

V11 Note Webcast - Basic Note Build

June 20, 2014

Embrace the new world of healthcare

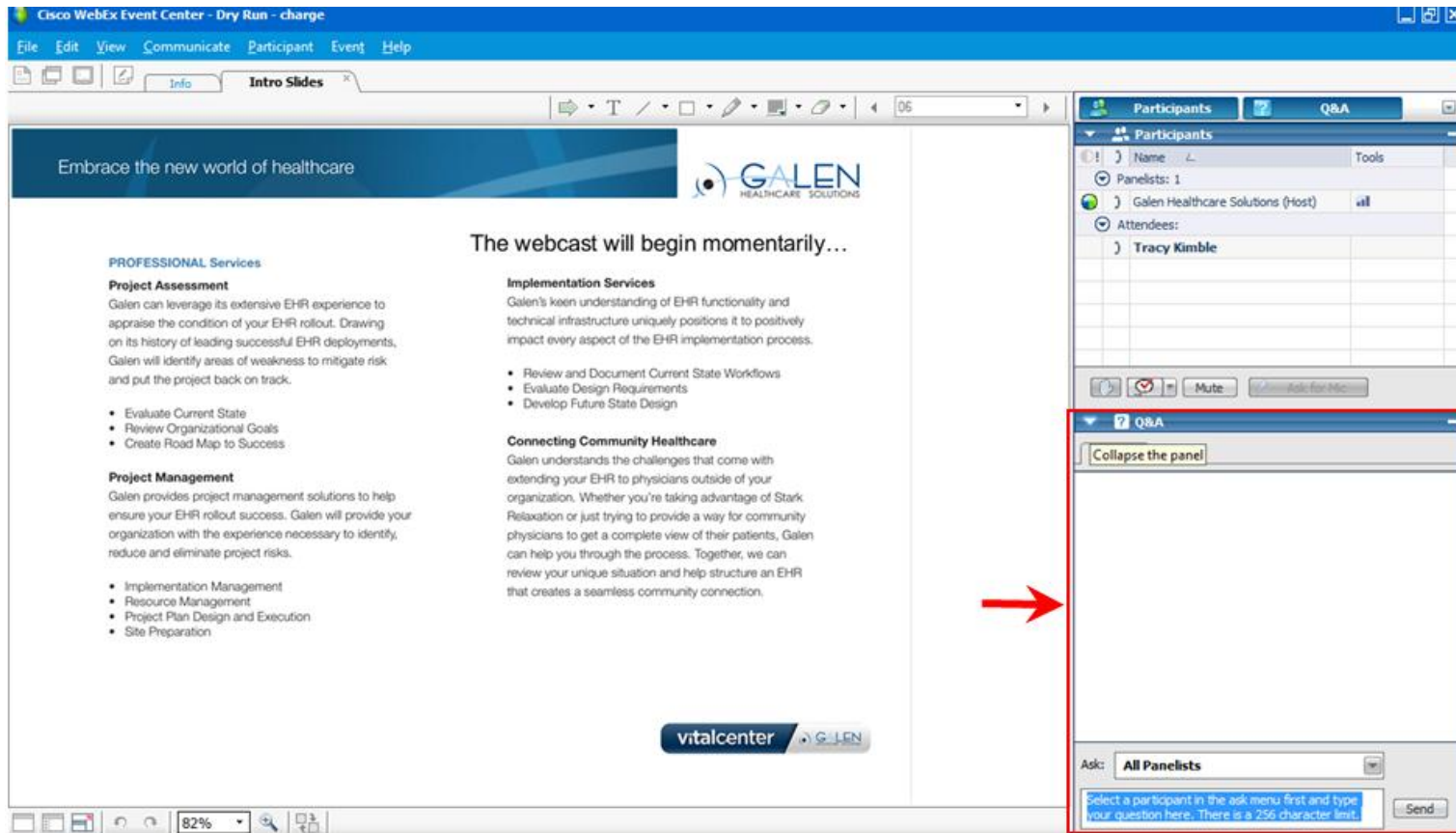


Sue D'Agostino, RN

Sr. Clinical Consultant with Galen Healthcare Solutions

- Over 20 years in Healthcare including 8 years EHR experience
- Galen TouchWorks EHR Certified
- Galen TouchWorks V11 Advanced Note Specialist
- Clinical consultant, Workflow Analysis, Business/Clinical Analyst

Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!



The screenshot shows a Cisco WebEx Event Center window titled "Cisco WebEx Event Center - Dry Run - charge". The main content area displays a presentation slide with the following text:

Embrace the new world of healthcare

PROFESSIONAL Services

Project Assessment
Galen can leverage its extensive EHR experience to appraise the condition of your EHR rollout. Drawing on its history of leading successful EHR deployments, Galen will identify areas of weakness to mitigate risk and put the project back on track.

