Touchworks Training

Patient Intake Process

A guide to Sharp Rees-Stealy's
Ambulatory Electronic Health Record (EHR)

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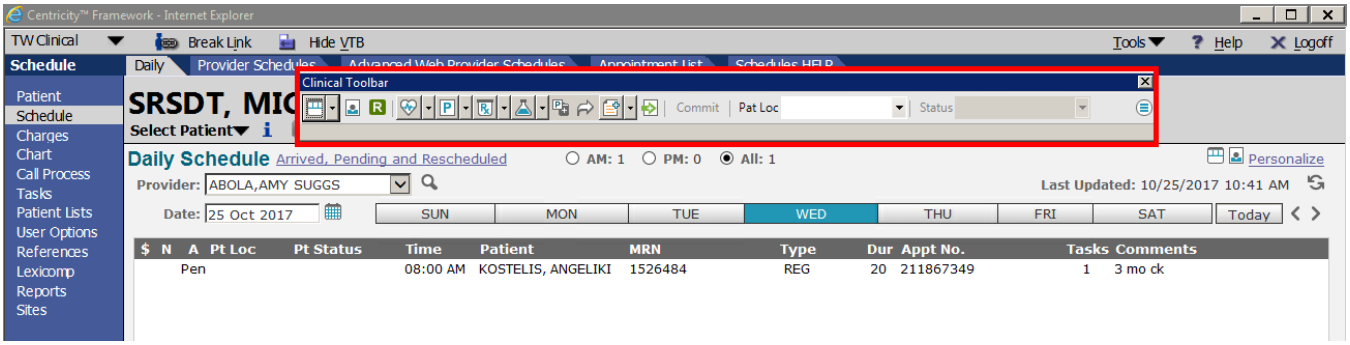
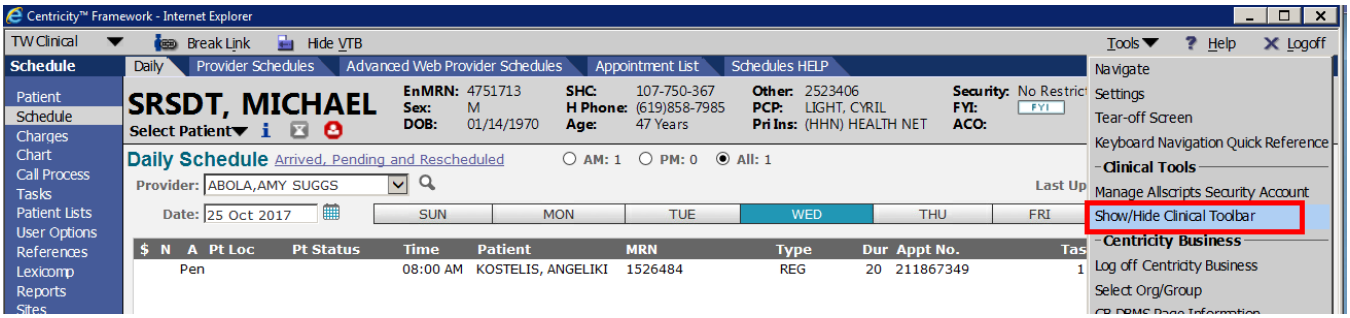
The Floating Clinical Tool Bar

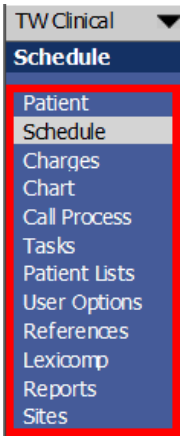


The Clinical Tool Bar allows users to quickly access chart information, medications and problems. The tool bar can be dragged to different positions on the screen by using the mouse.



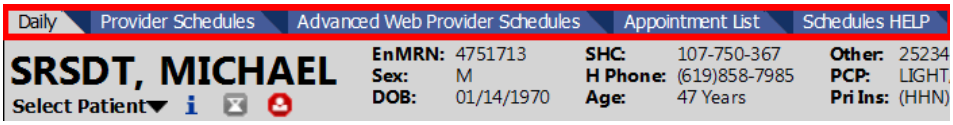
To bring the Clinical Tool Bar back, click Tools, then click Show/Hide Clinical Toolbar

Vertical Tool Bar (VTB)



The VTB contains a vertical list of menu items on the left hand side

Horizontal Tool Bar (HTB)

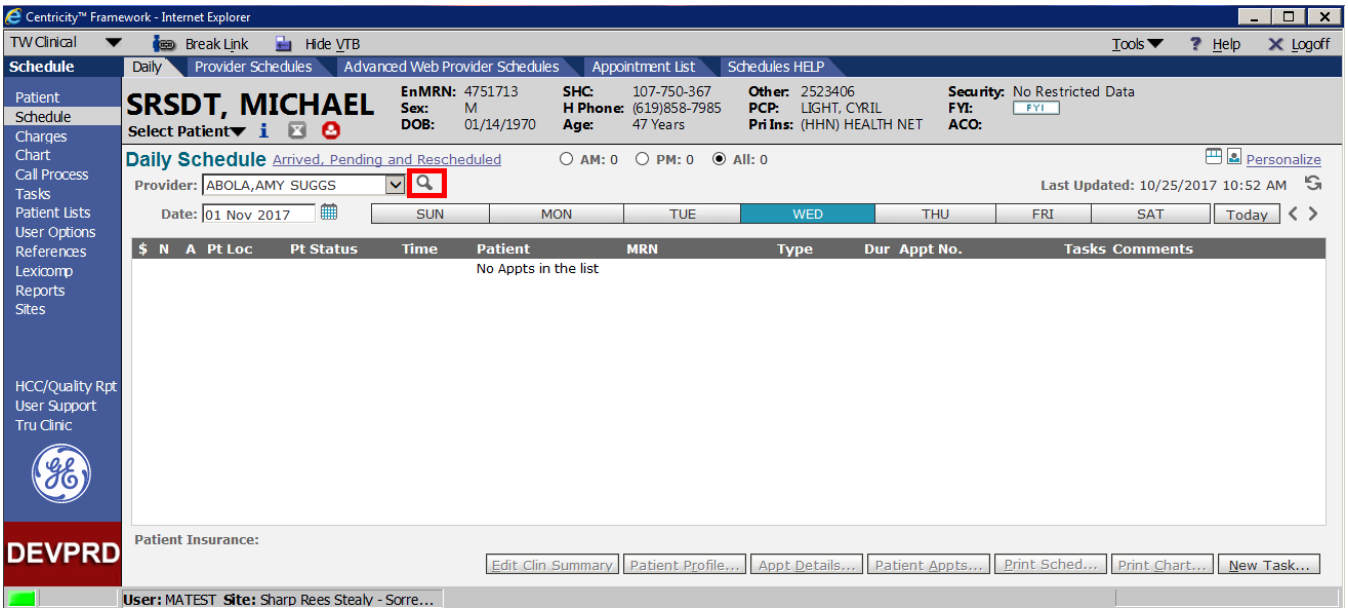


The HTB contains submenus across the top for the items listed from the VTB.

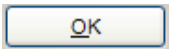
Schedules

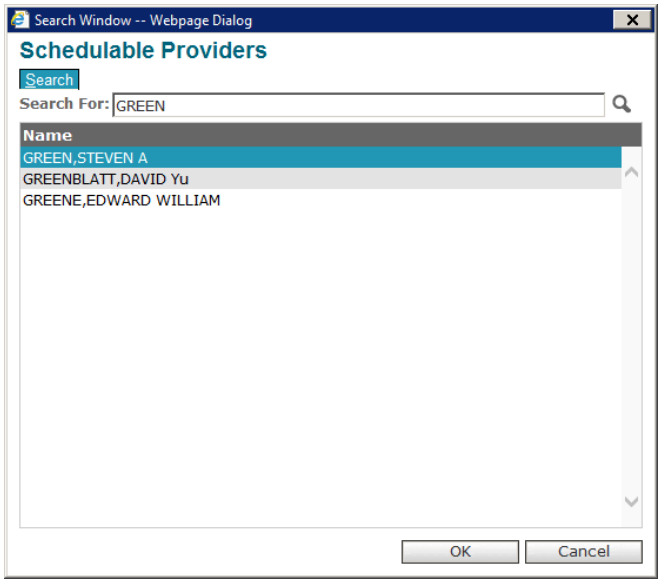
To select a Provider's schedule:

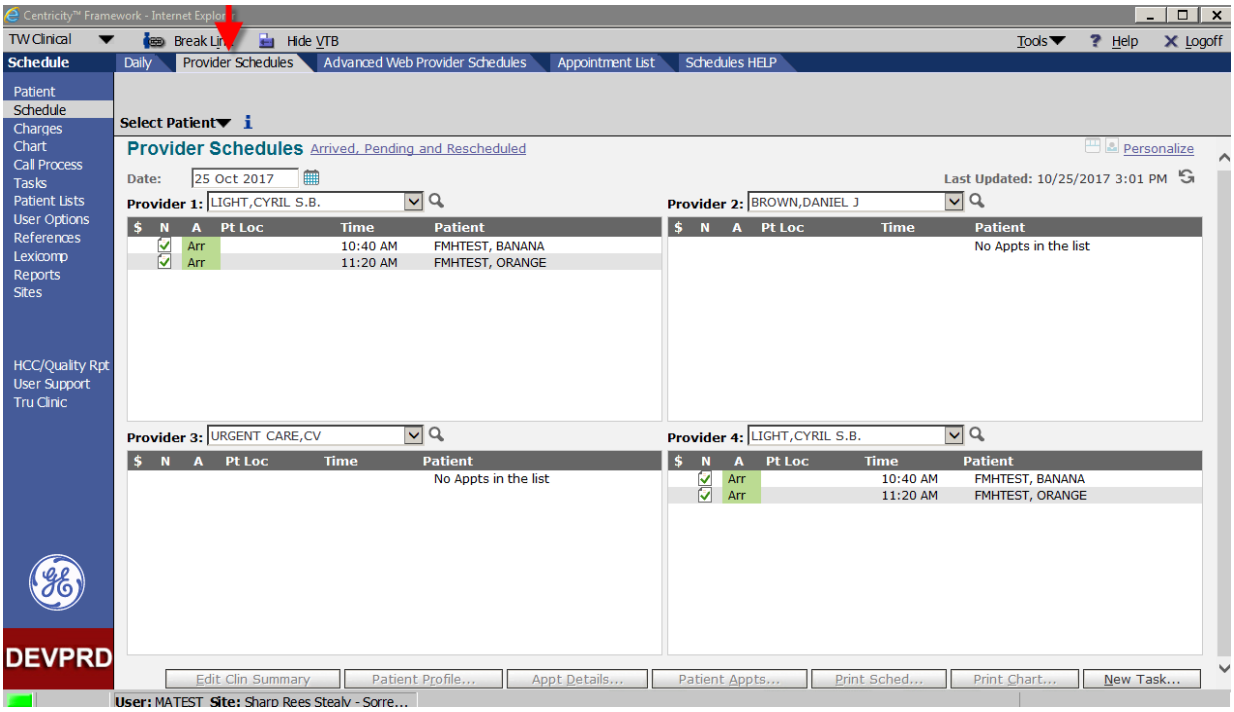
1. Click 



2. Type the provider's name in 

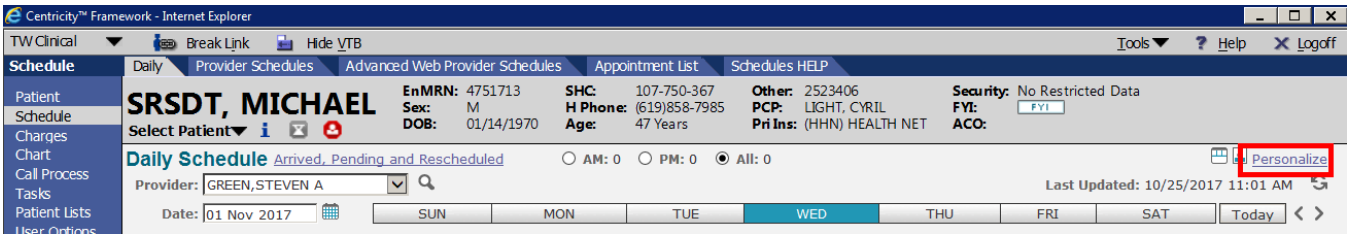
3. Click 
4. Highlight the provider and click 

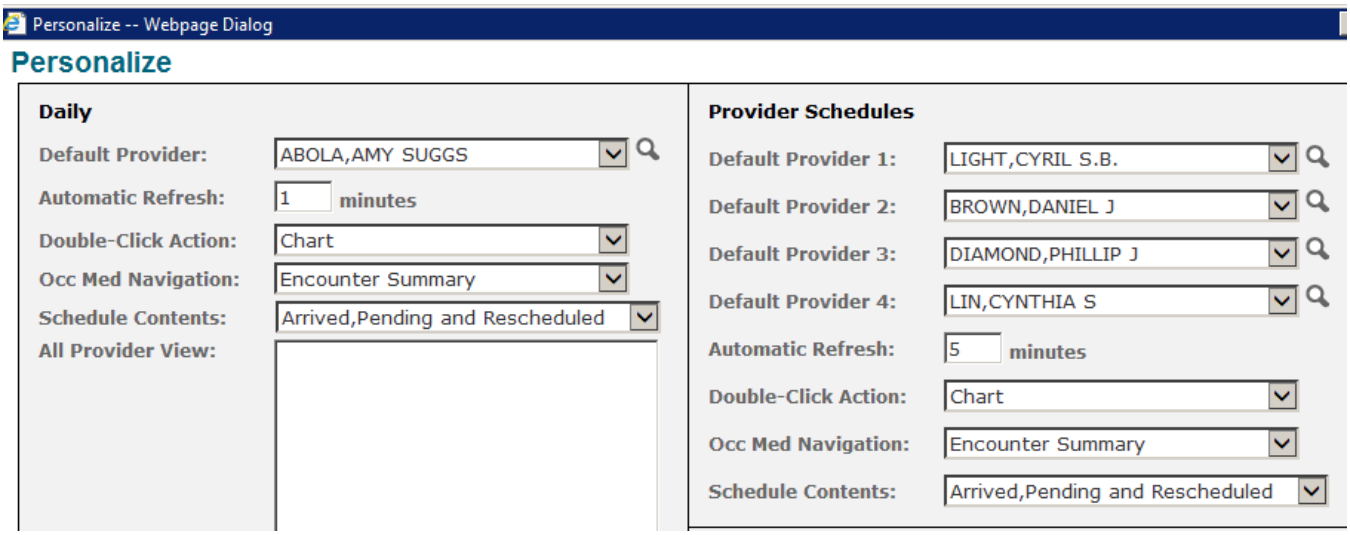




- The Providers Schedules tab allows the user to see up to 4 provider schedules.

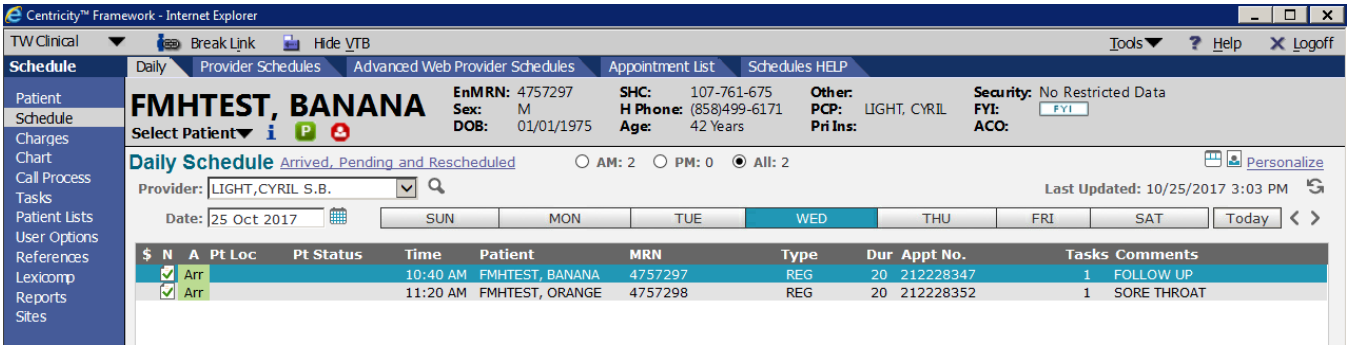
- To select a default provider, click the Personalize hyperlink.



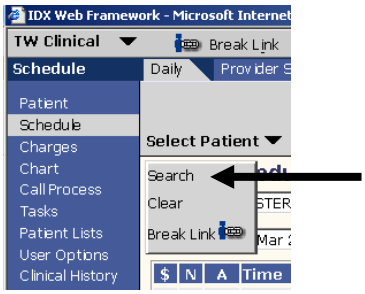


Patient Banner Bar

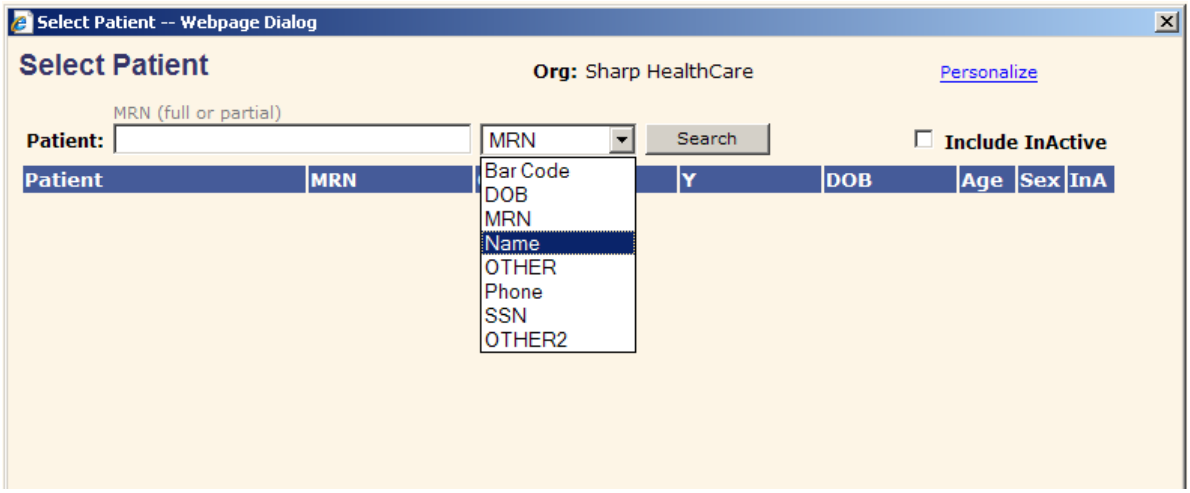
- The Patient Banner Bar populates by single clicking on a patient in the schedule or searching for a patient using the Select Patient Prompt on the Patient Banner Bar.



