

THE INDIAN HEALTH SERVICE

Patient Record Flag



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Superior Health Information Management
Now and for the Future

Learning Objectives

- Define what are Patient Record Flags and its clinical use
- Discuss Flag setups
- Demo the Creation a Patient Record flag from start to finish

What is Patient Record Flags

- Patient Record Flags is a mechanism in which an alert can be assigned to patients who have certain high risk clinical needs and/or behavior problems. This alert can be configured to “pop up” during the patient look-up process.
- PRF provides users with the ability to create, assign, inactivate, edit, generate reports, and view patient record flag alerts.

Why use Patient Record Flags

- Informs clinical staff of patient's clinical needs which can improve the quality of patient care and safety.
- Alerts staff to patients whose behavior or characteristics may pose a threat either to their safety and/or the safety of other patients.

Implementation

- All patient record flags must be kept *confidential*
- Local policies and procedure should be developed
- Patient flags should be reviewed at least every 2 years
- A patient may request a correction/amendment of their flag

Types of Flags

- Patient Record Flags are divided into two Categories:
 - Category I (National)
 - Can not be locally edited
 - Behavioral Flags
 - Category II (Local)
 - Established locally by facilities
 - NOT shared

Caution

- The effectiveness of Patient Record Flags depends upon limiting their use to high risk clinical situations and to those unusual clinical risks that threaten health care safety and quality.
- The use of local (Category II) flags should be strictly limited to information that is essential for the delivery of safe and appropriate health care

Implementing Patient Record Flags

- Sites need to evaluate how they are going to implement this program
 - How a request for “flagging” a patient’s record will be processed
 - Who is going to approve the flags
 - Who will be responsible for creating, reviewing, updating, and inactivating flags
 - Who will be placing, removing, and training staff on how to use flags

Flag Setup

- KEY assignments
 - DGPF LOCAL FLAG EDIT
 - This key is used to control access to the Record Flag Management option. Whom ever has this key can add new local flags and edit local flags.
 - DGPF PRF ACCESS
 - This key controls the Patient Record Flag module in the registration package. Holder of this key will be able to display record flag detail, patient assignment detail, and generate reports.

Keys Continued

- Keys...
 - DGPF PRF CONFIG
 - This key controls access to the PRF System Configuration.
 - DGPF RECORD FLAG ASSIGNMENT
 - This key controls access to the List Manager and Record Flag Assignment menu. Holder of this key can assign, edit, and change ownership local flags.

Medical Division

- Make sure to enable the patient record flag for each division
- Menu option used to enable the Medical Division

```
RM      Record Flag Reports Menu ...
FA      Record Flag Assignment
FM      Record Flag Management
TM      Record Flag Transmission Mgmt ...
ED      Record Flag Enable Divisions
```

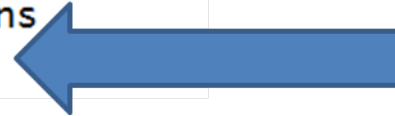


View Medical Division Setup

- 1st view your settings

select one of the following:

E	Enable Medical Center Divisions
D	Disable Medical Center Divisions
V	View Medical Center Divisions



```
Medical Center Division: 2014 DEMO HOSPITAL
PRF Assignment Ownership: ENABLED
      Edited By: COSEN,RICHARD L
      Edit Date/Time: APR 11, 2013
Active PRF Assignments: NO
```

```
Medical Center Division: 2014 DEMO SUB-FACILITY
PRF Assignment Ownership: ENABLED
      Edited By: COSEN,RICHARD L
      Edit Date/Time: APR 11, 2013
Active PRF Assignments: NO
```

