

V11 Note Webcast Series

Building Notes - Basics

Embrace the new world of healthcare



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- Galen Enterprise EHR Certified
- Clinical consultant, Business/Clinical Analyst



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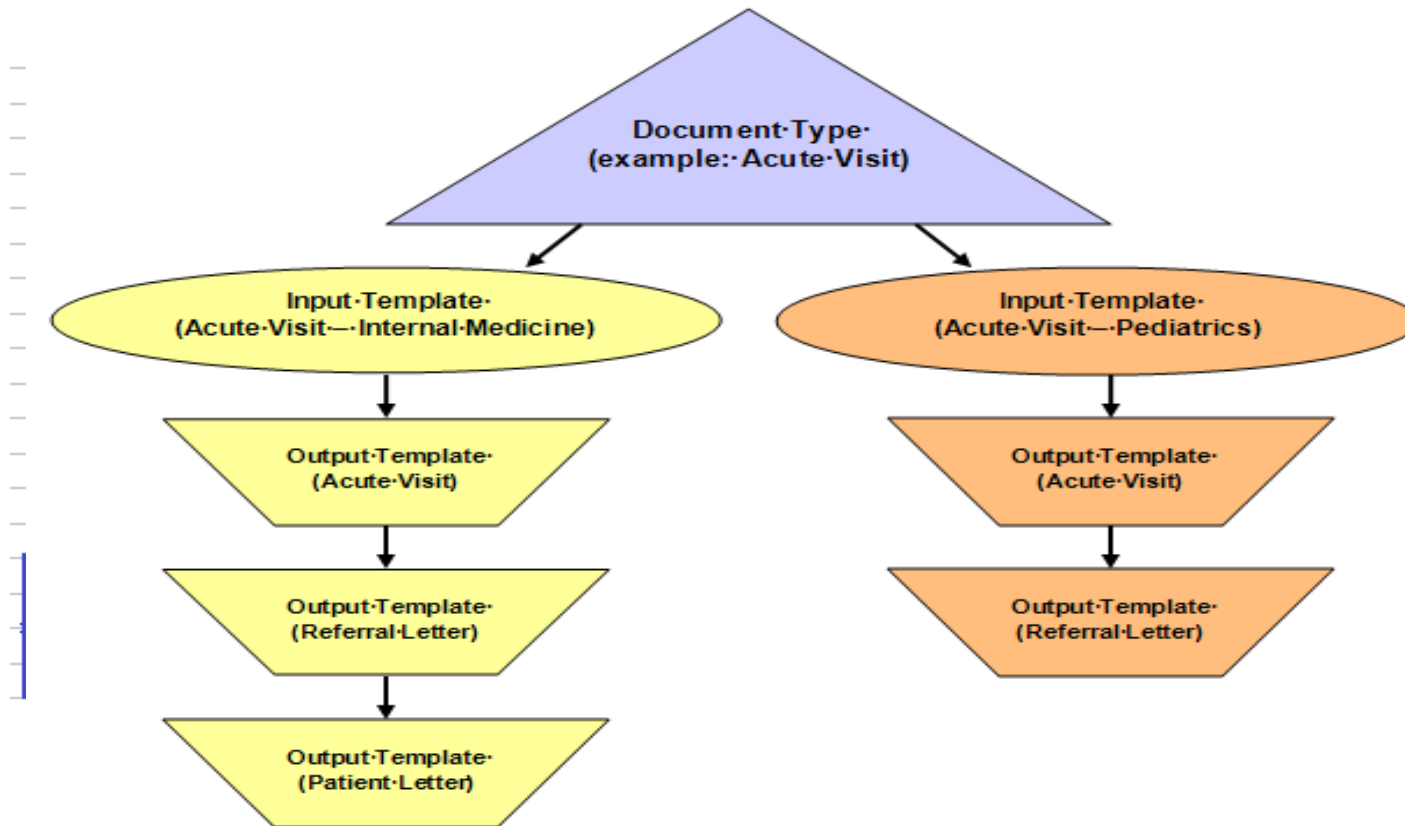
- Over 14 years in Healthcare including 8 years EHR experience
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Objectives:

