

THE INDIAN HEALTH SERVICE

Advance CAC TIU Templates and Data Objects



Superior Health Information Management
Now and for the Future

Learning Objectives

- Template Parameters
- Understand Template File structure
- Explain relationship between Share and Personal Template files
- Explain how templates are linked.
- Discuss how to break the links and locks between templates
- Discuss Template Properties and Search functions within templates
- Discuss Best Practice for Template Creation

TIU Templates

- TIU Templates provide a mechanism for structured input of text into RPMS-EHR.
- While the most common use for TIU Templates is to output text into Progress Notes, there are other uses available within RPMS-EHR.

Other Uses for Templates

Where can template fields be used in addition to Progress Notes?

- Discharge summaries
- Quick orders that have free text fields (e.g., comments)
- Generic orders that have word processing fields
- Consult reasons for request (using template editor)
- Reminder dialogs

Parameters for Templates

TIU PERSONAL TEMPLATE ACCESS – Who can make personal templates.

The choices are:

- 1 READ ONLY
- 2 NO ACCESS
- 0 FULL ACCESS

If the system level is full access, all users can make personal templates

Parameters for Templates

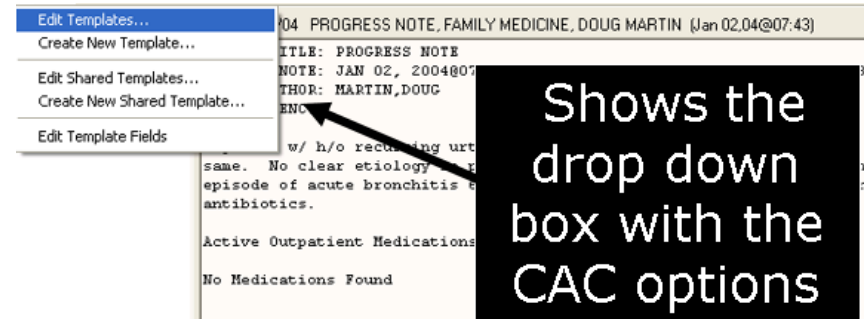
TIU Personal Template Access

TIU TEMPLATE ACCESS BY CLASS –

Same as Other Parameter but by ASU User Class.

Choices

- 0 FULL ACCESS
- 1 READ ONLY
- 2 NO ACCESS



Parameters for Templates

TIU Template Personal Objects

TIU TEMPLATE PERSONAL OBJECTS- This parameter controls which objects a user can insert into a personal template

Parameters for Templates

TIU Field Editor Class

TIU FIELD EDITOR CLASSES

Who can create template fields.

At system level, this should be set for Clinical Coordinators

Where are TIU Template Stored

- Every template is store in TIU Template file (8927)
- They are case sensitive
- Can contain multiple templates containing the same name

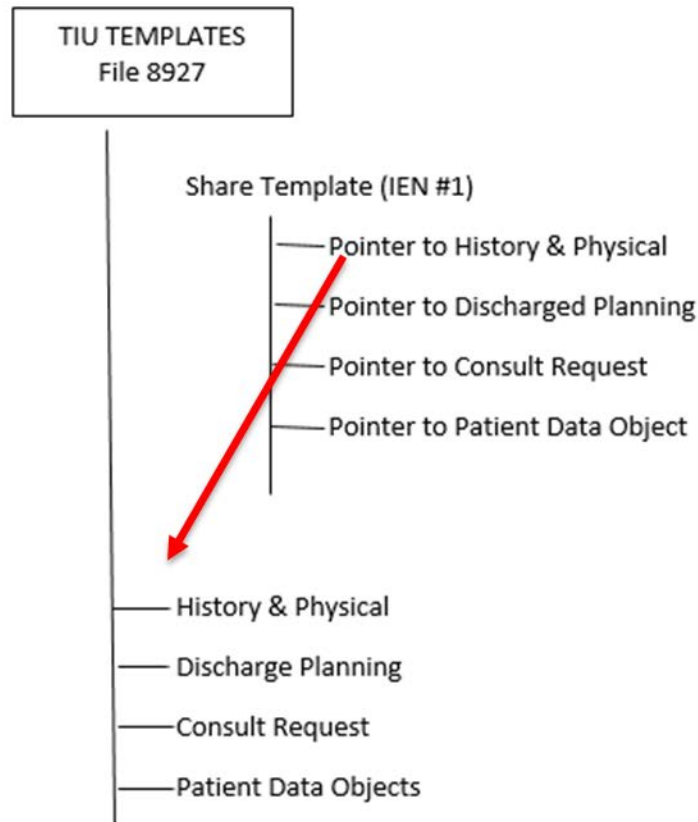
Who can edit “Share Template”

- Not controlled by Business Rules or RPMS Keys
- It is controlled by Editor Class under the Share Template in file 8927
- The Editor Class field only accepts one entry
- It is set for the Clinical Coordinator User Class

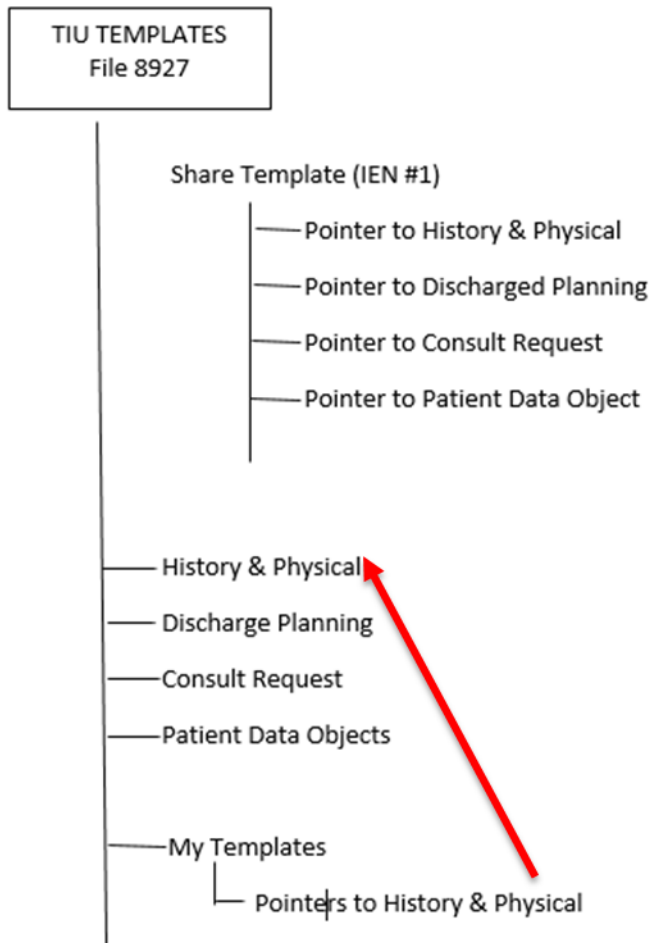
```
NAME: Shared Templates                                TYPE: SHARED ROOT CONTAINER
STATUS: ACTIVE                                       EDITOR CLASS: CLINICAL COORDINATOR
SEQUENCE: 1
ITEM: Dabetes Training and Therapy Services
SEQUENCE: 2                                         ITEM: Zero Suicide
SEQUENCE: 3                                         ITEM: Screening
SEQUENCE: 4                                         ITEM: phn workgroup 2015
SEQUENCE: 5                                         ITEM: AKN TEST
SEQUENCE: 6                                         ITEM: Chart Review
SEQUENCE: 7                                         ITEM: wound Exam
SEQUENCE: 8                                         ITEM: MEH New Employee Health
SEQUENCE: 9                                         ITEM: NUTRITION, MNT ASSESSMENT OUTPT
SEQUENCE: 10                                        ITEM: em2 header
```

Share Template Container

- Items under the Shared Templates are pointers to the actual entries in the file

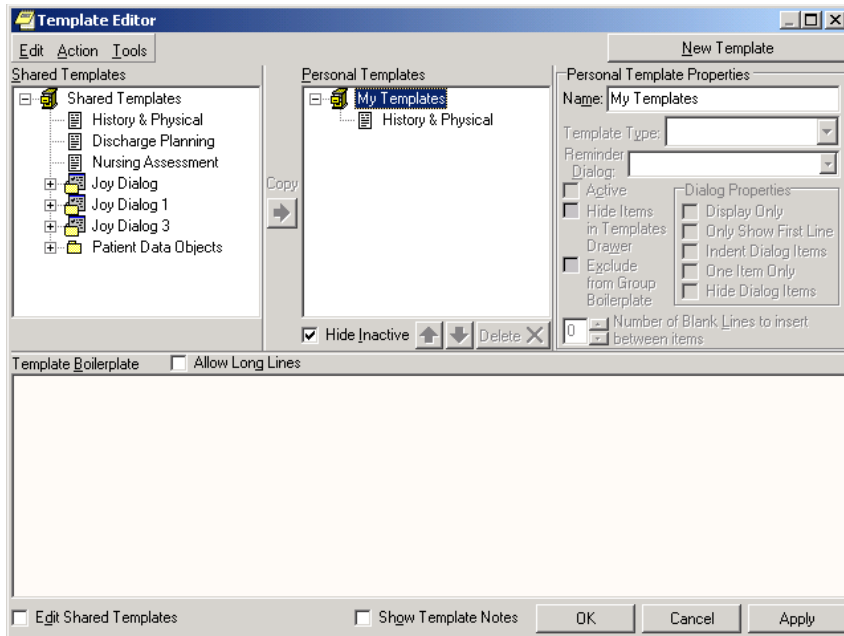


Relationship between Shared Templates & My Templates



- As Users copies a Shared Template into “My Template” they are adding pointers to this file