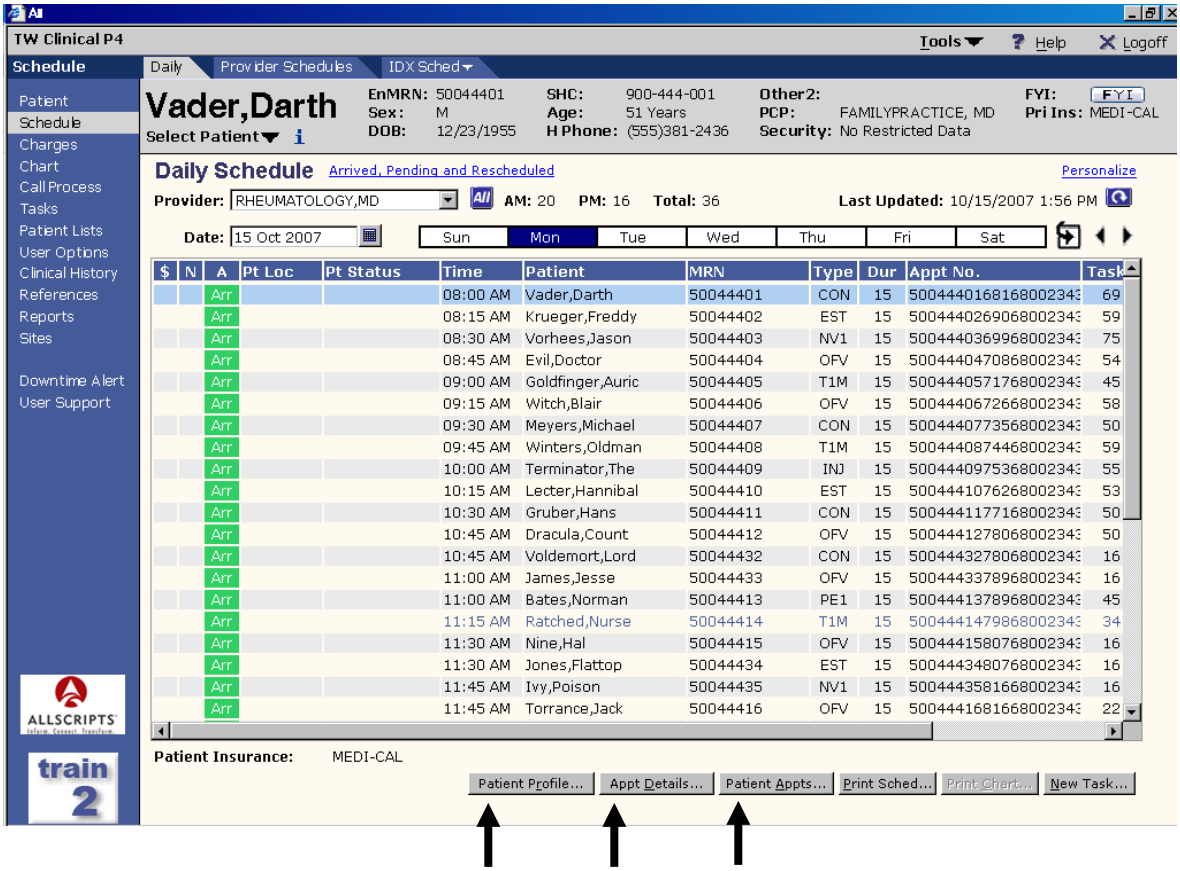
- To search for a patient not on the provider's schedule, click on 



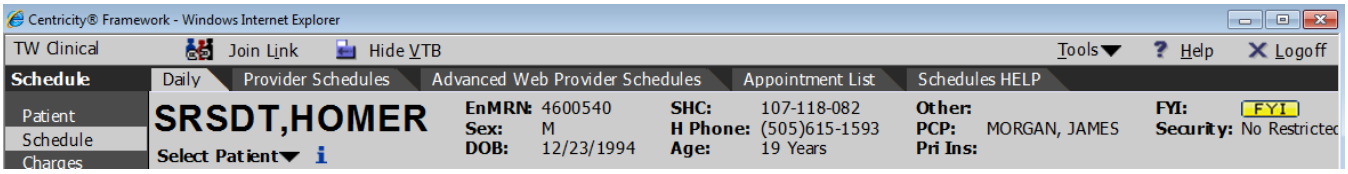
- Click on Search.



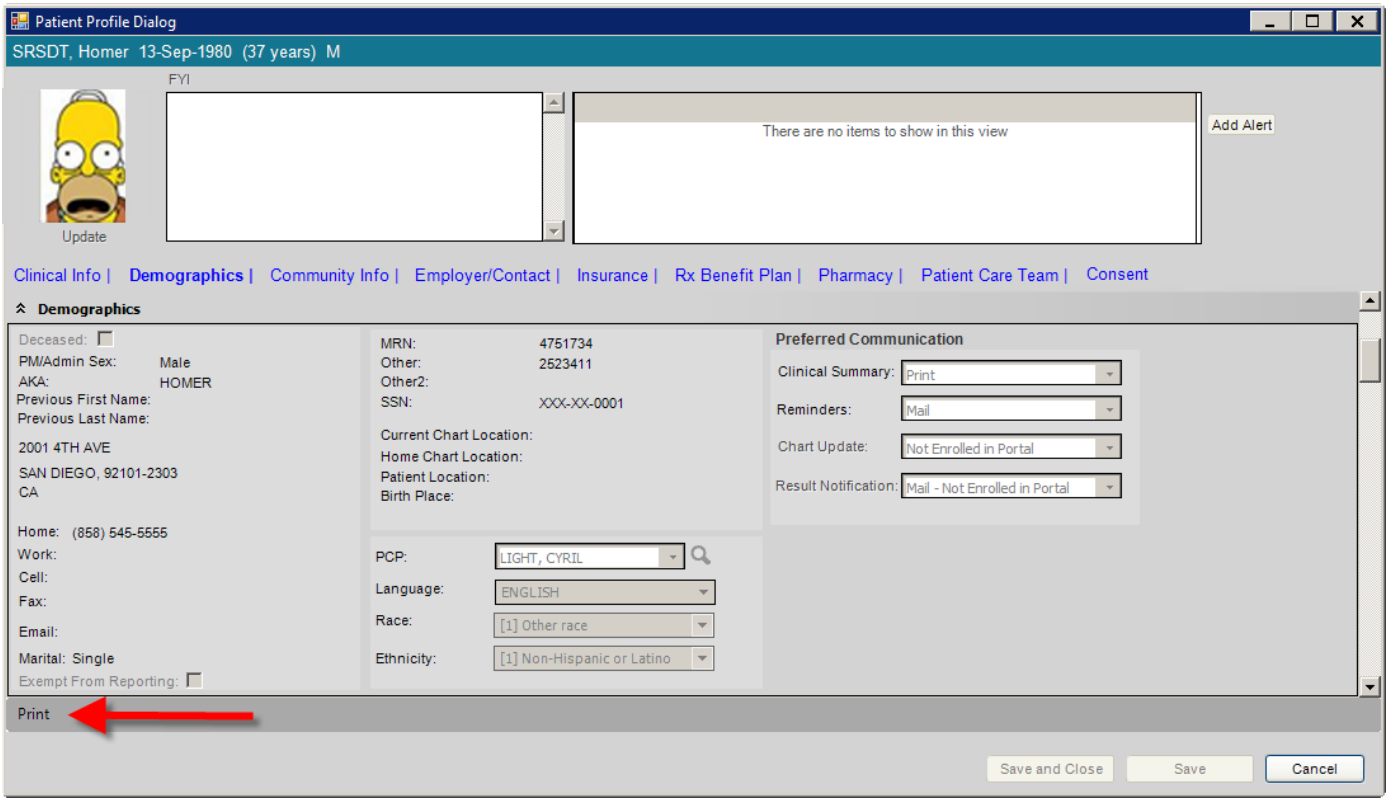
- Search for patient by MRN, Name, Partial Name, Phone or SSN.
- When the Patient Banner Bar is populated with a patient name from the schedule, the buttons on the bottom of the screen will be enabled.


TW Clinical P4
Tools
Help
Logoff
Schedule
Daily
Provider Schedules
IDX Sched
Patient
Schedule
Charges
Chart
Call Process
Tasks
Patient Lists
User Options
Clinical History
References
Reports
Sites
Downtime Alert
User Support
Vader,Darth
Select Patient
EnMRN: 50044401
Sex: M
DOB: 12/23/1955
SHC: 900-444-001
Age: 51 Years
H Phone: (555)381-2436
Other2:
PCP: FAMILYPRACTICE, MD
Security: No Restricted Data
FYI:
Pri Ins: MEDI-CAL
Daily Schedule
Arrived, Pending and Rescheduled
Personalize
Provider: RHEUMATOLOGY,MD
AM: 20
PM: 16
Total: 36
Last Updated: 10/15/2007 1:56 PM
Date: 15 Oct 2007
Sun
Mon
Tue
Wed
Thu
Fri
Sat
$
N
A
Pt Loc
Pt Status
Time
Patient
MRN
Type
Dur
Appt No.
Task
08:00 AM Vader,Darth 50044401 CON 15 69
08:15 AM Krueger,Freddy 50044402 EST 15 59
08:30 AM Vorhees,Jason 50044403 NV1 15 75
08:45 AM Evil,Doctor 50044404 OFV 15 54
09:00 AM Goldfinger,Auric 50044405 T1M 15 45
09:15 AM Witch,Blair 50044406 OFV 15 58
09:30 AM Meyers,Michael 50044407 CON 15 50
09:45 AM Winters,Oldman 50044408 T1M 15 59
10:00 AM Terminator,The 50044409 INJ 15 55
10:15 AM Lecter,Hannibal 50044410 EST 15 53
10:30 AM Gruber,Hans 50044411 CON 15 50
10:45 AM Dracula,Count 50044412 OFV 15 50
10:45 AM Voldemort,Lord 50044432 CON 15 16
11:00 AM James,Jesse 50044433 OFV 15 16
11:00 AM Bates,Norman 50044413 PE1 15 45
11:15 AM Ratched,Nurse 50044414 T1M 15 34
11:30 AM Nine,Hal 50044415 OFV 15 16
11:30 AM Jones,Flattop 50044434 EST 15 16
11:45 AM Ivy,Poison 50044435 NV1 15 16
11:45 AM Torrance,Jack 50044416 OFV 15 22
Patient Insurance: MEDI-CAL
Patient Profile...
Appt Details...
Patient Appts...
Print Sched...
Print Chart...
New Task...
ALLSCRIPTS
train 2

Patient Profile

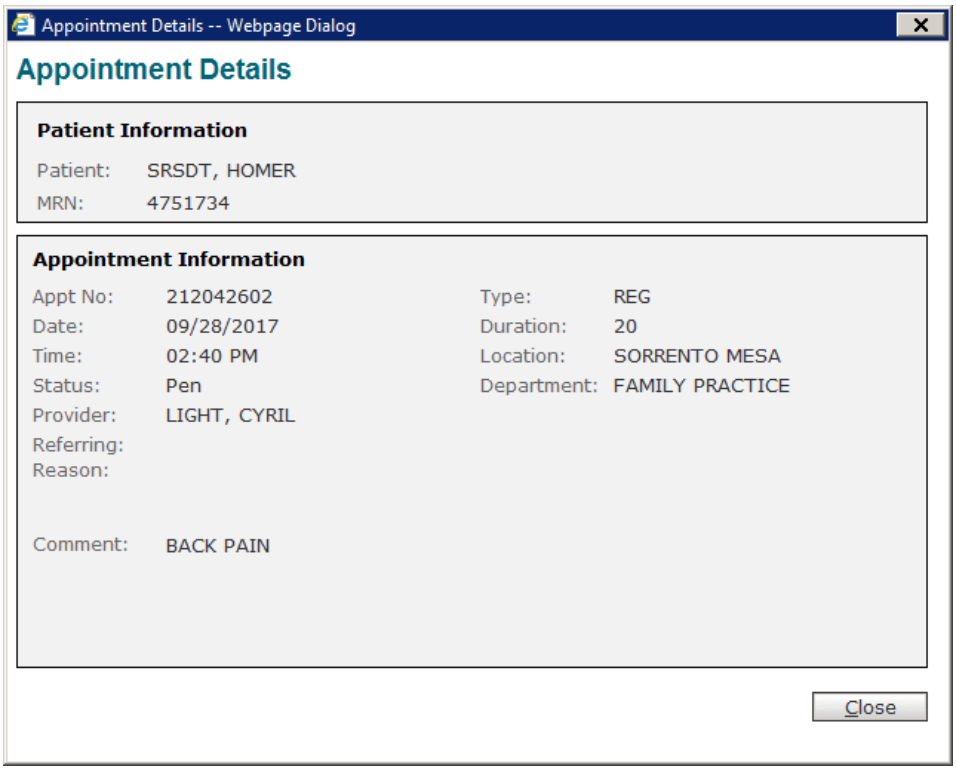


- To view the Patient Profile, click on the icon on the Patient Banner Bar -or- Click on the Patient Profile... button at the bottom of the screen



- The demographic page will appear and can be printed by clicking on <Print>.

Appointment Details

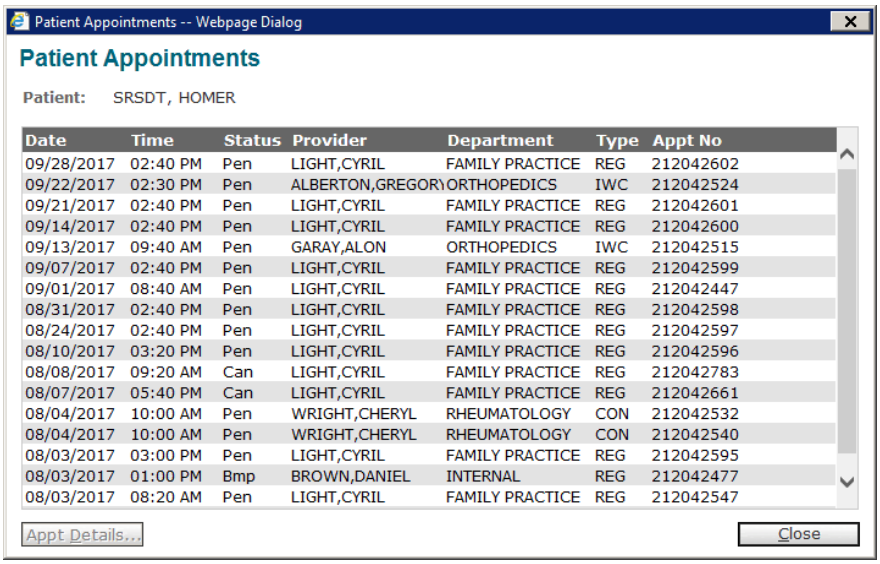


- Click on the 

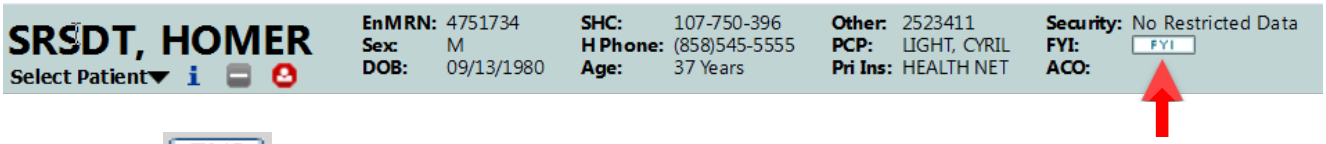
button to see the details of the current appointment.

Patient Appointments

- Click to see a list of the patient's appointments.

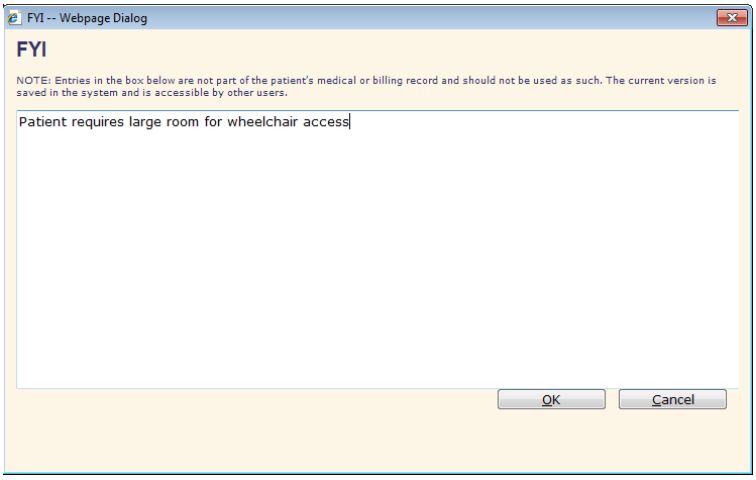


For Your Information (FYI) Button



- The FYI button can in the patient banner bar can be used to communicate important information to other staff members viewing the patient.

Note: This information is not a part of the patient's chart



- After clicking OK, the FYI button will change from white to yellow FYI on the Patient Banner Bar.

Examples of FYI Comments:

- Patient requires large room for wheelchair access
- Patient requires Spanish translator

FYI Standards – Rules and Guidelines

The FYI will be owned by the clinical staff. The nurse will notify the physician if there is information in the FYI button he/she should review. Information will be entered by the clinical staff using the IPC project tools used currently. Training involved for all clinical staff will be done by a clinical lead.

Information entered in the FYI is discoverable, do not use inappropriate content or language. Proper "task etiquette" should be used. Follow this basic rule:

"If you don't have anything nice to say, don't say anything at all"

What should the FYI be used for?

IPC (Individualized Patient Care) capturing specific data from the patient NOT related to his/her medical condition. This information is used to increase Patient Satisfaction.

- Patient doesn't like to be left alone in the exam room
- Patient recently returned from Italy
- Patient recently lost mother
- Patient just bought a new car
- Patient will need a wheelchair
- Patient is a great golfer

What should it NOT be used for?

1. Anything related to the patients medical condition
   - Patient is due for a pap smear
   - Patient is allergic to sulfa medications
   - Patient is HIV positive
2. Inappropriate comments
   - Patient was very annoying
   - Patient smells horrible
   - Patient is weird

How should info be entered?