- ➔ **Document using a new Chief Complaint driven note**
- ➔ **Review the relationship between document types, input and output templates.**
- ➔ **Discuss and review the Document Type Dictionary.**
- ➔ **Locate and briefly discuss noteforms and text templates.**
- ➔ **Discuss and review a note input template and define the sections.**
- ➔ **Discuss and review an output template.**
- ➔ **Assign the new output template to a chart section.**

Document/Input/Output Relationship

****Note that it is the output templates that get saved to the chart**



Document Type Dictionary

Dictionary: Document Type

Code	Name	Mnemonic
SNN	Sue's New Note	SNN

General Properties

Required Finalization Authority:

Required Owner Authority:

WorkFlow:

Manifestation:

Difficulty Factor:

General Properties II

Display Note Icon on Schedule Prompt User to Route for Further Signature

Include in Unsigned Notes Report Is Result

Auto CC Is Letter

Allow eReply to Patient Prompt For Signature Override

Req Corr - Allow Invalidate Only Is Clinical Summary

Note Properties

General

Description:

Is Sub Type Parent Form:

Finalize Note on Save

Note Visibility

On Saving On Initial Signing On Finalization

Note Task

Create Referring Provider Notification

Create Patient Notification

Create Review Covered Note Task on Finalization

Force Amendment if:

Annotation Added

Encounter Changed

Carbon Copy Added or Edited

Note Owner Changed

Add Picklist Report Search

Document Type Dictionary Fields

General Properties

- **Required Finalization Authority:** Determines how much authority a user needs in order to finalize a note. (i.e. “Make final” box will either be available to check or not available. May change depending on Note Type that is being created.
- **Required Owner Authority:** Determines the level of security required to be the Note Owner
- **Workflow:** Always set at Electronic Signature
- **Manifestation:** Always set at NOTEFORM for notes. Will change for other document types.
- **Difficulty Factor:** Used with dictating providers only for the dictation level of difficulty due to factors like accent, subject matter or workflow. The values can be set between 1 and 9.9.
- **Security Codes:** Provides two options for adding security to the document. Option #1 is “doc change” code. Allows only the author to edit the document or a user who has the “document management” security code. Option #2 is “doc change shared” code. Allows a group of users within the same classification to edit each others documents when the code is part of the classification.

General Properties II

- **Display Note Icon on Schedule:** Should be checked for any note associated with a visit encounter. When viewing the schedule, the note icon will be unchecked if the note is not finalized or checked when signed and final. This is useful for providers and/or billing people to easily see when notes are done.
- **Include in Unsigned Notes Report:** Should be checked for “Dictate” type documents. An report of unsigned notes by user can be run from TWAdmin.
- **Auto CC:** Can be checked to allow a document type to be automatically carbon copied.
- **Allow eReply to Patient:** Used to reply to a patient on-line when checked.
- **Prompt User to Route for Further Signature:** Check this box if you want the system to send a co-sign note task after the note has been signed. This might be set for Nurse Notes, or a Physician Assistants notes.
- **Is Result:** Identifies in chart viewer that a scanned document is a result.
- **Is Letter:** Allows users to create letters with a greeting and a closing when checked. (V10 only)
- **Prompt for Signature Override:** Allows the user to over-ride the required signature authority when checked. Will prompt the signing user to identify a second person to co-sign the note by sending a co-sign note task. Typically used with Residents. Have used with diabetic educators in the past for their Diabetes notes.

Note Properties

- **General Description:** The display name of your note.
- **Is sub type:** Determines if the note should display under a parent type. For example: acute and chronic notes could be subtypes of Office Visits. Have also used Parent form of Procedures and other subtypes like I&D, Vasectomy etc...
- **Finalize Note on Save:** When checked, it places the note in a “final” status upon saving.
- **Note Visibility:** Selecting one of the options determines when the note is visible in Chart Viewer. Recommend making it visible upon saving.
- **Create Referring Provider Notification:** Creates a delegated task (i.e. task that is not seen in My Active Tasks) for the note owner indicating that the referring provider should be notified.
- **Create Patient Notification:** Will create a delegated task for the note owner indicating that the patient should be notified.
- **Create Review Covered Note Task on Finalization:** When a note is finalized by a covering physician a task is created for the appointment encounter provider to review the note.
- **Force Amendment if (any of the boxes are checked):** The note status will be “amended” if an annotation is added, the encounter is changed, a cc is added or edited and/or the note owner is changed.