Relationships between Shared Templates & My Templates

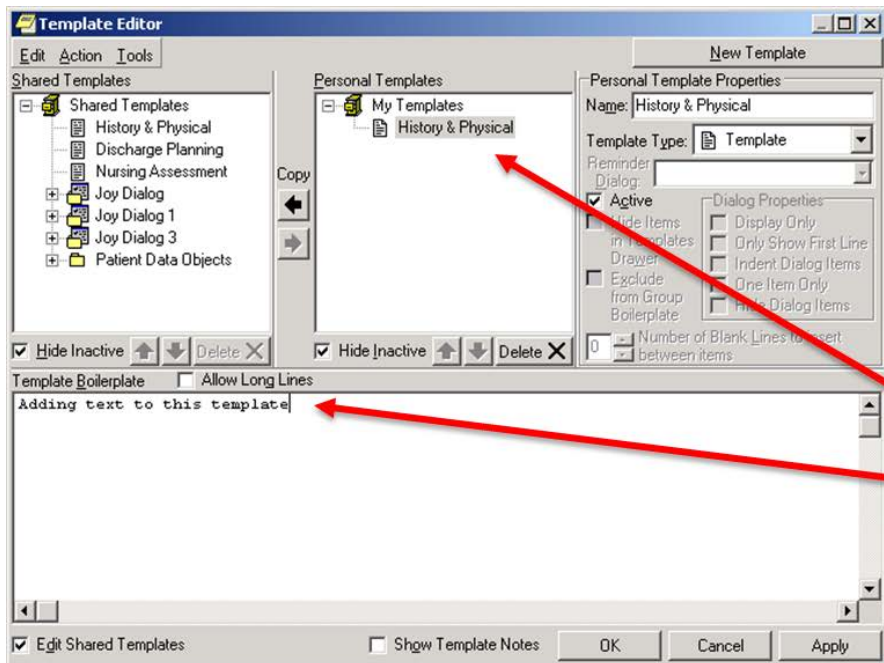


- Changes that are made to a template under Shared Templates, will be seen under 'My Templates', remember the pointer relation.

Shared Templates

My Templates

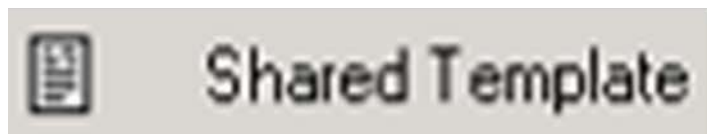
Once the user edits this Shared Template within 'My Templates' the Pointer Relationship is broken.



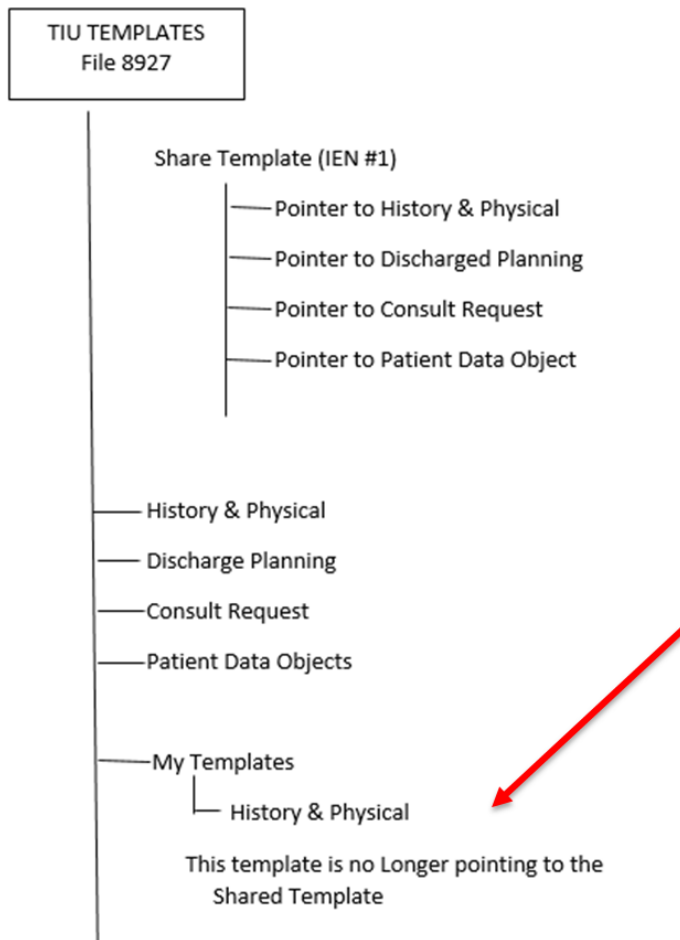
Added text, changes the icon

My Templates

The icon for the Title has changed – Flipped corner



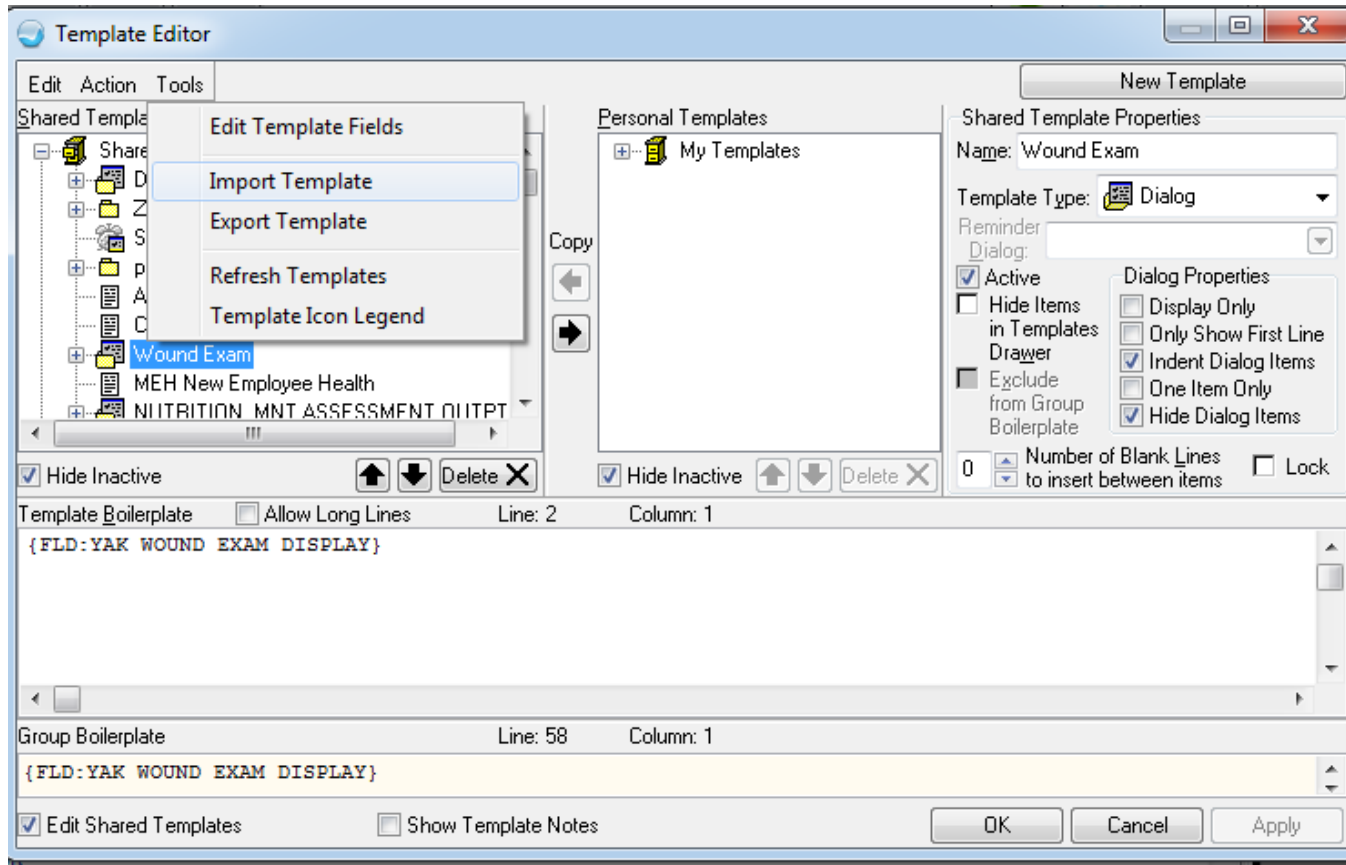
My Templates (cont.)