Enabling Medical Division

- Under that same menu option, you can enable your Medical Division

```
Select one of the following:
```

```
  E Enable Medical Center Divisions  
  D Disable Medical Center Divisions  
  V View Medical Center Divisions
```

```
Select action: E
```

```
Enter each medical center division that you would like to enable.
```

```
Select medical center division: 2014 DEMO SUB-FACILITY      8998  
Select medical center division:
```

```
Preparing to 'enable' the selected medical center divisions as  
patient record flag assignment owners...
```

```
Ok to enable division: 2014 DEMO SUB-FACILITY? YES//  
>>> Medical center division has been ENABLED
```

TIU 1010 and USR 1004

- Delivered new Business Rules
 - A completed (document class) Patient Record Flag CAT II may be linked to a PRF flag by a chief, MIS
 - A unsigned (document class) Patient Record Flag CAT II may be linked to a PRF flag by author/dictator

USR 1004

- After this patch, site managers was instructed to run the TIU165 DDEFS & RULES, PRF in programmers prompt
 - A completed (document class) Patient Record Flag CAT II may be linked to a PRF flag by a chief, MIS
 - A unsigned (document class) Patient Record Flag CAT II may be linked to a PRF flag by author/dictator
- If you do not have these Business Rule under **Document Class** contact your Area Office for instructions.

Create Note Title

- Create note titles under the new Patient Record Flag Category II document class
 - Use this format for your new titles
 - Patient Record Flags Category II – ***Flag Name***
- Assign corresponding note title to the corresponding patient flag. (recommended that you name your flag with the same name of your title)

Creating Note Title

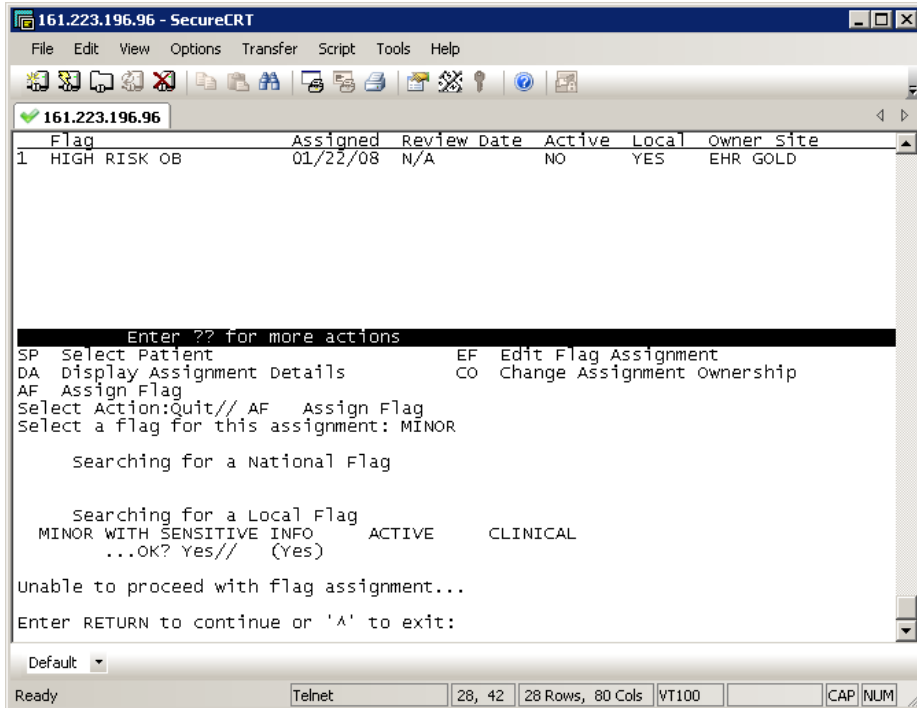
- Create new note titles under Document Definition “Patient Record Flag Cat II”
- Use some type of naming schema that clearly show the title is used for adding a note for an existing patient flag