NoteForms

- **Provided as an easy way to enter structured data and render text in a clinical note.**
- **Highly configurable and can consist of Medcin (which appear on a note form as a Yes/No or Plus/Minus control, a check box, or in a group of radio buttons.), Text, Illustrations or Text Templates.**
- **Note that Medcin findings are considered discrete data and are therefore queryable. In 11.2 and higher and higher releases of Analytics- text controls are also queryable.**
- **Forms can be added to a note section by hitting the “add” button and then searching for the desired form.**
- **Can either keep it simple when searching to see more options or can also filter by form type, note type and/or specialty.**

Forms

Note Admin								
Forms Symptoms NoteTemplates								
Physical Exam <Filter by Note Section> <Filter by Specialty>								
Form Display Name	Sex	Age	Type	Section	Specialty	Created By	Date Created	
Infant Pulmonary Exam		Infant 0...	PE	Physical Exam	Family Medi...	Allscripts Clinica...	12/31/2006	
Knee Exam Left			PE	Physical Exam		Allscripts Clinica...	12/27/2006	
Knee Exam Right	Unknown		PE	Physical Exam		Allscripts Clinica...	12/27/2006	
Knee Left			PE	Physical Exam		Allscripts Clinica...	12/20/2006	
Knee Right			PE	Physical Exam		Allscripts Clinica...	12/20/2006	
Liz Test Copy			PE	Physical Exam		Allscripts Clinica...	11/15/2006	
Lumbar Spine			PE	Physical Exam		Allscripts Clinica...	12/18/2006	
Lymphatics Exam			PE	Physical Exam		Allscripts Clinica...	12/9/2006	
Musculoskeletal			PE	Physical Exam		Allscripts Clinica...	12/14/2006	
*** Musculoskeletal test			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	10/26/2010	
Neck			PE	Physical Exam		Allscripts Clinica...	12/14/2006	
Neck Exam			PE	Physical Exam		Allscripts Clinica...	12/18/2006	
Neuro	Unknown	Adult > ...	PE	Physical Exam		Allscripts Clinica...	12/14/2006	
Neuro Exam	Unknown	Adult > ...	PE	Physical Exam		Allscripts Clinica...	1/1/2007	
Neuro Psych Exam			PE	Physical Exam		Allscripts Clinica...	12/9/2006	
Nose Exam	Unknown	Adult > ...	PE	Physical Exam		Allscripts Clinica...	12/16/2006	
Obstetrical Exam			PE	Physical Exam		Allscripts Clinica...	11/8/2006	
Oral Cavity Exam			PE	Physical Exam		Allscripts Clinica...	12/10/2006	
Ortho Hip-General			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/15/2006	
Ortho Hip-Post Op			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/8/2006	
Ortho Knee-General			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/5/2006	
Ortho Knee-Post Op			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/6/2006	
Ortho LE-Neuro			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/11/2006	
Ortho LE-Vascular			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/11/2006	
Ortho Shoulder-General			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/11/2006	
Ortho Shoulder-Post Op			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/11/2006	
Ortho UE-Neuro			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/11/2006	
Ortho UE-Vascular			PE	Physical Exam	Orthopedic...	Allscripts Clinica...	12/11/2006	
Pharynx Exam			PE	Physical Exam		Allscripts Clinica...	12/6/2006	
Pulmonary	Unknown	Adult > ...	PE	Physical Exam		Allscripts Clinica...	12/14/2006	
Pulmonary Exam	Unknown	Adult > ...	PE	Physical Exam		Allscripts Clinica...	12/14/2006	
Rectal Exam Female	Female		PE	Physical Exam		Allscripts Clinica...	12/27/2006	
Rectal Exam Male	Male		PE	Physical Exam		Allscripts Clinica...	12/16/2006	

New Edit Copy Properties Publish

Forms

- **There are three ways Allscripts allows you to utilize note forms:**
 - Utilize Allscripts delivered content.
 - Review and edit Allscripts delivered content.
 - Build your own new forms (not recommended)
- **There are five actions which can be performed within the Forms tab of Note Admin.**
 - New – allows you to create a brand new Note Form
 - Edit – allows you to edit the original Note Form (*Not recommended*)
 - Copy – allows you to copy the original Note Form and make edits
 - Properties – displays the properties of the Note Form selected
 - Publish – activates the edited Note Form for user access
 - Note: unpublished forms (not available to end users) are indicated by three astericks in front of the name.

