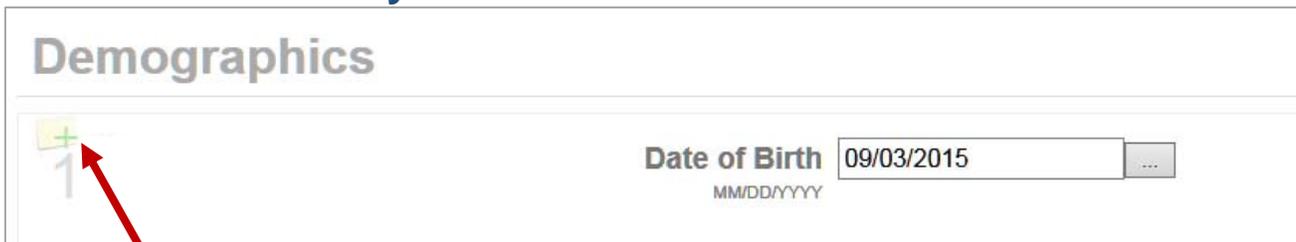**Sticky Notes**
WBDE Release 1.1.3
Released 10/08/2018

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:

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.

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.

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.)

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.

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.

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 questing 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.

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.

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.

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

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

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

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

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.