THE INDIAN HEALTH SERVICE

Structured Note Documentation

RPMS EHR

Electronic Health Record

PHN

Superior Health Information Management
Now and for the Future

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Mr. Taylor is a clinical consultant contractor with Medsphere Systems Corporation. He has been contracted through IHS to provide EHR consultation and education. Mr. Taylor will not be promoting Medsphere Corporation through this education.

Learning Objectives

At the end of this session participants should be able to explain why the use of standardized Note structure for public health nursing:

- Facilitates provider communication
- Promotes quality patient care and safety
- Meets professional and legal standards.

Content

- Describe aspects of accomplished documentation specific to PHNs.
- Demonstrate retrieval of standardized electronic Note templates from a public repository.
- Work session: collaboratively plan and configure a common scheme for standardized Note documentation throughout public health nursing.

Template Creation

- Templates are created using the EHR
- Content of the templates follow guidelines for proper documentation and are approved by the HIM director
- Shared templates are created by anyone in the Clinical Coordinator user class. Shared templates can be accessed by all EHR users
- Personal templates (My templates) can be created by individual users and only available to the user who created it.

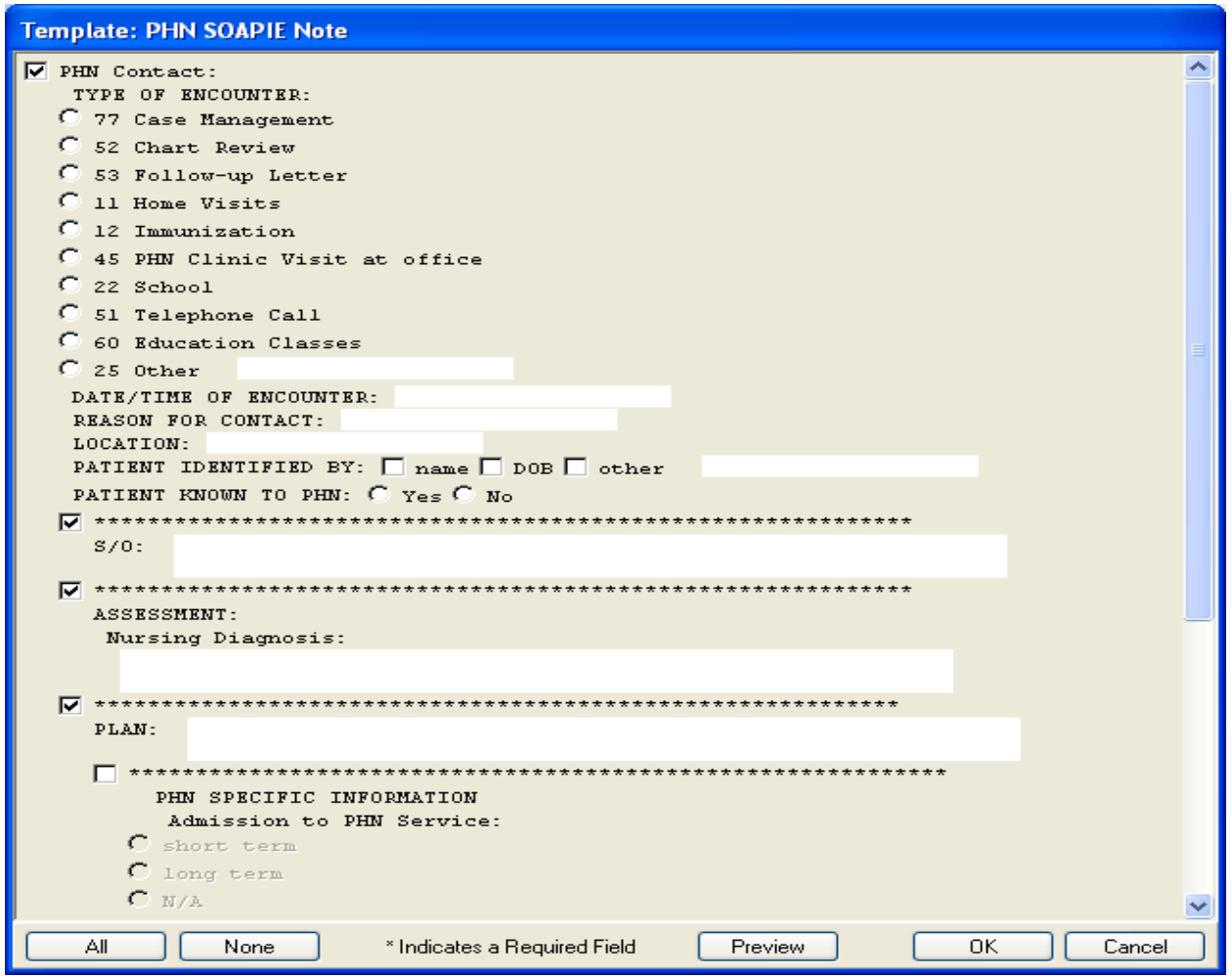
What are Templates

- Boilerplate - Information written that could be reused
- Template Fields
- Forms - Forms are protected documents that restrict the user of the form to editing only specific areas of the text

Why Use Templates

- Add information to your progress notes.
- All users can make personal templates.
- Can repeat information.

Template for a Note



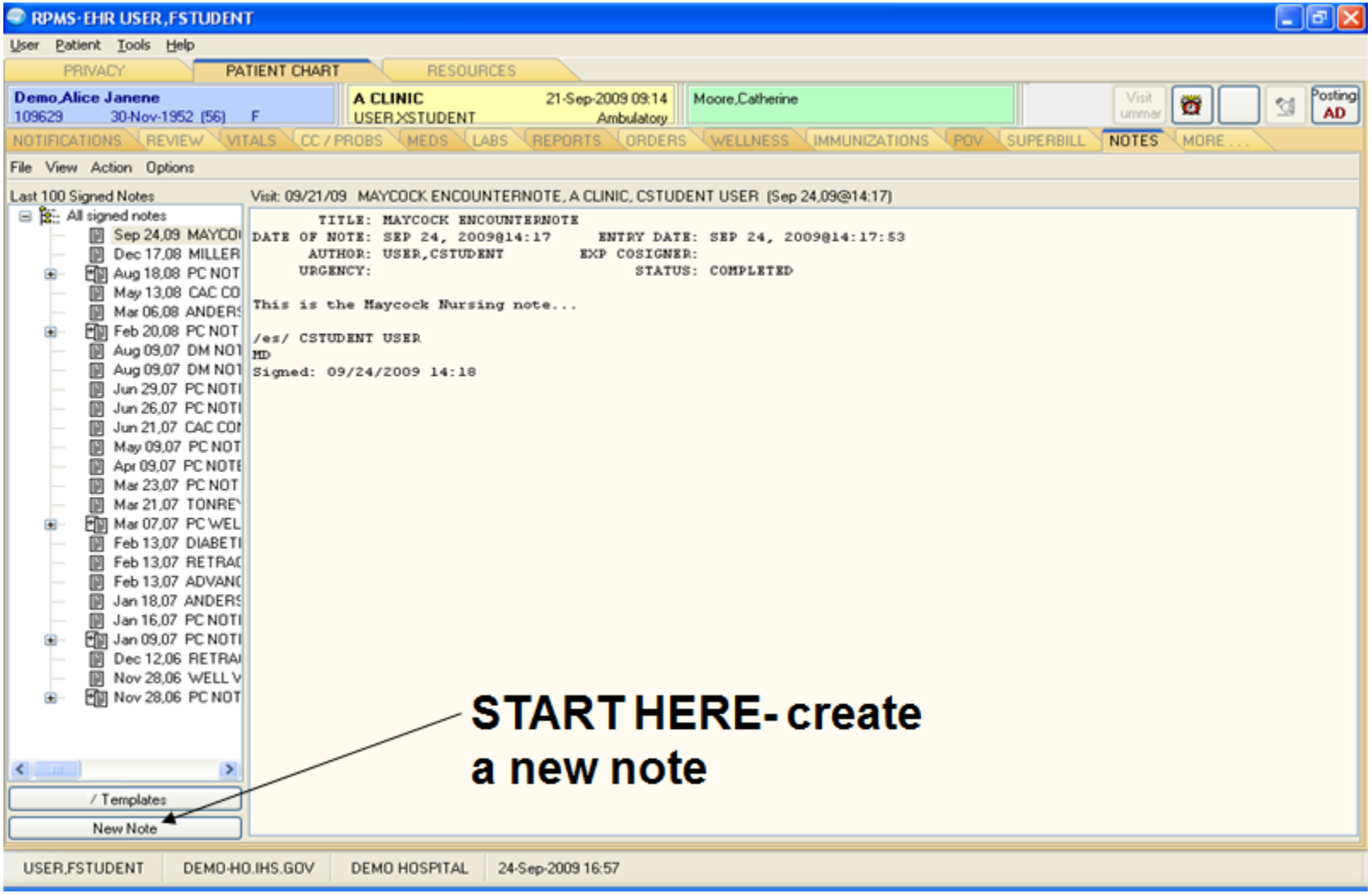
Creating New Templates

- Must work with CAC or designated personal to design and install templates
- National Templates (in the works) - will review FTP repository / import demo
- Best practice: Use existing templates approved by National IHS PHN committee to ensure consistent legal and financial (billing) standards

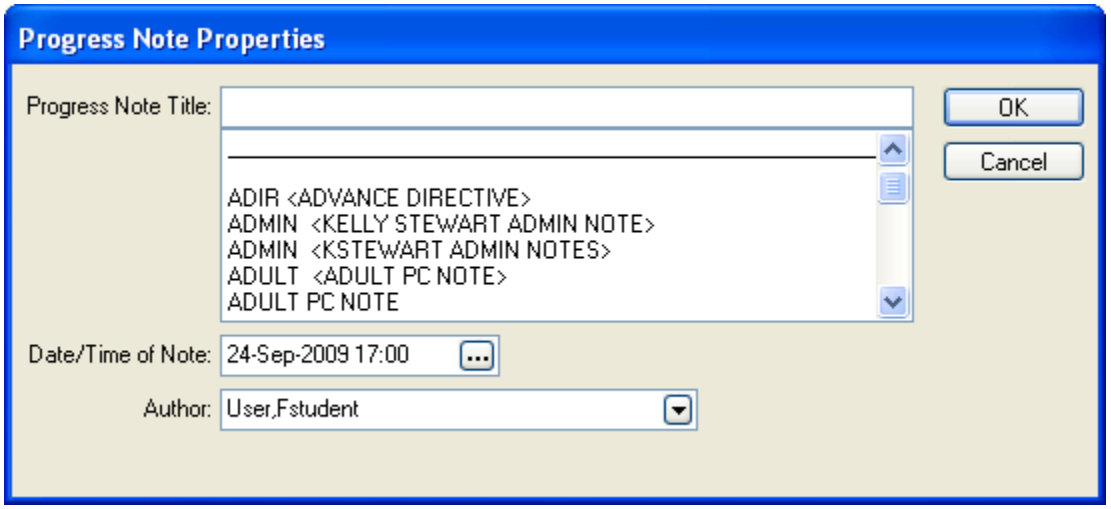
Template Review Committee

- All templates should be reviewed and approved by the Forms/Template Committee prior to use in the EHR.
- Committee representatives should consist of nursing, providers, HIM, BO, UR, PI/QI, etc.
- Once the template is approved, place in the “shared” directory.
- Approval is not required for minor revisions such as check boxes or structural items.
- Approval is required for content changes.