Symptoms

Note Admin

Forms Symptoms NoteTemplates

All

Abdominal Pain	Easy Bruising Tendency	Musculoskeletal Symptoms Ankles	Urinary Frequency More Than Once At Night (No...
Abdominal Swelling	Edema	Musculoskeletal Symptoms Elbows	Vaginal Discharge (Other Than Normal Menstruati...
Abnormal Urethral Discharge	Excessive Thirst / Fluid Intake (Polydypsia)	Musculoskeletal Symptoms Feet	Vaginal Itching Or Burning
Acting Fussy	Eye Pain	Musculoskeletal Symptoms Fingers	Vaginal Lump Or Mass
Alcohol Abuse	Eyes Itch	Musculoskeletal Symptoms Hands	Vaginal Odor
Anal Itching	Eyesight Problems	Musculoskeletal Symptoms Hips	Vaginal Pain During Intercourse
Anal Pain	Fainting (Syncope)	Musculoskeletal Symptoms Knees	Visit For: Screening Exam Deficiency Anemia
Ankle Injury	Fatigue	Musculoskeletal Symptoms Shoulders	Vomiting
Anxiety	Feelings Of Weakness	Nasal Discharge	Vomiting Blood (Hematemesis)
Appetite Lost (Anorexia)	Fever	Nasal Symptoms	Vulvar Lump Or Mass
Baby (In Uterus) Decreased Fetal Movements	Frequent Falls While Walking	Neck Pain	Wheezing
Bad Breath	Gain Weight	Nipple Discharge	Yellow Skin Or Eyes (Jaundice)
Bladder Incontinence	Groin (Inguinal) Swelling	Nonmenstrual Bleeding	
Bleeding During Pregnancy	Gum Symptoms	Nosebleeds (Epistaxis)	
Bleeding Gums	Headache	Obesity	
Blood In The Urine	Heart Rate Is Fast	Pain During Intercourse	
Breast Symptoms	Heart Rate Is Slow	Pain During Urination (Dysuria)	
Breathing Sounds High-pitched When Inhaling	Heartburn	Pain In The Flank	
Bright Red Blood Per Rectum	Hemorrhoids	Pain In The Leg (Below The Knee)	
Chest Pain	Hoarseness	Pain In The Thigh	
Confused Or Disoriented	Hot Flashes	Palpitations	
Constipation	Inadequacy Of Penile Erection	Parental Observations Abdominal	
Convulsions (As Sx)	Insomnia	Pelvic Pain	
Cough	Involuntary Movements	Poor Coordination	
Coughing Up Blood (Hemoptysis)	Involuntary Shaking Or Trembling Movements (Tr...	Red Eyes	
Delays In Starting Urination (Hesitancy)	Itching Of The Nose	Ringling In The Ears (Tinnitus)	
Delirium	Joint Pain, Localized In The Ankle	Skin Color - Cyanosis	
Depression	Joint Pain, Localized In The Elbow	Skin: A 'Rash'	
Diarrhea	Joint Pain, Localized In The Hip	Sore Throat	
Difficulties In Speech	Joint Pain, Localized In The Knee	Staring Spells (Reported)	
Difficulty Breathing (Dyspnea)	Joint Pain, Localized In The Shoulder	Stridor	
Difficulty Finding Desired Words	Joint Pain, Localized In The Wrist	Sunburn	
Diffuse Joint Pains (Arthralgias)	Joint Swelling Of The Ankle	Swollen Glands In The Neck	
Discharge Of Pus From Eyes	Leg Pain With Exercise (Leg Claudication)	Tongue Abnormalities	
Dizziness	Loss Of Hearing	Tooth Pain	
Dry Eyes	Lower Back Pain	Unable To Perform Sex (Impotence)	
Dry Skin	Lump Or Mass In Breast	Unable To Restrain Bowel Movement	
Earache	Lymphadenopathy	Unusual Darkening Of The Skin Color	
Easy Bleeding	Mouth Sores	Urinary Frequency	