- Evaluate Current State
- Review Organizational Goals
- Create Road Map to Success

Project Management
Galen provides project management solutions to help ensure your EHR rollout success. Galen will provide your organization with the experience necessary to identify, reduce and eliminate project risks.

- Implementation Management
- Resource Management
- Project Plan Design and Execution
- Site Preparation

Implementation Services
Galen's keen understanding of EHR functionality and technical infrastructure uniquely positions it to positively impact every aspect of the EHR implementation process.








- Review and Document Current State Workflows
- Evaluate Design Requirements
- Develop Future State Design

Connecting Community Healthcare
Galen understands the challenges that come with extending your EHR to physicians outside of your organization. Whether you're taking advantage of Stark Relaxation or just trying to provide a way for community physicians to get a complete view of their patients, Galen can help you through the process. Together, we can review your unique situation and help structure an EHR that creates a seamless community connection.

The slide also features the Galen logo and a "vitalcenter" logo at the bottom.

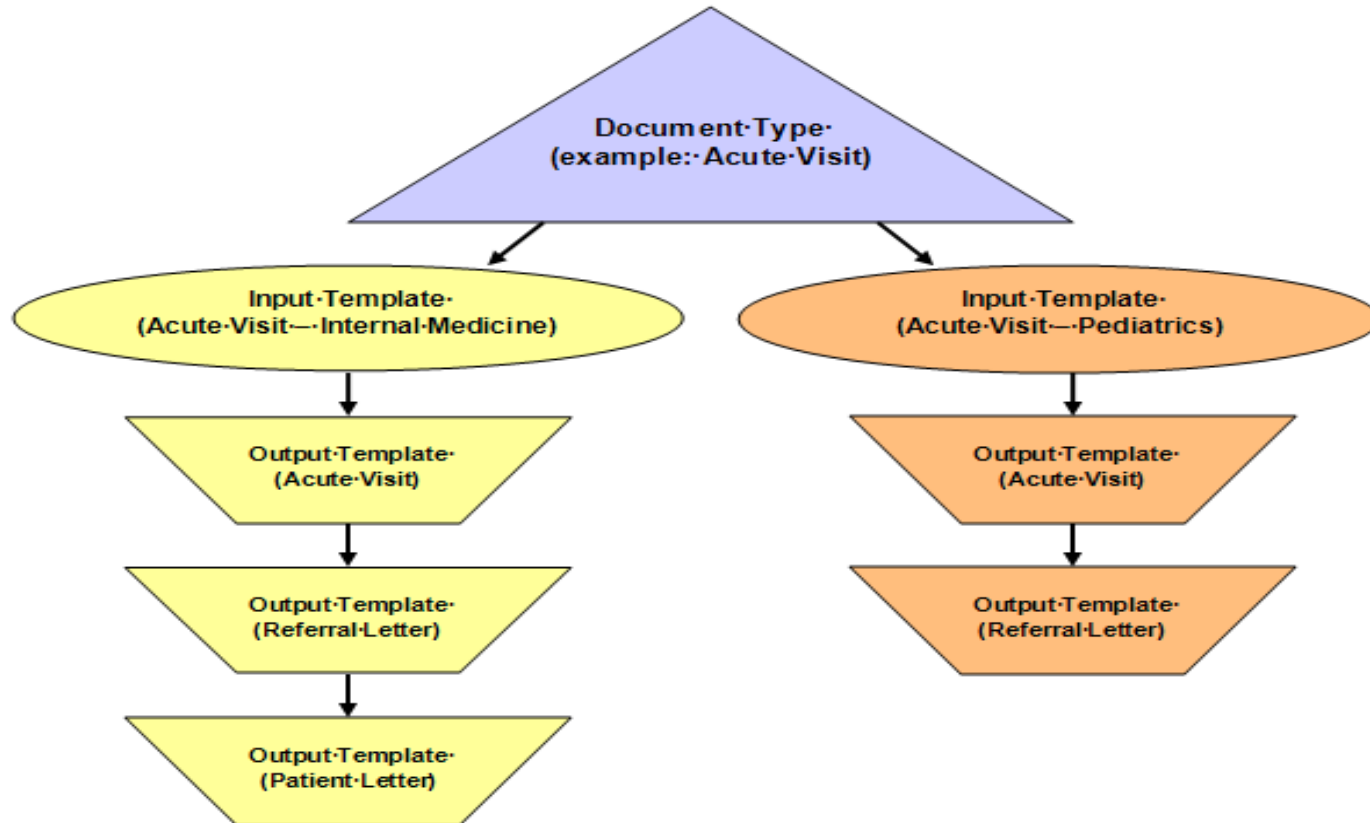
On the right side of the interface, there is a "Participants" panel and a "Q&A" panel. The "Q&A" panel is highlighted with a red border and contains a "Collapse the panel" button. Below the Q&A panel, there is an "Ask:" dropdown menu set to "All Panelists" and a "Send" button. A red arrow points from the main content area towards the Q&A panel.

