

THE INDIAN HEALTH SERVICE

# RPMS EHR CAC Review



Consult Tracking

Superior Health Information Management  
Now and for the Future

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# Learning Objectives

- Examine the electronic health record consult process from beginning to end.
- Utilize electronic patient consult tools to promote coordination of care and collaboration between interdisciplinary providers.
- Understand user configuration for receiving and resulting electronic consults.

# Learning Objectives

- Understand that a structured input template can ensure that needed information is included when requesting an electronic consult.
- Generate a consult tracking report to ensure closed loop communication and assist in ensuring a complete and accurate record.

# Preparation

- Differentiate Service Consults from Referrals (RCIS).
- Determine what information needs to be included with the Consult Request.
- Determine who receives the consult.
- Determine if the service needs a printed requisition.
- Differentiate consult completion “administratively” vs. “clinically.”
- Determine if providers want optional consult update notifications.
- Determine who will monitor the Consult Reports for tracking incomplete Consults.

# Consult Creation

- Consult creation involves several steps.
- Ensure a clear, consistent process is delineated and in place before you begin RPMS configuration.

# Identify Recipients of Consult Service Request

- Create a Provider Team for the consult  
BEH > PAT > TEA > CRE.
- Ensure the notification:  
NEW SERVICE CONSULT/REQUEST  
is set to Mandatory at the system level.

# Hands-On Activity

- Create a Team:  
NUTRITION YOURNAME  
with your user as a member.

# Create New Consult Service

- BEH > CON > SS
- There are many fields, most left blank, only these six fields need to be completed:
  - SERVICE NAME: NUTRITION//
  - PROVISIONAL DX PROMPT: REQUIRE//
  - PROVISIONAL DX INPUT: FREE TEXT//
  - Select SERVICE TEAM TO NOTIFY: TEAM NUTRITION//
  - Select ADMINISTRATIVE UPDATE TEAM: TEAM NUTRITION//
  - SPECIAL UPDATES INDIVIDUAL: COORDINATOR,CARL//

# Hands-On Activity

- Create a new Consult Service:  
NUTRITION YOURNAME

# Add New Consult to All Services

- Edit grouper All Services making no changes except to add the New Consult to the SUB-SERVICE/SPECIALTY field.

Select SUB-SERVICE/SPECIALTY: NUTRITION

# Consults – EHR Patch 11

- Sub-Services
  - Now prevents a service from becoming a sub-service anywhere within its own hierarchy. This will prevent the endless looping issue.

# Hands-On Activity

- Have one user at each site add all the new Consults (multiple users cannot edit All Services at the same time).

# Quick Order and Order Menu

- Create a new Quick Order with the new Consult Service:  
GMRCZ NUTRITION
- Place the new Quick Order on an Order menu:  
GMRCZM CONSULTS

# Hands-On Activity

1. Create a quick order with your new Consult:  
(GMRCZ NUTRITION YOURNAME).
2. Set the Parameter:  
ORWDX NEW CONSULT  
for your user with your new quick order  
dialog (classroom alternative to menu  
placement).