Creating a Note and Using a Template

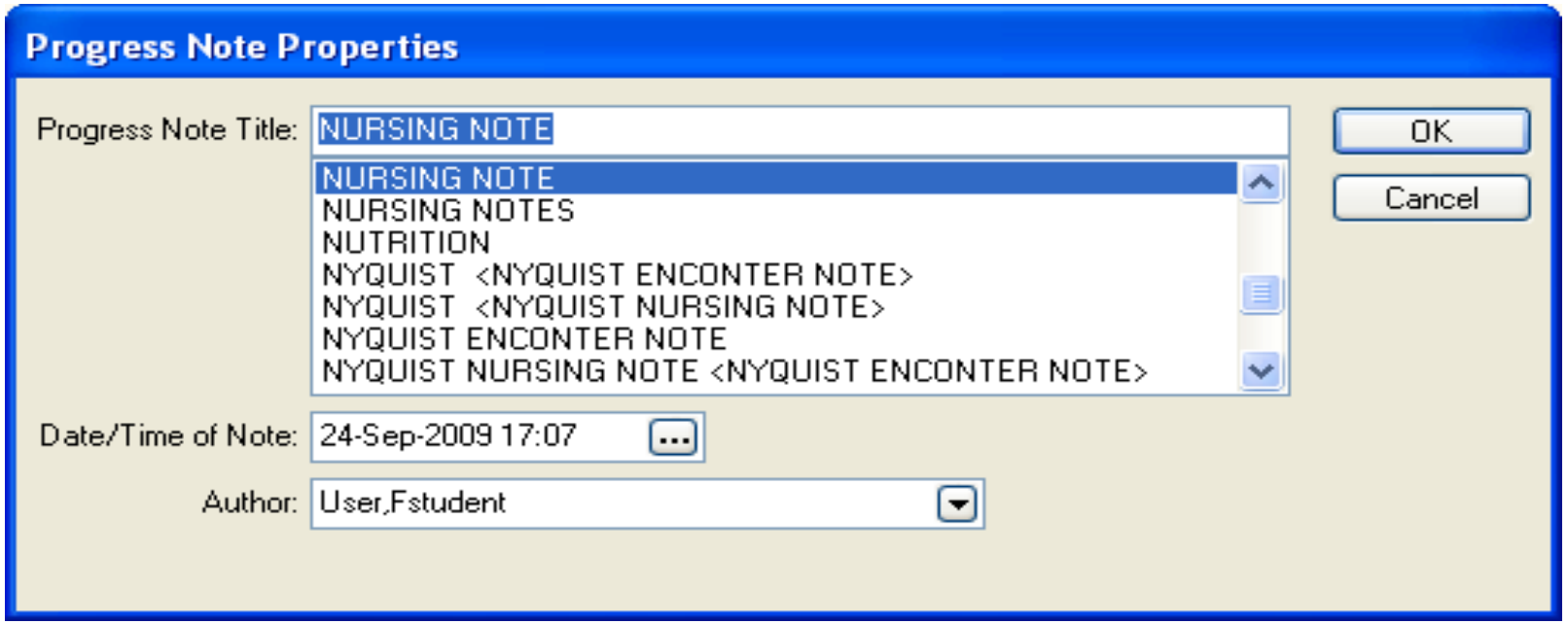


Type the Note Title

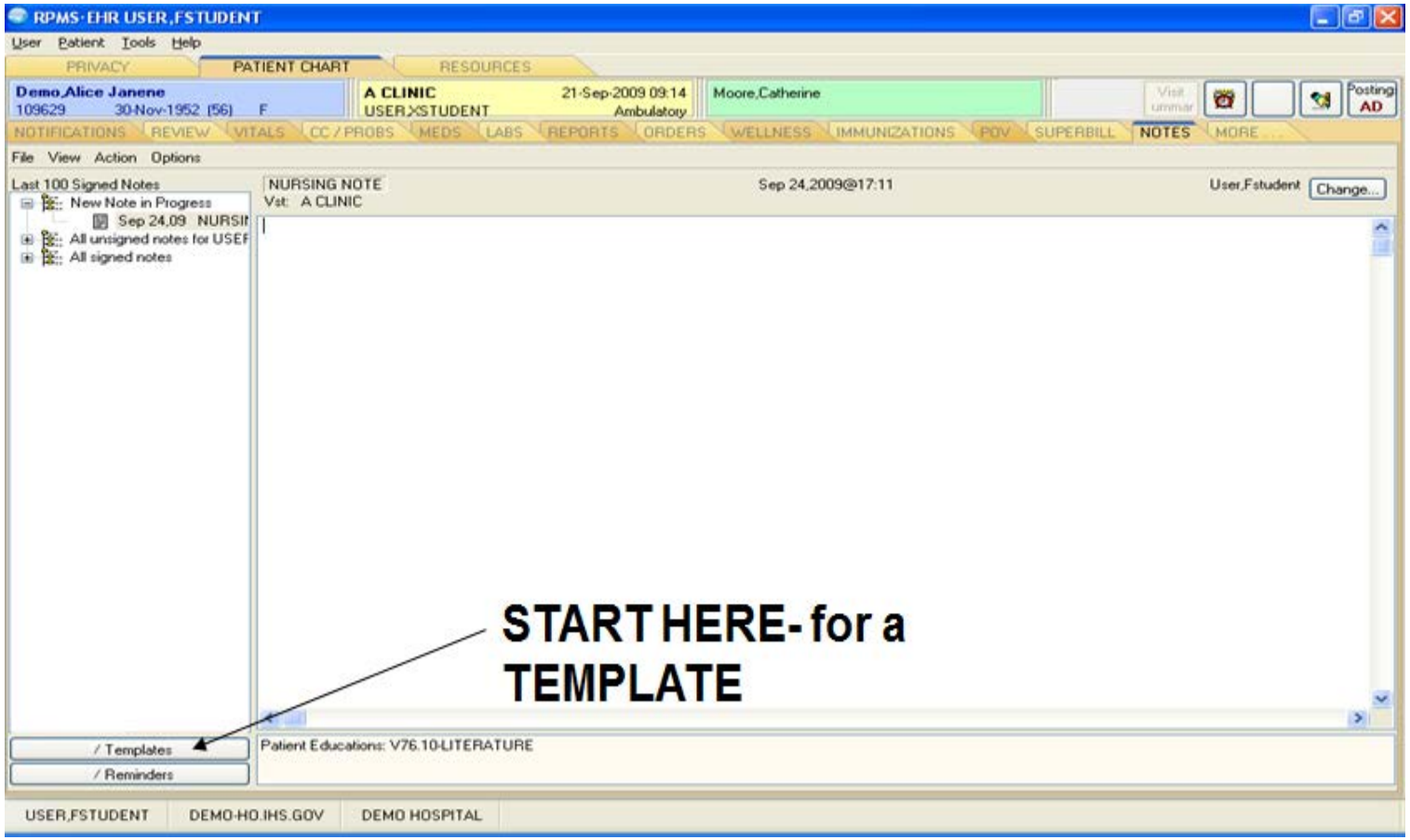


Note Title Selection

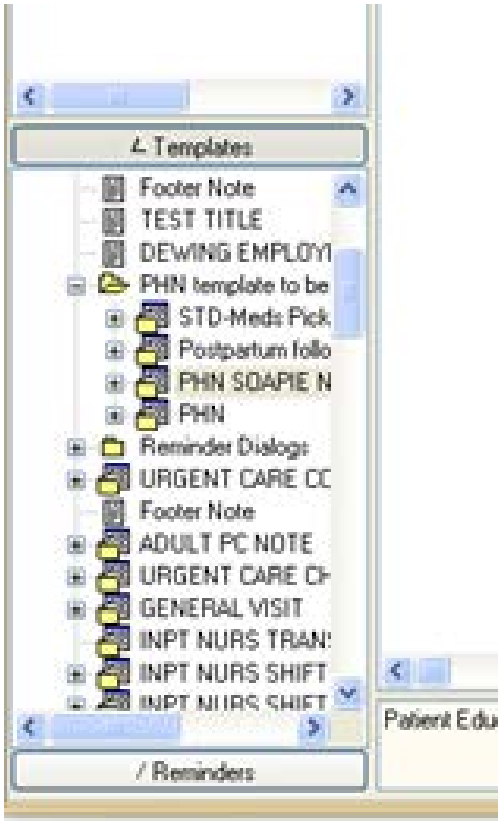
- Nursing
- Public Health Nursing
- Etc., etc.