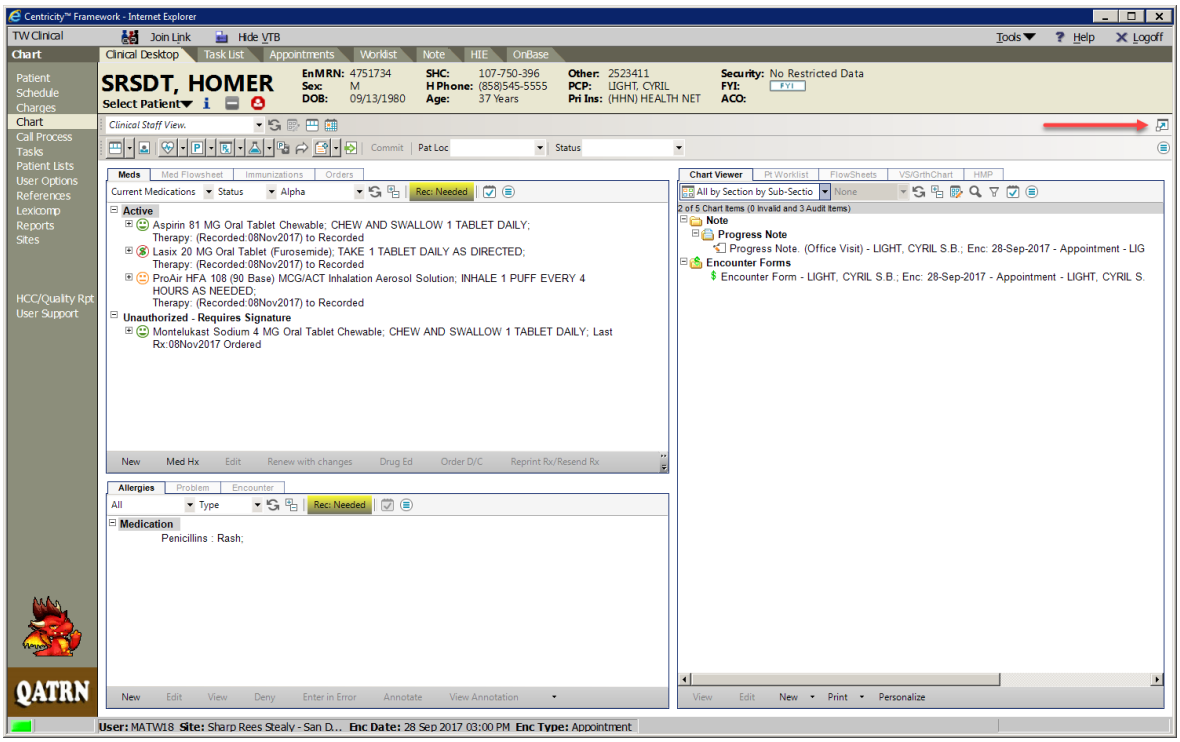
1. Information should be entered as seen below (date, info, user name):
   - 05/04/07 "Patient…" RAZCR
2. Items will be in chronological order, most recent updates to be at the top

Who to contact if the information entered is questionable?

Staff should contact their supervisor or manager. Staff should provide:

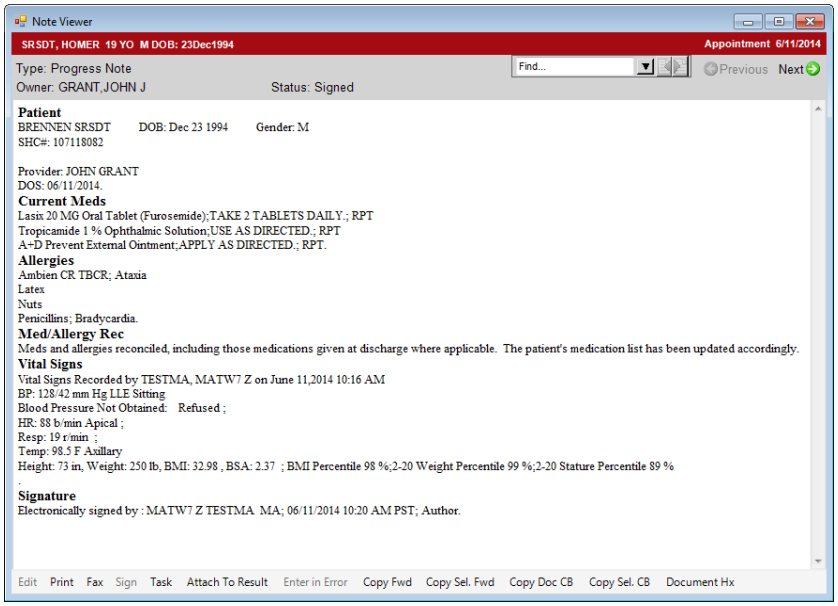
- Patient name
- Patient MRN

Chart



- The Clinical Desktop is comprised of 3 panes in one workspace.
- There are tabs within each pane.
- To view one full screen pane at a time, click on the  icon in the upper right corner.

Double click on an item in the chart to display the selected information.



AFFIX PATIENT LABEL HERE

SHARP Rees-Stealy Medical Centers

PATIENT INTAKE FORM

INTERNAL USE ONLY *BMI:_____

BP:_____ T:_____ Ht:_____

P:_____ R:_____ Wt:_____

At Sharp Rees-Stealy, it is important that your concerns are heard.
Please complete the information below to assist us with your visit today.

My major concern today is:

If time permits, other issues I would like to discuss are:

	YES	NO	
Do we need to update your address or phone #?			New #/Address:
Do you need a note for work/school or any other form?			
Do you need medications refilled?			Name of medication(s):
*Do you use any tobacco products?			Type of tobacco:
*Have you recently received care such as inpatient hospitalization, ER visits, Urgent Care visits, nursing home stays, or visits with other physicians?			Which facility:
You can now get a summary of today's visit through our patient portal. If you aren't already signed up, would you like more information?			

If you are 64 years of age or younger, STOP here. STOP

If you are 65 years of age or older, please complete the two questions below:

*Question #1: Fall Screening	YES	NO
1. Have you fallen in the last calendar year?		
a. If yes, how many times? _____		
b. Were you injured?		

*Question #2: Depression Screening

Over the last two weeks, how often have you been bothered by any of the following problems?

	Not at all	Several days	More than half the day	Nearly every day
1. Little interest or pleasure in doing things	0	1	2	3
2. Feeling down, depressed or hopeless	0	1	2	3

STOP

INTERNAL USE ONLY

FOR OFFICE CODING ONLY ADD QUESTIONS 1 & 2 FROM PAGE 1	_____ + _____ + _____ + _____ = TOTAL SCORE: _____

	Not at all	Several days	More than half the day	Nearly every day
3. Trouble falling or staying asleep, or sleeping too much	0	1	2	3
4. Feeling tired or having little energy	0	1	2	3
5. Poor appetite or overeating	0	1	2	3
6. Feeling bad about yourself – or that you are a failure or have let yourself or your family down	0	1	2	3
7. Trouble concentrating on things, such as reading the newspaper or watching television	0	1	2	3
8. Moving or speaking so slowly that other people could have noticed? Or the opposite – being so fidgety or restless that you have been moving around a lot more than usual	0	1	2	3
9. Thoughts that you would be better off dead or of hurting yourself in some way	0	1	2	3

FOR OFFICE CODING ONLY ADD QUESTIONS 1-9 FROM PAGES 1 & 2	_____ + _____ + _____ + _____ = TOTAL SCORE: _____

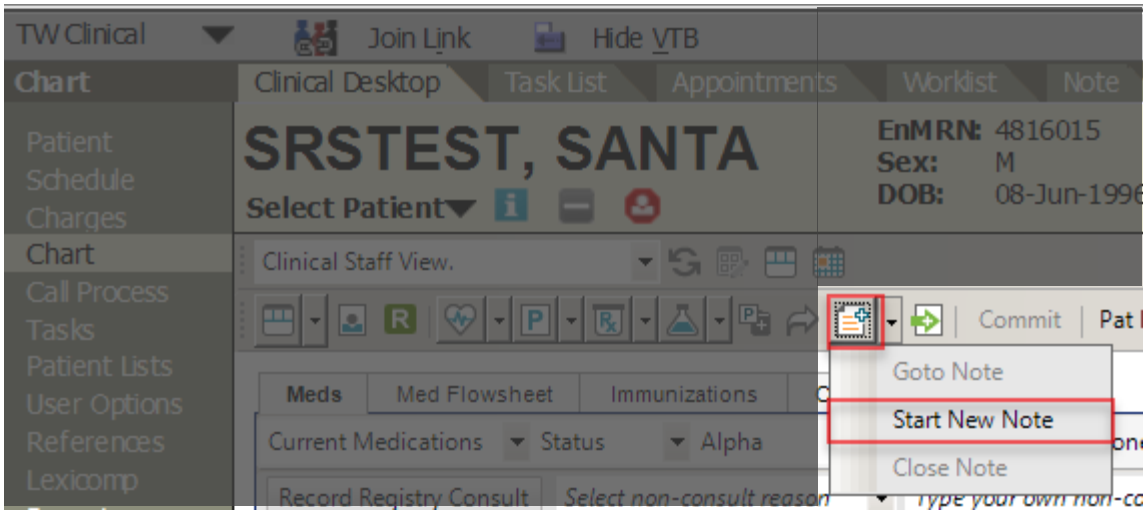
INTERNAL USE ONLY

Pain Scale *(Provider use only)*: _____

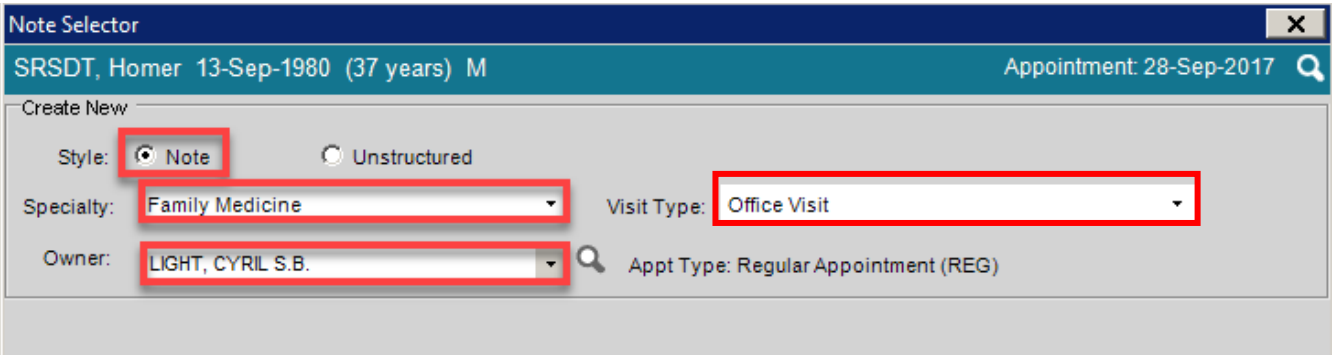
	Provider action needed?	
Depression Screening:		
Depression on problem list? (YES/NO) If yes, skip question *(Document once a calendar year)*	YES	NO
Fall Screening:		
Criteria 65+: If 2 or more falls or 1 fall with injury *(Document once a calendar year)*	YES	NO
BMI Screening:		
18-64 years: If <18.5 or ≥25 provider action needed *(Document Wt & Ht every 6 months)*	YES	NO
65+ years: If <23 or ≥30 provider action needed *(Document Wt & Ht every 6 months)*	YES	NO
Transitions of Care 65+:		
Patient outside SRS or doesn't share same E.H.R.	YES	NO
Social History: Smoking status documented changed or unchanged *(Document once a calendar year)*	YES	NO
Patient education material provided *(Document once a calendar year)*	MD	CS

Starting a New Provider Note (*V11 Note)*

- To begin a note, start by **double-clicking**  on the patient from the schedule.

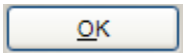


- Click the arrow beside the Note icon  and select Start New Note



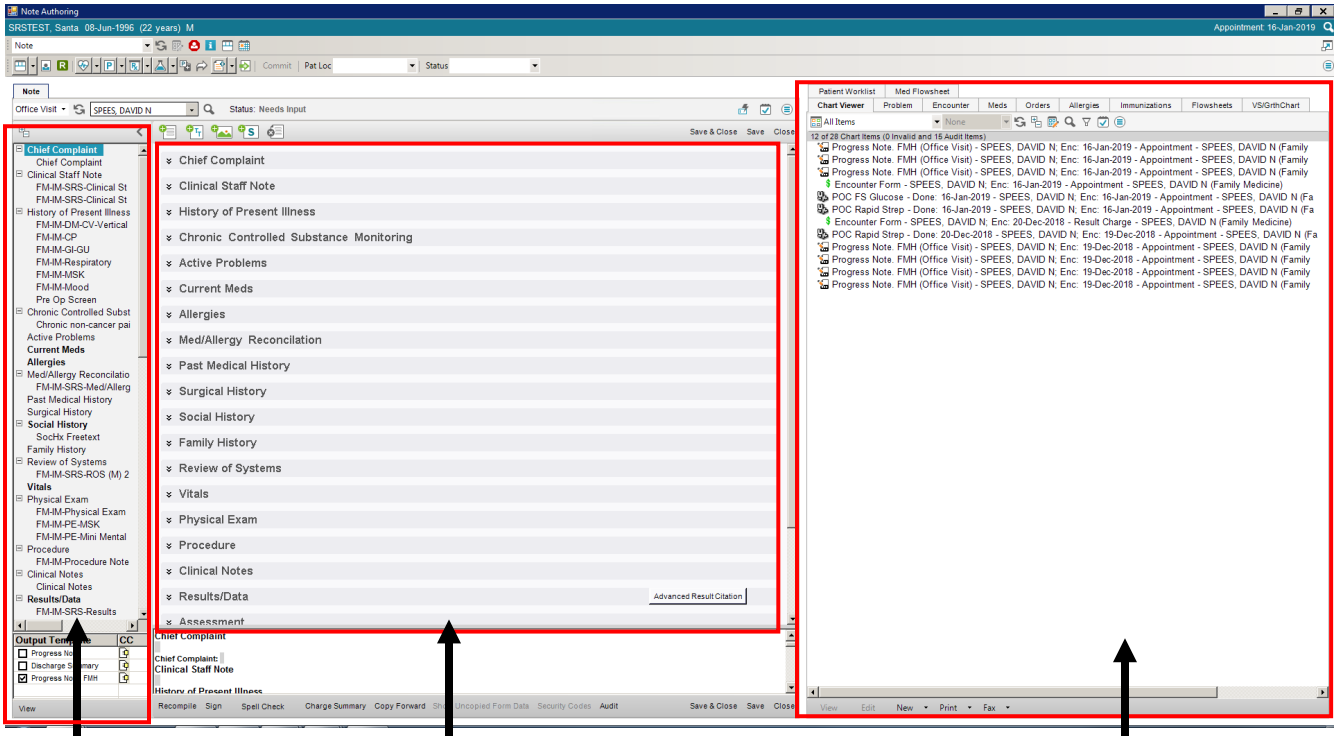
Select the correct fields in Note Selector:

a. Select “Note” if not defaulted
b. Select Specialty
c. Select Visit Type
d. Select Owner

- Click 

Note Authoring Window

- A separate window will pop-up called ‘Note Authoring’

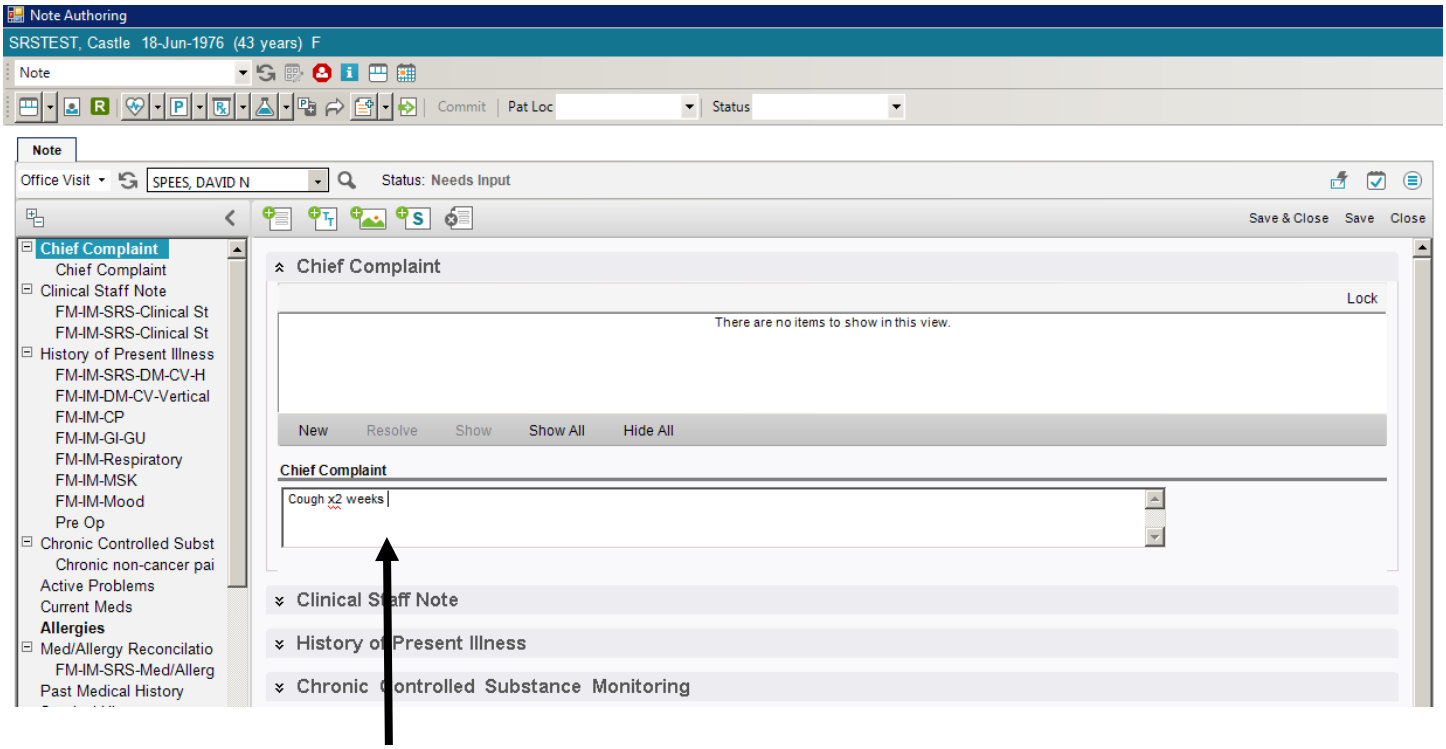


Complete Note by completing designated fields

- **Clinical Staff Note**
- **Medications**
- **Allergies**
- **Med/Allergy Reconciliation**
- **Pharmacy**
- **Height/Weight/Vitals**
- **Meaningful Use Guidelines**