Objectives:

-  **Review the relationship between document types, input and output templates.**
-  **Document using a new Chief Complaint driven note**
-  **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 including 11.4 additions**
-  **Discuss and review an output template.**
-  **Assign the new output template to a chart section.**

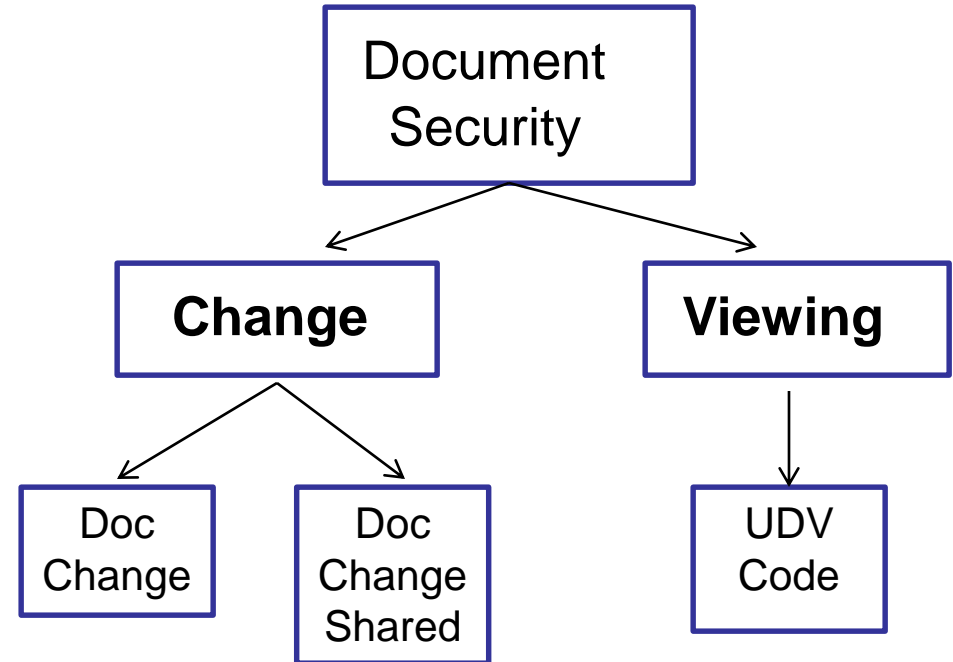
Document/Input/Output Relationship

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



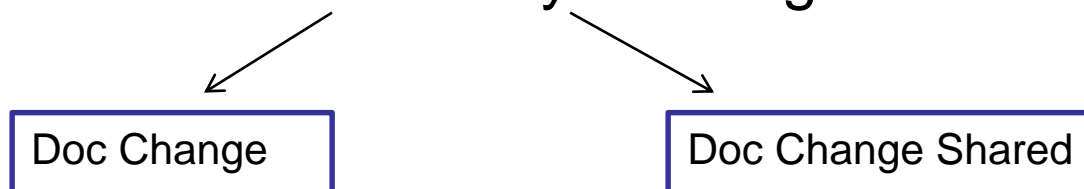
Document Security

- **Broken out into two types:**
Change and Viewing
- **Available to assign at three separate levels:**
 - Document Type
 - Note Template
 - Ad-hoc per document*



*Users must have the code(s) assigned to their security classification to be able to assign

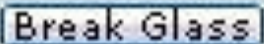
Document Security - Change



- **Broken out into two types: Doc Change and Doc Change Shared**
- **Doc Change:**
 - Document is visible to any user
 - Changes are restricted to the owner of the note *only*
- **Doc Change Shared:**
 - Document is visible to any user
 - Changes are restricted to a group of users who have this security code

Document Security - Viewing



- **Do not come pre-delivered; must be manually created (UDV)**
- **Once assigned to a document, it is hidden in the chart *unless*:**
 - User has the same code assigned to their security classification
 - User has the **Break Glass** security code in their classification
- **If secured documents exist in a patient's chart:**
 - **Security:**  icon will present in the patient banner if user has Break Glass security code
 - [R] will precede patient name on the patient banner indicating restricted documents exist in the chart
- **Using Break Glass will force password entry and audit user's actions at the highest level**