Changes made on the share template will not updated “my templates” area

Other ways to break the link

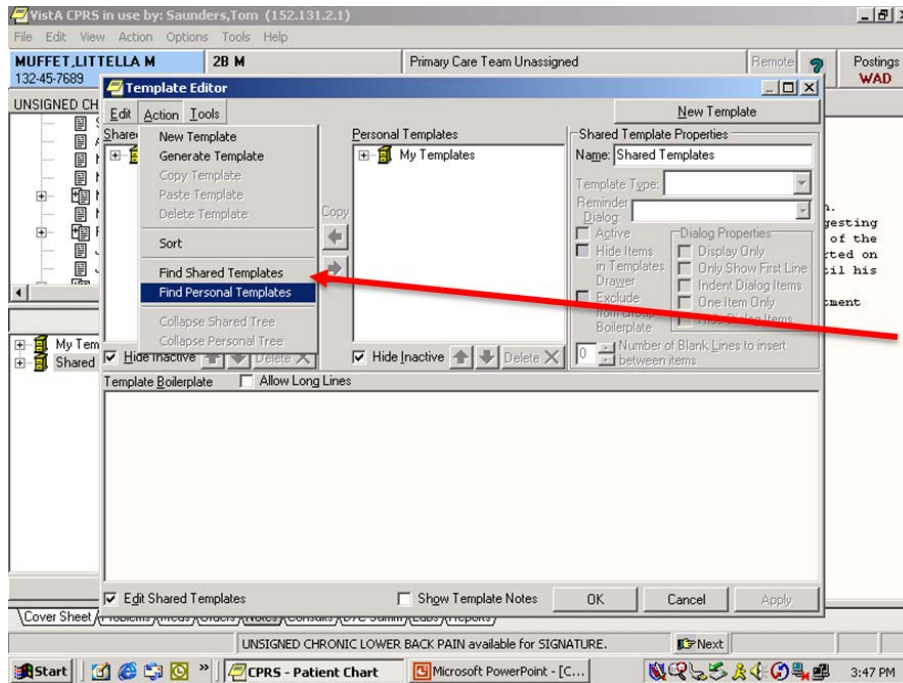
- You can export then import a template. This creates a new version of that template within that TIU Template File (8927)



Finding Templates

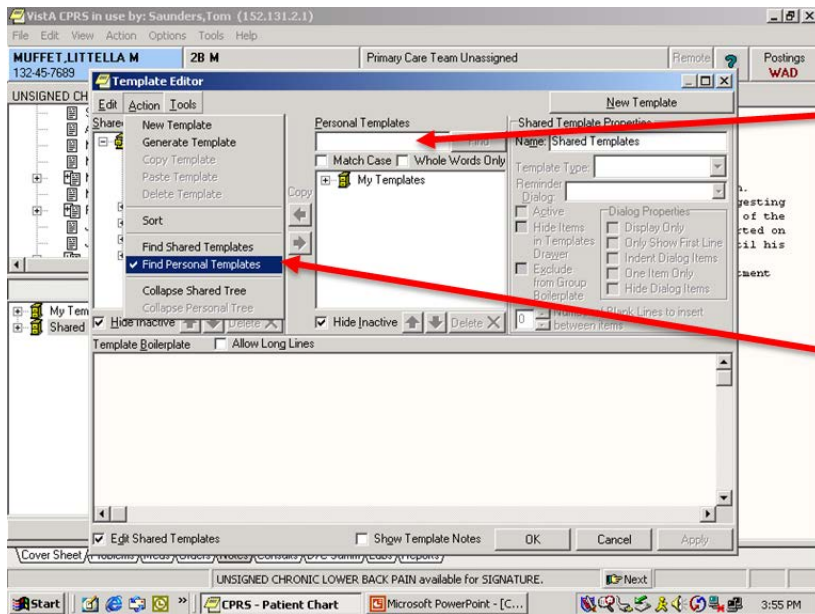
- Options are available for both the CAC and the End User
 - Options are available on the Template Editor and the Template drawer
 - The search is done on the 'Shared Templates' folder and the users 'My Templates' folder of the File 8927 TIU TEMPLATE
 - Can be CPU intensive

Finding Templates (cont)



In the Template Editor, using the Action pull down menu. Can turn ON one or both of the FIND options.

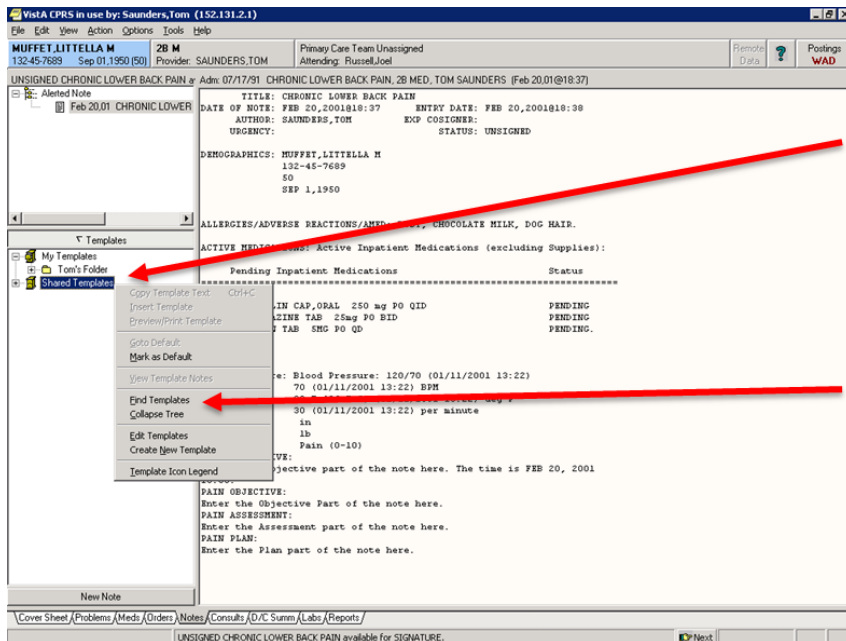
Finding Templates (cont.)



The dialog for Personal Templates is open.

The Find Personal Template in the pull menu has a check mark.

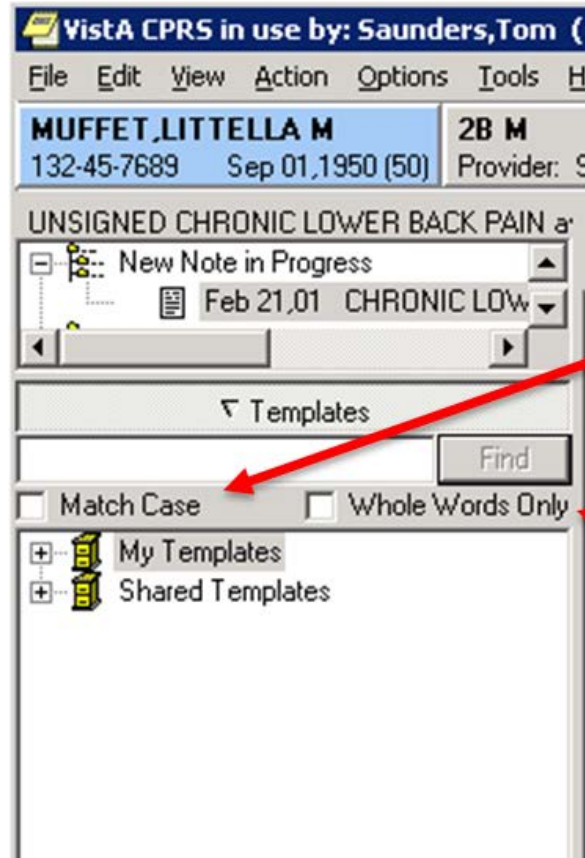
Finding Templates (cont)



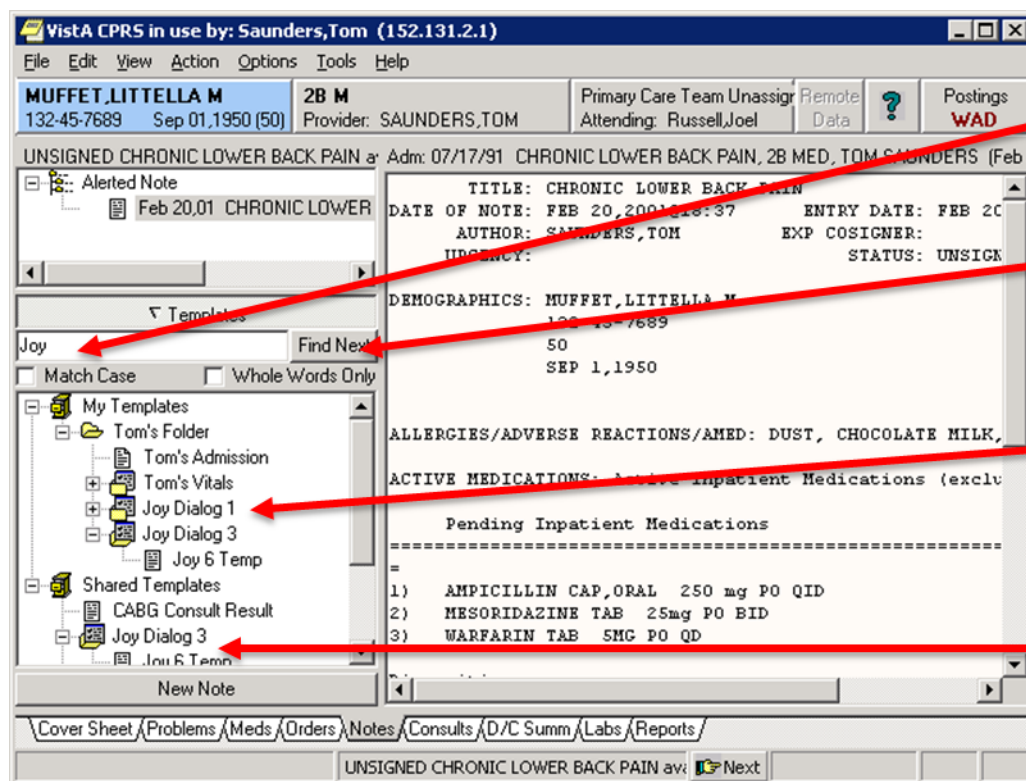
- A right click on either the Shared Template or My Templates, select **Find Template**, searches both Shared Template and My Templates.

Finding Template (cont.)

- Searching can be done to Match Case and Whole Words Only



Finding Templates (cont.)



Enter Search Criteria

Click Find Next

Finds the 1st entry, then the 2nd and 3rd in 'My Templates'

The search continues onto 'Shared Templates'

Template Properties

Display Only:

- Generally used for a text field that give the template user directions or help.
- Can also be used for templates and dialogs.

Template Properties (cont.)

Template Formatting:

- Indenting, One Item Only, Only Show First Line, and Hide Dialog Items are tools that can improve the appearance and usability of the input template.

Template Properties (cont.)