Note: Review at your site which fields to populate. Some departments may be required to complete additional fields

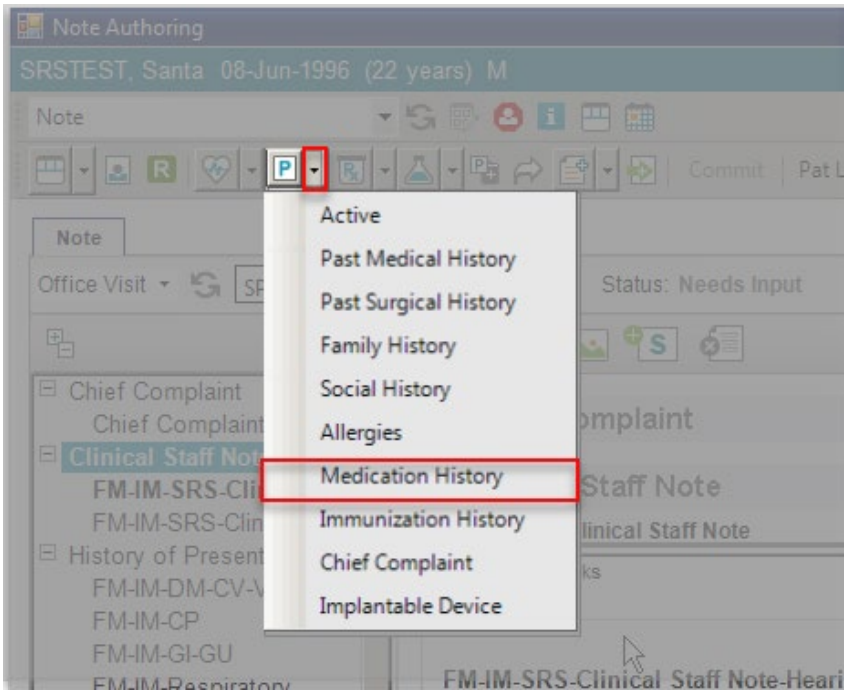
Reason for Visit

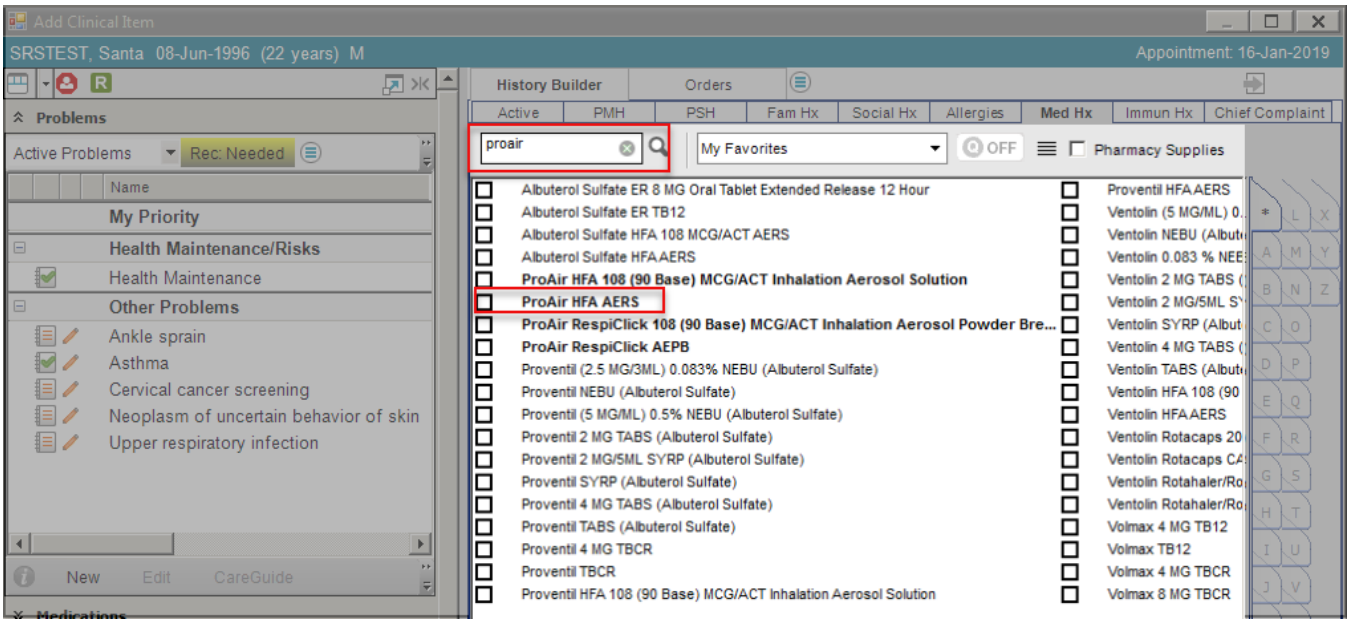


- Click into the free-text ***Chief Complaint*** field and enter the patient's chief complaint(s)

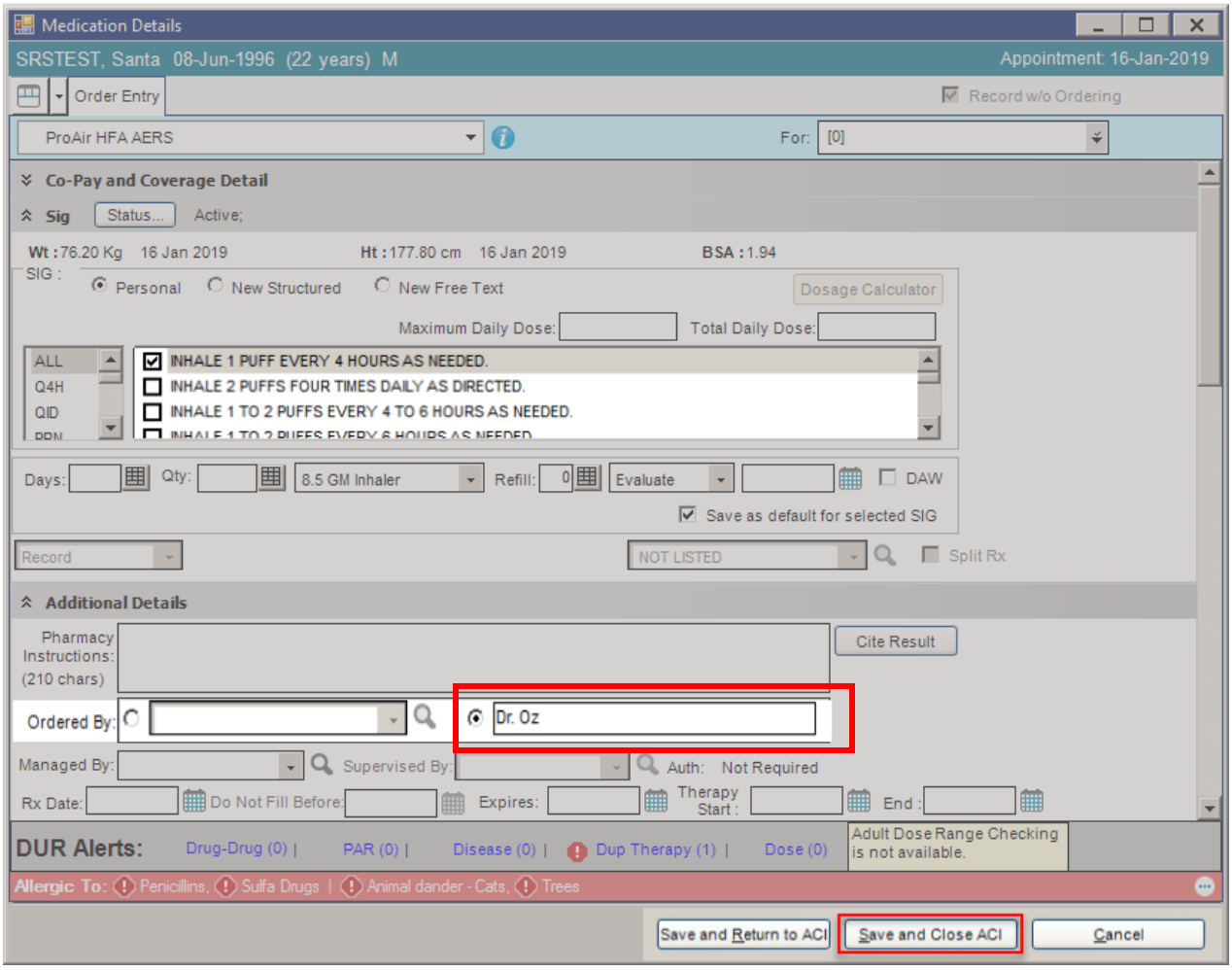
Medication History

- Click the arrow beside the P (Problem)  icon
- Select Medication History

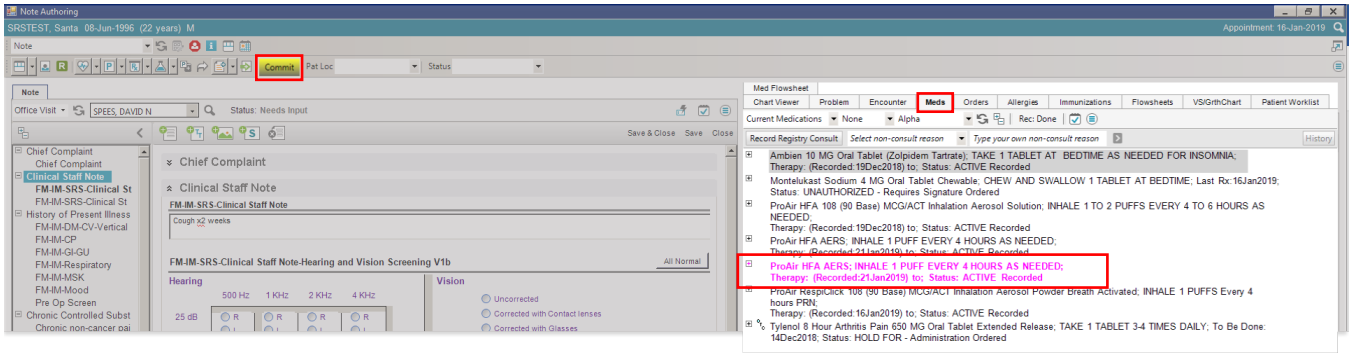




- In the search text box. Type in all or part of the medication name.
- **Double-Click**  on the medication name.



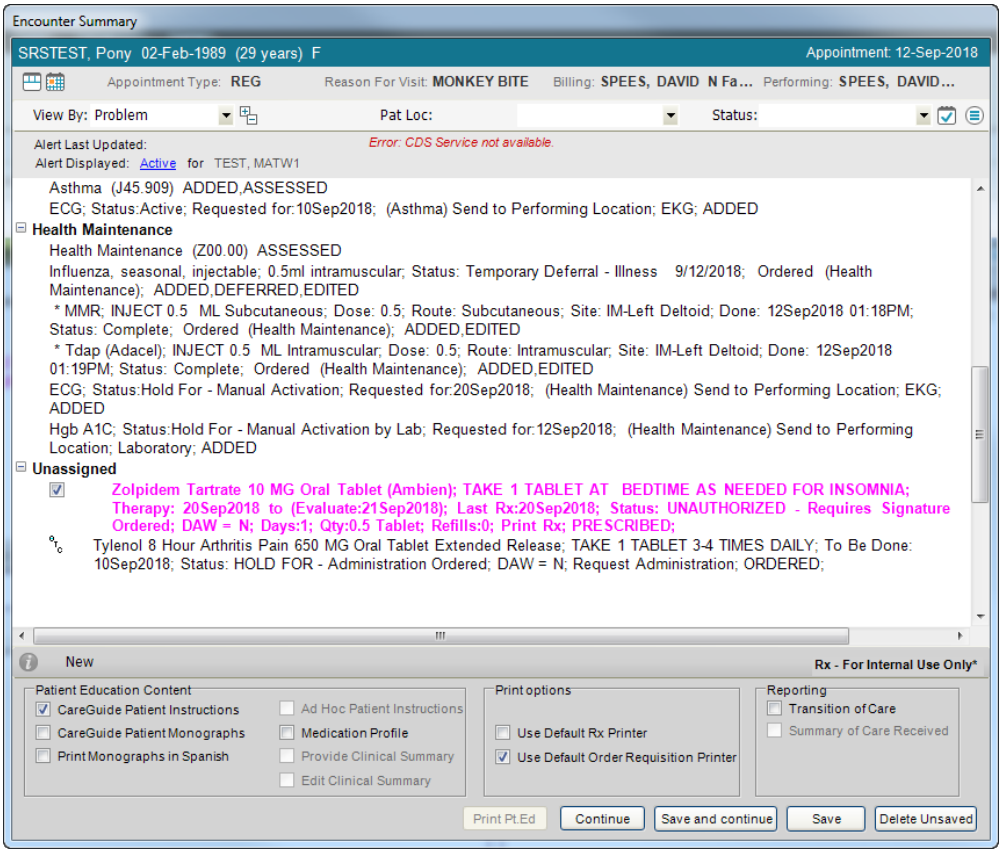
- Select the appropriate Sig and click the Save and Close ACI button.



- The added Medication History will be **pink** until it is saved.
- To save the information, click on the Commit button.

- Once you click Commit, you will get an **"Encounter Summary" pop-up window**

- Click **Save and Continue**



This allows you to verify the information that was entered before it is saved in the patient's chart.

Continue – will **close** the Encounter Summary window **without saving** the information. The information will remain pink

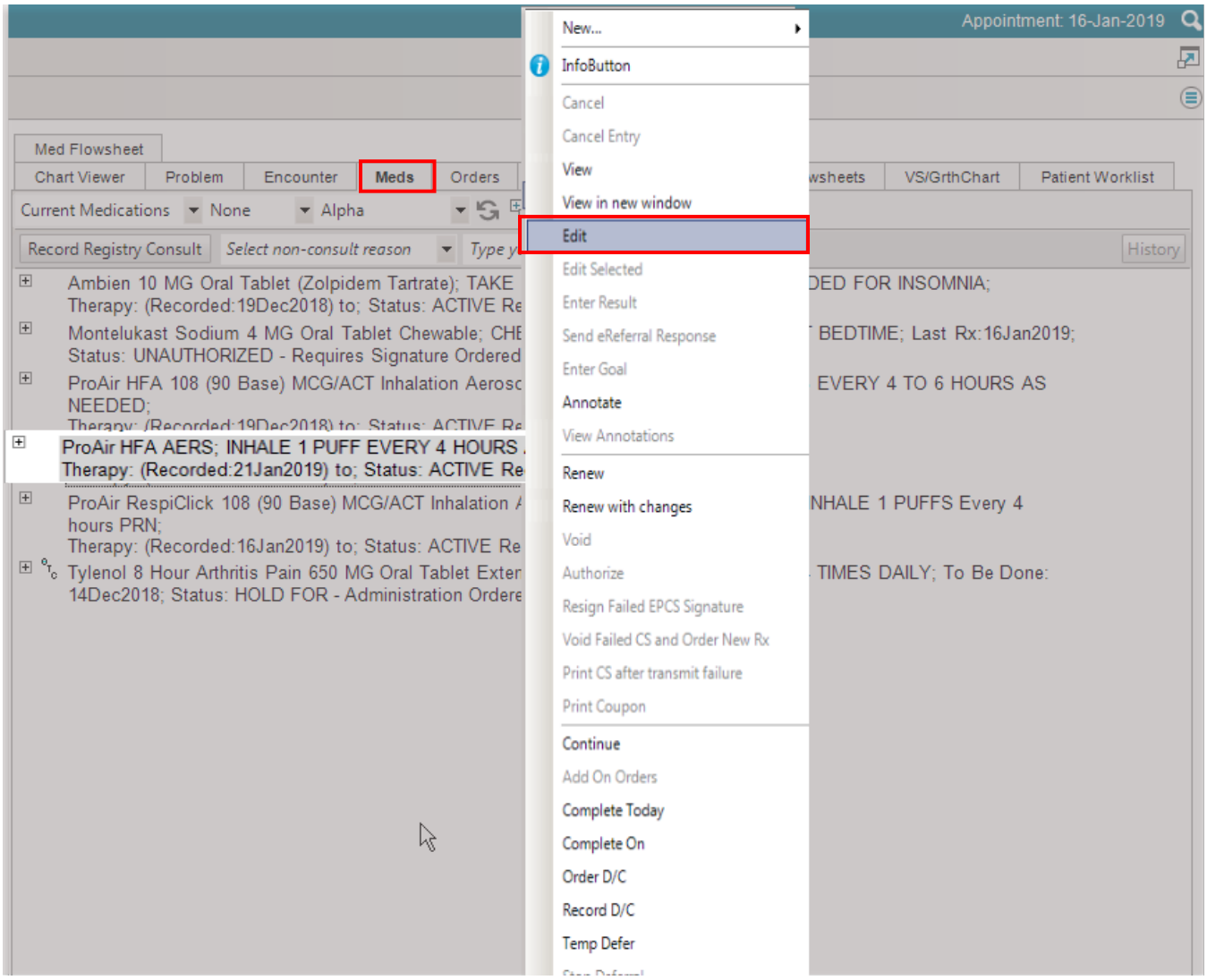
Save and continue – will **save** the information and **close** the Encounter Summary window. The information will no longer be pink

Save – will **save** the information and keep the Encounter Summary window **open**. The information will no longer be pink.

Delete Unsaved**Delete Unsaved** – will **delete** the information without saving and **close** the Encounter Summary window. The information will be removed from the patient's chart.

Edit Medication

- Right click on the medication and click ***Edit***



- The edited Medication will be **pink** until it is saved.
- To save the information, click on the Commit button.