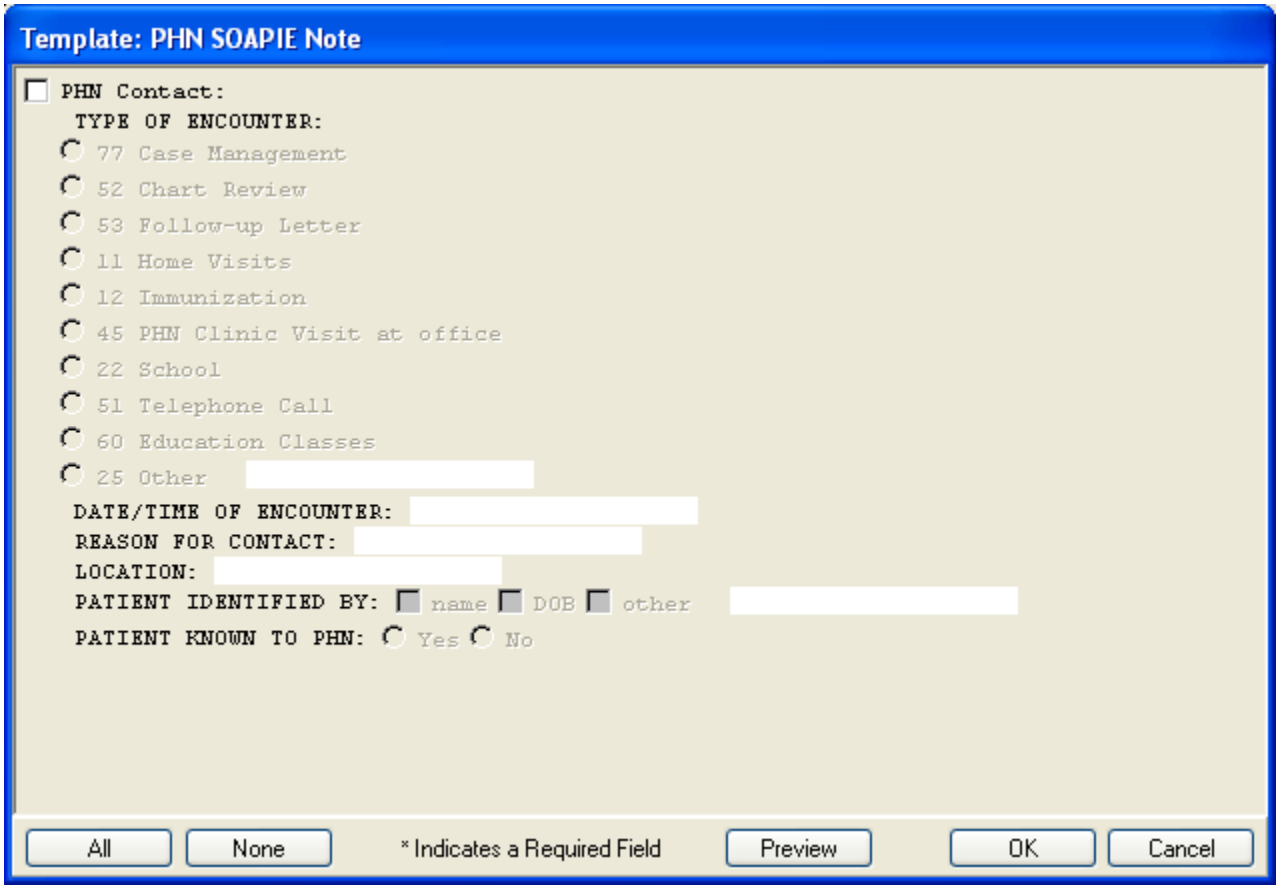
Use a Template



Available Templates List

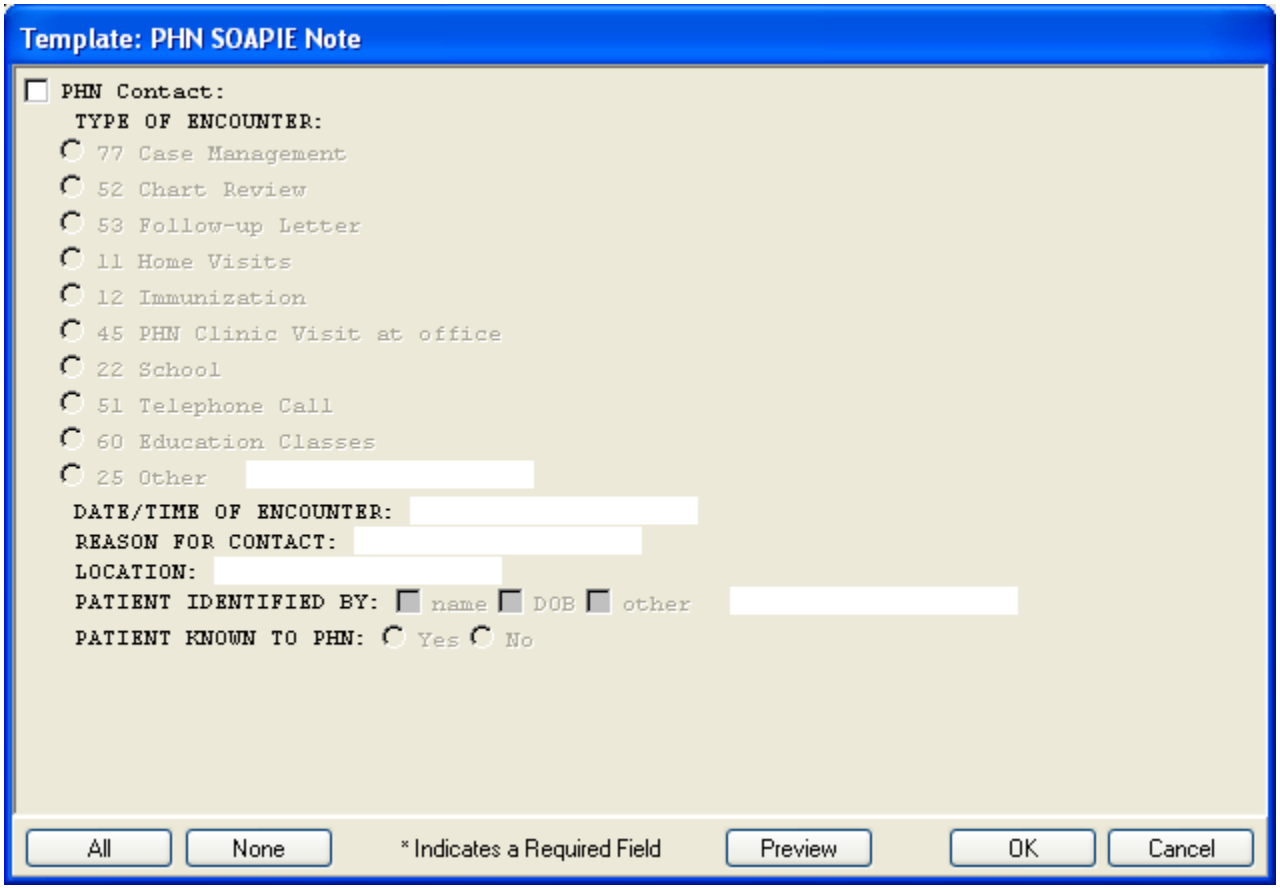


Template Dialog

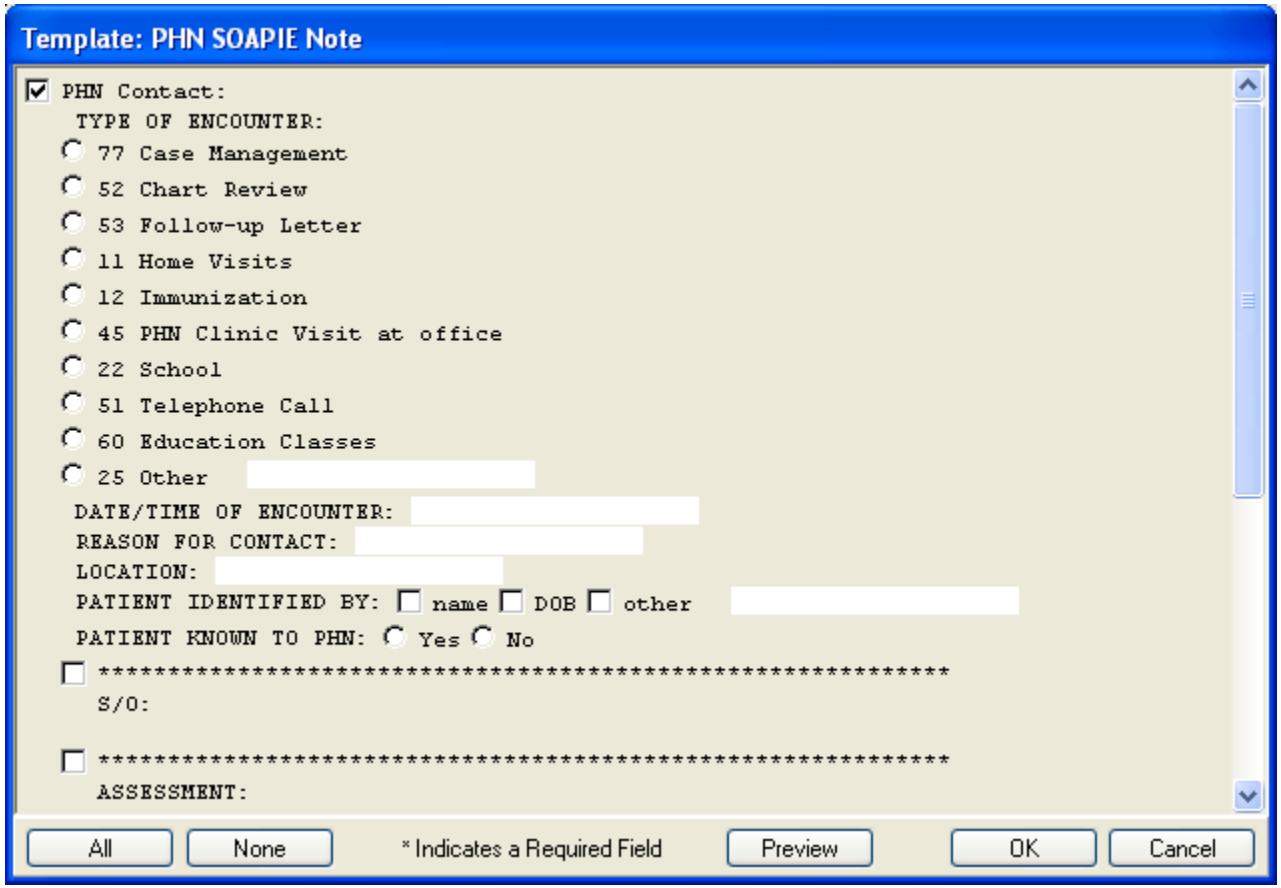


Template Activation

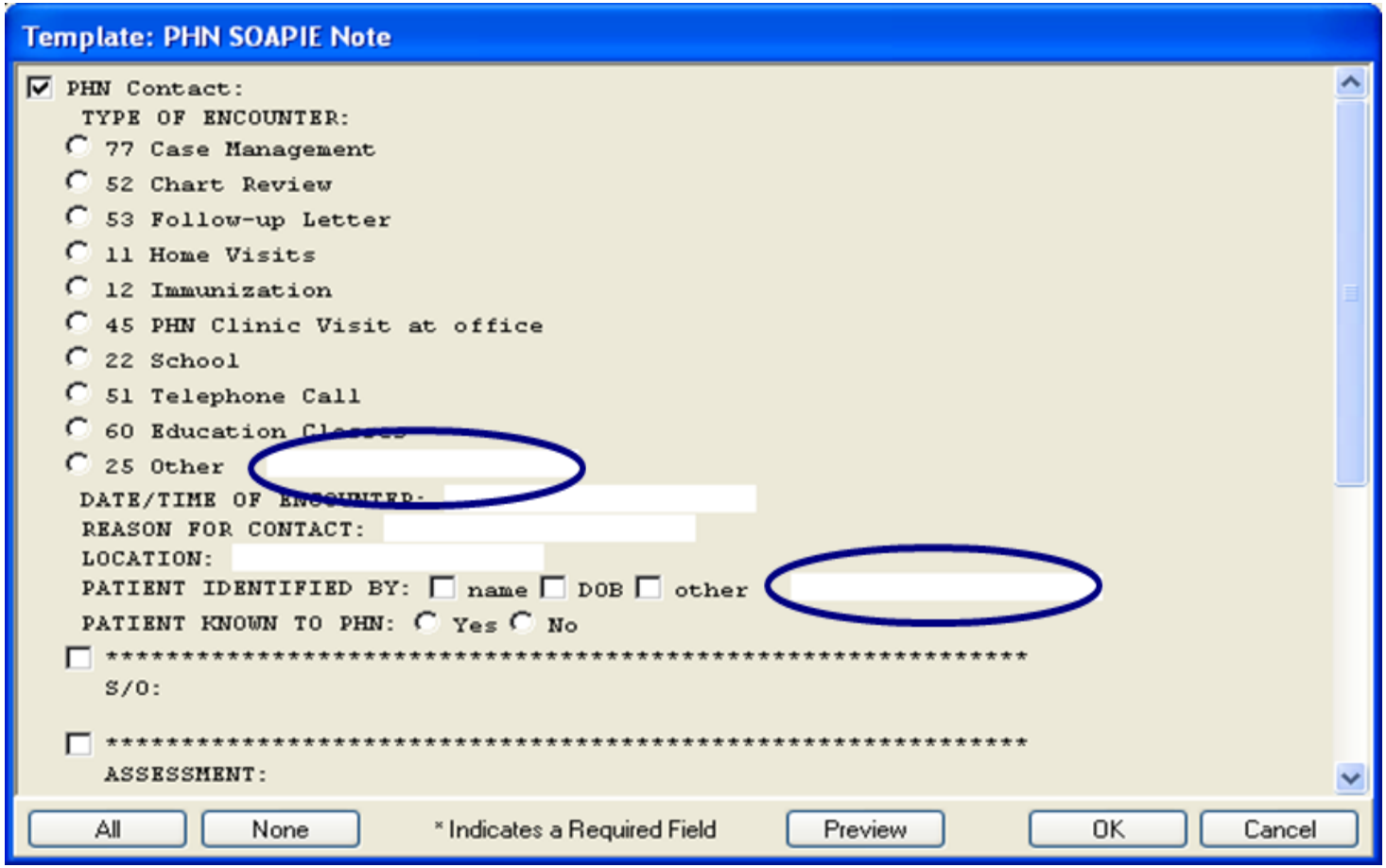
Select **PHN Contact**



Once Activated it Looks like:

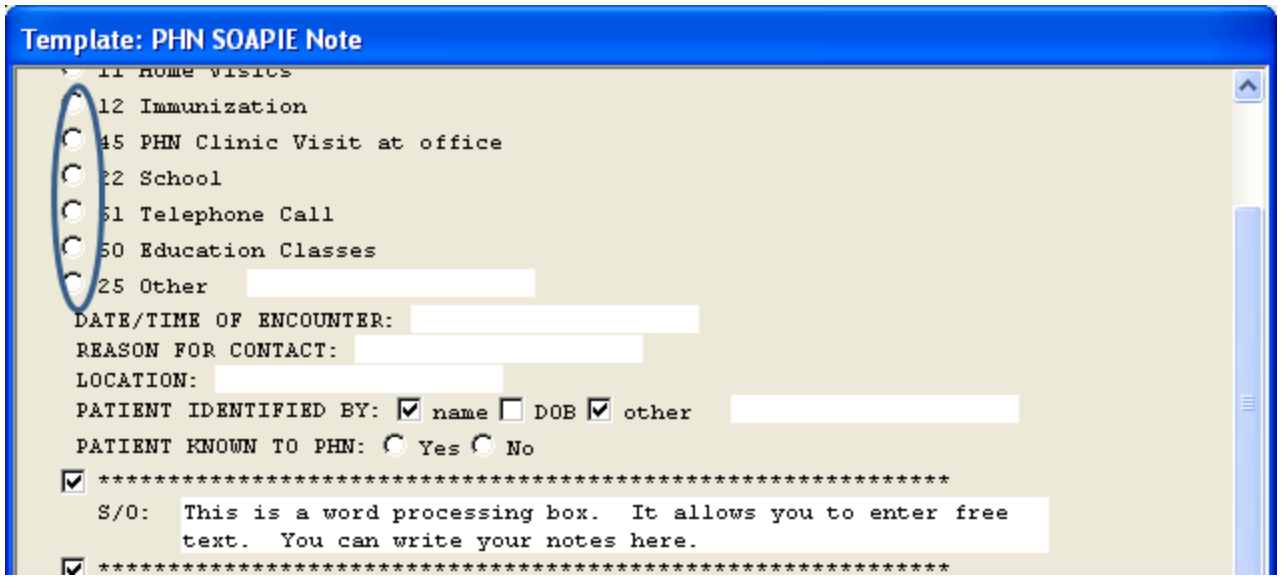


Text Field- Allows for Short Free Text



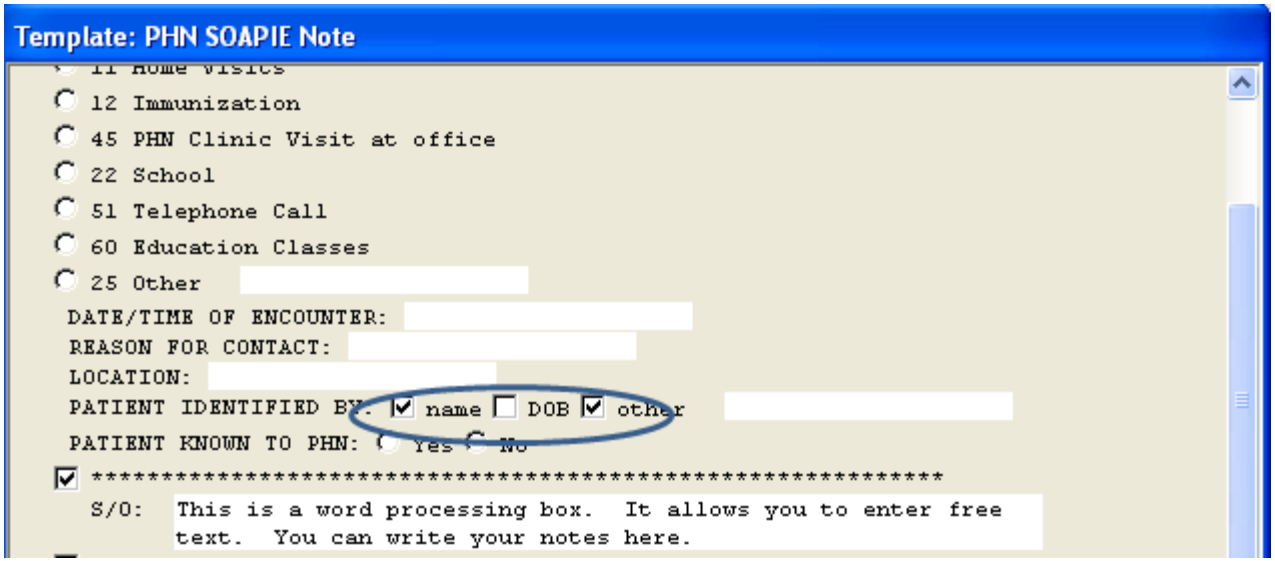
Radio Button Set

Allows you to choose one option from a group of options.

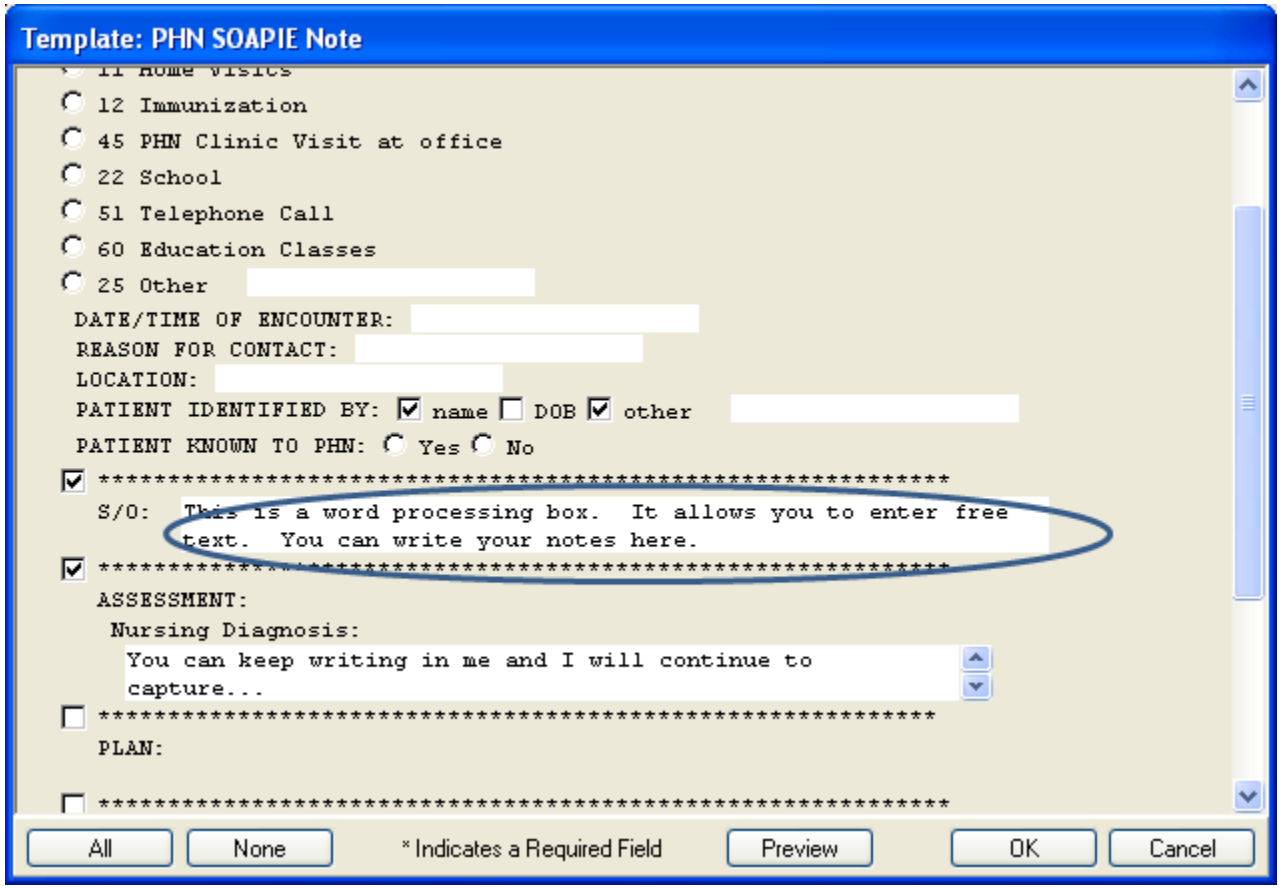


Check Box

Allows you to select one or more options from a group of options.