TWAdmin → Security Admin
 → Security Tab → Security Codes

User Defined Security Code-
 document viewing security indicated



Code	Name	Mnemonic	Inactive	Enforced
3000	Report Category - Administration	ADMIN	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3100	Report Category - Charge	CHARGE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3700	Report Category - Custom	CUSTOM	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3800	Report Category - Dictate	Dictate	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3200	Report Category - Document	DOC	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3300	Report Category - Library	LIB	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3550	Report Category - MAR	MAR	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3400	Report Category - Note	NOTES	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3900	Report Category - Order	3900	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3350	Report Category - Patient	PATIENT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
POPMGM...	Report Category - Population Healt...	POPMGMTC	<input type="checkbox"/>	<input checked="" type="checkbox"/>
REGISTRY	Report Category - Registry	REGISTRY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3500	Report Category - Rx+	RX	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3600	Report Category - Transcribe	TRANSC	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9000	Restricted Patient Access Security...	RestrictSC	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4201	Results-Edit	ResultEdit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4205	Results-EditInterface	ResEditInf	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4203	Results-Invalidate	ResultInva	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4202	Results-Verify	ResultVeri	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1109	Run a Query	RQuery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2100	SA Application Access	SA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1202	Social Stigma (ie HIV)	Stigma	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TWUPEdit	TWuser - Provider Edit	TWUPEdit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TWUEdit	TWuser - User Edit	TWUEdit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3803	View Report - Outstanding Orders	OSORDERS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9002	VIP Patient Access Security Code	VIPAccessSC	<input type="checkbox"/>	<input checked="" type="checkbox"/>
WLVEdit	Worklist View - Edit	WLVEdit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
WLAdmin	WorkListAdmin	WLAdmin	<input type="checkbox"/>	<input checked="" type="checkbox"/>
WVEdit	Workspace View - Edit	WVEdit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UDVCon	Confidential Document		<input type="checkbox"/>	<input type="checkbox"/>

NoteForms

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

NoteForms

- **Building blocks**
- **A way to enter structured data and render text in a note.**
- **Highly configurable and can consist of Medcin or Text controls, Free Text, Illustrations or Text Templates.**
- **Medcin findings = discrete data and are queryable. In 11.2 and higher and higher releases of The TouchWorks EHR Reporting Tool (aka Analytics)- text controls are also queryable.**
- **Added to a note section by hitting the “add” button and then searching for the desired form.**
- **Can keep it simple when searching to see more options OR use filters for more specific search**