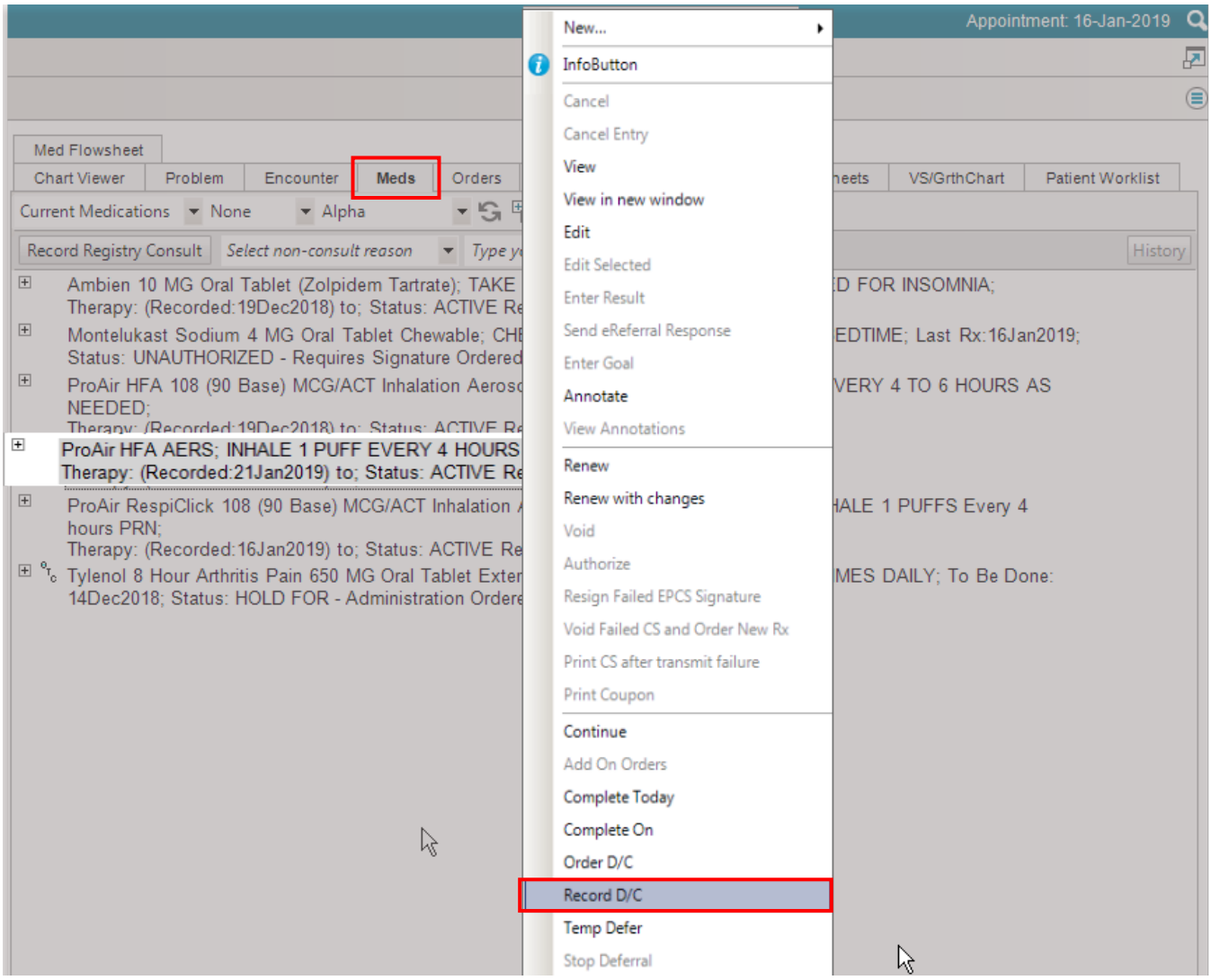
- Once you click Commit, you will get an **"Encounter Summary" pop-up window**
- Click Save and continue

Remove Medication

Inform the provider if the patient is no longer taking a medication that is on their medication list. ***DO NOT*** *remove the medication unless instructed by the provider.*

The provider will consult with the patient and either remove the medication or instruct you to remove it.

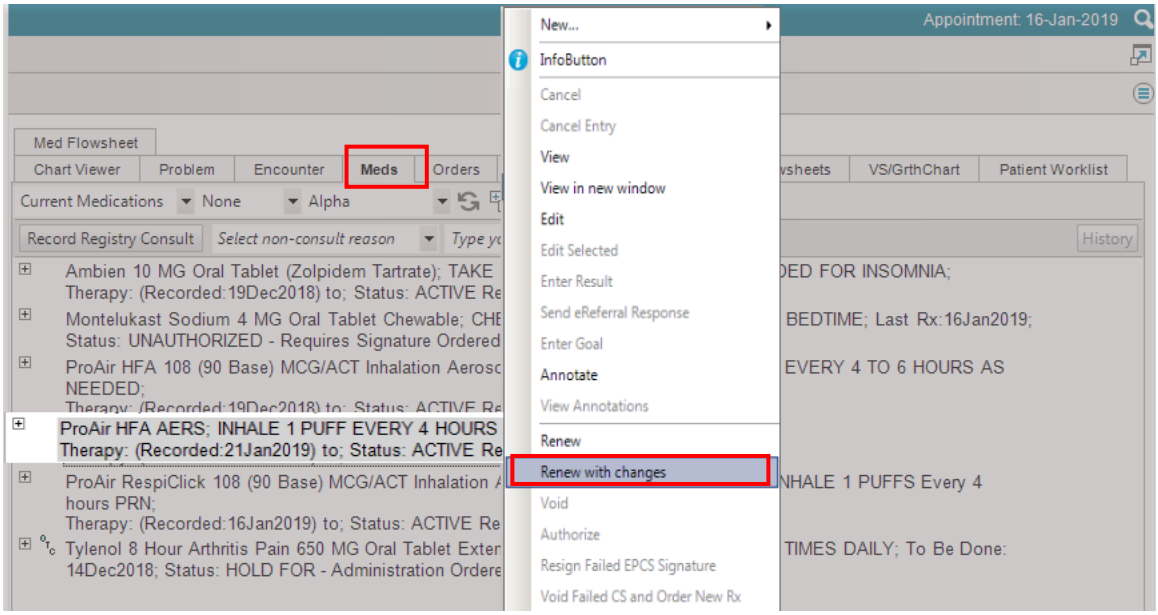
- Right click on the medication and click ***Record D/C***

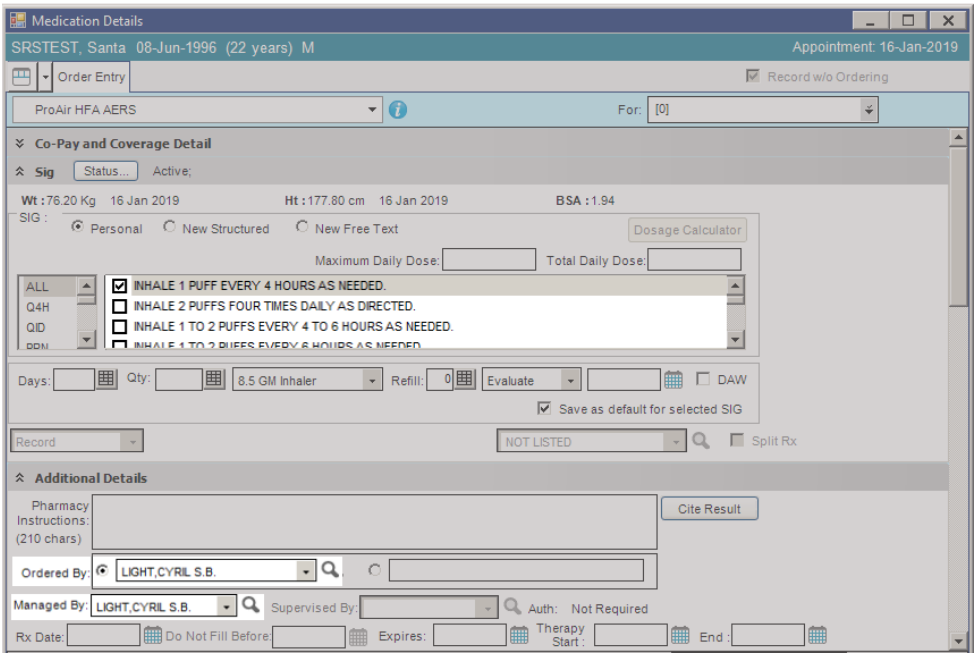


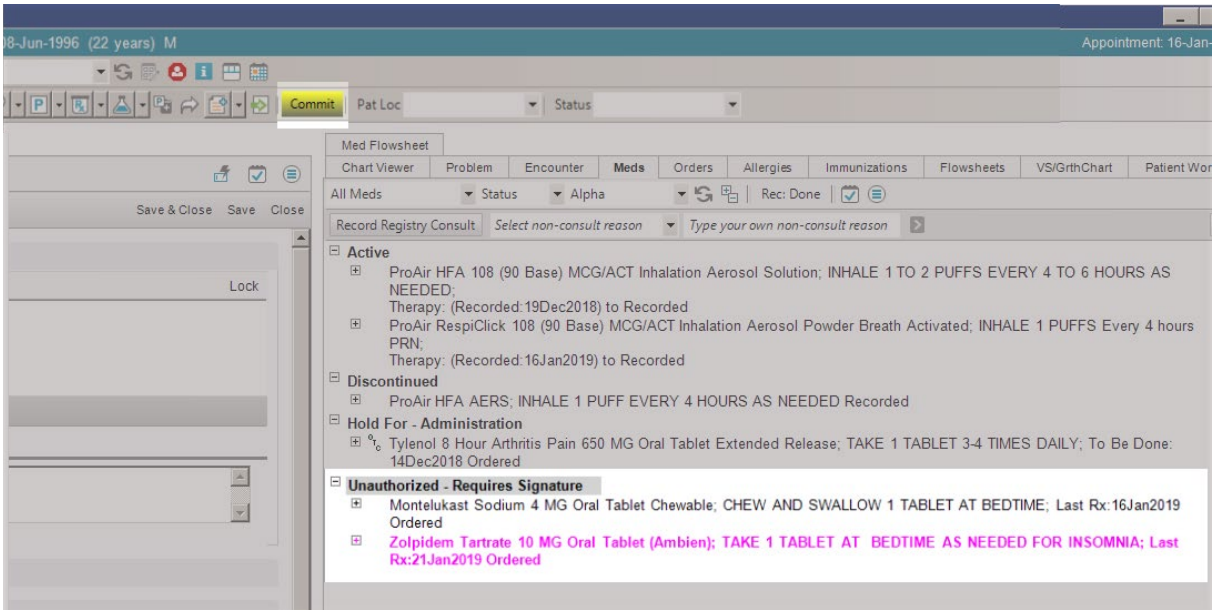
- To save the information, click on the Commit button.
- Once you click Commit, you will get an **"Encounter Summary" pop-up window**
- Click Save and continue

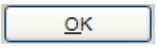
Renew Medications

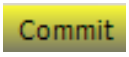
- Right click the name of the medication to refill and click on ***Renew with Changes.***

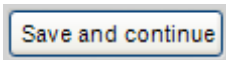






- Click 

- Click 

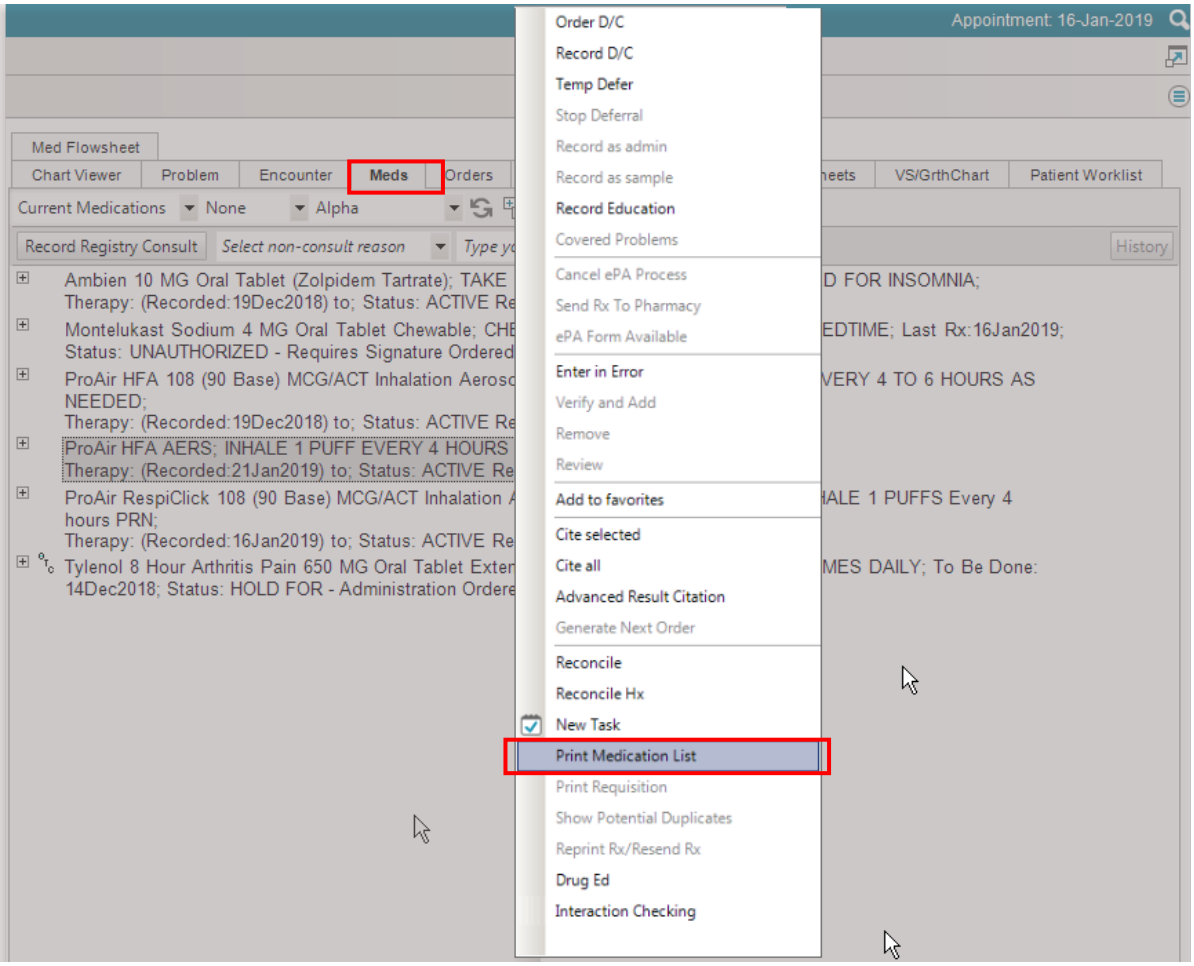
to save
- Click 

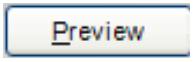
What do the faces mean?

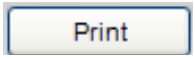
- Medication is covered by insurance with a co-payment.
- Medication is covered by insurance but requires a higher co-payment.
- Medication is not covered by insurance.
- Not reimbursable
- Over the counter
- PA Prior authorization required

Print Medication List

- Right click in the *Medication Pane* and click ***Print Medication List***

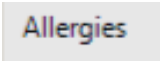


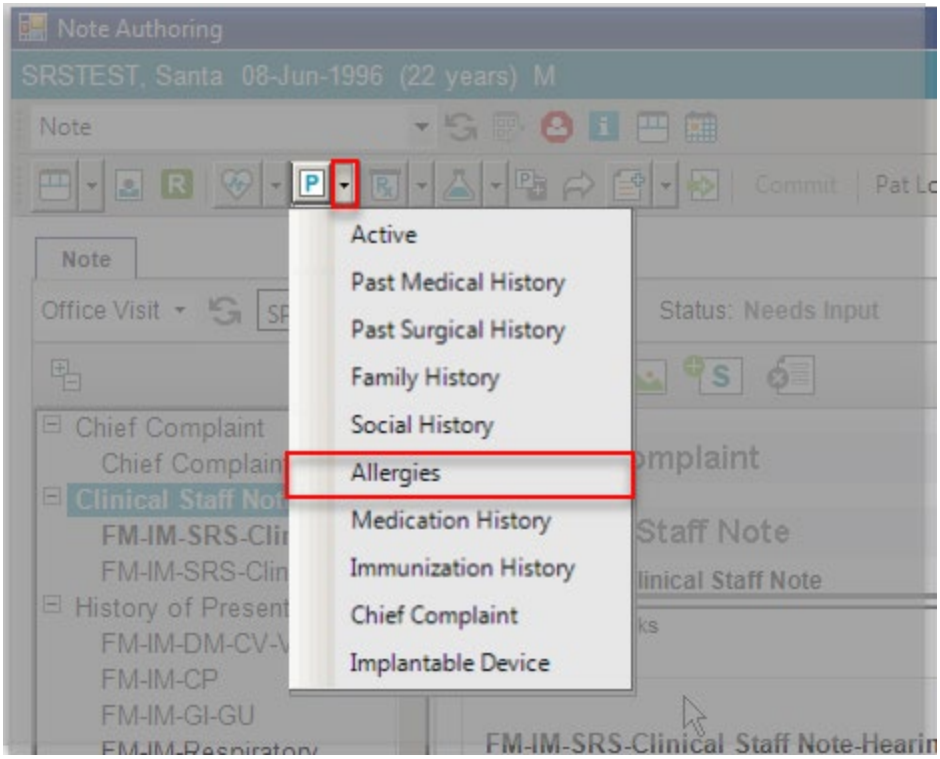
- Click 

- Click 

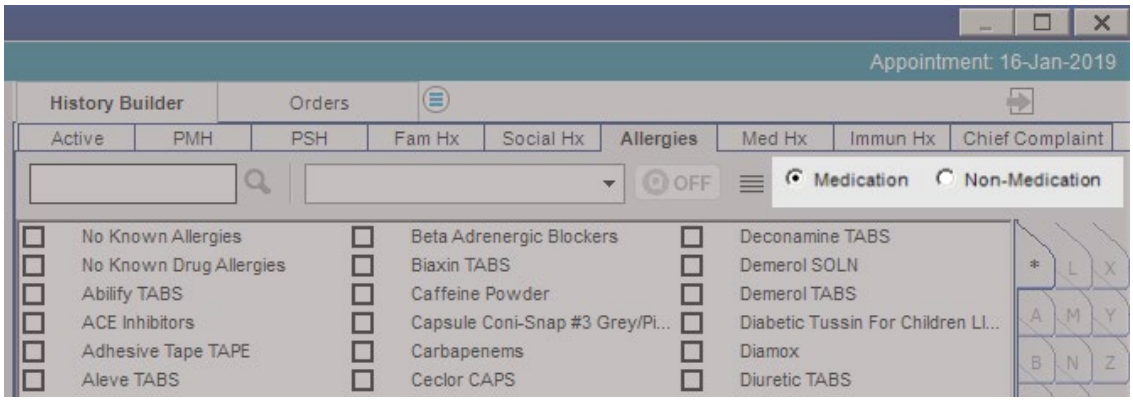
Allergies

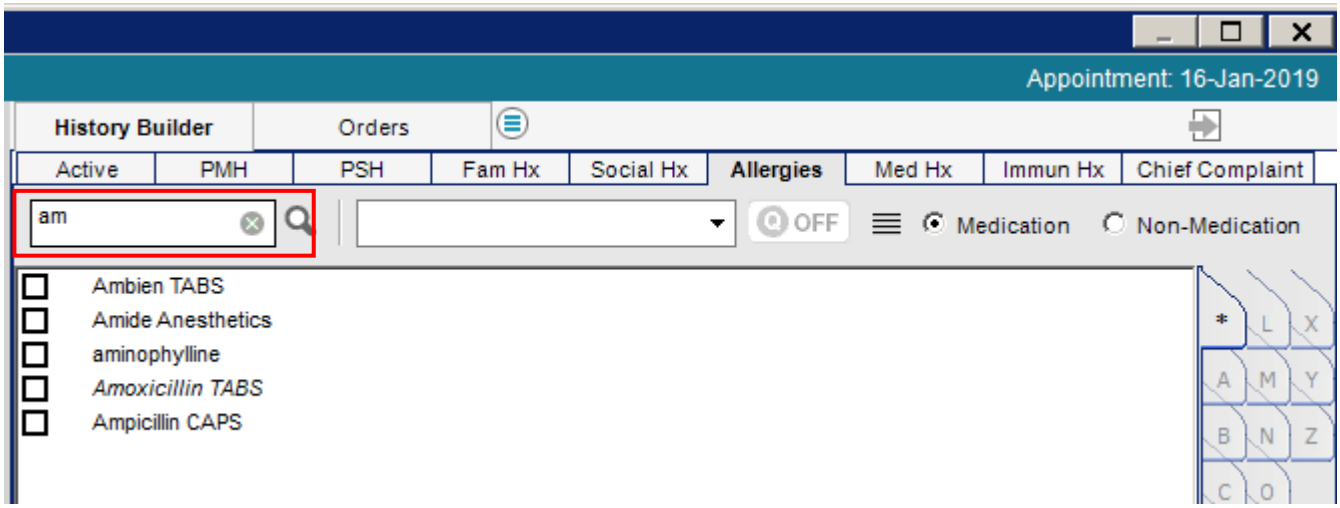
Keywords:
"For your safety…"

