Component 7, Unit 2: Under the Hood: Functions of HIT Systems

About the (Optional) Orientation Videos:

Part 1: Adding a Note to a Visit
Part 2: Attaching a Template to a Note
Part 3: Working With Templates

Videos are provided as files with a .swf extension. These .swf files are designed to be opened in all major web browsers. If the file does not open in your browser you can download a free .swf player at the Adobe site:
 http://www.adobe.com/products/flashplayer/

Step-by-step instructions for completing the activities are provided below for those who do not prefer to view the .swf files.

Instructions for the Activities

A scripted and pre-configured standardized electronic patient encounter in the demo system is crafted to illustrate parts of the patient care process, how different components of an HIT system are called upon during the process, and to emphasize the importance of HIT workflow support.

Hands-on Assignment

Watch the orientation videos or read the assignment instructions carefully, referring to the CPRS Manual.

 In this assignment, students will interact with the CPRS system as a user would during and ambulatory (outpatient). care visit The focus of this unit is not upon knowledge of clinical nuances, since not all students will have clinical experience. The focus of this exercise is upon understanding the rationale of WHY certain linkages exist, HOW systems can assist with workflow, and how HIT systems can support efficiency and effectiveness. There are **2 deliverables** for this assignment – both are highlighted throughout the document. Additional page references with detailed instructions from the CPRS Users Manual (included as part of Component 7) are provided as well to assist the student with use of these materials.

Activity 1

Mr. Outpatient Eleven is coming in today (August 28, 2010) for a regularly scheduled primary care clinic appointment. The appointment already exists in the system. You will be using the VistA system to help you complete your assessment and to fully complete all of the documentation required.

Keeping in mind the **2 deliverables**, - as you walk through this exercise, you should:

- Capture your work for submission to your instructor. Options for doing this may include using the print screen function (with a cut and paste to a document file or CTRL-C/CTRL-V), or certain software applications such as Screen Print & Capture 32, SnagIT, CaptureWiz, etc. Many actions have a "PREVIEW" button which an optimal place to do a cut and paste of your work. Check with your instructor for submission requirements.

- Make a <u>few brief notes/suggestions</u> of where you thought the software could have been more supportive of the process being undertaken, be specific – and you may want to take a screen picture to illustrate your suggestions to the instructor. ***In example***, in the video you witnessed the completion of the Mini Mental State Exam. Why does the system require that the user tally up the results? A good suggestion for improved support of workflow would be to have the system be able to add up the scores to arrive at the total score instead of putting that burden on the user.

<u>Steps to complete the Activity 1</u>:

1. From within the VistA system, select Eleven, Outpatient and open his record.
2. Change from "Visit Not Selected" to the ambulatory clinic location of "Primary Care, August 28, 2010".
3. As the clinician, you want to add a new note to reflect your actions in the clinic on August 28th with the patient. Choose "Note" and then "New Note".
4. Assign "Admission/Eval Assessment" as the title for the new Progress Note, ignoring any warning or error boxes (should they appear).
5. Change the date of your new Progress Note to match the date of the visit – **in this example it will be August 28, 2010** and click OK.
6. A "new note in progress" should appear in the Note box to the left.
7. As the clinician, you choose "Template", because you know that the exam that you are going to perform on Mr. Eleven has a template that will guide your exam and make the documentation easier.
8. Choose "Shared Template", and then choose "National Templates" and "Mental Health Templates".
9. Your goal in today's visit is to do an <u>MH Abbreviated Assessment</u>, and tend to other needs that Mr. Eleven has during this visit. Double click "MH Abbreviated Assessment" to display the template. *What is then displayed is an **institutionally vetted** assessment template that guides best practice for the Mental Health Assessment and documentation process.*
10. Complete **only** the parts of the MH Abbreviated Assessment noted below. Students are to refrain from entering unprofessional data, remembering that all entries are linked to your login. **Data approximating reality is close enough** – as it is understood that not all students have a clinical background.
    a. Marital Status (married)
    b. Presenting Chief Complaint (depression)

c. History of Current Illness (example: "Patient presents with depression of three days duration")

d. Pertinent Past Psychiatric History, Family, & Medical History (example: "None" or "Vietnam war vet with significant family issues" or "History of substance abuse", etc. For medical history – think about this patient's current active problem list……)

e. Complete the Mental Status Exam, the Assessment of Danger to Self, and Assessment of Danger to Others. Note the "fan-out" function. **Ignore the rest of the examination.** *Again, we are not grading on quality of clinical documentation, understanding not all students will understand the terminology and meaning. The purpose is to demonstrate HIT support for vetted practices.*

f. Scroll to the bottom and click "PREVIEW". If you need to make corrections, do so.

g. If satisfied, highlight all of the material in the PREVIEW box. When highlighted, click CTRL-C (to copy what is highlighted), open a word document and CRTL-P (or paste) your highlighted material into the document. Save it for submission to instructor.

h. Click OK at the bottom of the template to transfer the note from the template into the patient's chart. The results of your MH Abbreviated Assessment will appear in the Note window to the right. As the clinician, you have now completed the assessment and recorded your findings.

i. Click finish.

j. Verify yourself as the Primary Care Provider in the box that will pop up.

k. Right click in the body of the note to "sign note now". Your note will now appear as a "signed" note in the left margin. Exit the system.

11. Ask your instructor for instructions on how to submit the **2 deliverables**: 1.) the screen captures showing your work and 2.) a few brief suggestions for where the system could better support user workflow.

Additional guidance for utilizing the VA CPRS system can be found in the Vista CPRS Users Guide:

- Setting Visit Encounter Date and Location – pp.52-53 and 151
- Entering Notes – p.306
- Signing Orders p.116
- Working with Reminders pp.66-67 and 314-318
- Document Templates (progress Notes) pp.324-326

Please note that the instructions in the video file may not correspond exactly to the manual. The printed manual may use different patient names and reflect a few minor differences from the video tutorials.