36	PATIENT RECORD FLAG CAT II	DC
37	PJS PATIENT RECORD FLAG CAT II - BAD PATIENT	TL
38	PATIENT RECORD FLAG CATEGORY II - GURDIAN BW	TL
39	PATIENT RECORD FLAG CATEGORY II-TM GUARDIAN	TL
40	AA PT REC FLAG LOCAL ADVANCE CAC	TL
41	BN PT REC FLAG LOCAL ADV CAC	TL
42	CDL PT REC FLAG LOCAL ADVANCE CAC	TL
43	DTM PT REC FLAG LOCAL ADV CAC	TL
44	JCS BURNING MAN FLAG	TL

Points to Consider

- Note title can only be assigned to one flag
- If you want to re-assign a note title that was already assigned to a flag, you will need to edit that flag containing the title you would like to change. You will need to “swap out” that title with a new title.

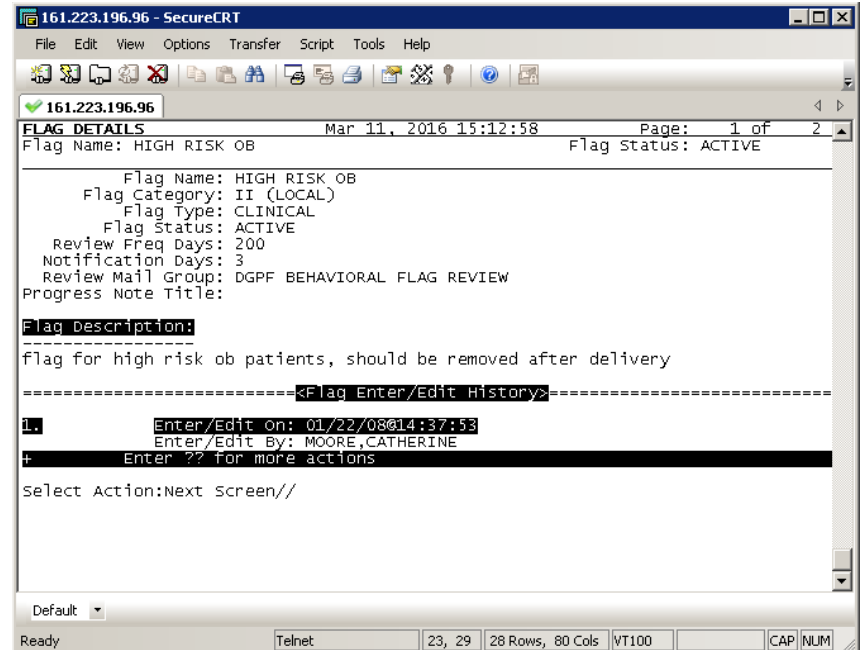
Common Errors Related to note titles



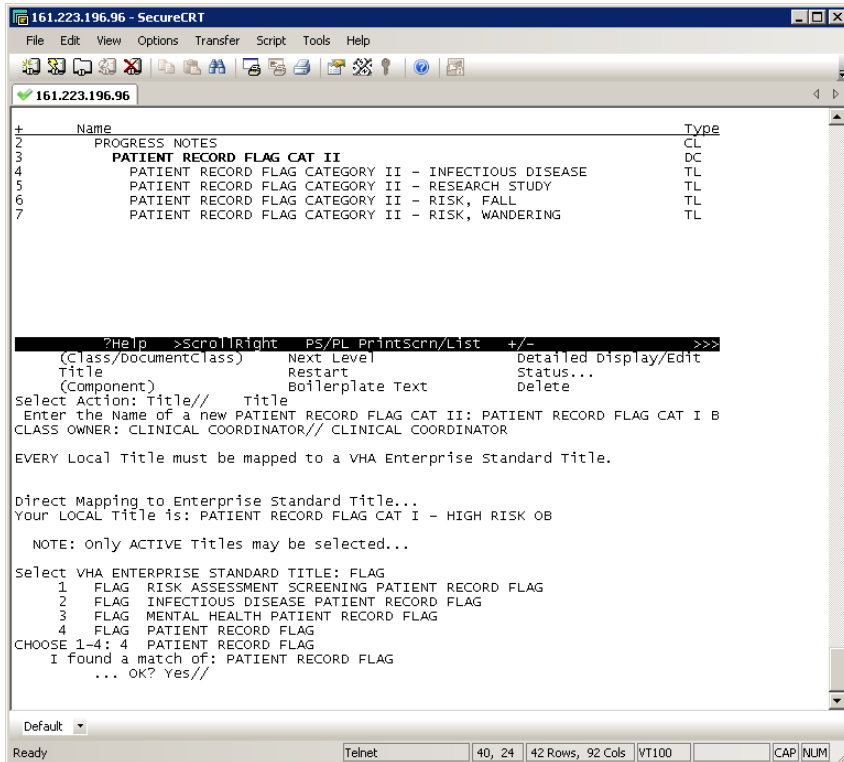
- For all pre-existing flags, you will need to assign a note title
- Without the note title, you will not be able to place that flag on new patients
- The pre-existing flag will still be attached to previous patient. But you will not be able to add a note to that flag for that patient