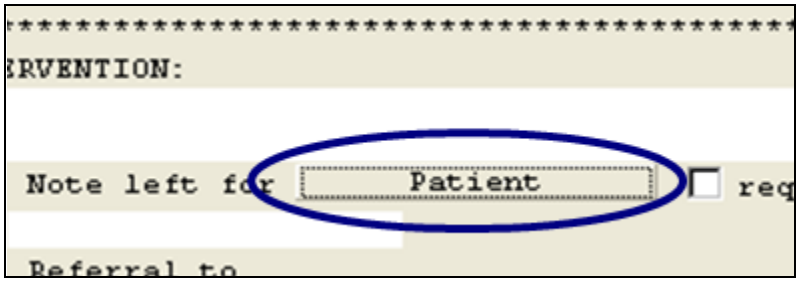
Scrolling Text Field

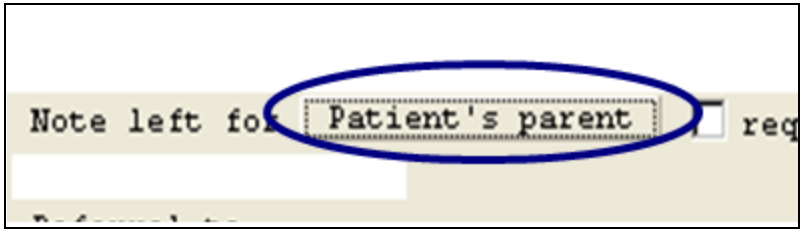


Option Button

Allows you to select one option from a group of options- in a different way!

Click the button; it changes!

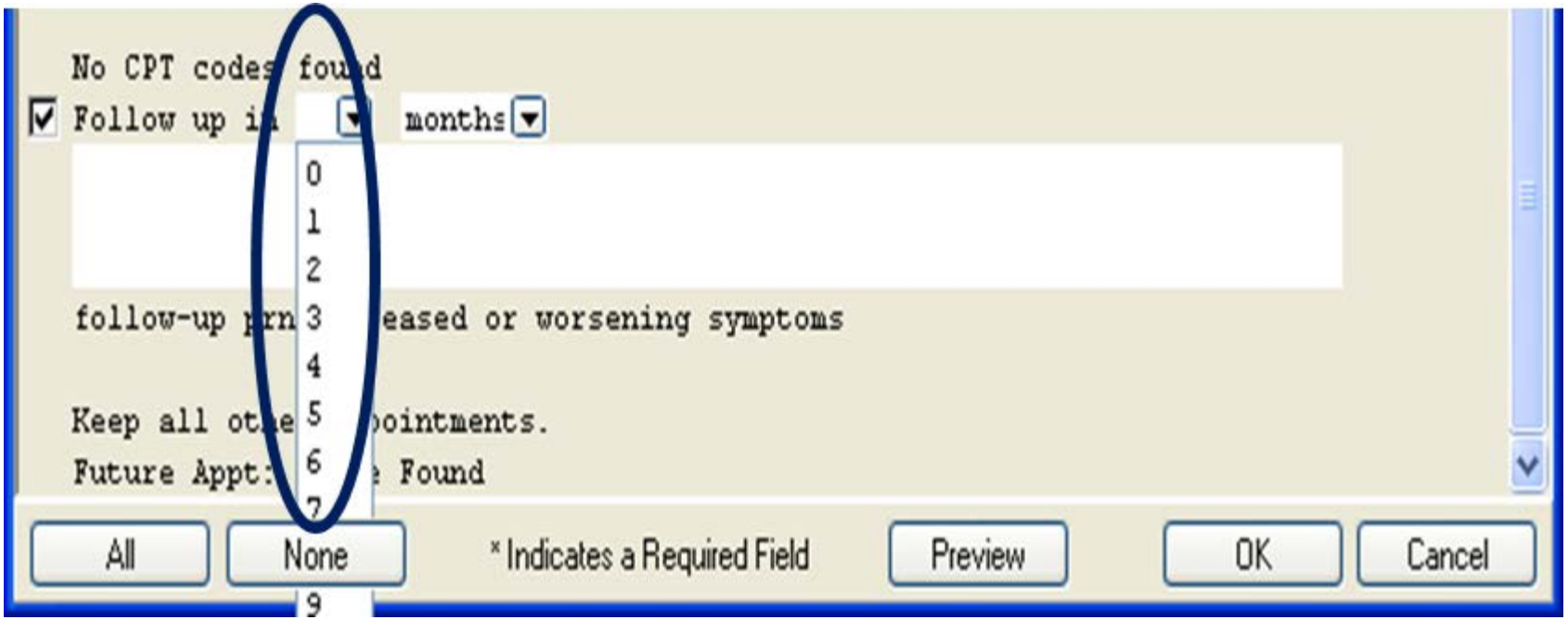




Drop-down List

Allows selection of one item from a list.

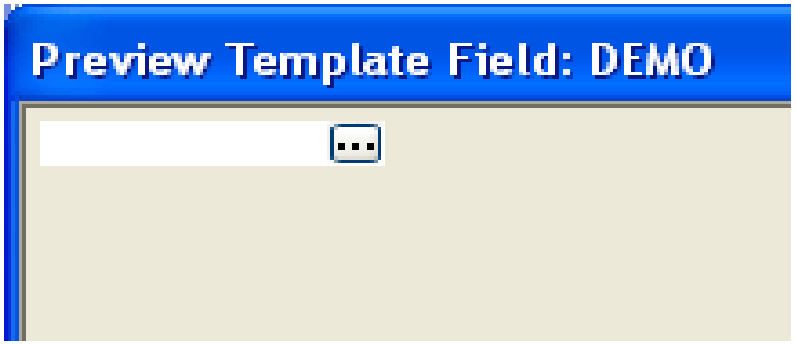
- Click the drop-down arrow to display the list.

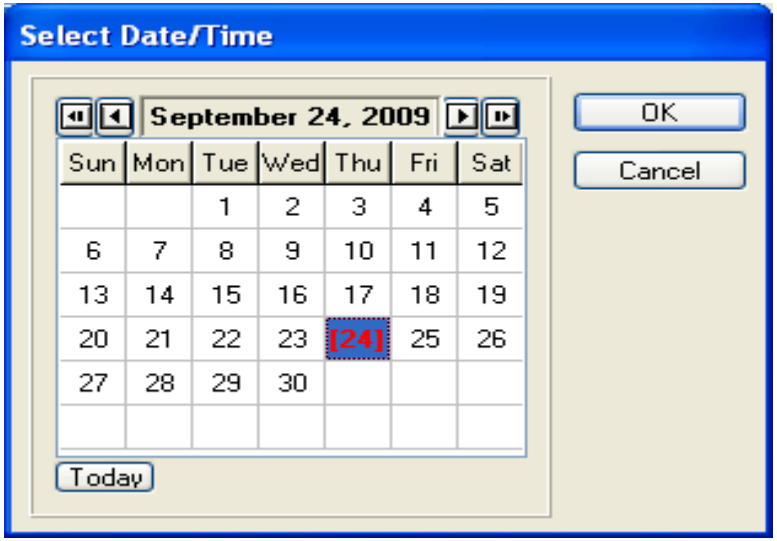


DATE

Allows you to put a date in the note

- Click on the dots.
- A calendar will display and you select a date!

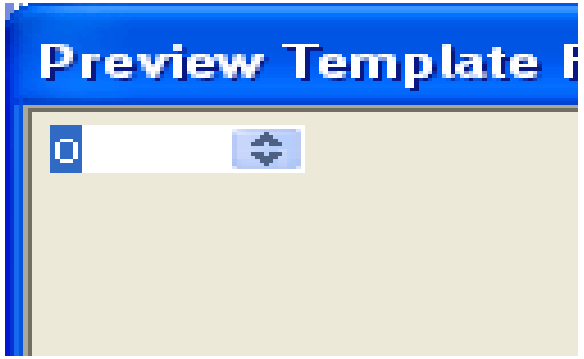


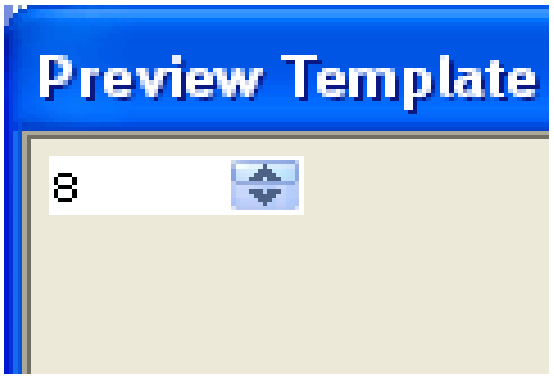


NUMBER

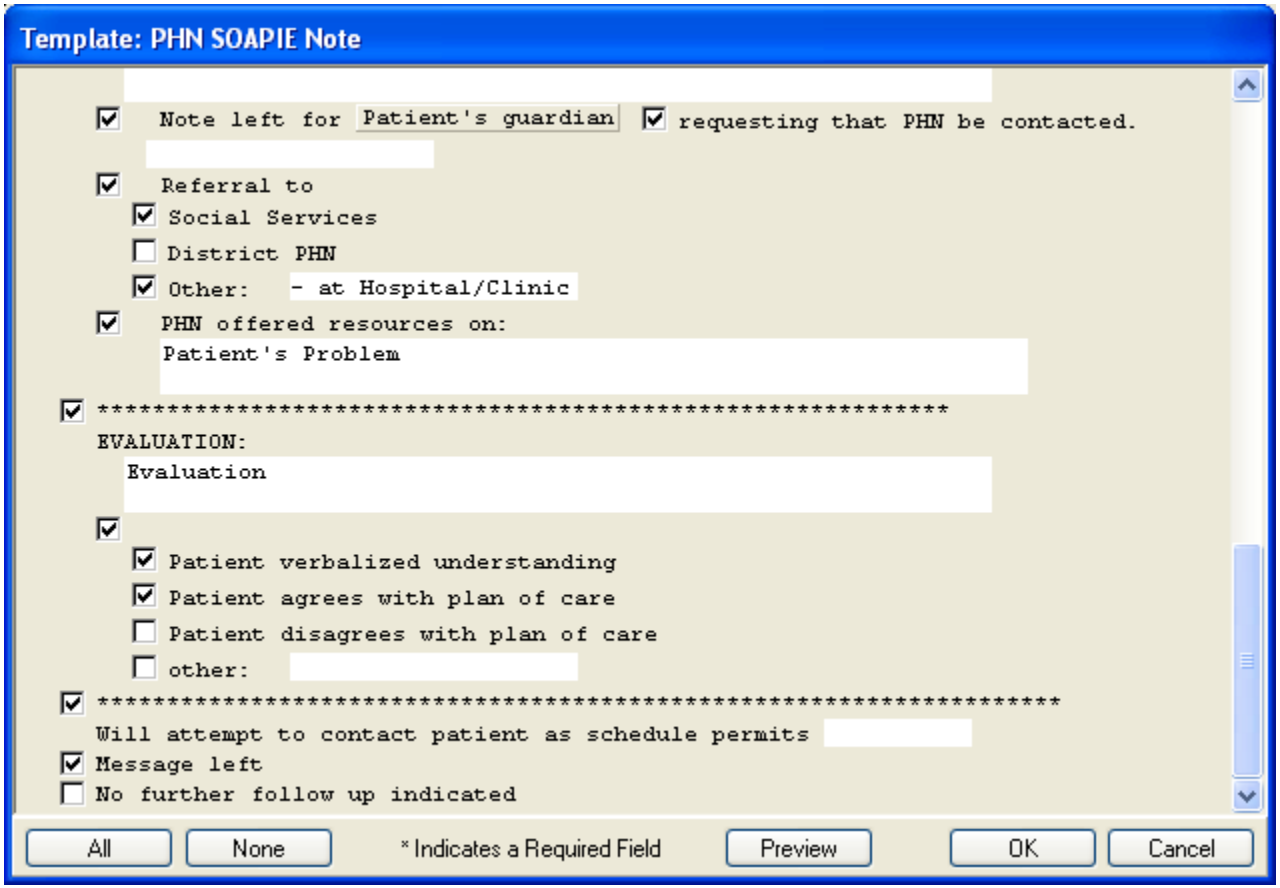
Allows you to select a number.