New Edit Copy Publish

Symptoms

- **These are detail forms that are associated with HPI: Symptom (parent forms). The details of these sub-forms are managed from this tab.**
- **Available in the ACI (add clinical item) under chief complaints.**
- **When HPI is set to “Auto Config” based upon Chief Complaint, the system pulls from these HPI:Symptom forms by adding the appropriate form to the HPI section of the note.**

Text Templates

Manage Text Templates

TW Module:

Note Section:

Specialty:

Name	TW Module	Note Section	Specialty	Description
0-Newborn WCC	Note		Pediatrics	
02 Mo Dev Milestones	Note		Pediatrics	Starter Set
06 Mo Dev Milestones	Note		Pediatrics	Starter Set
09 mo Dev Milestones	Note		Pediatrics	Starter Set
15 Mo Dev Milestones	Note		Pediatrics	Starter Set
18 Mo Dev Milestones	Note		Pediatrics	Starter Set
1 MONTH	Note		Pediatrics	
2 MONTH	Note		Pediatrics	
2 Yr Dev Milestones	Note		Pediatrics	Starter Set
3 Yr Dev Milestones	Note		Pediatrics	Starter Set
4 MONTH	Note		Pediatrics	
6 MONTH	Note		Pediatrics	
6-7 Yr Dev Milestones	Note		Pediatrics	Starter Set
8-9 Yr Dev Milestones	Note		Pediatrics	Starter Set
0-Newborn WCC	Note		Pediatrics	
04 Mo Dev Milestones	Note		Pediatrics	Starter Set
1 Instructions	Note		Pediatrics	

More...

Text Templates

- **Located under Note Admin > Manage Text Templates**
- **Text templates are another way of documenting within a note. Buttons at bottom allow you to create/manage TTs similar to the way forms are managed.**
- **Not queryable**
- **Not captured by E/M coder**
- **Used in various Modules within EHR**
- **AHS provides Pre-delivered content and TTs can also be built from scratch relatively easily**

Input Templates

- **Note input templates control the note sections (HPI, ROS, Active Problems, Vitals, Assessment, Plan, etc.) that appear in the note and in what order. Note input templates also determine the auto-cite behavior for lists (Current Meds, Active Problems, Vitals, and Results) and the note forms that populate the note.**

Note Input Templates

Forms | Symptoms | **NoteTemplates**

Document Type: **Established Pt Sick** Specialty: **PEDIATRC** Gender: **Unknown** Age Range: **Pediatric 0-19 years**

Sections

- Chief Complaint
- Reason For Visit
- History of Present Illness
- Review of Systems
- Active Problems
- Current Meds
- Allergies
- Vitals
- Results/Data
- Physical Exam
- Assessment
- Plan
- Discussion/Summary
- Letter Greeting
- Letter Closing
- Signatures

Add/Remove Sections

Output Templates

- Established Pt Sick

Chief Complaint Insert Dictation Placeholder

Forms:

*** Chief Complaint List ***

Reason For Visit Insert Dictation Placeholder

History of Present Illness Insert Dictation Placeholder Previous History Auto-Config

Review of Systems Insert Dictation Placeholder All Normal

Active Problems Insert Dictation Placeholder

Current Meds Insert Dictation Placeholder

Allergies Insert Dictation Placeholder

Vitals Insert Dictation Placeholder

Results/Data Insert Dictation Placeholder

Physical Exam Insert Dictation Placeholder All Normal Previous Exam Auto-Config

Assessment Insert Dictation Placeholder

Plan Insert Dictation Placeholder

Discussion/Summary Insert Dictation Placeholder

Letter Greeting Insert Dictation Placeholder

Letter Closing Insert Dictation Placeholder

Signatures

New Output Preview Properties Save Cancel New Input Search

Note Input Template Properties

Document Type: **Established Pt Sick Visit**

Assign Specialties

- Adolescent Medicine
- Allergy/Immunology
- Anesthesia
- Audiology
- Breast Care