Editing Flag

- You can display flag details to determine if the flag has a note title assigned



Fixes



```
161.223.196.96 - SecureCRT
File Edit View Options Transfer Script Tools Help
161.223.196.96
+ Name Type
2 PROGRESS NOTES CL
3 PATIENT RECORD FLAG CAT II DC
4 PATIENT RECORD FLAG CATEGORY II - INFECTIOUS DISEASE TL
5 PATIENT RECORD FLAG CATEGORY II - RESEARCH STUDY TL
6 PATIENT RECORD FLAG CATEGORY II - RISK, FALL TL
7 PATIENT RECORD FLAG CATEGORY II - RISK, WANDERING TL

?Help >ScrollRight PS/PL Printscrn/List +/- >>>
(Class/DocumentClass) Next Level Detailed Display/Edit
Title Restart Status...
(Component) Boilerplate Text delete
Select Action: Title// Title
Enter the Name of a new PATIENT RECORD FLAG CAT II: PATIENT RECORD FLAG CAT I B
CLASS OWNER: CLINICAL COORDINATOR// CLINICAL COORDINATOR

EVERY Local Title must be mapped to a VHA Enterprise Standard Title.

Direct Mapping to Enterprise Standard Title...
Your LOCAL Title is: PATIENT RECORD FLAG CAT I - HIGH RISK OB

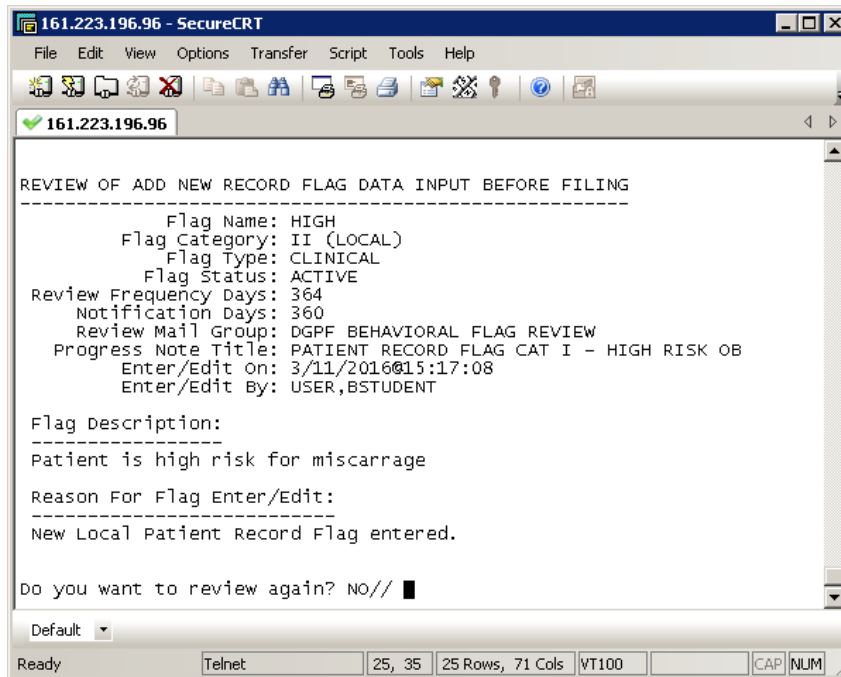
NOTE: only ACTIVE Titles may be selected...

Select VHA ENTERPRISE STANDARD TITLE: FLAG
1 FLAG RISK ASSESSMENT SCREENING PATIENT RECORD FLAG
2 FLAG INFECTIOUS DISEASE PATIENT RECORD FLAG
3 FLAG MENTAL HEALTH PATIENT RECORD FLAG
4 FLAG PATIENT RECORD FLAG
CHOOSE 1-4: 4 PATIENT RECORD FLAG
I found a match of: PATIENT RECORD FLAG
... OK? Yes//

Default
Ready Telnet 40, 24 42 Rows, 92 Cols VT100 CAP NUM
```