Note Output viewed in patient chart

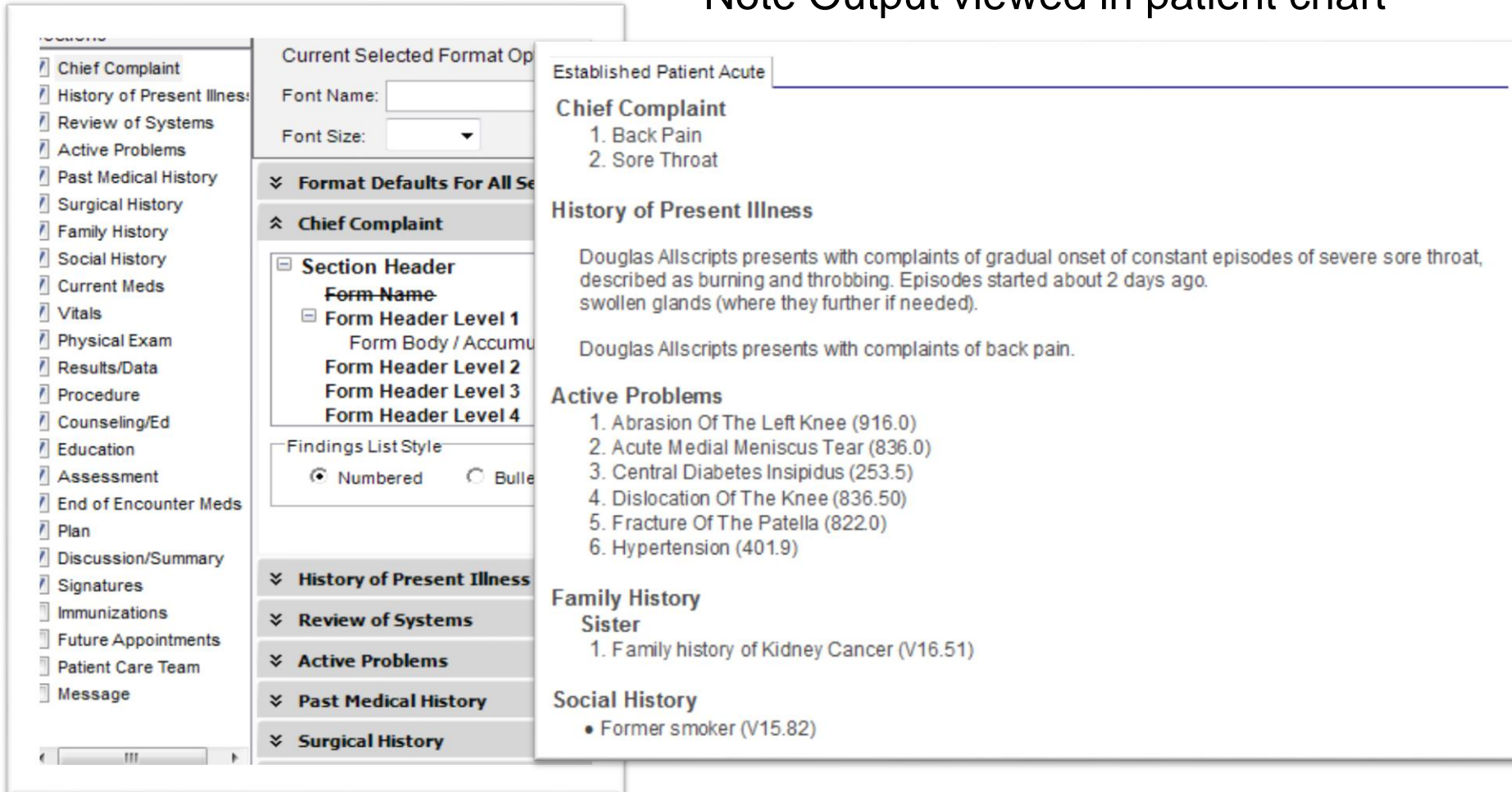


Table of Contents (Left Sidebar):

- Chief Complaint
- History of Present Illness
- Review of Systems
- Active Problems
- Past Medical History
- Surgical History
- Family History
- Social History
- Current Meds
- Vitals
- Physical Exam
- Results/Data
- Procedure
- Counseling/Ed
- Education
- Assessment
- End of Encounter Meds
- Plan
- Discussion/Summary
- Signatures
- Immunizations
- Future Appointments
- Patient Care Team
- Message

Format Defaults Panel (Center):

Current Selected Format Op
 Font Name:
 Font Size:

Format Defaults For All Se

Chief Complaint

Section Header
 Form Name
 Form Header Level 1
 Form Body / Accumu
 Form Header Level 2
 Form Header Level 3
 Form Header Level 4

Findings List Style
 Numbered Bulle

History of Present Illness

Review of Systems

Active Problems

Past Medical History

Surgical History

Note Content (Right Pane):

Established Patient Acute

Chief Complaint

1. Back Pain
2. Sore Throat

History of Present Illness

Douglas Allscripts presents with complaints of gradual onset of constant episodes of severe sore throat, described as burning and throbbing. Episodes started about 2 days ago. swollen glands (where they further if needed).

Douglas Allscripts presents with complaints of back pain.

Active Problems

1. Abrasion Of The Left Knee (916.0)
2. Acute Medial Meniscus Tear (836.0)
3. Central Diabetes Insipidus (253.5)
4. Dislocation Of The Knee (836.50)
5. Fracture Of The Patella (822.0)
6. Hypertension (401.9)

Family History

Sister

1. Family history of Kidney Cancer (V16.51)

Social History

- Former smoker (V15.82)

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.**
- **Hiding the List Header in the Output Template**
- **Family History List Headers- “Hide Format Option” unchecked for family members to show**
- **CMT (content management tool)- can be a useful tool to move noteforms from one environment to another, always make sure that you have the most recent version, be aware of any known issues.**
- **Enter comments on inputs for ease of finding template when ready to move via CMT**

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 (somewhat) E/M coder will be. Some functionality loss with 11.4**
- **Medcin IS discrete data and is therefore queryable**
- **Although IMO (Intelligent Medical Objects Terminology) is replacing Medcin in the Problem Dictionary, Medcin will still be used for Noteforms**
- **Controls can be double clicked within the NAW to bring up a text box for additional information on an item.**

Contact Information

Questions:

education@galenhealthcare.com

Corporate: 888-Galen-44 Information

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

[http://wiki.galenhealthcare.com/Webcasts.](http://wiki.galenhealthcare.com/Webcasts)

Questions?

