky Notes". All sticky notes will appear here. This grid will default to the open sticky



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notes, but the user may change the view to include resolved notes, archived notes, or all notes.

The screenshot shows the 'Sticky Notes' interface. At the top left, there is a 'Show' dropdown menu set to '15' and a search bar. Below this is a table with columns: Patient ID, Old Pt Number, Form, Question, View, Messages, Created By, Last Message By, and Status. A dropdown menu is open over the 'Form' column, showing options: 'Open', 'Resolved', 'Archived', and 'All'. A red arrow points to this menu. The table contains three entries:

Patient ID	Old Pt Number	Form	Question	View	Messages	Created By	Last Message By	Status	
12351		BOR	Screening Log	Is patient under the age of 18 at the time of listing?	View	1	slende	slende	Open
12349		JAP	Demographics	Date of Birth	View	1	slende	slende	Open
11285		SML	Demographics	Blood A Subtype	View	1	slende	slende	Open

At the bottom, it says 'Showing 1 to 3 of 3 entries (filtered from 5 total entries)' and navigation links: 'First Previous 1 Next Last'.

From this grid, the user may navigate to the patient summary of a patient by clicking the patient ID or the patient initials.

The screenshot shows the same 'Sticky Notes' interface. The 'Show' dropdown is now set to 'Open'. Two red boxes highlight the 'Patient ID' and 'Patient Initials' columns. The table data is the same as in the previous screenshot:

Patient ID	Old Pt Number	Patient Initials	Form	Question	View	Messages	Created By	Last Message By	Status
12351		BOR	Screening Log	Is patient under the age of 18 at the time of listing?	View	1	slende	slende	Open
12349		JAP	Demographics	Date of Birth	View	1	slende	slende	Open
11285		SML	Demographics	Blood A Subtype	View	1	slende	slende	Open

At the bottom, it says 'Showing 1 to 3 of 3 entries (filtered from 5 total entries)' and navigation links: 'First Previous 1 Next Last'.

The user may navigate to the specific form the sticky note is on by selecting the form for that patient or the question. When you click on the specific form, the sticky note will automatically open when the form loads.



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Sticky Notes									
Show	15	entries	Open	<input type="checkbox"/>	Only show notes I created	Search:			
Patient ID	Old Pt Number	Patient Initials	Form	Question	View	Messages	Created By	Last Message By	Status
12351		BOR	Screening Log	Is patient under the age of 18 at the time of listing?	View	1	slende	slende	Open
12349		JAP	Demographics	Date of Birth	View	1	slende	slende	Open
11285		SML	Demographics	Blood A Subtype	View	1	slende	slende	Open

Showing 1 to 3 of 3 entries (filtered from 5 total entries) First Previous 1 Next Last

The user may just view the text of the sticky note without opening the patient summary or the form by using the view column.

Sticky Notes									
Show	15	entries	Open	<input type="checkbox"/>	Only show notes I created	Search:			
Patient ID	Old Pt Number	Patient Initials	Form	Question	View	Messages	Created By	Last Message By	Status
12351		BOR	Screening Log	Is patient under the age of 18 at the time of listing?	View	1	slende	slende	Open
12349		JAP	Demographics	Date of Birth	View	1	slende	slende	Open
11285		SML	Demographics	Blood A Subtype	View	1	slende	slende	Open

Showing 1 to 3 of 3 entries (filtered from 5 total entries) First Previous 1 Next Last

## Reporting

The "Compliance" tab is now called the "Reports" tab and sticky note reporting is available in addition to compliance reporting. In this tab, the user may view the history of all active, resolved, and archived sticky notes.

 Pediatric Heart Transplant Society	<a href="#">Dashboard</a>	<a href="#">Files</a>	<a href="#">Screen Patient</a>	<a href="#">Reports</a>	d.prince The Justice League of America <a href="#">Change Password</a>	<a href="#">Logout</a>
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**Available Reports**

Followup Compliance

Sticky Notes