- Simply create the title for that pre-existing flag under the correct document class
- Map the title VHA Enterprise Standard Title “Patient Record Flag”

Assigning Flag



```
161.223.196.96 - SecureCRT
File Edit View Options Transfer Script Tools Help
161.223.196.96
REVIEW OF ADD NEW RECORD FLAG DATA INPUT BEFORE FILING
-----
Flag Name: HIGH
Flag Category: II (LOCAL)
Flag Type: CLINICAL
Flag Status: ACTIVE
Review Frequency Days: 364
Notification Days: 360
Review Mail Group: DGPF BEHAVIORAL FLAG REVIEW
Progress Note Title: PATIENT RECORD FLAG CAT I - HIGH RISK OB
Enter/Edit on: 3/11/2016@15:17:08
Enter/Edit By: USER,BSTUDENT

Flag Description:
-----
Patient is high risk for miscarriage

Reason For Flag Enter/Edit:
-----
New Local Patient Record Flag entered.

Do you want to review again? NO// █
Default
Ready Telnet 25, 35 25 Rows, 71 Cols VT100 CAP NUM
```

- Now you can assign the pre-existing flag

Flag Note Title

- Only title under the Patient Record Flag Document Definition will attach the note to a flag.
- You will not be able to use that title if the patient does not have an existing flag
- Any note title under that Document Definition can be used for any flags.

Example

- If patient does not an existing flag, you will not be able to use the note title.

****This was true until last EHR 17 patch.

And was not fixed with patch 18****

Progress Note Properties

Progress Note Title: PATIENT <PATIENT RECORD FLAG CAT II - BW GUARDIAN>

PATIENT <OR PERIOPERATIVE PATIENT INSTRUCTIONS>
PATIENT <PATIENT CORRESPONDANCE>
PATIENT <PATIENT RECORD FLAG CAT II - BW GUARDIAN>
PATIENT <PATIENT RECORD FLAG CAT II - GL GUARDIAN>
PATIENT <PATIENT RECORD FLAG CAT TI FLAG CAT II - EM GL
PATIENT <PATIENT RECORD FLAG CATEGORY II - INFECTIOUS
PATIENT <PATIENT RECORD FLAG CATEGORY II - LJB GUARD

Date/Time of Note: 11-Mar-2016 13:32

Author: Mosely,Elvira

Which Patient Record Flag Action should this Note be linked to?