Required:

- It is tempting to make fields required to force users to enter necessary information, but use this sparingly because it can be very frustrating and may cause providers to abandon use of templates altogether!

Standardization

- Use a standard approach when creating any new template fields.
- Use beginning text in fields so that related items group together in the list, making it easier to find them later when building the template.

Standardization (cont.)

Example:

- Site Abbreviation: CIH
 - Specific Template: ANTICOAG CIH ANTICOAG DX
 - CIH ANTICOAG INR HI RANGE
 - CIH ANTICOAG INR LO RANGE
 - CIH ANTICOAG TIME
- This will group like elements together and aid in template building and future maintenance.

Appearance of TIU Templates

- It is possible to create TIU Templates that look good for text entry.
- It is possible to create TIU Templates that output good looking text.
- But it is not always possible to create a TIU Template that does both at the same time.

Using the Copy Button

- Templates can be created in the My Templates folder and then copied to the Shared Templates folder when completed.
- But beware, this action is not truly copy, but more akin to creating a shortcut link.
- After copying, if either of these templates are edited *both will be changed!*

Templates Associations (Links)

- Templates can be linked to
 - Note titles
 - Consult Request
 - Quick notes
- Templates must be un-linked from the title or consult request before deleting.

Importing IHS Templates

- IHS uploads and stores TIU templates at its national FTP site.
- These templates are publicly accessible at:
<ftp://ftp.ihs.gov/pubs/EHR/Templates/TIU%20Note%20Templates/>
- When returning to the IHS FTP site remember to click View > Refresh to update the browser's cache.

Importing and Exporting

- If an exported .txml file is double clicked, the browser will attempt to open it because it is an XML type file.
- Only TIU within EHR can properly process a .txml file.
- Those who have created HTML will see similarities in raw exported TIU files.

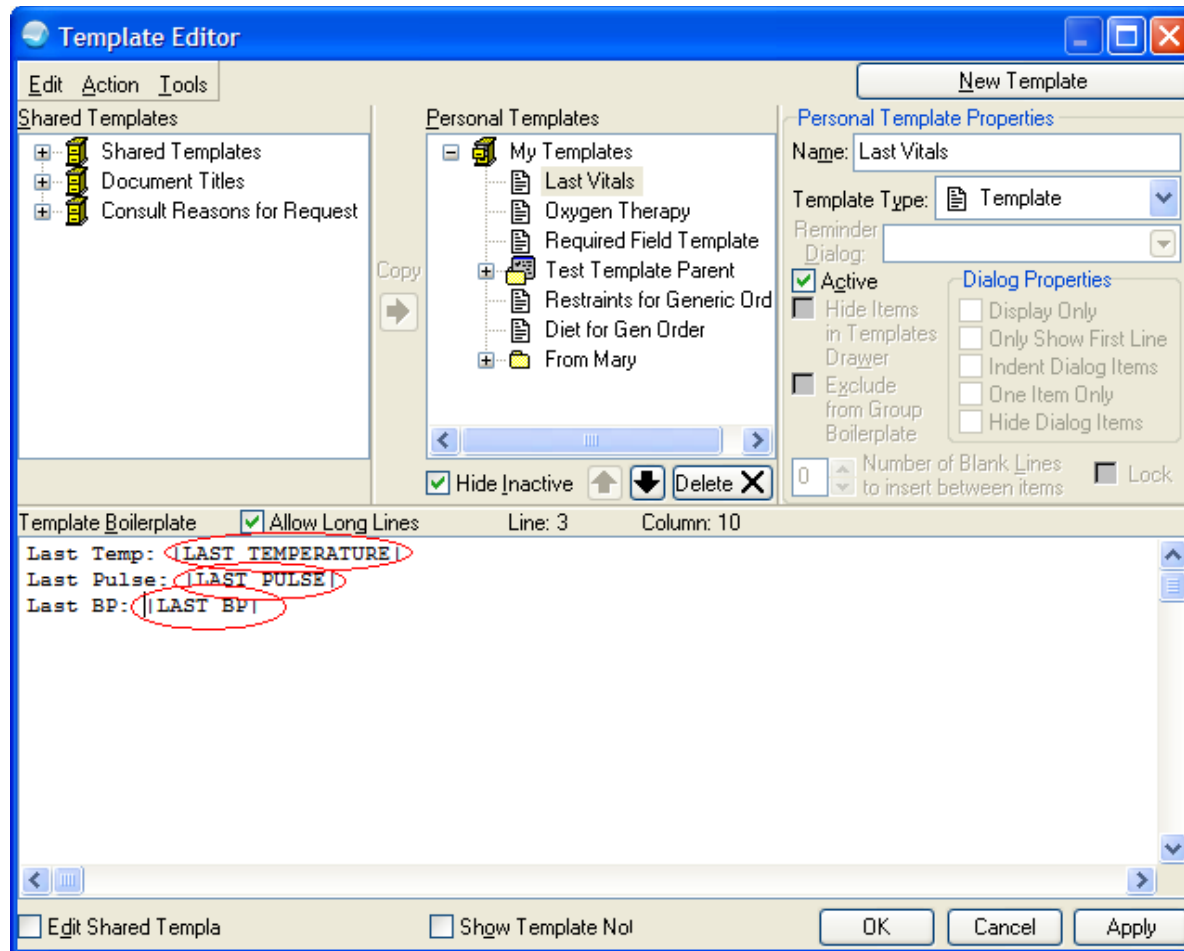
Best Practice For Template Creation

- Establish formalized process for template creation, deletion and approval
- Once the template has been approved, you can lock the template to prevent editing
- Although the template is locked, users can unlock it by exporting and re-importing template
- Few users should have Clinical Coordinator User Class.

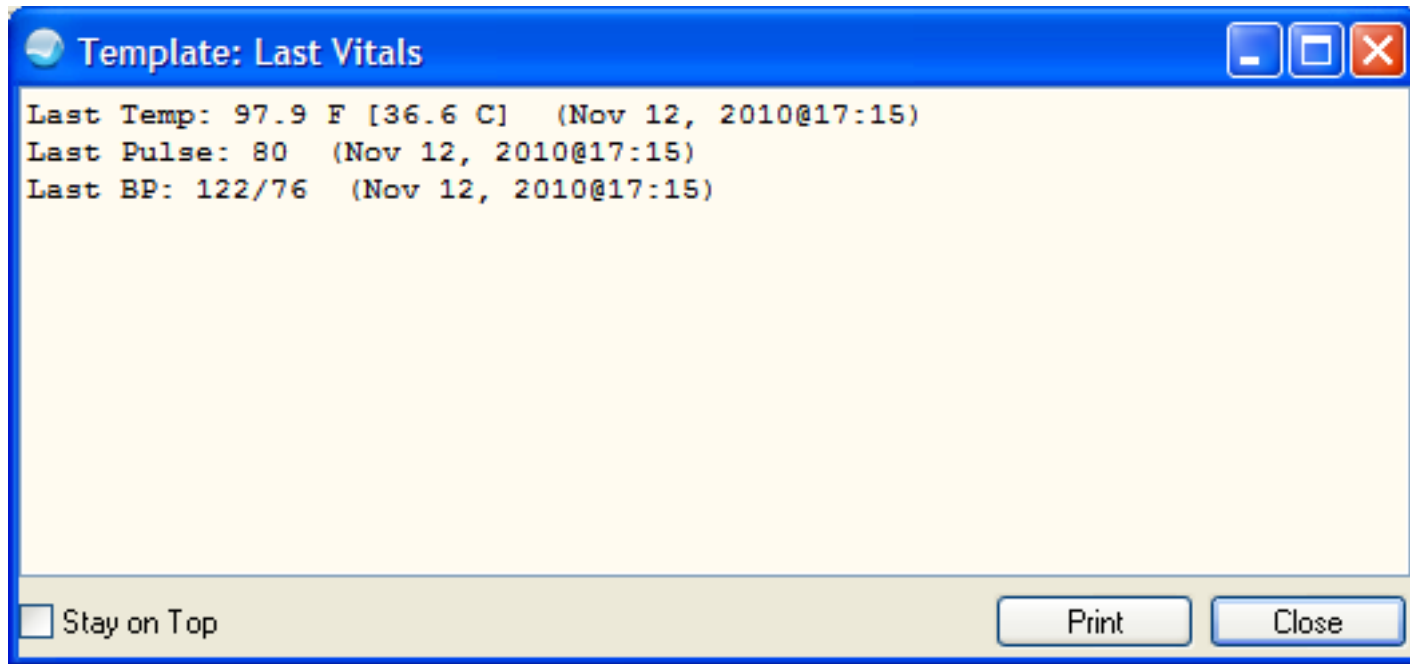
Data Objects

- TIU Data Objects that can be used in TIU Templates to reduce double entry of data by end-users:
 - Data object creation via copy
 - Data object creation via Health Summary

Data Objects in Templates



Data Objects in Templates (Output)



NOTE TITLES AND TEMPLATE ASSOCIATIONS

Note Title Associations

- You can associate note titles to TIU template or reminder dialog
- Guides provider to standard template
- Lessens “clicks”
- Helps with workflow and productivity