- Click up or down to appropriate number.

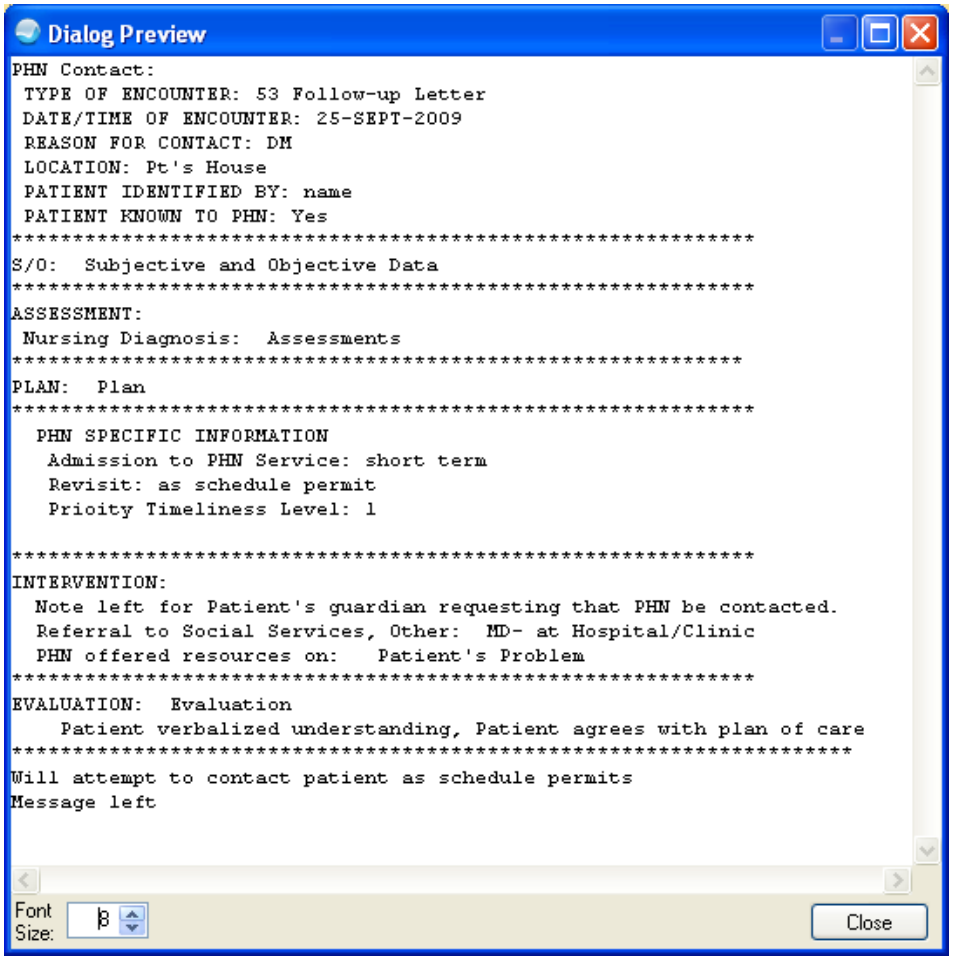




Fill Out Template



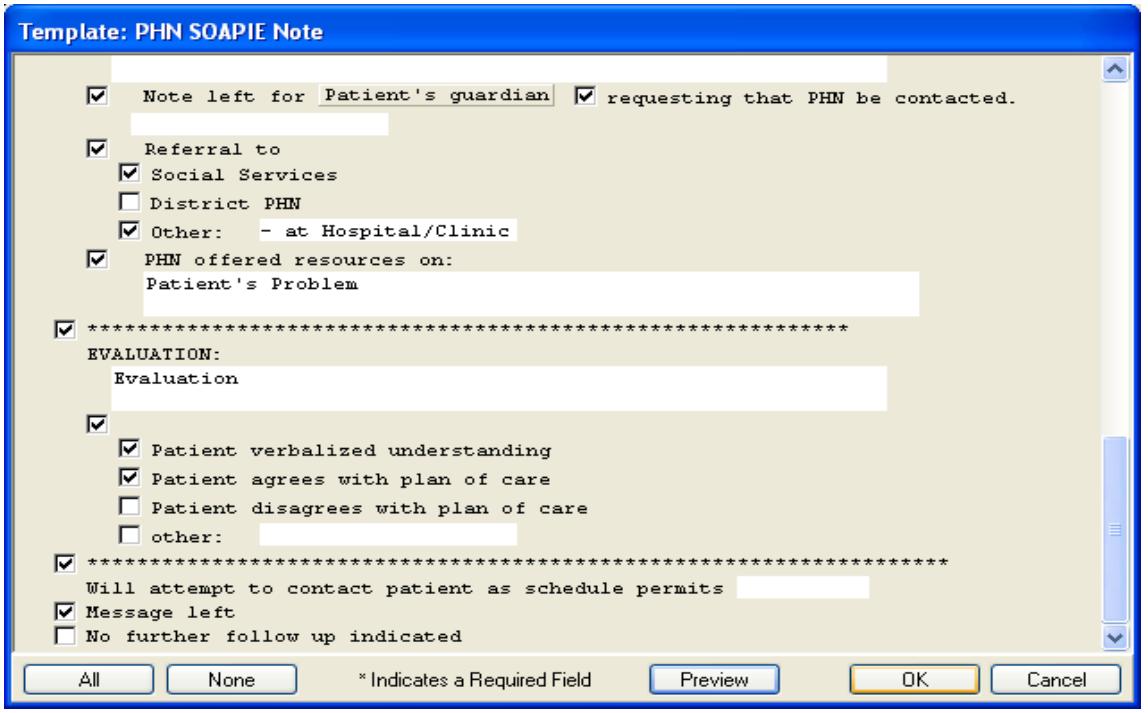
Preview Template



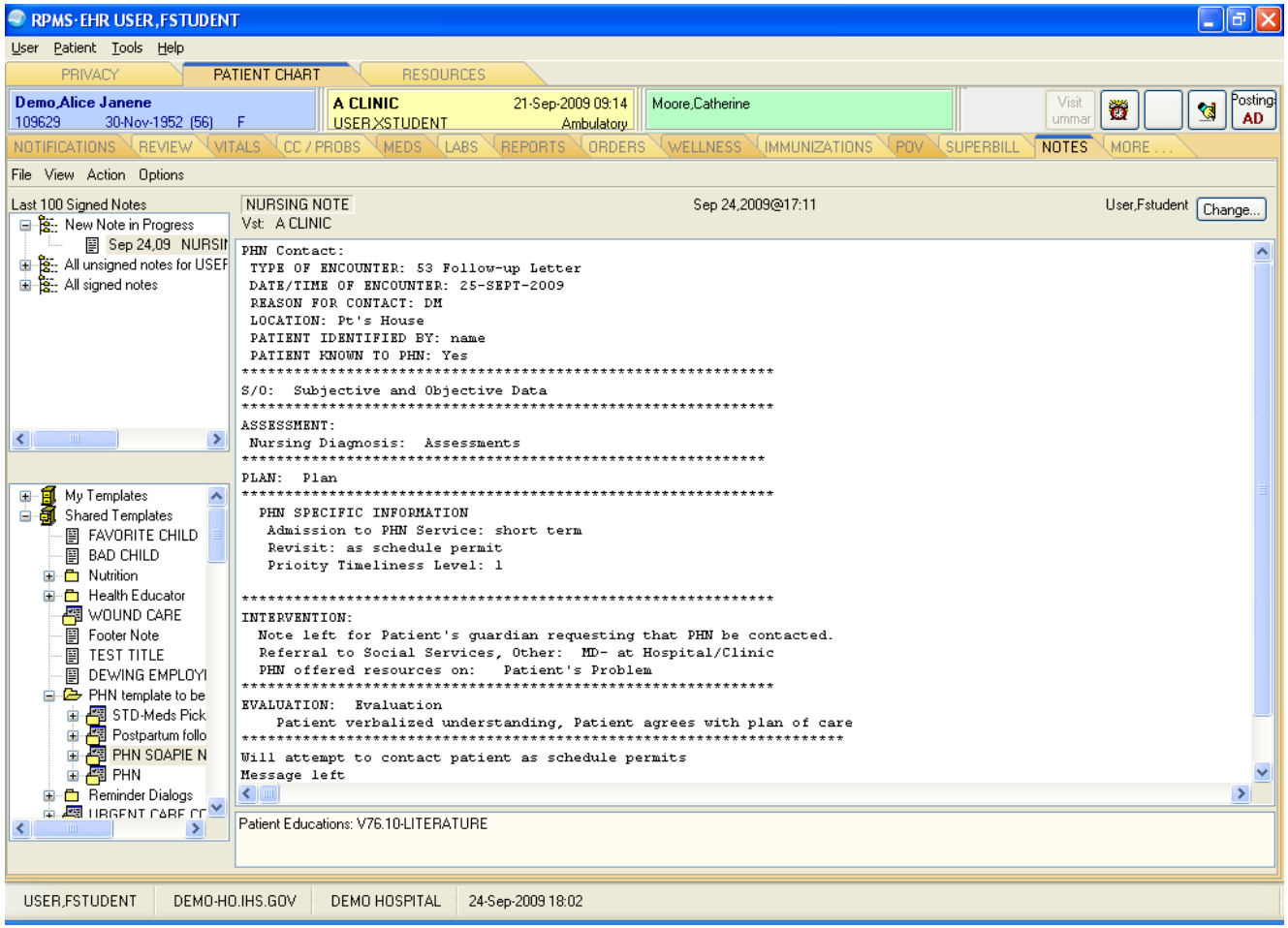
Template

Click OK

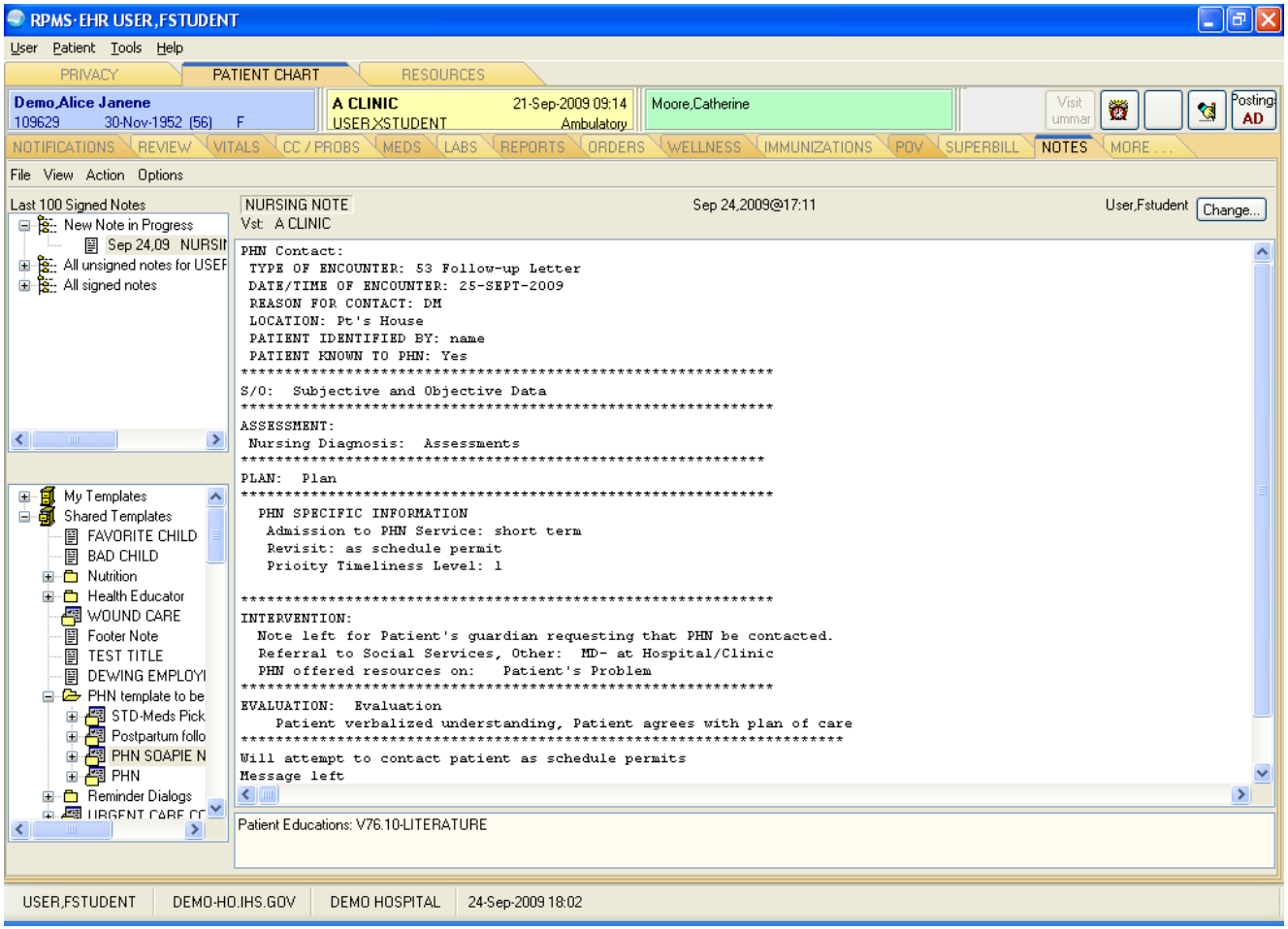