# Create TIU Consult Title

BEH > TIU > HIS > TMM > DDM > DDM3

- Create new title in special Consults Document Class

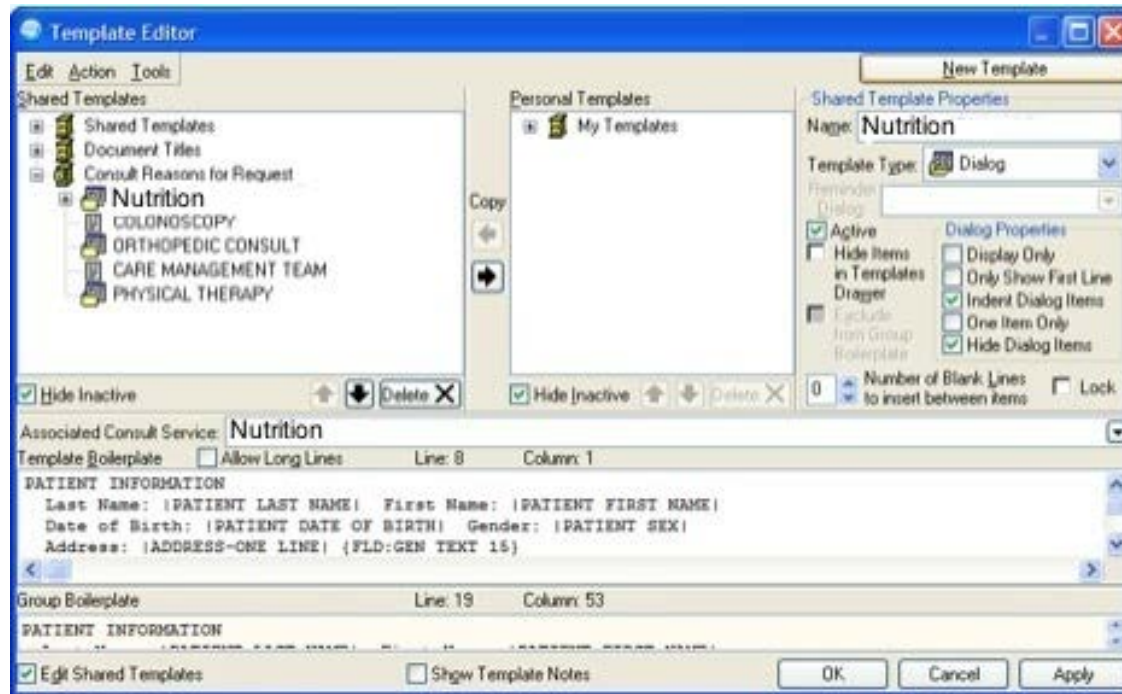
1.	Name	Type
2.	PROGRESS NOTES	CL
3.	CONSULTS	DC
4.	DENTAL CONSULT	TL
5.	DIETETICS CONSULT	TL
6.	DIABETES EDUCATION CONSULT	TL
7.	NUTRITION CONSULT	TL

# Hands-On Activity

- Have one user at each site create a new Consults note title:  
NUTRITION CONSULT  
(multiple users cannot edit the same Document Class at the same time)

# EHR GUI Configuration

- Optionally a TIU Input Template may be attached to the Service Consult Request.

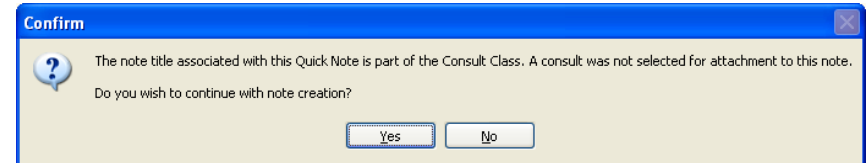
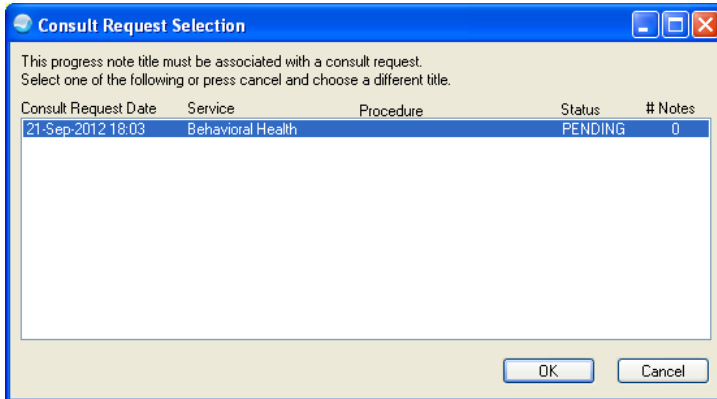


# EHR GUI Configuration

- Optionally, a Completion TIU Note Template may be attached to the Consult note title, if desired by the Consult Service.

# Consult Quick Notes EHR Patch 11

- IF you have a consult that may be resulted and you select a quick note with an associated title, a selection window will appear.
- IF there is not a consult available OR you do not select a consult you will be asked if you wish to continue.