Note Title Template Association

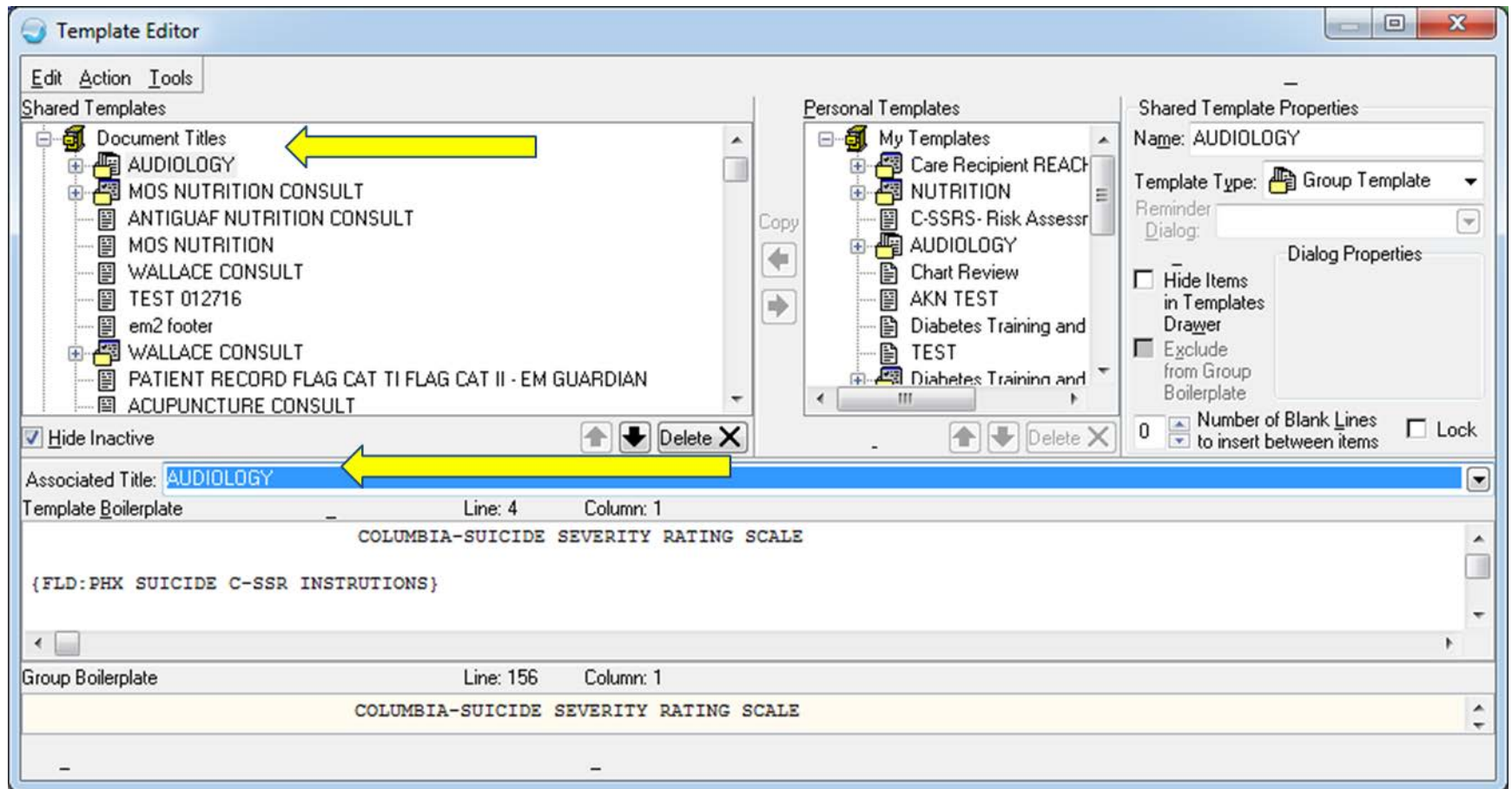
The screenshot displays the 'Template Editor' application window. It is divided into several sections:

- Shared Templates:** A tree view on the left showing a hierarchy of templates. 'Columbia Suicide Severity Rating' is selected and highlighted in blue.
- Personal Templates:** A tree view on the right showing a hierarchy of personal templates.
- Shared Template Properties:** A panel on the right showing the properties for the selected template, including 'Name: Columbia Suicide Severity Rating' and 'Template Type: Group Template'.
- Associated Title:** A text field at the bottom left with a blue arrow pointing to it from the instruction text.
- Template Boilerplate:** A text area showing the content of the selected template, including the text 'COLUMBIA-SUICIDE SEVERITY RATING SCALE' and a placeholder '{FLD:PHX SUICIDE C-SSR INSTRUCTIONS}'.
- Group Boilerplate:** A text area showing the content of the group template, including the text 'COLUMBIA-SUICIDE SEVERITY RATING SCALE'.

Select the note title to associate template

At the bottom left, there is a checked checkbox labeled 'Edit Shared Templates'.

Association Title



Title and Associated Template

Progress Note Properties

Progress Note Title: AUDIOLOGY

AUDIOLOGY
AUDIOLOGY <AUDIOLOGY>
Adverse React/Allergy <ADVERSE REACTION/ALLERGY>
BAD <PJS PATIENT RECORD FLAG CAT II - BAD PATIENT>
BENSO <BENSO ADMIN>
BENSO ADMIN
BENSO ADMIN <BENSO ADMIN>

Date/Time of Note: 07-Apr-2016 15:28

Author: Mosely,Elvira

OK

Title: AUDIOLOGY

COLUMBIA-SUICIDE SEVERITY RATING SCALE

Ask questions 1 and 2. If both are negative, proceed to "Suicidal Behavior" section. ask questions 3, 4 and 5. If the answer to question 1 and/or 2 is "yes", complete "In

Ask questions 1 and 2. If both are negative, proceed to "Suicidal Behavior" section. ask questions 3, 4 and 5. If the answer to question 1 and/or 2 is "yes", complete "In

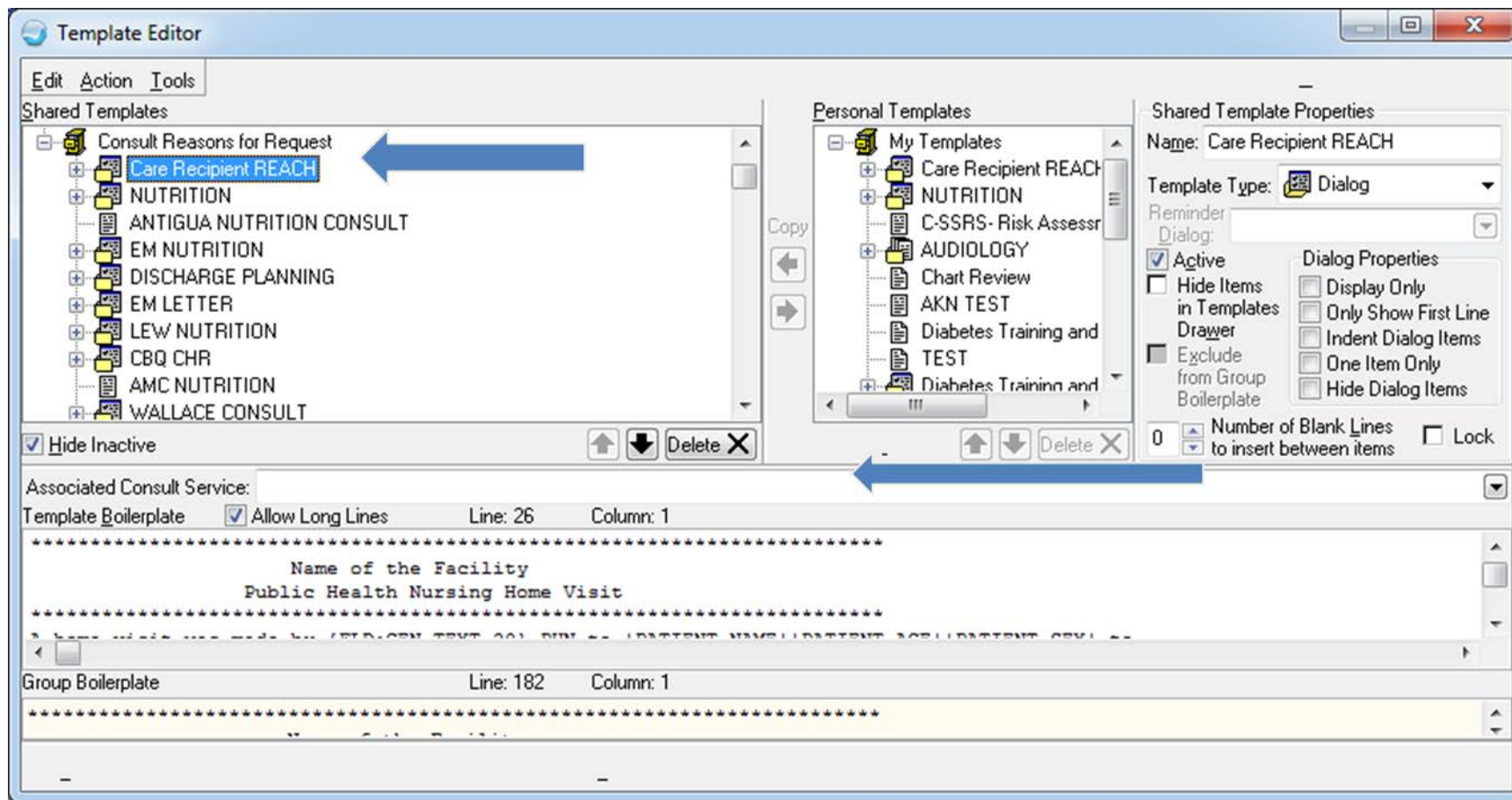
SUICIDE IDEATION

1. WISH TO BE DEAD
In the past month, Have you wished you were dead or wished you could go to sleep and not wake up? No Yes
In your lifetime? No Yes
If yes, Describe:

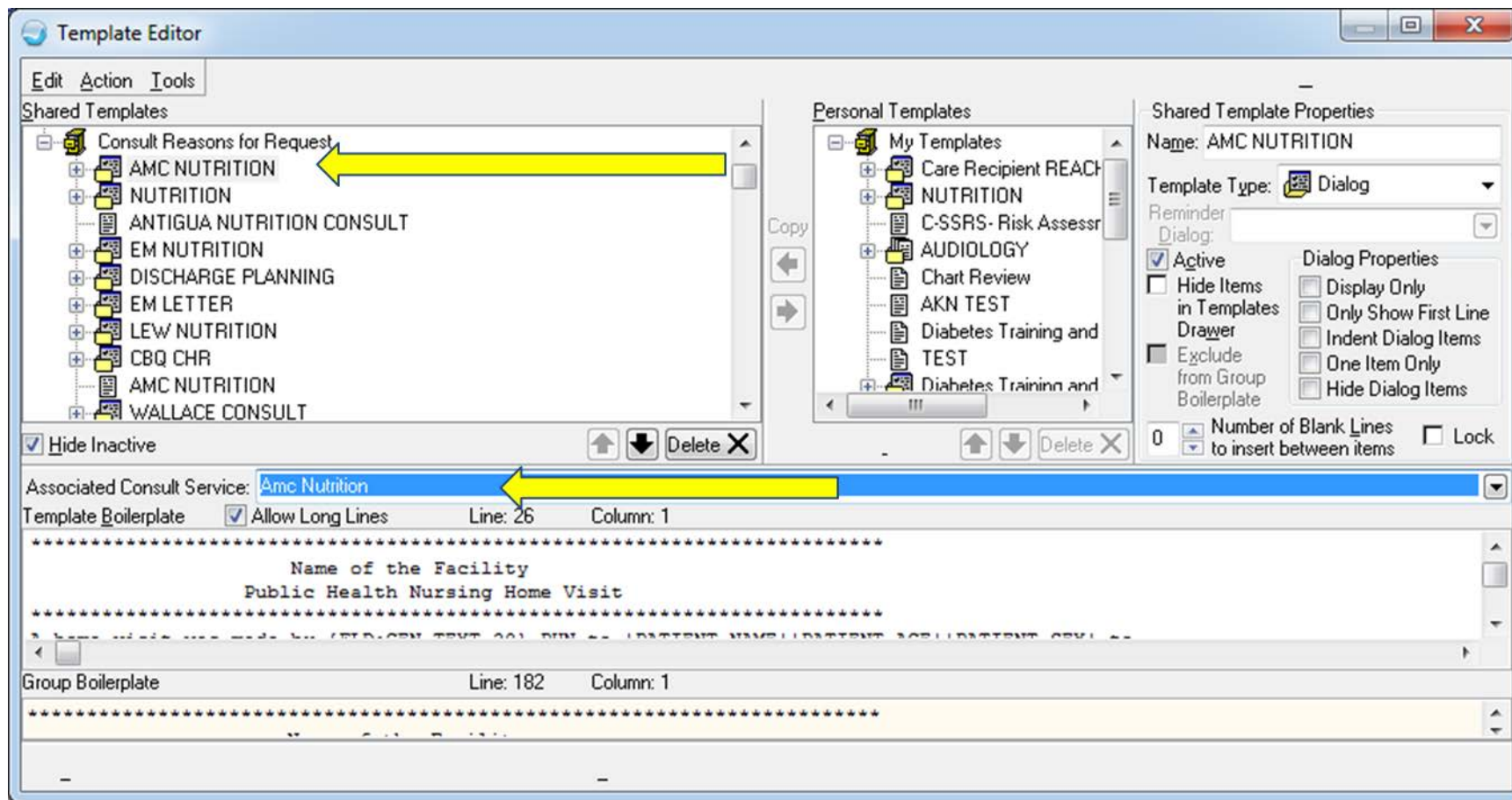
2. NON-SPECIFIC ACTIVE SUICIDAL THOUGHTS
In the past month, Have you actually had any thoughts of killing yourself?
 No Yes

* Indicates a Required Field

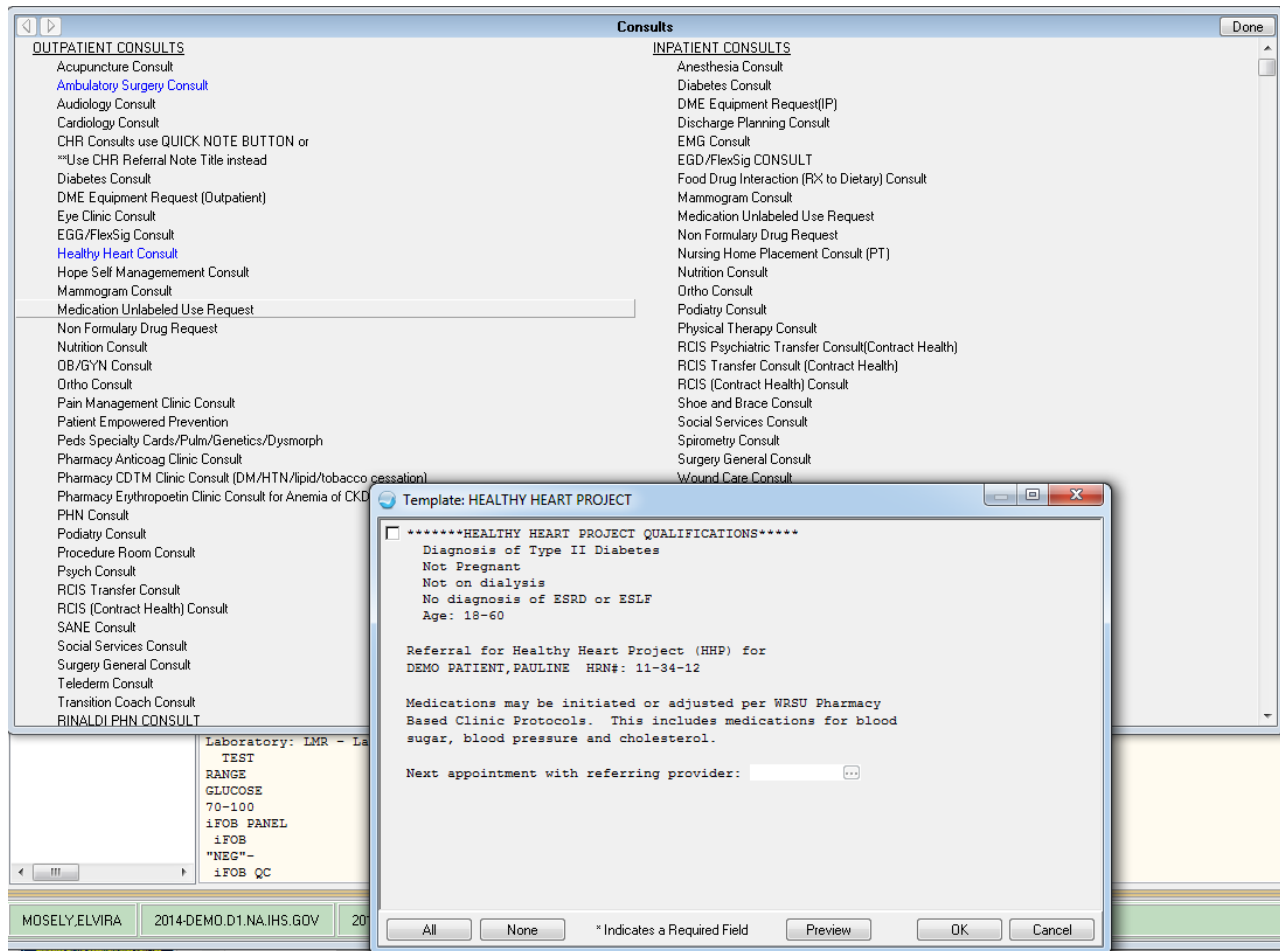
Template Association to Consult Request



Template Association to Consult Request (cont.)



Consult Service Template Association



Parameters for Templates (continued)