Flag	Date	Action	Note
------	------	--------	------

FLAG ASSIGNMENT AND SETUP

Flag Assignment

RECORD FLAG ASSIGNMENT Apr 01, 2008 13:31:25 Page: 1 of 1

Patient: DEMO,PATIENT FIVE (20-00-05) DOB: 01/01/61

	Flag	Assigned	Approved By	Review Date	Active	Local
1	HIGH RISK PREGNANCY	11/19/07	CARPEN,DWIGHT R	08/15/08	YES	YES
2	DIABETIC	01/07/08	ALLEN,MITZIE A	N/A	NO	YES
3	CRITICAL LAB DUE	01/22/08	GEMELAS,JAMES C	04/21/08	YES	YES

Enter ?? for more actions

SP Select Patient EF Edit Flag Assignment
DA Display Assignment Details CO Change Assignment Ownership
AF Assign Flag
Select Action:Quit// █

Assign Menu

- Site manager needs to add this menu to the IHS Core
 - DGPF RECORD FLAGS MAIN MENU

Patient Flag Main Menu

```
RM    Record Flag Reports Menu ...  
FA    Record Flag Assignment  
FM    Record Flag Management  
IRM   PRF System Configuration
```

```
You have 1 PENDING ALERTS  
      Enter "VA to jump to VIEW ALERTS option
```

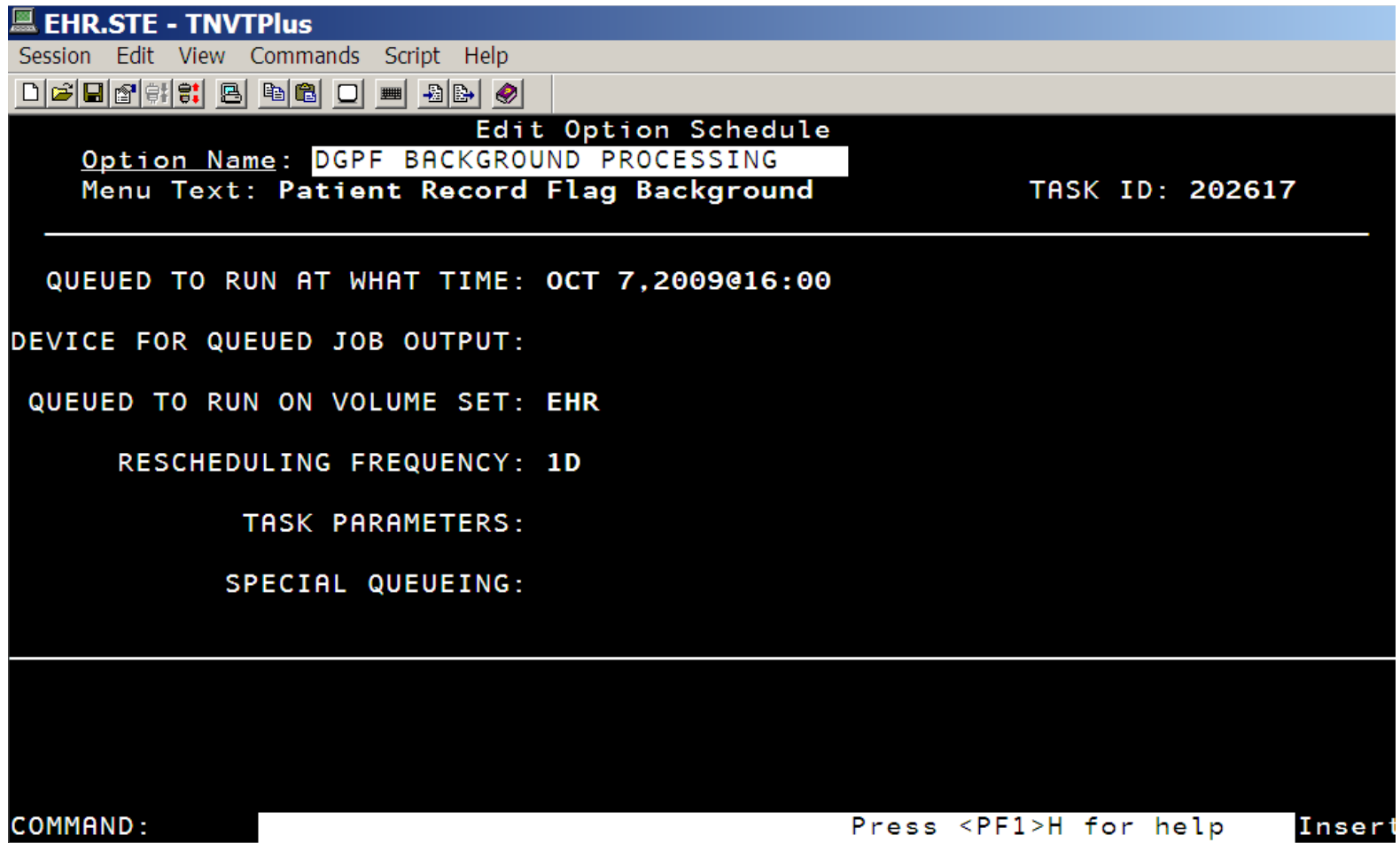
```
You've got PRIORITY mail!
```

```
Select Patient Record Flags Main Menu Option: █
```