- Once you leave the template you cannot go back!!



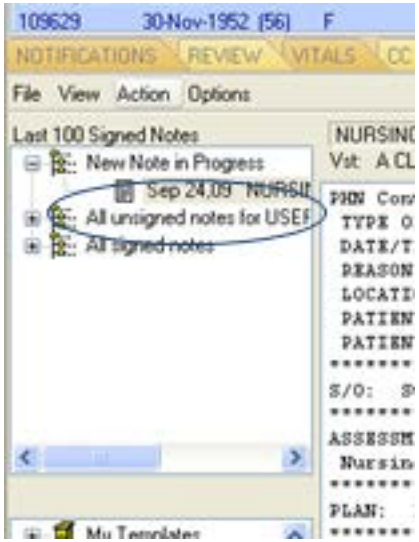
Now it is a TEXT Document

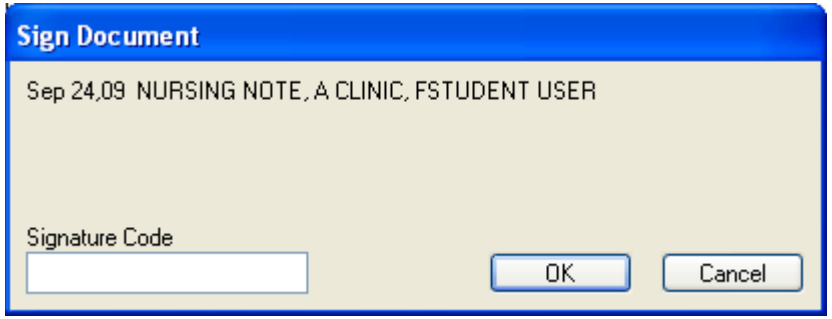


Review and Edit

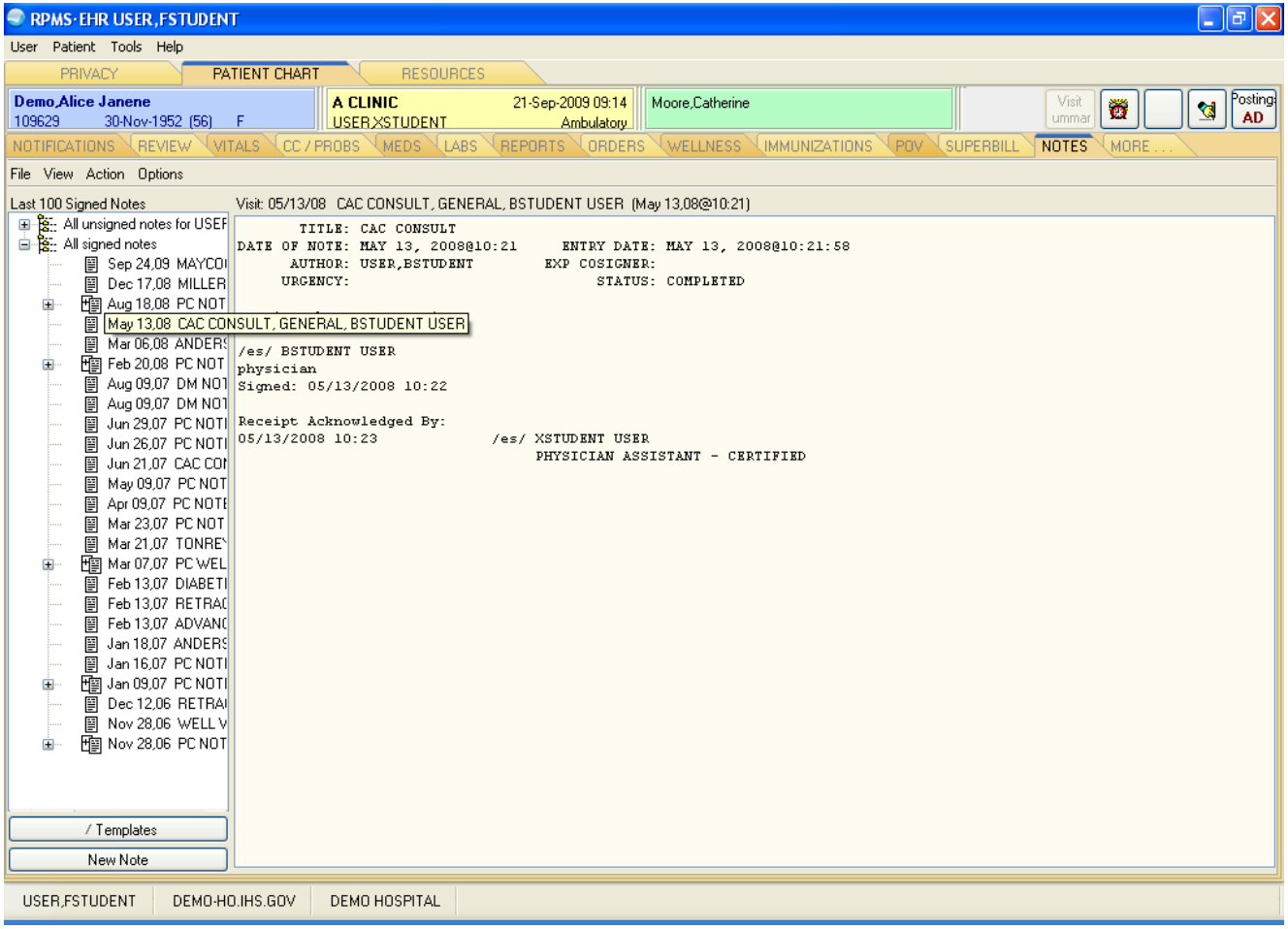


Sign and Complete





DONE!