# Testing the New Consult

Go through the process start to finish to ensure that all the steps work correctly:

1. Does the quick order work?
2. Did the consult requisition print (if enabled)?
3. Do service team members get the notification?
4. Can the service team members receive, schedule, and comment on the consult request?
5. Can the service team members administratively close the consult?
6. Can the service team members complete the consult with the note title?

# Hands-On Activity

1. Order the new consult using the New Consult button on the Consult tab.
2. Determine if your user received a notification for this consult.
3. Create a Nutrition Consult Quick Note.

# Consult Tracking Using EHR

- Consult Tracking:
  - Receive
  - Schedule
  - Cancel (Deny)
  - Discontinue
  - Add comments
  - Administrative complete
- Consult Results:
  - Complete/Update

# Consult Tracking

The screenshot displays the RPMS-EHR USER, BSTUDENT interface. The main window shows a patient chart for 'Demo, Carol' (DOB: 22-Feb-1991) with a consult for 'NUTRITION' on Nov 14, 2011. A context menu is open over the consult, listing actions such as 'Receive', 'Schedule', 'Cancel (Deny)', 'Edit/Reschedule', 'Discontinue', 'Forward', 'Add Comment', 'Significant Findings', 'Administrative Complete', 'Display Details', 'Display Results', 'Display SF 513', and 'Print SF 513'. The patient details section includes:

- STATUS: Inpatient
- LOCATION: INPATIENT
- CLINIC: NUTRITION
- CLINIC: A CLINIC
- ORDER PROVIDER: USER, BSTUDENT
- ORDER TYPE: to be rendered on an OUTPATIENT basis
- ORDER REASON: Consultant's choice
- ROUTINE: Routine
- REQUEST: NUTRITION
- REQUEST: Consult Request

The 'Type of services requested' section lists:

- New Onset Diabetes Type nutrition counseling, carbohydrate counting

The 'Diagnosis' section lists:

- New Onset Diabetes Type 2
- Significant past medical history: New Onset Diabetes Type 2

The 'Inter-facility Information' section states: 'This is not an inter-facility consult request.'

The 'Status' section shows:

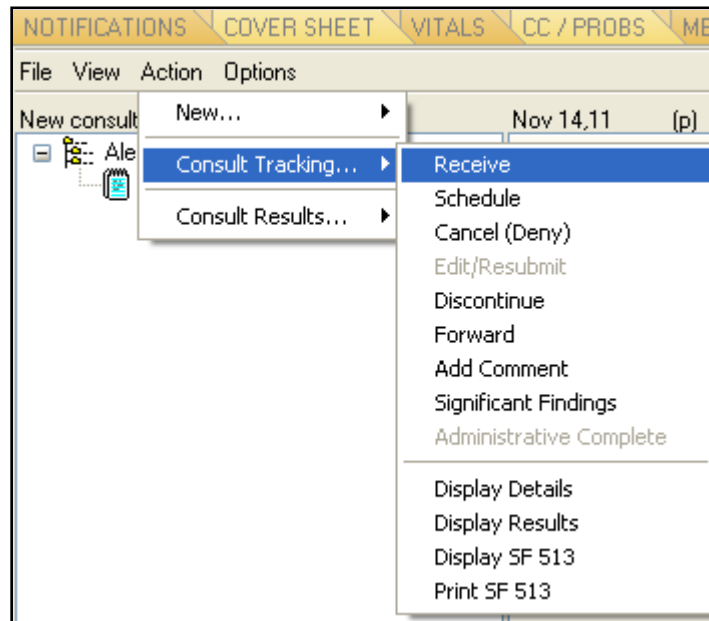
- Status: PENDING
- Last Action: PRINTED TO

The 'Facility' section includes a table with the following data:

Activity	Date/Time/Zone	Responsible Person	Entered By
CPRS RELEASED ORDER	11/14/11 17:20	USER, BSTUDENT	USER, BSTUDENT
PRINTED TO PTOPAT2	11/14/11 17:20		

A note at the bottom states: 'Note: TIME ZONE is local if not indicated' and 'No local TIU results or Medicine results available for this consult'.