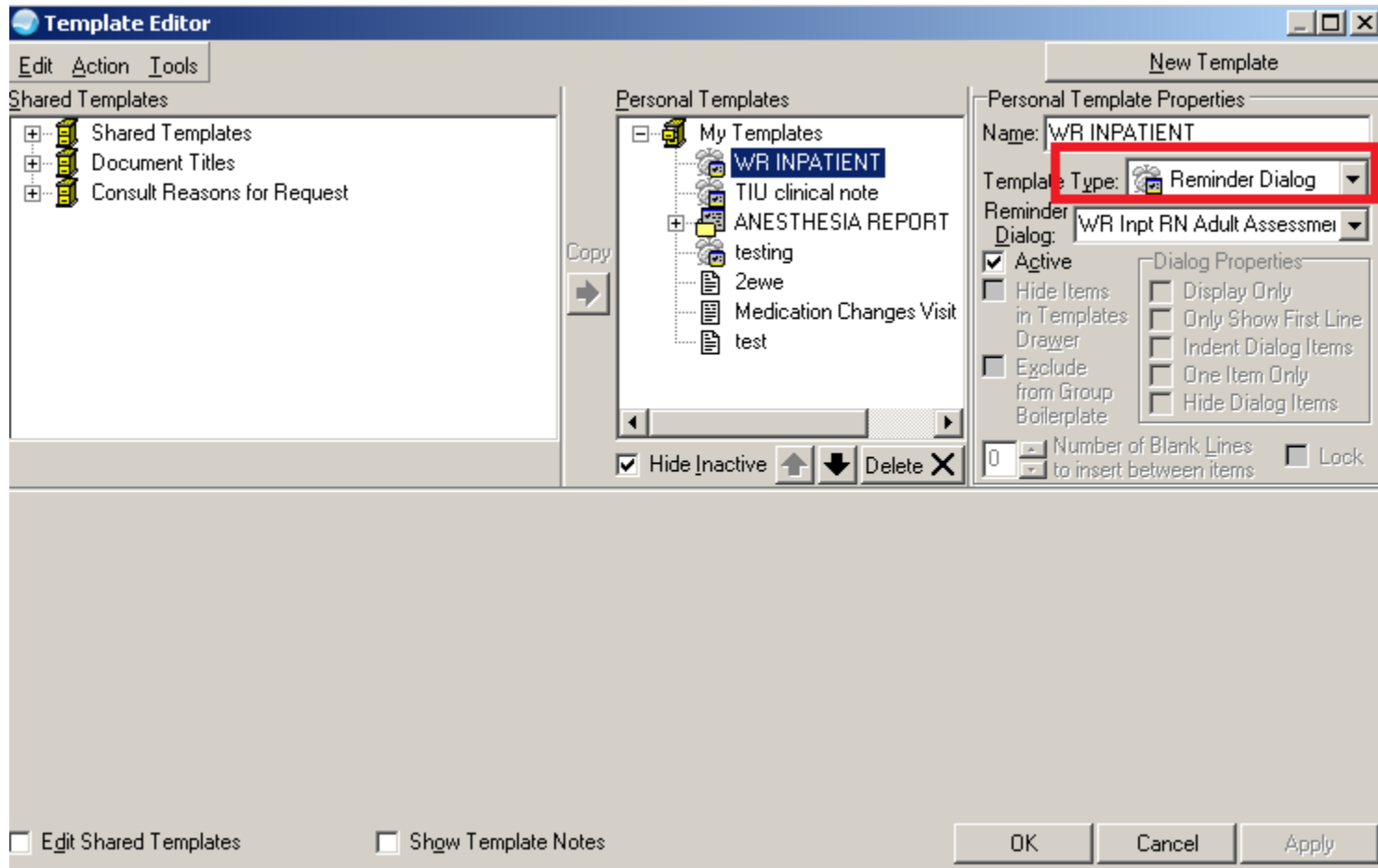
Reminder Dialogs Allowed as Templates

Reminder Dialogs allows as Templates may be set for the following:

- 1 User USR [choose from NEW PERSON]
- 3 Service SRV [choose from SERVICE/SECTION]
- 4 Division DIV [DEMO HOSPITAL]
- 5 System SYS [DEMO.CIAINFORMATICS.COM]

Enter selection:

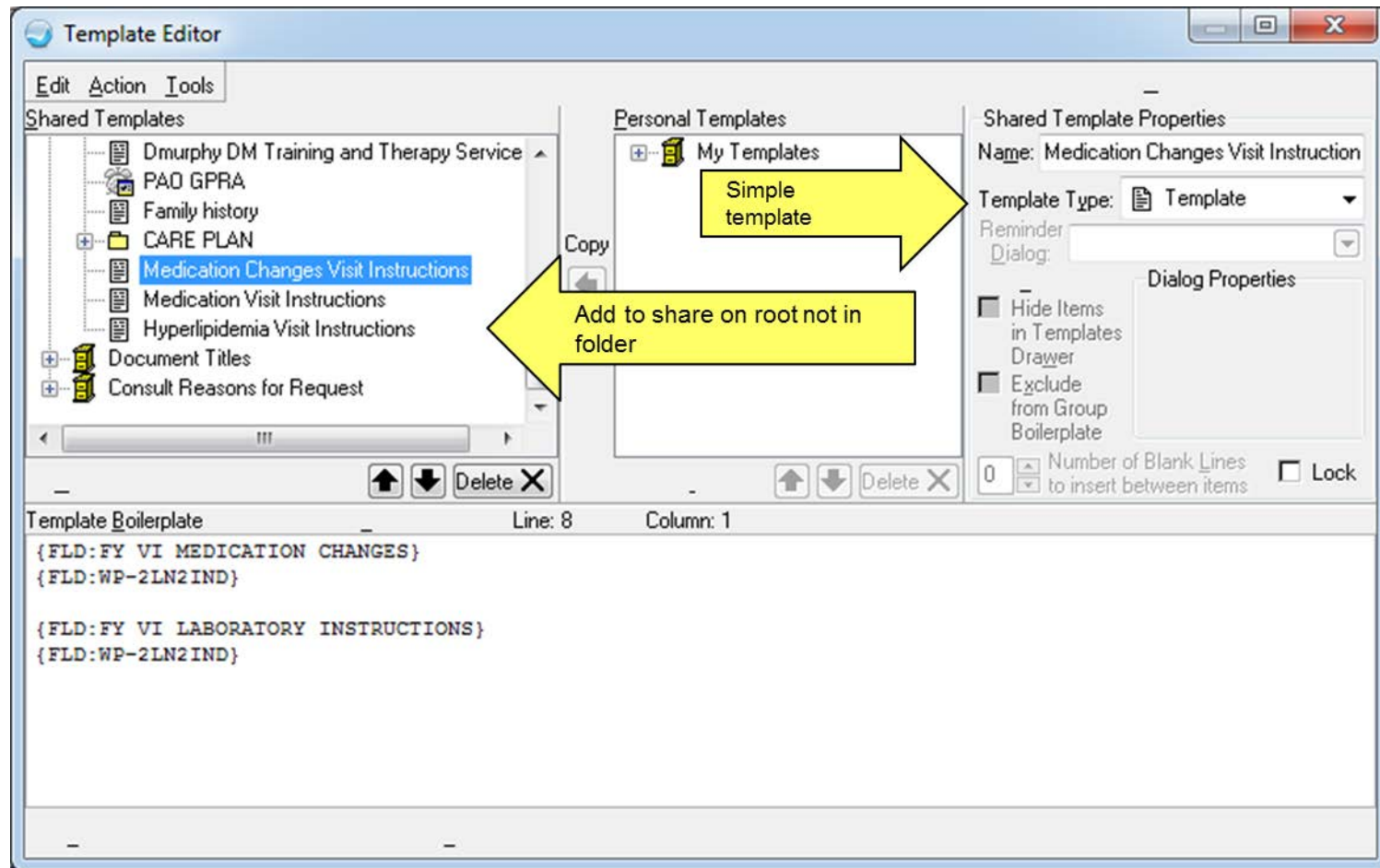
Reminder Dialog as TIU Template



IPL Visit Instruction/Goals/Care plan

- Create a simple TIU template
- Add template to share folder
 - DO NOT use neither TIU dialog or group type
 - DO NOT create a folder and add these template under that folder
- Add the corresponding template to the corresponding parameters
 - BGO IPL CARE TEMPALTE
 - BGO IPL GOAL TEMPALTE
 - BGO IPL VISIT TEMPLATE

Adding to share



Add to Corresponding Parameter

BGO IPL VISIT TEMPLATE may be set for the following:

100 User	USR	[choose from NEW PERSON]
700 Division	DIV	[choose from INSTITUTION]
800 System	SYS	[2014-DEMO.D1.NA.IHS.GOV]

Enter selection: 800 System 2014-DEMO.D1.NA.IHS.GOV

---- Setting BGO IPL VISIT TEMPLATE for system: 2014-DEMO.D1.NA.IHS.GOV ----
Select Sequence: ?

Sequence	Value
1	DM Visit Instructions
5	Pharm ABX Visit Instructions
10	Pharm ABX Visit Instructions

Select Sequence: 15
Are you adding 15 as a new Sequence? Yes// YES

Sequence: 15// 15
Template Name: Medication Changes Visit Instructions
Select Sequence:

Entering Visit Instruction in IPL

POV

ID	Status	Prov. Narrative	POV	Episodicity	Alternate POV Provider Text	Goal Notes	Care Plans	Visit Instructions	Pt Ed	Tx/Regimen/FU	Tx/Regimen/FU display only
98421	Episodic	Nicotine dependence	<input checked="" type="checkbox"/>	<input type="radio"/> First episode <input type="radio"/> New episode <input type="radio"/> Old episode <input type="radio"/> Ongoing episode <input type="radio"/> Undefined episode					<input type="checkbox"/> DP <input type="checkbox"/> N <input type="checkbox"/> EX <input type="checkbox"/> LA	Treatment/Regimen	

Primary POV
Nicotine dependence

E&M

Selected	History & Exam	Complexity	Approx Time	CPT Code
<input type="checkbox"/>	Brief	Nurse Visit	5 min	99211
<input type="checkbox"/>	Problem Focused	Straightforward	10 min	99212
<input type="checkbox"/>	Expanded	Low	15 min	99213
<input type="checkbox"/>	Detailed	Moderate	25 min	99214
<input type="checkbox"/>	Comprehensive	High	40 min	99215

1. Right click on visit instructions box then select add

Visit Instruction

2. Click on template icon

3. Select template

Templates

- Medication Changes Visit Instructions
- Medication Visit Instructions
- DM Visit Instructions
- Hyperlipidemia Visit Instructions
- WALLACE CONSULT
- UTI Visit Instructions
- URI Visit Instructions
- Immunization Visit Instructions
- Pharm ABX Visit Instructions