- Click the arrow beside the P (Problem)  icon
- Select 

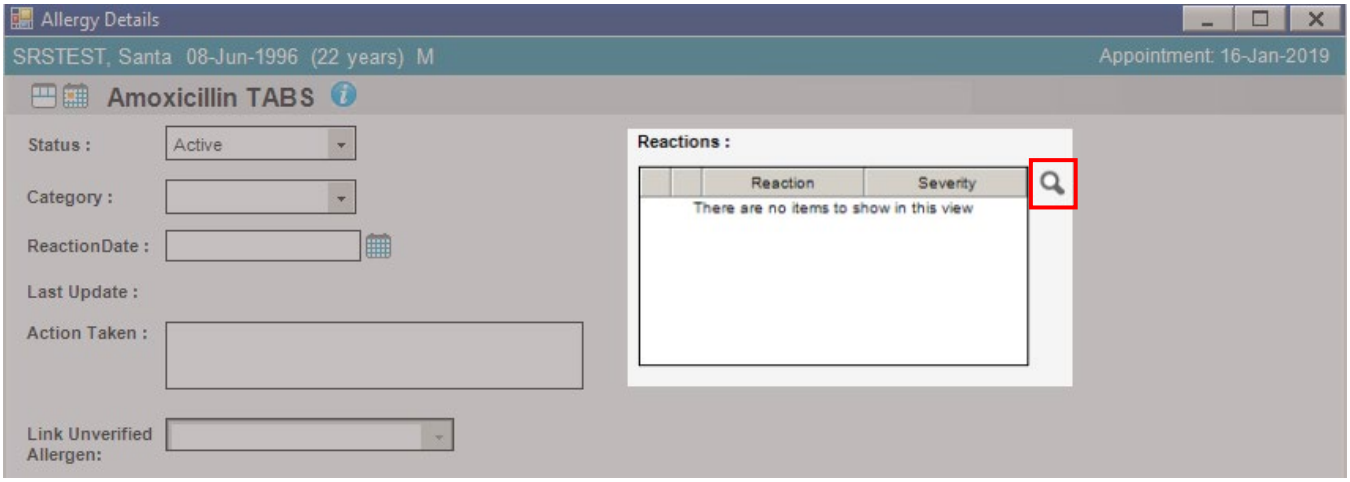


- Select ***Medication*** or ***Non-Medication.***

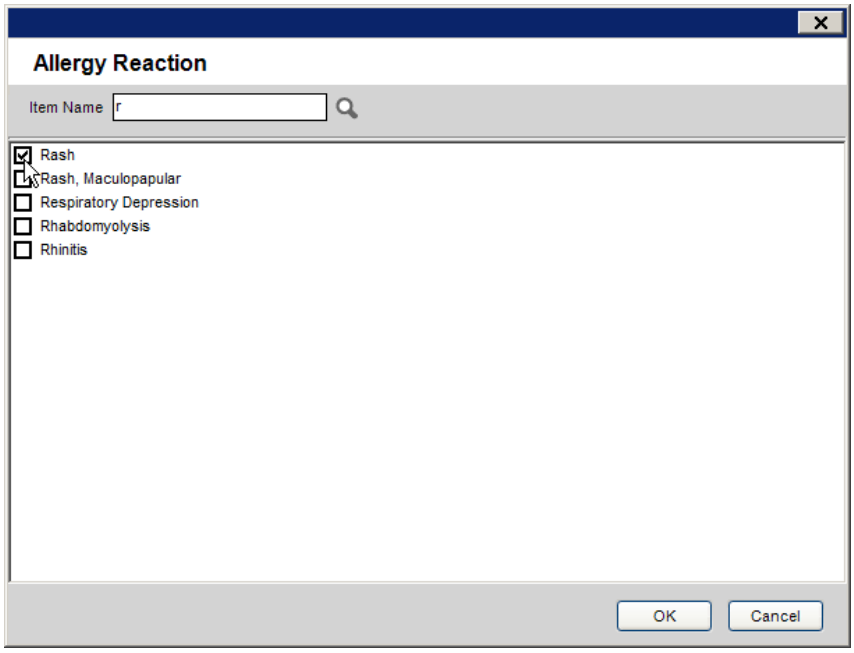


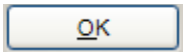


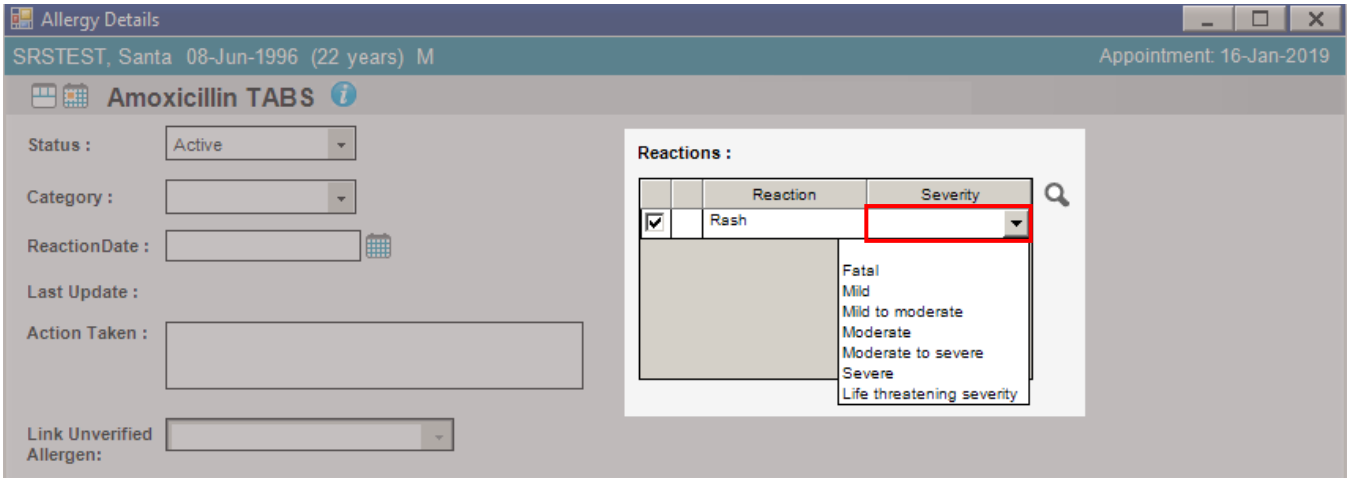
- Type in the name of the medication and press Enter.
- **Double-Click**  on the allergy.



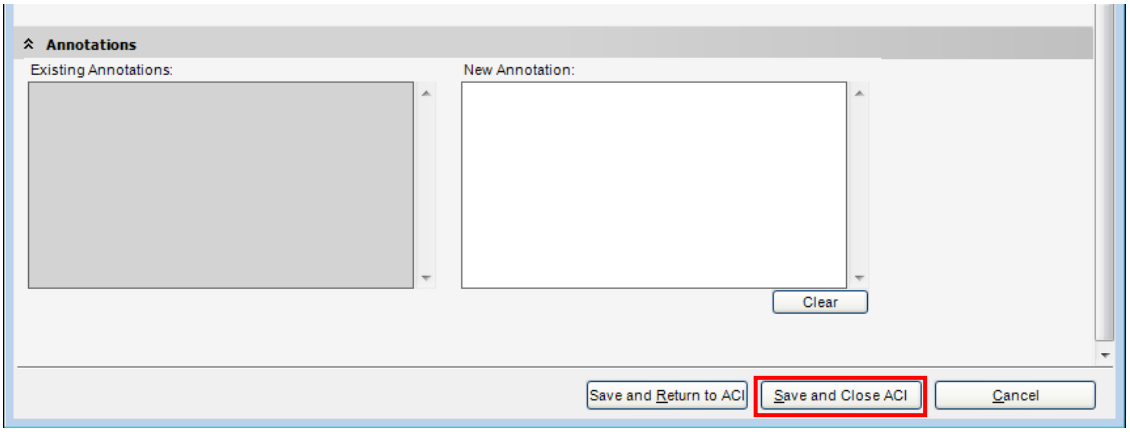
- Click on the magnifying glass icon  to add a reaction.



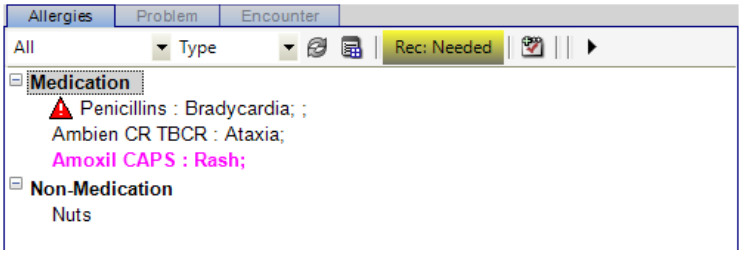
- Search and checkmark the correct allergy reaction.
- Click 



- Click on the drop-down arrow to choose the **Severity**



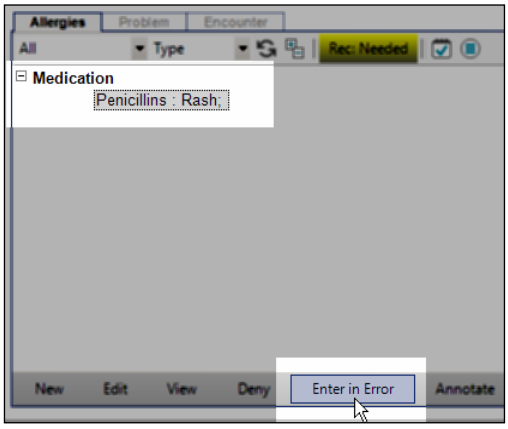
- Click the Save and Close ACI button.



- The new allergy will appear **pink**.
- Click Commit to save.
- Click Save and continue

Allergies Entered in Error

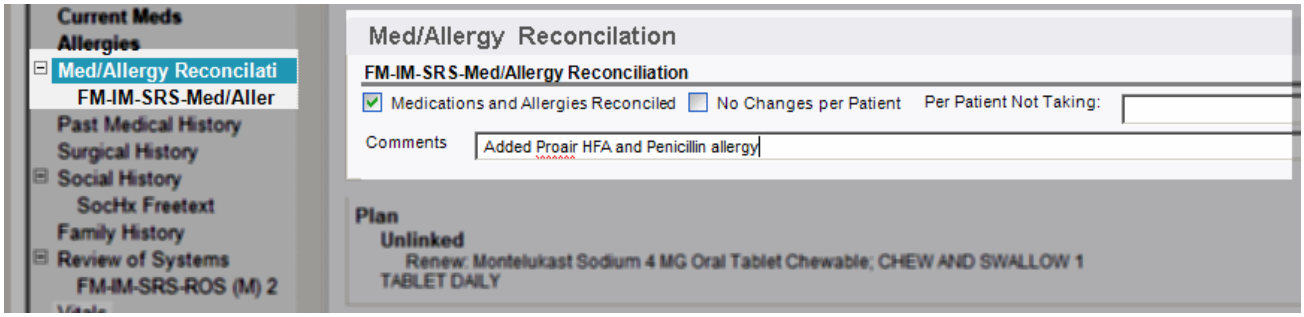
- If an allergy was entered in error, highlight the name of the allergy by clicking on it.
- Click on Enter in Error.



Note: This process must be done by the person who entered the Allergy in Touchworks AND it must be done within the same work day.

Med/Allergy Reconciliation

- Select ***Med/Allergy Reconciliation*** from TOC pane



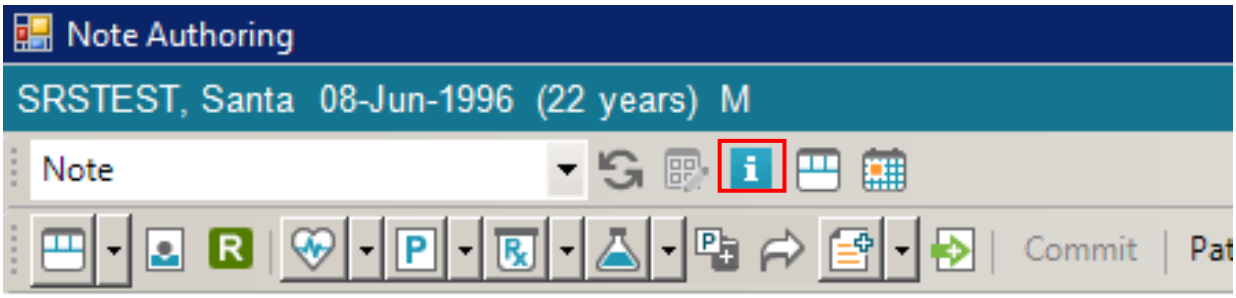
- Checkmark **Medications and Allergies Reconciled**
  - If there were no changes, checkmark *No Changes per Patient*

- Document any changes made to patient Medications or Allergies in **comments**

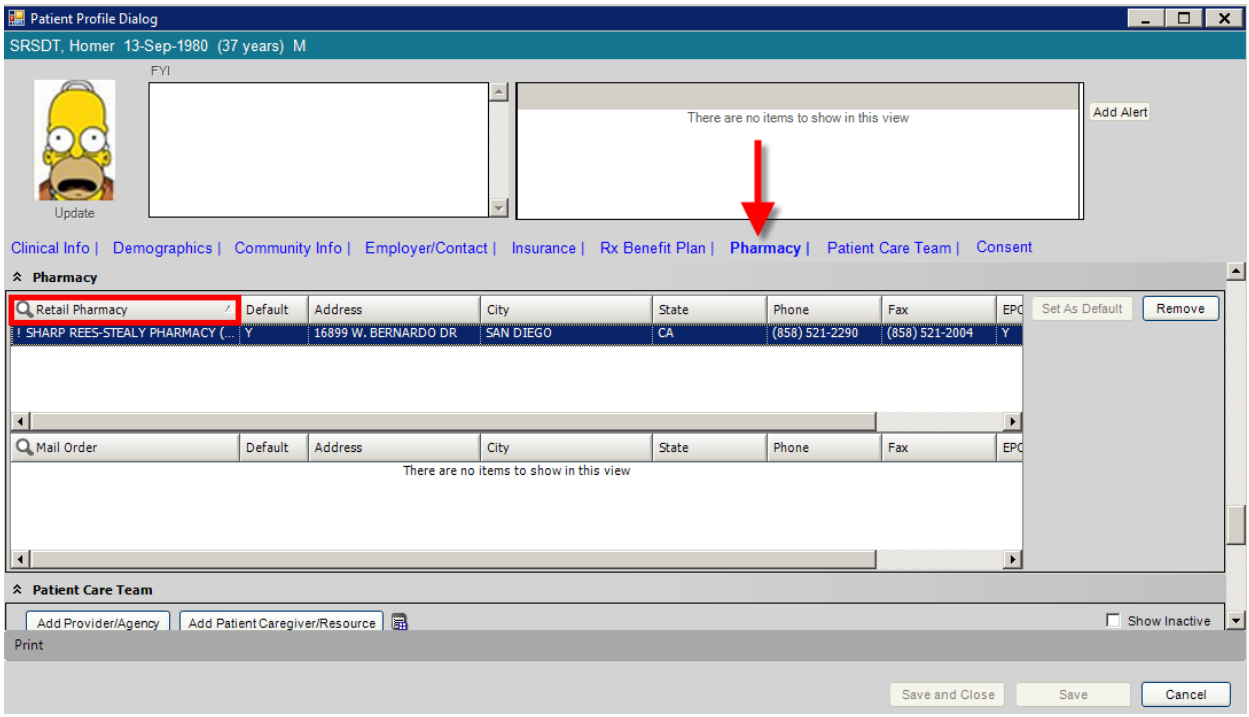
Adding a Pharmacy (*in Patient Profile)*

Suggested scripting: What **SRS** pharmacy would you like your provider to use for your prescriptions?"