# Consult Tracking



# Receive Consult

Receive Consult

Comments

Date/time of this action

Action by

OK Cancel

# Schedule Consult

The screenshot shows a software interface for scheduling a consult. The main window, titled "Schedule Consult", has a "Comments" section containing the text "Appt 12/5/2011 @ 10:00am". Below this, there is a checked checkbox for "Send alert". To the right of the checkbox are two input fields: "Date/time of this action" (with a calendar icon) and "Responsible Person" (containing "User,Bstudent").

An "Send Alert" dialog box is overlaid on the main window. It features a list titled "Select or enter name" with the following items: User,Bstudent (highlighted), User,Cstudent, User,Dstudent, User,Estudent, User,Fstudent, User,Gstudent, and User,Hstudent. To the right of this list is a "Currently selected recipients" list containing "User,Bstudent". At the bottom of the dialog are "OK" and "Cancel" buttons.

# Add Comments

**Add Comment to Consult**

Comments

Patient cancelled 12/5/2011 appt  
Rescheduled for 12/7/2011 @ 9:00am

Send alert

Date/time of this action  
 ...

OK Cancel

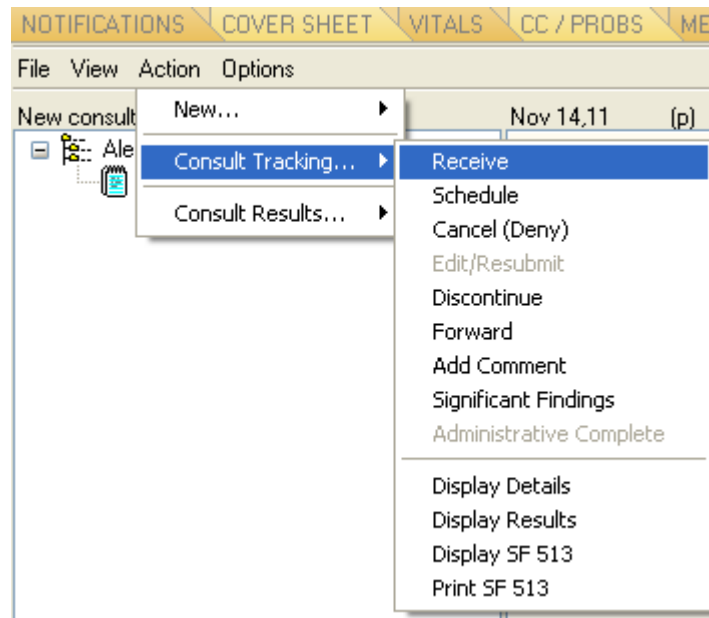
# Hands-On Activity

1. Mark your consult **Received** in EHR, set date and time to ***now***, your user as **Responsible Person**.
2. Mark your consult ***Scheduled*** and enter a date and time of an appointment.
3. Enter a comment on your consult, select **Send Alert**, and indicate your user name as recipient.

# Administrative Consult Completion

- Used with some specialty consults when consultant documentation is not completed using EHR (i.e. Dentrix, dictation, periodic contract providers, etc.).