Gender

Both
 Male
 Female

Description: Documentation for an Established Patient Sick Visit

Age Range: Adult > 19 years

Filter Default Note Forms by Selected Specialty

Note Attributes

Security

Finalization Authority: Level 7
Note Owner Authority: Level 7

Prompt to Route for Signature
 Permanently Lock Note when Finalized

eReply to Patient
 Create Note Icon in Schedule

Create Task

- Referring Provider Notification on Finalization
- Patient Notification Task on Finalization
- Review Covered Note on Finalization

Force Amendment if:

- Annotation Added
- Carbon Copy Added or Edited
- Encounter Changed
- Note Owner Changed

Note Visibility

- Visible on Saving
- Visible on Initial Signing
- Visible on Finalization

Audit

E & M

Inactive

E&M

Adult

E & M

E/M Enabled

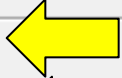
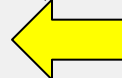
Guidelines: 1997 1995


Exam Type:

Patient Status: New Established

Setting:

Service:

 Inactive

OK Cancel

Input Template Details

- **Gender:** Male/Female/Both (Example, if there's an OB Note, it would only be applicable to Female patients and therefore is only available to choose from when the patient in context is female.)
- **Age:** Using the OB Example, an age range could also be assigned to the input for adult patients 19-50 years old. These Age Ranges are predefined by AHS and cant be modified, so only assign this field if applicable (e.g. well child checks)
- **Note Attributes (security):** Please note that changes made here do not show up in the document type dictionary so the same changes will also need to be made there.
- **Audit:** Lists every event associated with the note input template.

Input Template Details

E&M :

- The E/M Enable boxed must be checked in order for the patient's information recorded in the note to be captured by the coder.
- Remember that the setting and service should be applicable to the service and setting offered in your facility/clinic.
- Patient status can also be set here, but it can also be changed by clicking the E/M coder button from within the note.
- Example: Could set this to "Established" for Family and Internal Medicine specialties as this probably accounts for the majority of the patients seen.

•**Inactive:** This box can be checked to inactive the note input. This makes is not available for the end user to select. It does not remove any inputs that are already in use.

Output Templates

- **Can have multiple outputs for every input**
- **Can change the text on each section or apply changes to all sections**
- **Can reorder and remove sections**

Litisha's Note Tips and Tricks

- **Organizing the Doc Type Dictionary Before Building Input Templates**
- **Copying Note Templates**
- **Ensure that the input/output and document type details match.**
- **Enter comments on inputs for ease of finding template when ready to move via CMT**
- **Images on Note Outputs TWAdmin and Note Views**
- **Hiding the List Header**
- **Results Data Section Error**
- **Vitals Panel incorrect for end users**
- **Clinical Toolbar – an Extension of the Clinical Desktop, not the note**

Things to Consider

- Remember that **STANDARDIZATION** is key. Align your note names with other document type (i.e. Scan and Unstructured). Determine what types of notes you will need across your organization as a whole, consider a good naming convention for ease of finding them in the Chart Viewer.
 - Note type examples include:
 - Acute, Chronic, Telephone, Refill/Renewal, Result Notes
 - New Pt, Established Pt Notes
 - Disease specific (i.e. Diabetes, COPD/Asthma) Notes
 - Note naming convention for multi-specialty orgs:
 - IM Renewal , FP Renewal, Peds Renewal, Derm Renewal etc...
 - Single Specialty with multiple sites:
 - Use clinic acronym as prefix: AO Phone, LO Phone, HO Phone

Additional Considerations

- **Remind your end users to ALWAYS read their note outputs to ensure clarity, prior to signing off of the note.**
- **The more documentation that is done within the note using Medcin, the more accurate E/M coder will be.**
- **Medcin IS discrete data and is therefore queryable**
- **In higher versions of Analytics using V11.2 or higher, text controls in addition to Medcin controls are reportable.**

Contact Information

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You can find all handouts as well as questions and answers from this webcast and other webcasts on our wiki at:

<http://wiki.galenhealthcare.com/Webcasts>

Questions?