- Click on the  icon to access the **Patient Profile**

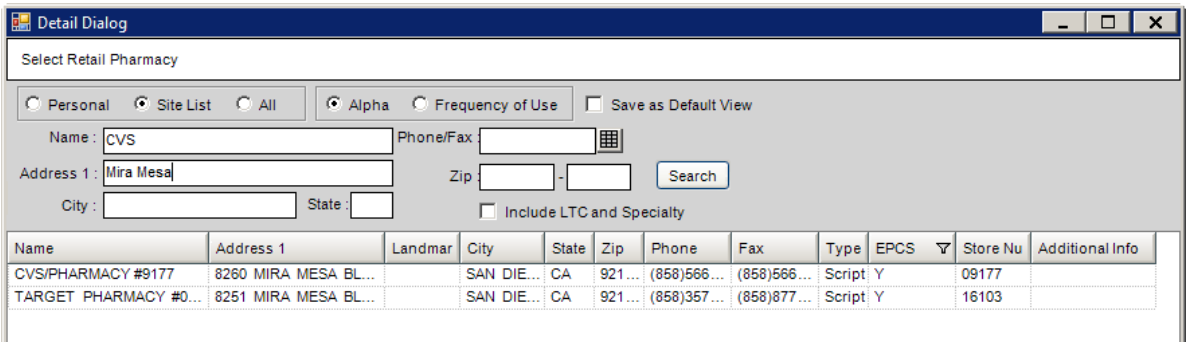


- Click pharmacy



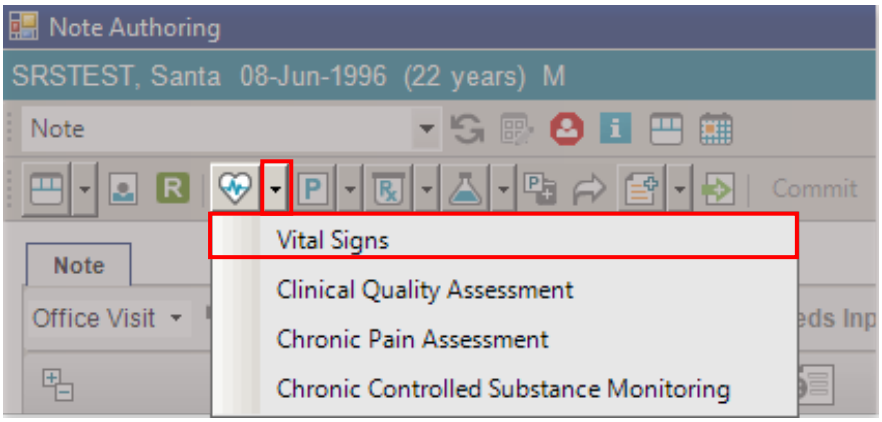
- Click on the Magnifying Glass 

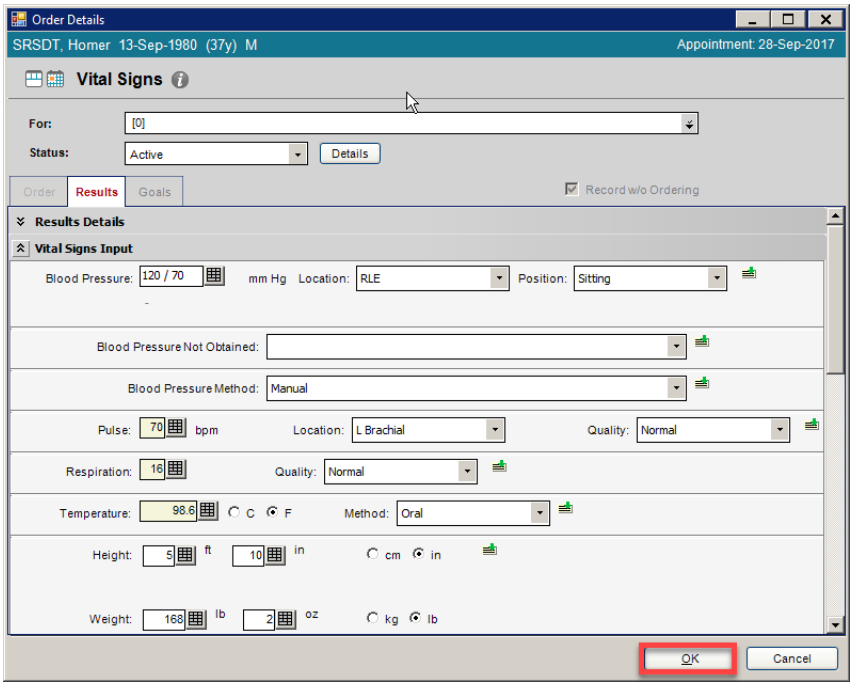
- Type in the name and/or address of the pharmacy and click Search.

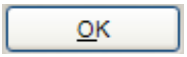


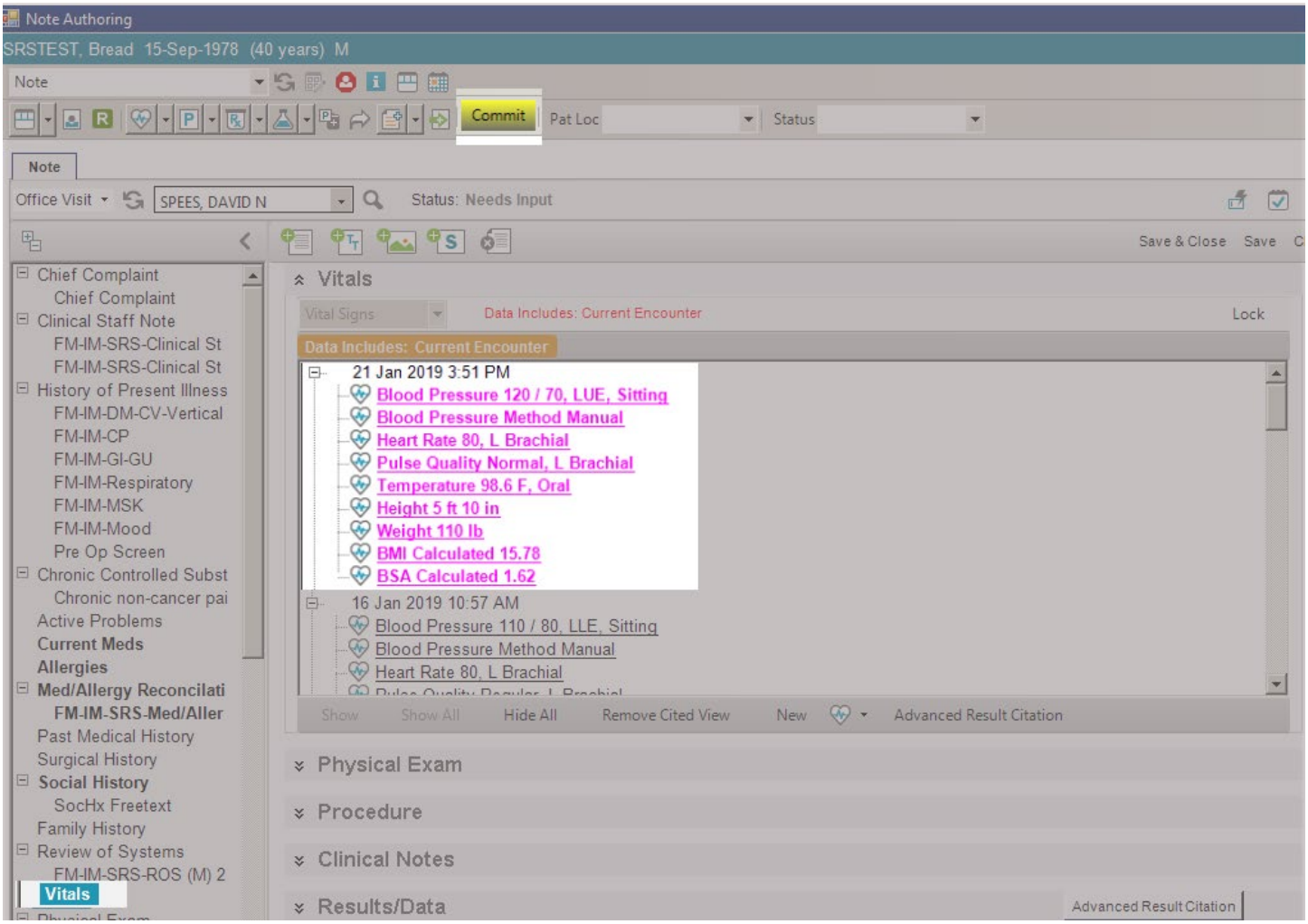
Vitals

- Click on the drop-down menu next to the  icon





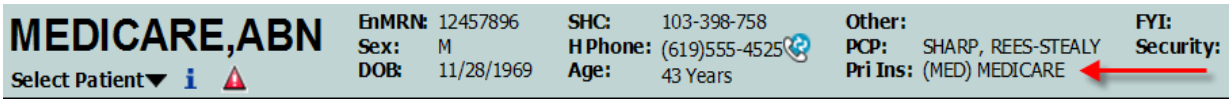
- Enter Vital Signs & Click 



- The new vitals will appear **pink**.
- Click Commit to save.
- Click Save and continue

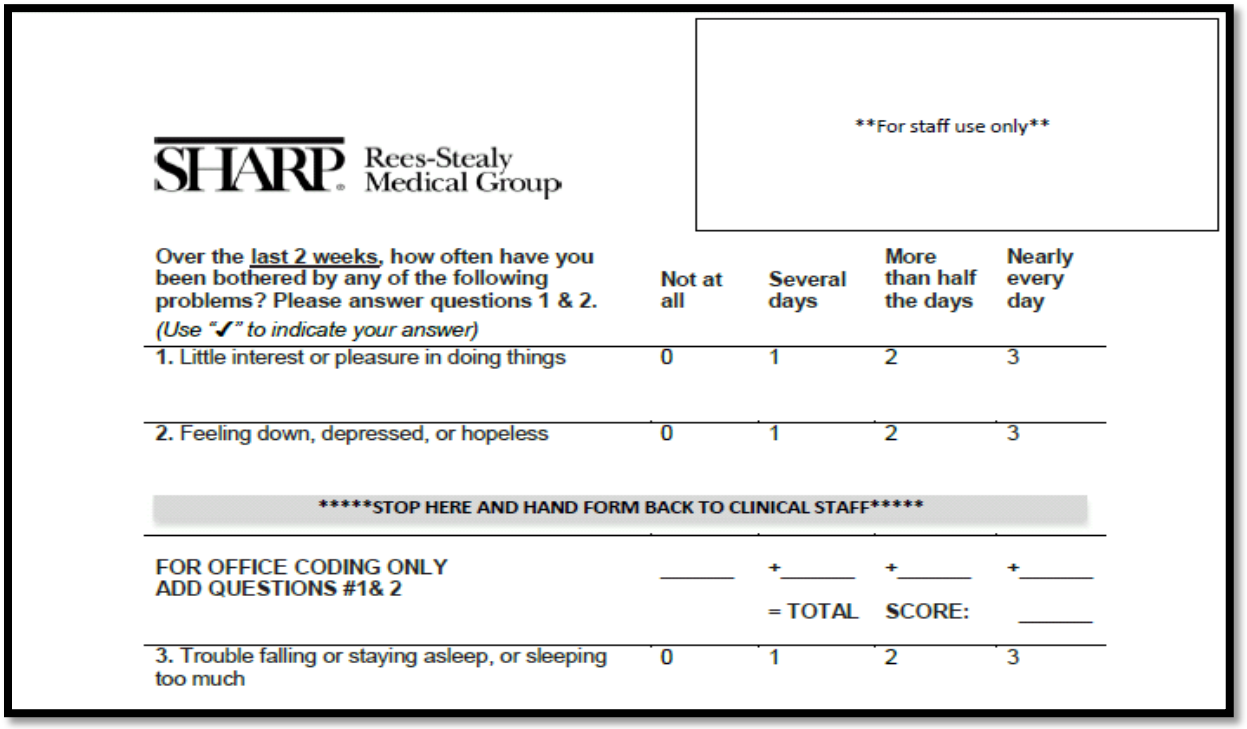
Meaningful Use Guidelines

Screenings must be completed on patients **65 or older**



Note: Check with your department lead or supervisor to determine if your department is participating in this workflow.

- **Depression Screening** (Annually): Provide patient with the PHQ Form, they will fill out the **first two** questions (PHQ-2). If the score of the first two questions equal 3 or more, ask the remaining questions with the patient. The sum off **all** the questions (including the PHQ-2 score) will equal the PHQ-9 score.
- **Fall Screening** (Annually): Ask patient if they have fallen within the past year, if they have, how many times and if there were injuries.
- **BMI Screening** (Every 6 months): Ensure you capture weight and height at the visit if this was not captured in the last 6 months.



SHARP Rees-Stealy Medical Group

For staff use only

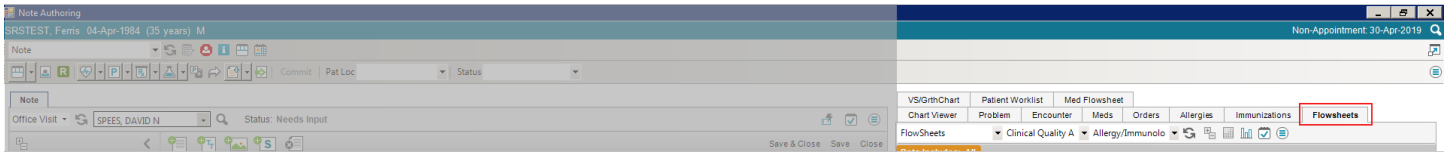
Over the last 2 weeks, how often have you been bothered by any of the following problems? Please answer questions 1 & 2. *(Use "✓" to indicate your answer)*	Not at all	Several days	More than half the days	Nearly every day
1. Little interest or pleasure in doing things	0	1	2	3
2. Feeling down, depressed, or hopeless	0	1	2	3

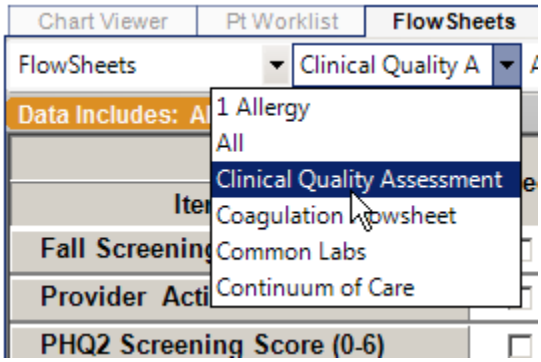
*****STOP HERE AND HAND FORM BACK TO CLINICAL STAFF*****

FOR OFFICE CODING ONLY ADD QUESTIONS #1& 2	_____	+_____ = TOTAL	+_____ SCORE:	+_____ _____
3. Trouble falling or staying asleep, or sleeping too much	0	1	2	3

Documenting Screening Results

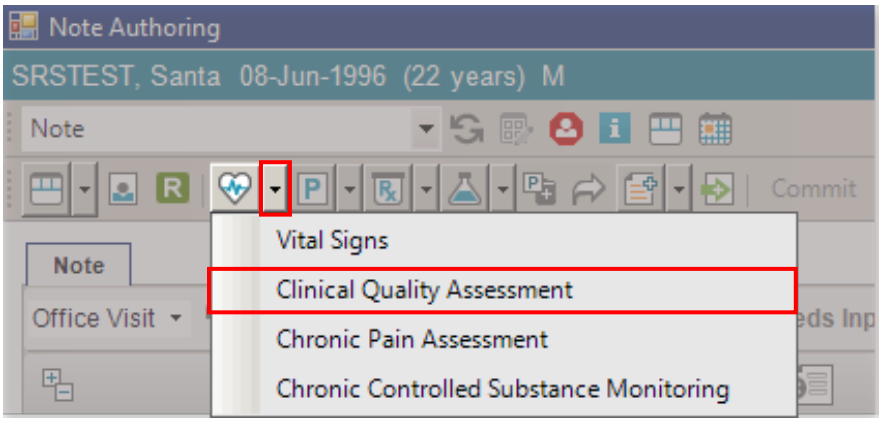
- Click the **Flowsheets** tab and select **Clinical Quality Assessment** flowsheet.

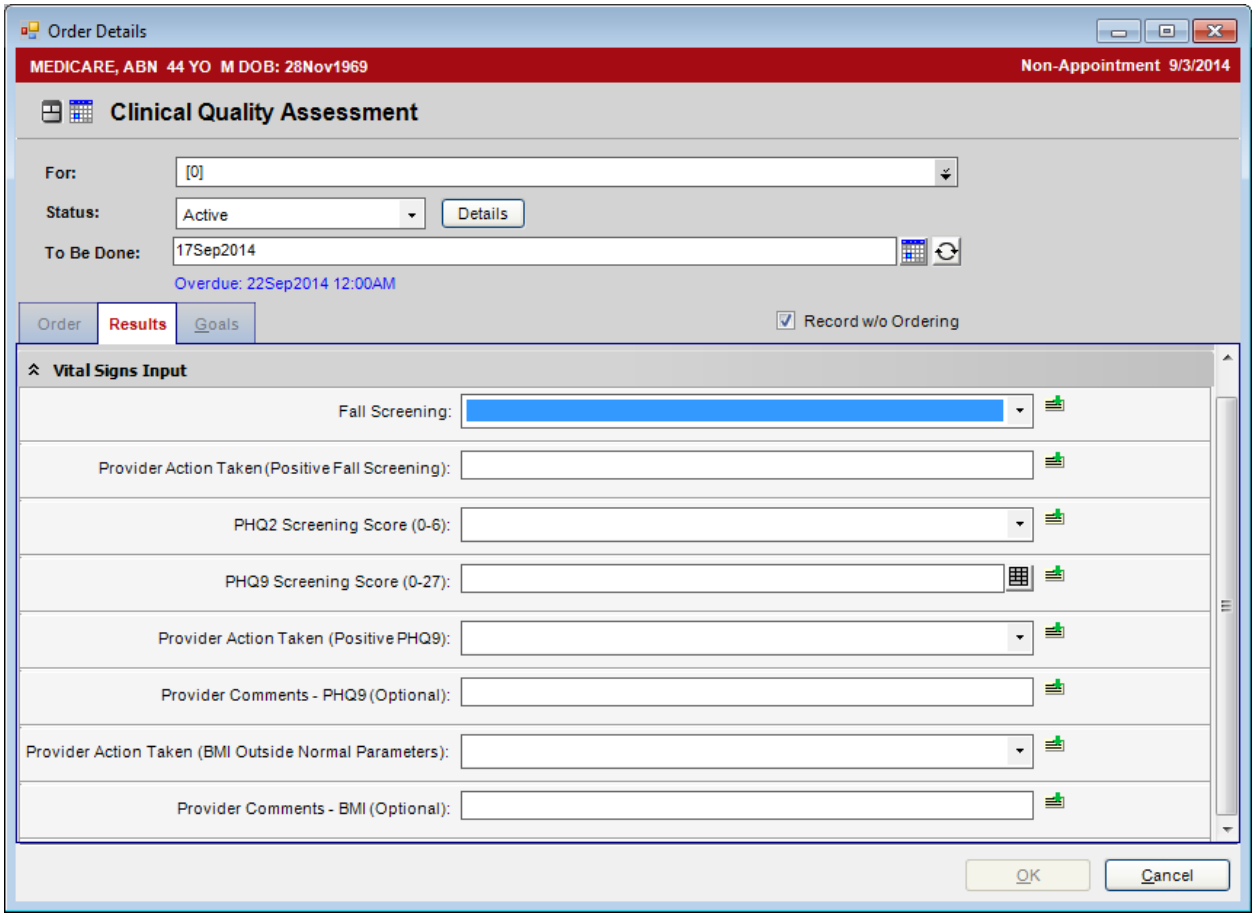




- If no screenings have been completed, then capture the information.