# Administrative Complete

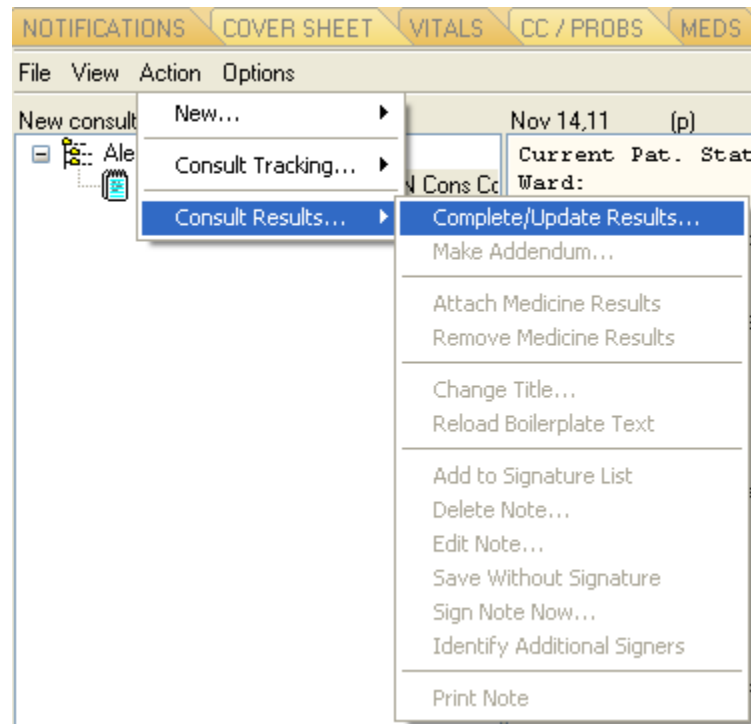


# Consult Resolution with a Clinical Note

- A new Consult Note may be entered from the EHR Notes tab, Consults tab, or Quick Note button.
- Special note titles for consult services within the Consults Document Class prompts the user to select the consult when documenting from Notes tab.

# Consult Results...

## Complete/Update Results...



# Consult Note Titles

**Consult Note Properties**

Progress Note Title:

- CARDIOLOGY <CARDIOLOGY CONSULT>
- CARDIOLOGY CONSULT
- CONSULT <CARDIOLOGY CONSULT>
- CONSULT <CONSULT DIAB EDUCATION>
- CONSULT <CONSULT PHYSICAL THERAPY>
- CONSULT DIAB EDUCATION
- CONSULT PHYSICAL THERAPY

Date/Time of Note: 26-Mar-2004 15:22 ...

Author: Hager, Mary G

OK

Cancel

# Consult Viewing on Consult Tab

The screenshot displays the TRAIN EHR interface for user MOORE, CATHERINE. The main window shows a patient chart for 'Demo, Patient C' (ID 333, DOB 17-Apr-1978, Female). The 'Consults' tab is active, showing a list of consults on the left and a detailed view of a selected consult on the right.

**Consult Details:**

- Current Pat. Status: Outpatient
- Order Information:
  - To Service: NUTRITION
  - From Service: A CLINIC
  - Requesting Provider: MOORE, CATHERINE
  - Service is to be rendered on an OUTPATIENT basis
  - Place: Consultant's choice
  - Urgency: Routine
  - Orderable Item: NUTRITION
  - Consult: Consult Request
  - Reason For Request: \*\*\*\*\*NUTRITION CONSULT REQUEST\*\*\*\*\*
- Pertinent H&P:
  - Medical Priority:
  - Next Physician Appointment:
  - Orders for Nutritionist:
  - Nutrition Education:
    - Educate on use of glucose meter:
    - Other:
  - Inter-facility Information:
    - This is not an inter-facility consult request.
  - Status: COMPLETE
  - Last Action: COMPLETE/UPDATE
- Facility Activity Log:
 

Activity	Date/Time/Zone	Responsible Person	Entered By
CPRS RELEASED ORDER	05/09/06 11:05	MOORE, CATHERINE	MOORE, CATHERINE
COMPLETE/UPDATE	05/09/06 11:31	MOORE, CATHERINE	MOORE, CATHERINE

At the bottom of the window, there are navigation tabs for various clinical areas: Notifications, Cover Sheet, Orders, Labs, Medications, Triage, Wellness, Prob/POV, Services, Notes, Reports, **Consults**, D/C Summ, and Privacy. The status bar at the very bottom shows the user name MOORE, CATHERINE, the organization WRSU-TRNG.PHX.IHS.GOV, and the location WHITERIVER H.