Setting up Taskman

- Setup the task DGPF BACKGROUND PROCESSING to run daily. This task will find the Flags that need review and send a Mailman message to the group.
- Keep in mind that you have to run this task during the day when you don't have a lot of users on. Your site manager will know when to run this and can set it so that other task are not running at the same time this task is running.

Screen Capture of Task



Set up Notification

- You create a Mailman group to receive a Mailman message when a flag is due for review.
- You can only enter the Mail group that begins with DGPF for your notifications.
 - When creating local mail groups, use this naming convention DGPFZ

Creating Local Record Flags

- Site should create a formalize process for creating local flags
- Input for local flag creation should be solicited by
 - Medical Staff
 - Clinical Applications Coordinator (CAC)
 - Health Information Management professionals
- HIM is the owner of this package

Patient Flag Review

- Patient Flags should be reviewed to ensure that they are still appropriate for the patient and/or the facility.
- The members of the Mailman group assigned to the flag will get a Mailman message that a Patient Record is due for review.
- You can also run a report to get a list of patients that have flags due.

Running Reports

- FAR Flag Assignment Report
 - This option enables a user to display or print all of the patient assignments for Category I and/or Category II Patient Record Flags.
 - The information provided on the display for each flag includes patient name, chart number, when it was assigned, review date, and if a notification was sent.

Flag Assignment Report Example

PATIENT RECORD FLAGS				
ASSIGNMENTS DUE FOR REVIEW REPORT				

CATEGORY: Category II (Local)				Page: 1
DATE RANGE: 03/21/09 TO 04/25/10				Printed: Oct 07, 2009@10:4
FLAG NAME: MINOR WITH SENSITIVE INFO				
PATIENT NAME	CHART #	ASSIGNED	REVIEW DT	NOTIFICATION SENT
-----	-----	-----	-----	-----
PARKER, LEE VIRGIL	11-76-61	10/07/09	02/04/10	NO

Assignments Due for Review

- ADR Assignments Due For Review Report
 - This option will be used to display or print all Category I or Category II Patient Record Flag Assignments due for review within a given date range.
 - The information provided on the display for each flag includes patient name, chart number, when it was assigned, review date, and if a notification was sent.

Assignments Due Report Example

```
PATIENT RECORD FLAGS
ASSIGNMENTS DUE FOR REVIEW REPORT
-----
CATEGORY: Category II (Local)
DATE RANGE: 08/08/09 TO 04/25/10
FLAG NAME: MINOR WITH SENSITIVE INFO
-----
PATIENT NAME          CHART #    ASSIGNED  REVIEW DT  NOTIFICATION SENT
-----
PARKER, LEE VIRGIL    11-76-61  10/07/09  02/04/10  NO
-----
Total Review Assignments for Flag: 1
Note: " * " indicates that review date is past due
```



Questions and Discussion