Cancel

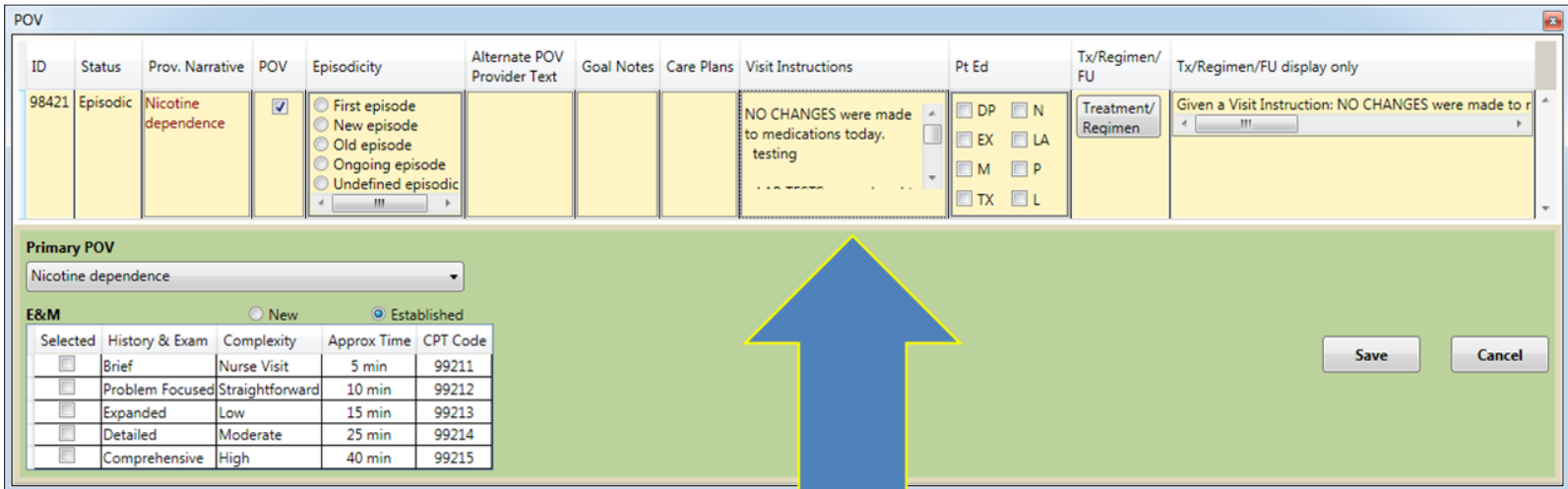
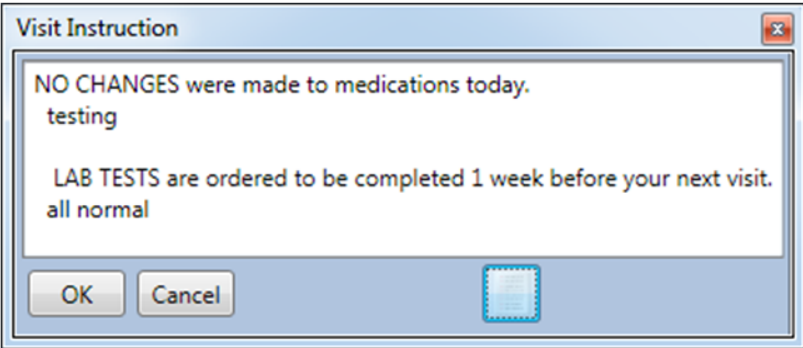

Template

The screenshot shows a software window titled "Template: Medication Changes Visit Instructions". The window has a light blue title bar with standard minimize, maximize, and close buttons. The main content area has a light yellow background and contains the following elements:

- A master checkbox on the left is checked.
- Three sub-items, each with its own checkbox:
 - NO CHANGES were made to medications today.
 - MEDICATION CHANGES have been made today.
 - NEW MEDICATIONS have been added to the medication list.
- A text input field containing the word "testing".
- A second checked sub-item:
 - LAB TESTS are ordered to be completed 1 week before your next visit.
- A second text input field containing the text "all normal".

At the bottom of the window, there is a footer area with a blue background. On the left, it says "* Indicates a Required Field". On the right, there are three buttons: "Preview", "OK", and "Cancel".

Visit Instructions IPL



ID	Status	Prov. Narrative	POV	Episodicity	Alternate POV Provider Text	Goal Notes	Care Plans	Visit Instructions	Pt Ed	Tx/Regimen/FU	Tx/Regimen/FU display only
98421	Episodic	Nicotine dependence	<input checked="" type="checkbox"/>	<input type="radio"/> First episode <input type="radio"/> New episode <input type="radio"/> Old episode <input type="radio"/> Ongoing episode <input type="radio"/> Undefined episodic				NO CHANGES were made to medications today. testing	<input type="checkbox"/> DP <input type="checkbox"/> N <input type="checkbox"/> EX <input type="checkbox"/> LA <input type="checkbox"/> M <input type="checkbox"/> P <input type="checkbox"/> TX <input type="checkbox"/> L	Treatment/Regimen	Given a Visit Instruction: NO CHANGES were made to r

Primary POV: Nicotine dependence

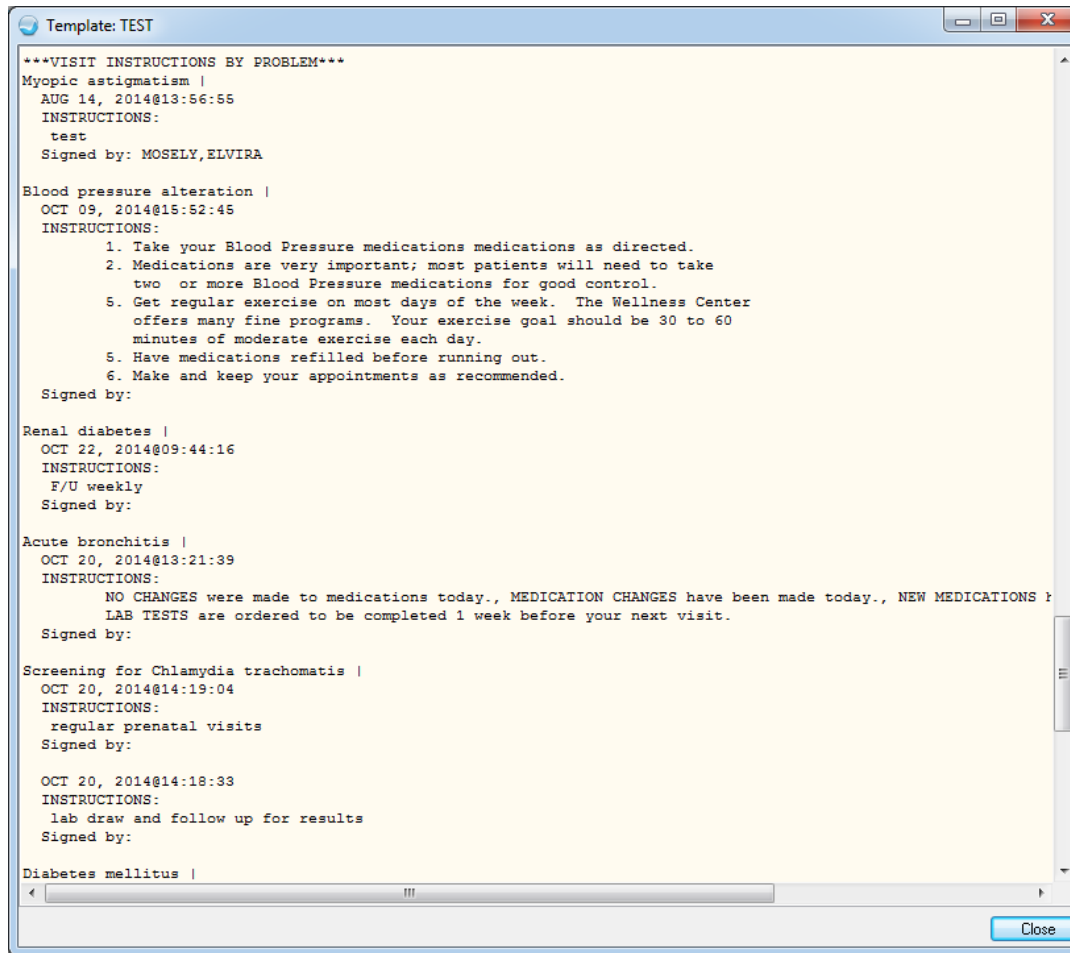
E&M: New Established

Selected	History & Exam	Complexity	Approx Time	CPT Code
<input type="checkbox"/>	Brief	Nurse Visit	5 min	99211
<input type="checkbox"/>	Problem Focused	Straightforward	10 min	99212
<input type="checkbox"/>	Expanded	Low	15 min	99213
<input type="checkbox"/>	Detailed	Moderate	25 min	99214
<input type="checkbox"/>	Comprehensive	High	40 min	99215

Data Object for IPL Visit Instructions/Goals/Care Plan

- Visit Instructions by date
- Visit Instructions by Problem
- Active Care Plans by date
- Active Care Plans by problem
- Active Goals by date
- Active Goals by problem

Example Visit Instructions by date



```
Template: TEST

***VISIT INSTRUCTIONS BY PROBLEM***
Myopic astigmatism |
AUG 14, 2014@13:56:55
INSTRUCTIONS:
  test
Signed by: MOSELY,ELVIRA

Blood pressure alteration |
OCT 09, 2014@15:52:45
INSTRUCTIONS:
  1. Take your Blood Pressure medications medications as directed.
  2. Medications are very important; most patients will need to take
    two or more Blood Pressure medications for good control.
  5. Get regular exercise on most days of the week. The Wellness Center
    offers many fine programs. Your exercise goal should be 30 to 60
    minutes of moderate exercise each day.
  5. Have medications refilled before running out.
  6. Make and keep your appointments as recommended.
Signed by:

Renal diabetes |
OCT 22, 2014@09:44:16
INSTRUCTIONS:
  F/U weekly
Signed by:

Acute bronchitis |
OCT 20, 2014@13:21:39
INSTRUCTIONS:
  NO CHANGES were made to medications today., MEDICATION CHANGES have been made today., NEW MEDICATIONS |
  LAB TESTS are ordered to be completed 1 week before your next visit.
Signed by:

Screening for Chlamydia trachomatis |
OCT 20, 2014@14:19:04
INSTRUCTIONS:
  regular prenatal visits
Signed by:

OCT 20, 2014@14:18:33
INSTRUCTIONS:
  lab draw and follow up for results
Signed by:

Diabetes mellitus |
```



Questions