# Consult Viewing on Notes Tab

The screenshot displays the TRAIN EHR interface for user MOORE,CATHERINE. The patient information is 'Demo, Patient C' (ID 333, DOB 17-Apr-1978, Female). The current visit is 'A CLINIC' on '09-May-2006 11:04'. The interface shows a list of 'Last 100 Signed Notes' on the left, with the selected note titled 'May 09, 06 NUTRIT'. The main content area displays the details of this nutrition consult note.

Visit: 05/09/06 NUTRITION CONSULT, A CLINIC, Catherine Moore,MT(ASCP) (May 09,06@12:57)

**NOTE DETAILS:**

- TITLE:** NUTRITION CONSULT
- DATE OF NOTE:** MAY 09, 2006@12:57
- ENTRY DATE:** MAY 09, 2006@12:57:37
- AUTHOR:** MOORE,CATHERINE
- EXP COSIGNER:**
- URGENCY:**
- STATUS:** COMPLETED

**SUBJECTIVE:**  
RECENT AND PAST HISTORY RELATED TO POV:weight gain

**GI Complaints:**  
Nausea -  
Vomiting -

**Food/Drug interactions:**

**Food Allergies:**  
Salt substitutes used: Mrs. Dash  
Sweeteners used: White Sugar, Brown Sugar, Honey  
Patient uses the following dietary supplements: Vitamins

**Signature:**  
/es/ Catherine Moore,MT (ASCP)  
Clinical Application Coordinator  
Signed: 05/09/2006 12:58

The interface includes a menu bar (File, View, Action, Options), a toolbar with icons for 'No Postings', and a bottom navigation bar with tabs for Notifications, Cover Sheet, Orders, Labs, Medications, Triage, Wellness, Prob/POV, Services, **Notes**, Reports, Consults, D/C Summ, and Privacy. The status bar at the bottom shows 'MOORE,CATHERINE', 'WRSU-TRNG.PHX.IHS.GOV', and 'WHITERIVER H'.

# Consults – EHR Patch 11

- View Details
  - May view details using right click from notes

# Hands-On Activity

1. On the Consults Tab, select the consult you ordered earlier and from the Action menu select **Consult Results** and then **Complete/Update Results**.
2. Select the note title **Nutrition Consult** created earlier, write a note, and sign it.
3. Select **Consult Quick Note** and document consult completion note.
4. View Consult Details by Right Clicking on **Note**.
5. Note the status of your consult from **Details and Consults** tab.

# Consult Tracking Reports

- BEH > CON > RPT

ST	Completion Time Statistics
PC	Service Consults Pending Resolution
CC	Service Consults Completed
CP	Service Consults Completed or Pending Resolution
SC	Service Consults by Status
PR	Print Service Consults by Status
TS	Print Completion Time Statistics Report
SH	Service Consults Schedule-Management Report
LCR	Consults Local Completion Rate
PM	Consult Performance Monitor Report

# Consult Tracking Reports

- Reports can be generated by:
  - Service
  - Status
  - Dates
- Reports are only available in RPMS roll-and-scroll.
- Reports produce statistics on numbers of consults ordered and completion rates.

# Consults – EHR Patch 11

- New Reports

SH	Service Consults Schedule-Management Report
LCR	Consults Local Completion Rate
PM	Consult Performance Monitor Report

# Consult Tracking Reports

Who should use consult reports?

- Consult Service Staff to ensure patients are not lost to follow-up (daily or weekly).
- Quality Managers and Clinical Applications Coordinators to ensure consult service staff are completing consults properly (monthly).
- Clinical Management to report how many consults are ordered/completed, to capture workload and report to hospital administration (quarterly ).

# Consult Reports Menu Option

Coordinate with your site manager to add the consult tracking reports to your primary

AKMOEVE menu:

RPT Consult Tracking Reports [GMRC REPORTS]

- Provides access for consult service teams to the tracking reports without giving them access to the entire RPMS-EHR Configuration menu consult setup.