RPMS-EHR USER,FSTUDENT
User Patient Tools Help
PRIVACY
PATIENT CHART
RESOURCES
Demo,Alice Janene
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A CLINIC
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Moore,Catherine
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NOTIFICATIONS REVIEW VITALS CC / PROBS MEDS LABS REPORTS ORDERS WELLNESS IMMUNIZATIONS POV SUPERBILL NOTES MORE . . .
File View Action Options
Last 100 Signed Notes
All unsigned notes for USEF
All signed notes
Sep 24,09 MAYCOI
Dec 17,08 MILLER
Aug 18,08 PC NOT
May 13,08 CAC CONSULT, GENERAL, BSTUDENT USER
Mar 06,08 ANDERS
Feb 20,08 PC NOT
Aug 09,07 DM NOT
Aug 09,07 DM NOT
Jun 29,07 PC NOTI
Jun 26,07 PC NOTI
Jun 21,07 CAC CON
May 09,07 PC NOT
Apr 09,07 PC NOTE
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Feb 13,07 ADVANC
Jan 18,07 ANDERS
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Nov 28,06 WELL V
Nov 28,06 PC NOT
/ Templates
New Note
Visit: 05/13/08 CAC CONSULT, GENERAL, BSTUDENT USER (May 13,08@10:21)
TITLE: CAC CONSULT
DATE OF NOTE: MAY 13, 2008@10:21 ENTRY DATE: MAY 13, 2008@10:21:58
AUTHOR: USER,BSTUDENT EXP COSIGNER:
URGENCY: STATUS: COMPLETED
/es/ BSTUDENT USER
physician
Signed: 05/13/2008 10:22
Receipt Acknowledged By:
05/13/2008 10:23 /es/ XSTUDENT USER
PHYSICIAN ASSISTANT - CERTIFIED
USER,FSTUDENT
DEMO-HO.IHS.GOV
DEMO HOSPITAL

PHN Templates

- National Templates (in the works) - will review FTP repository / import demo.
- Best practice: Use existing templates approved by National IHS PHN committee to ensure consistent legal and financial (billing) standards.
- CACs present at each site will import templates from repository into local DEHR database at end of presentation.

Notifications

- There are many notifications that can be set up in the EHR.
- Work with your CAC to review current notifications that are turned on.
- A user can also schedule a notification to themselves or others.
- PHNs will receive notifications for unsigned notes and referrals/consults .
- HIM responsible to run the unsigned notes, unsigned orders, consults.

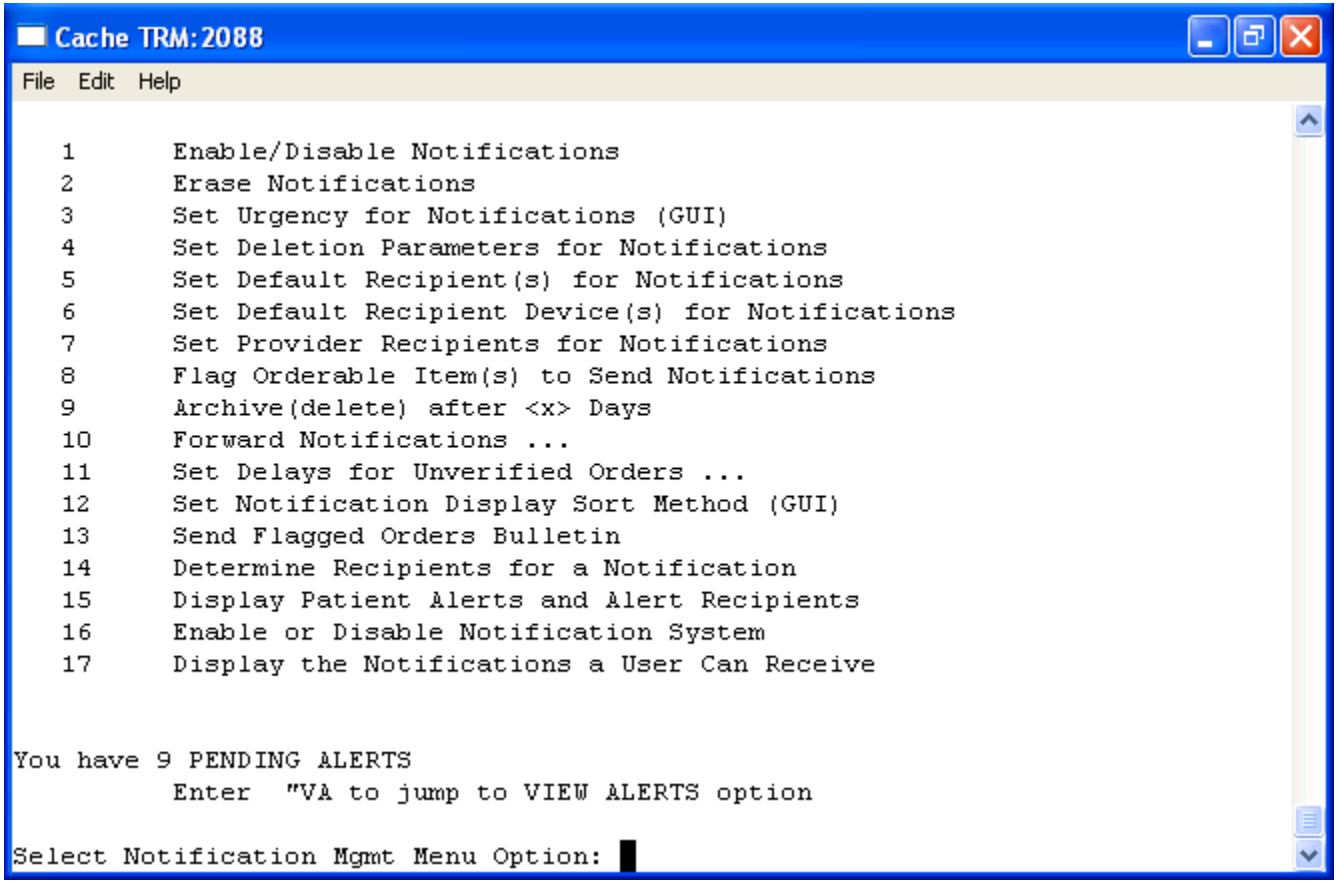
How do They Work?
Recipient Determination

- Turn off only “E&M Code Required” and turn on “POV Required” notifications for PHN User Class
- If a PHN writes a note for a visit and leaves out POV, when they select the next patient or close the EHR they receive a notification. A reminder window will open to sign note, click **OK** and go to Action and sign note.
- Reminders only stay on the Notification Tab for 30 days unless locally modified.

Notification Management Menu

- This menu handles all the notifications. Number 16 turns on the notification system for the facility. Until then *no notifications can be sent*.
- However, once its turned on, all clinicians will receive any mandatory or enabled notifications, even if they are not using the EHR. Do not turn on notification until you are ready to use the EHR.
- Notifications set as mandatory cannot be turned off by the user. Notifications that are “Enabled” can be “Disabled” by the user in the EHR.

Notification Menu



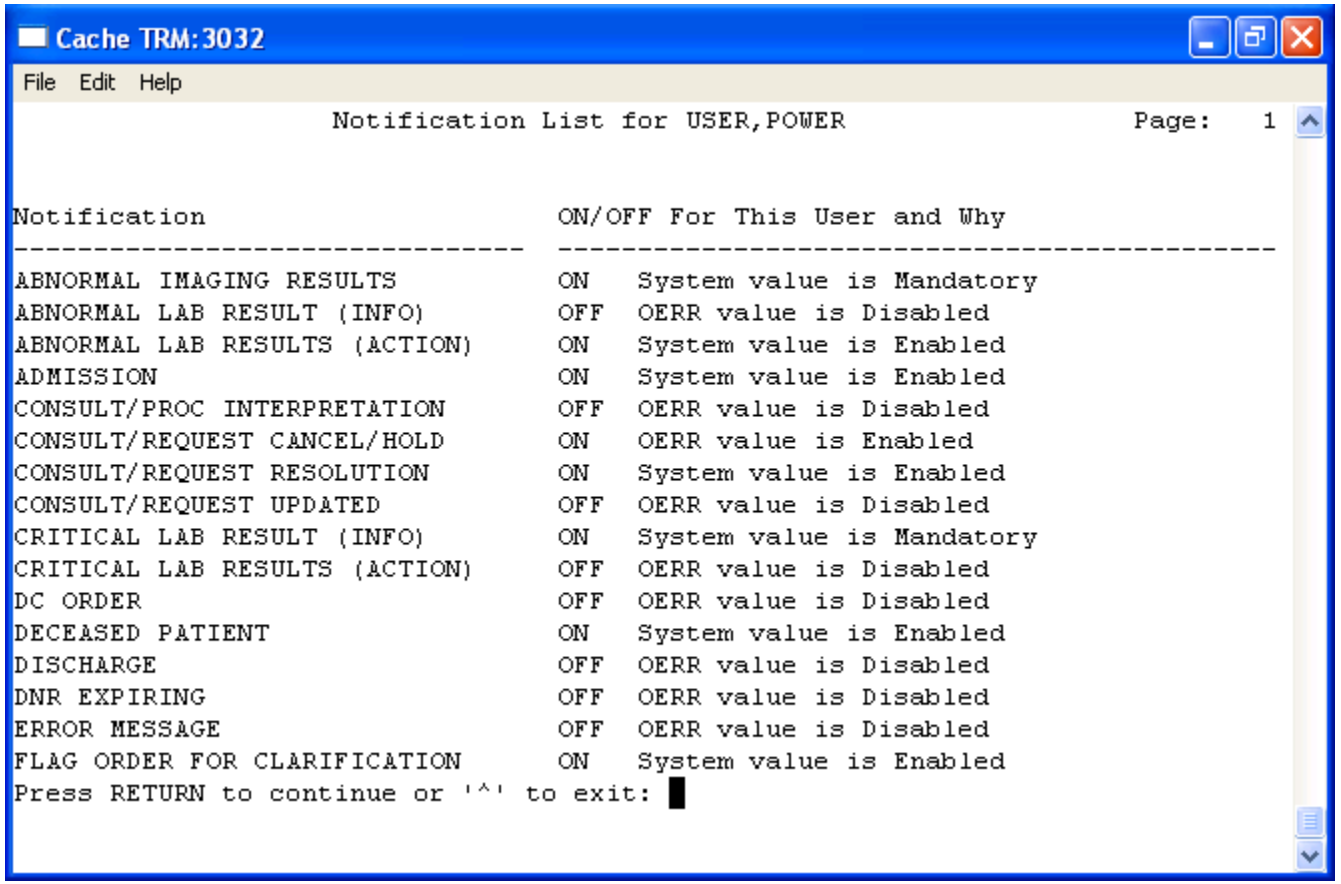
Determining Settings for Notifications

- Team needs to decide which notifications to turn on, what the urgency level is for each notification and who is to receive the notification.
- Avoid Notification Overload.
- Start out conservatively and review 90 days after Go Live.

Erase Notifications

- If a user receives a notification that does not apply to them “lab result notification”, when they didn’t see the patient they can forward to another provider.
- Notifications can be erased by the user or a CAC.

Display the Notifications a User Can Receive



GUI Personal Preferences

From the Tools menu and “Options”, a user may:

- Enable/disable notifications
- Set a surrogate (ability to send to a department, e.g., PHN)
- Customize personal note title list

PHN Templates and Notifications

- Work Session: CACs present at each site please import templates from repository into local DEHR database

- Please setup default Notifications for users

Discussion and Questions