- Click on the drop-down menu next to the  icon and select **Clinical Quality Assessment**.





- Enter the Fall Screening information by selecting the drop-down

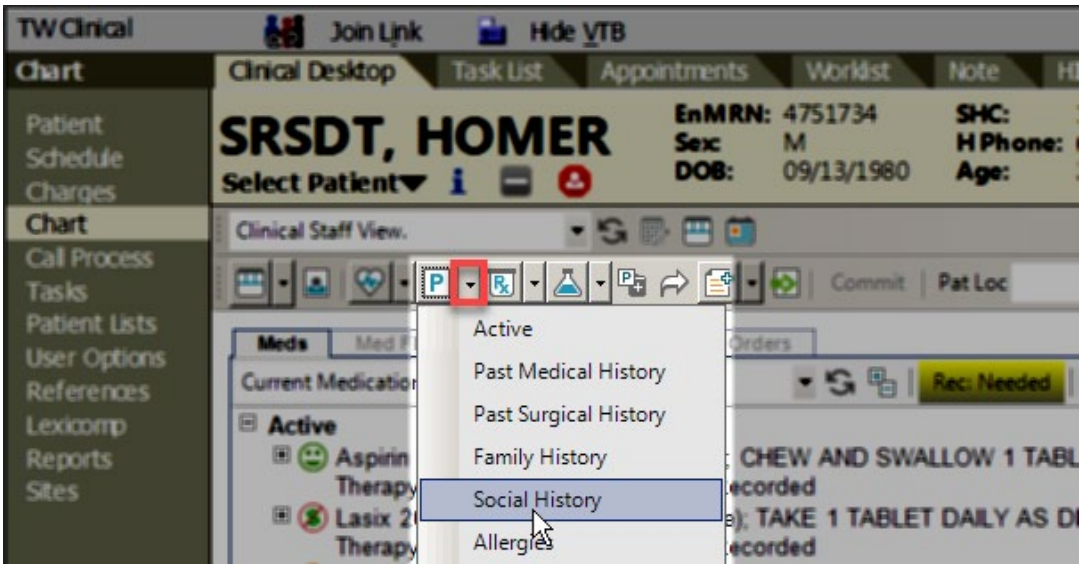
- Enter the PHQ-2 score.
    - If the score for the **first two** questions is **3** or more, you MUST ask the remaining questions and enter in the total PHQ-9 score.

- Click **OK**

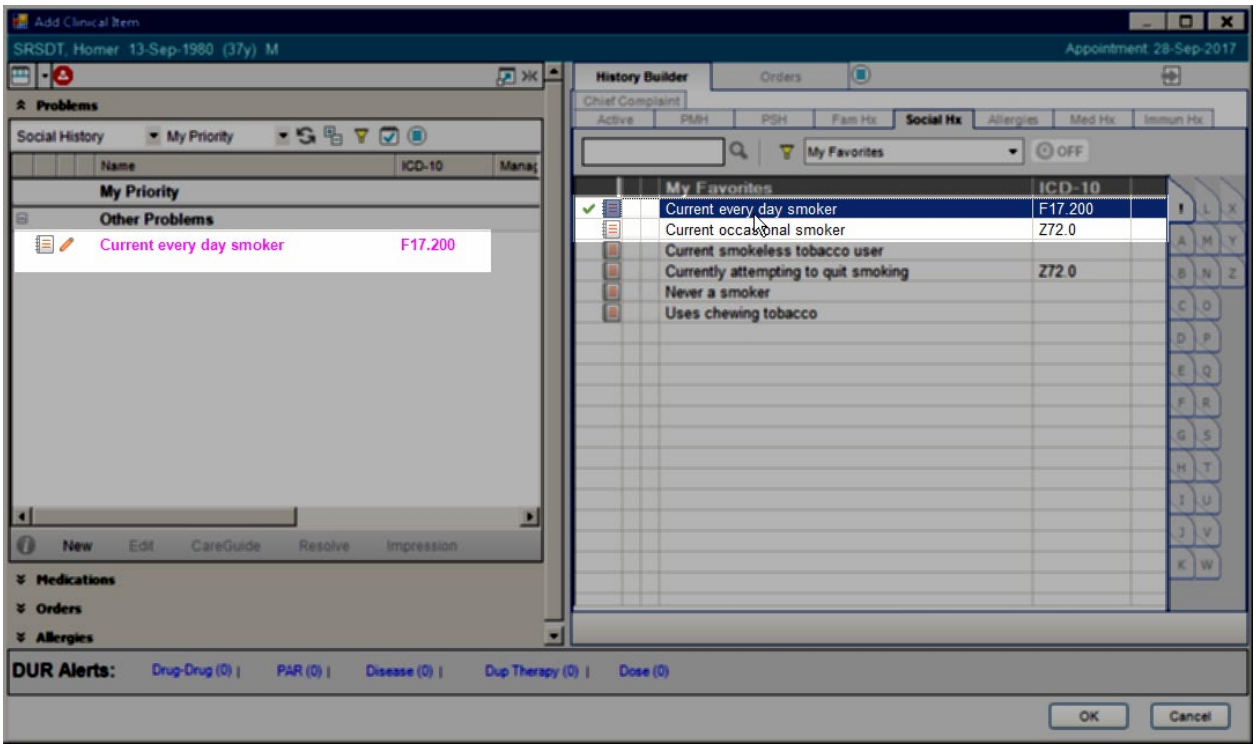
- If BMI was also not screened, be sure to capture height and weight under **Vitals.**

Social History – Smoking Status

- Click the arrow beside the P (Problem)  icon



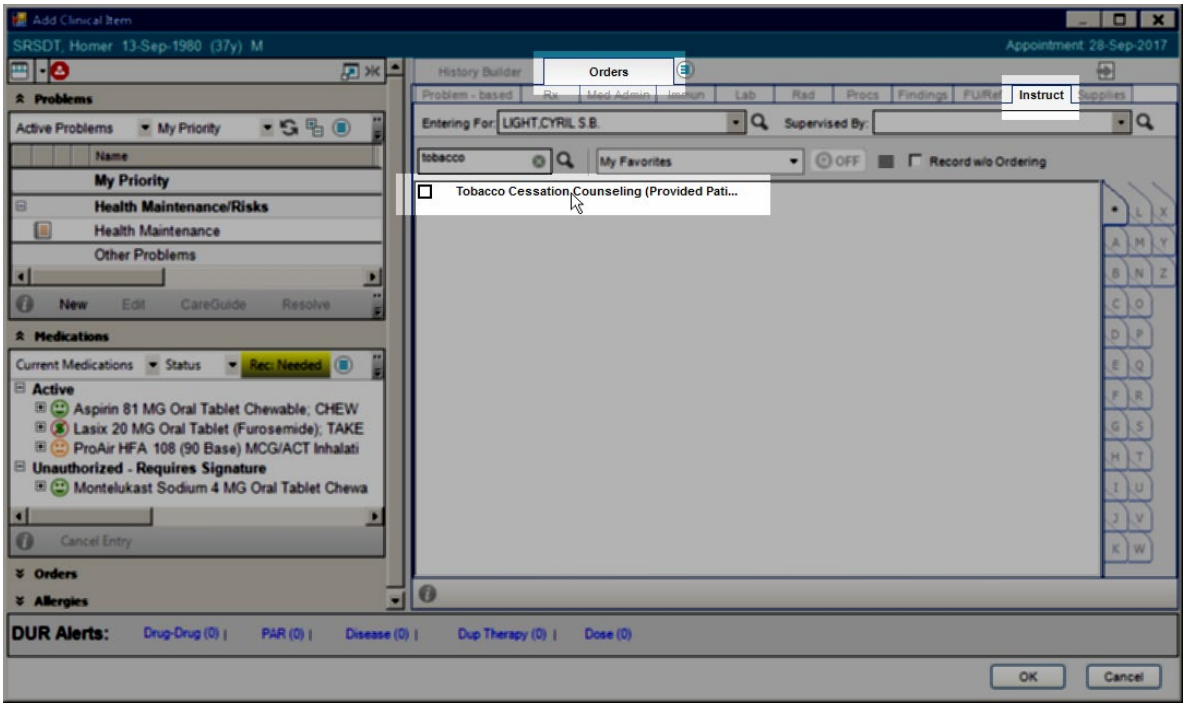
- Search and **single-click** to Select the correct Smoking Status



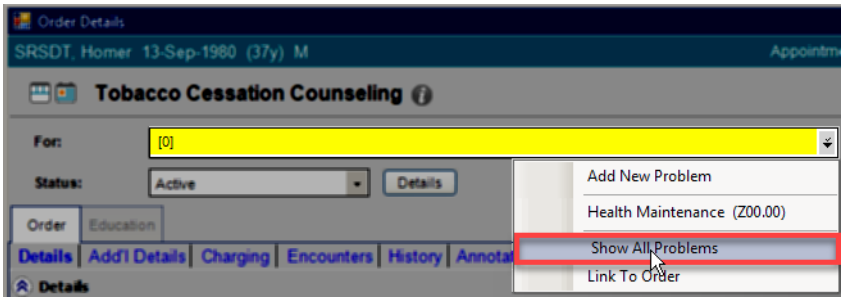
Patient Education - Smoking Cessation

- Select Orders tab

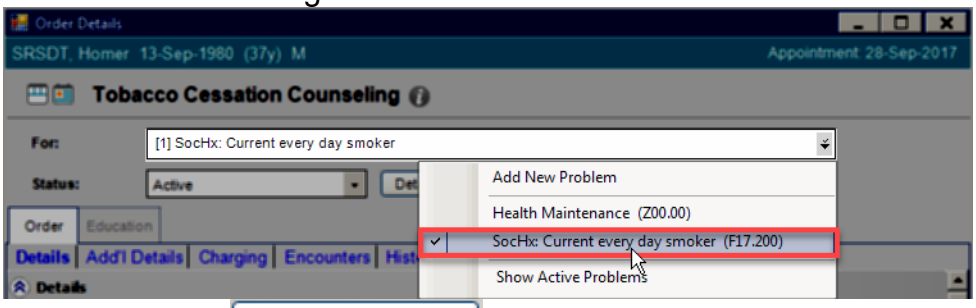
- Select Instructions tab
- **Double click**  ‘Tobacco Cessation Counseling…’

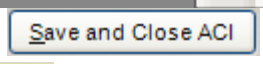


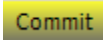
- Select Show All Problems



- Select Smoking Status SocHx



- Click the 

button.
- Click 

Second Breath

A Comprehensive **Smoking Cessation** Program

If you're ready to quit smoking, Sharp Health Care's Second Breath program can help.

This small group program is designed to guide you through the process of becoming tobacco-free by addressing both the habit and addiction components of smoking. During the six-weekly sessions you will build skills in behavior change, stress management, weight control, and effective medication use and preventing relapse. Long-term support and follow-up is provided. Participants who experience a relapse are welcome to repeat the program within one year, free of charge.

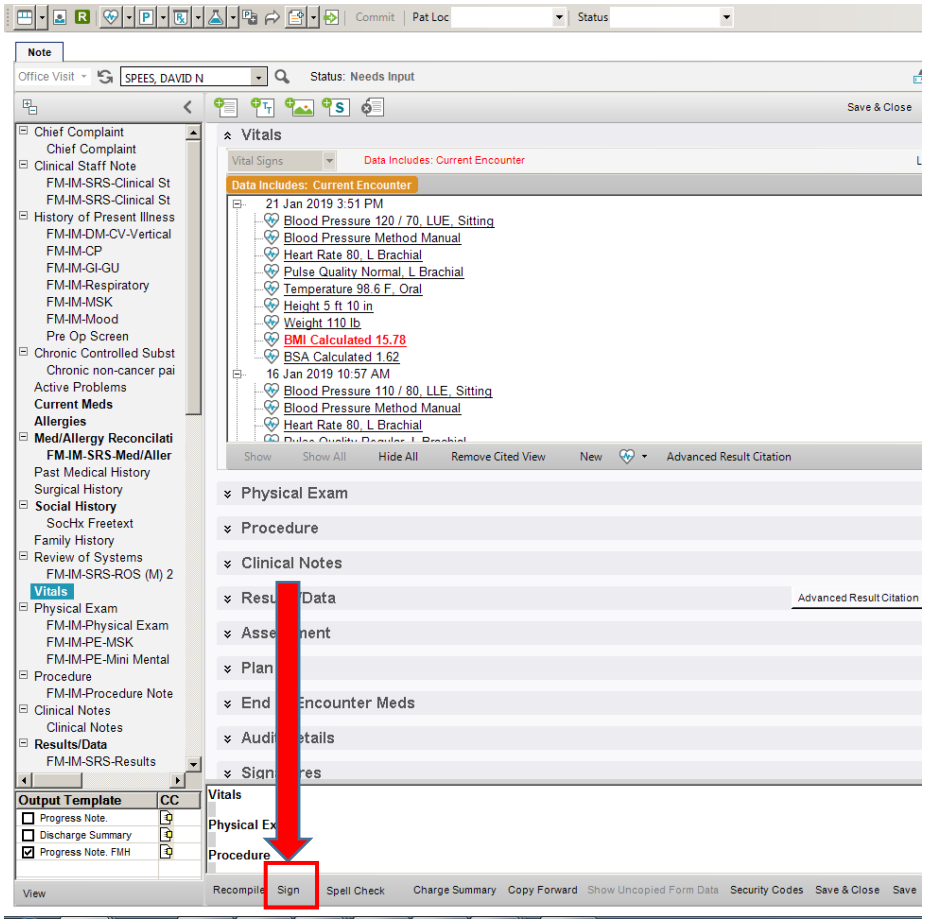
- Instructors are trained and experienced health care professionals who provide smokers with support they need to reach their goal
- Second Breath is based on clinically-proven therapeutic methods
- Classes consist of small group settings, and teach overall healthier lifestyles
- Each class meeting the importance of exercise, good nutrition, weight management, relaxation techniques and the use of effective coping skills are discussed
- Medication management is discussed and in some cases, may be prescribed to help alleviate the withdrawal symptoms associated with nicotine addiction.

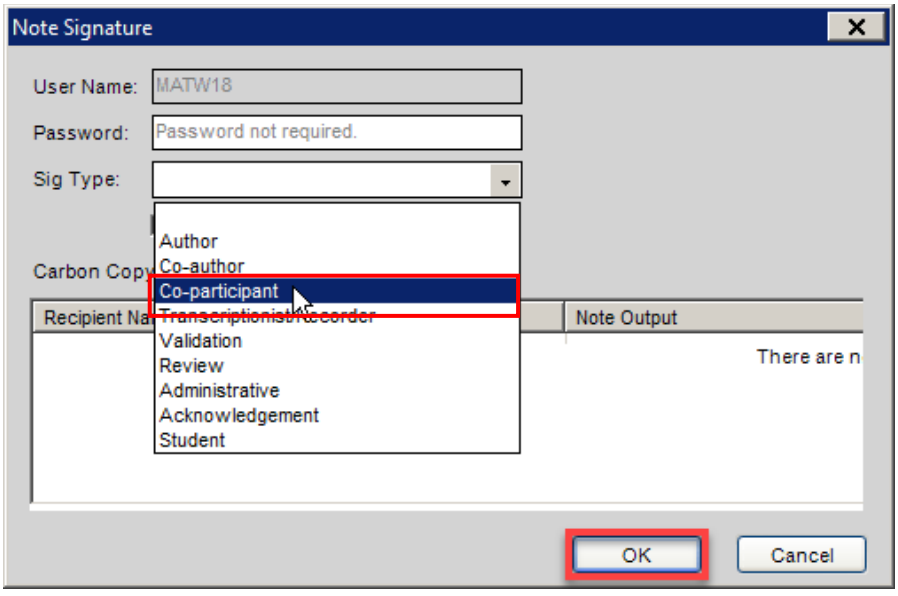
Registration is required.

Payment options include cash, check or credit card (Some insurance plans may cover a portion of the program fee)

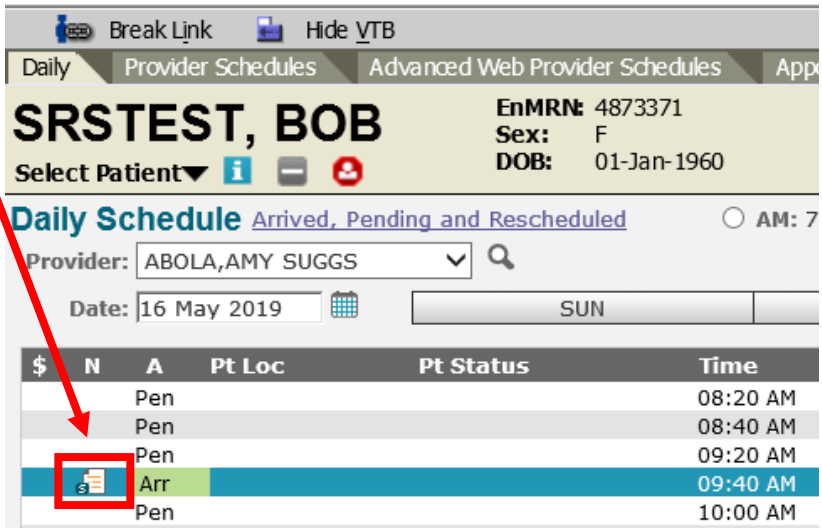
To schedule a free orientation, please call (858) 505-1400. Classes are held in the evening at various Sharp Rees-Stealy locations.

Sign the note (*as Co-participant)*





Once a note has been signed, a paper icon will appear on the provider's schedule



Note: Once you sign a note, you will be unable to go back into it.