# Hands-On Activity

1. Generate a Consult Tracking Report for Service Consults completed or pending resolution and Review:

BEH > CON > RPT > CP

Enter Nutrition Yourname, All Dates, All Pts

2. Generate a New EHR patch 11 Consult Report and Review.

# Group Update

BEH > CON > GU

GU Group Update of Consult/Procedure Requests

- Who can perform Consult Group Update?
  - Special Updates Individual
- When should you use Consult Group Update?
  - Per local policy and procedures to “clean up” when a large number of pending consults have accumulated due to no-shows, etc.

# New Consult Parameter EHR Patch 11

- New Parameter: ORWOR SHOW CONSULTS

Parameter set to “NO”:

- The list of consults is not initially displayed on the note title screen, regardless of whether there are pending consults the user is able to resolve. Clicking a Consults document class title will still display the list of unresolved consults, if any.

This setting leaves behavior same as EHR patch 10.

# New Consult Parameter

## EHR Patch 11

- New Parameter: ORWOR SHOW CONSULTS

Parameter set to “YES”:

- If there are unresolved consults for the user, the user is presented directly with the note title screen with the unresolved consults displayed.
- If there are not unresolved consults for the user, the list of consults is not displayed on the note title screen. Clicking a Consults document class title will still display the list of consults.

This setting changes current behavior and users will see the screens on the next slide.

# New Consult Parameter EHR p11

- New Parameter: ORWOR SHOW CONSULTS

The screenshot displays two overlapping windows from an EHR system. The background window is titled 'Progress Note Properties' and contains the following fields:

- Progress Note Title:** A text box containing 'GENERAL MEDICAL' and a list box below it with the same text selected. The list also includes: 'ADIR <ADVANCE DIRECTIVE>', 'ADULT <BH BIOPSYCHOSOCIAL - ADULT STANDARD>', 'ADULT <BH BIOPSYCHOSOCIAL - ADULT TRADITIONAL>', and 'ADULT <BH BIOPSYCHOSOCIAL - ADULT WELLNESS>'.
- Date/Time of Note:** A text box containing '13-May-2013 16:55'.
- Author:** A dropdown menu showing 'Richards,Susan P'.
- Buttons:** 'OK' and 'Cancel' buttons are located to the right of the title field.

The foreground window is a smaller dialog box titled 'Not a consult title' with a question mark icon. It contains the following text:

You currently have unresolved consults awaiting completion. The selected title cannot be used to complete consults. You must select a Consults title to complete a consult.

Answer "YES" to continue with this title and not complete a consult. Answer "NO" to select a different title.

Do you want to use this title and continue?

Buttons for 'Yes' and 'No' are at the bottom.

At the bottom of the 'Progress Note Properties' window, there is a table with the following data:

Consult Request Date	Service	Procedure	Status	
Sep 06,12 13:35	Behavioral Health		PENDING	0

# Hands-On Activity

1. Set New Consult XX Parameter ORWOR SHOW CONSULTS to **YES**.
2. Log into EHR and Select Note Title in EHR Notes tab to see new functionality.

# Consult Creation Steps

## RPMS Setup

1. Create Consult Team(s) (BEH-PAT-TEA-CRE).
2. Create Consult (BEH-CON-SS).
3. Add new consult to ALL SERVICES Consult (Sub-Service / Specialty).
4. Create Consult Quick Order and hang to Consult Quick Order Menu - (Create: BEH-ORD-MNU-QOC / Hang: BEH-ORD-MNU-MNU):
  - Prefix for Consult Quick Orders = GMRCZ / Quick Order Menu = GMRCZM
5. Create Consult Note Title (i.e. Nutrition Consult): (BEH – TIU – HIS – TMM – DDM – DDM3)
  - Expand Progress Notes then Consults Folder to add new note title with special consult business rules

# Consult Creation Steps

## EHR Setup

6. Create Consult Ordering Progress Note Template:
  - Notes - Options - Edit Shared Templates - Consult Reasons for Request
7. Create Consult Completion Progress Note Template for clinical note completion (optional):
  - Notes - Options - Edit Shared Templates - Document Titles
8. Create Consult Quick Note (optional).
9. Test Consult Ordering and Completion process to ensure working properly.
10. Train providers and consult tracking staff how to use consults and generate consult reports.



# Questions and Discussion