

Chart Prep for Follow-Up Appointments

PURPOSE:

1. Prepare charts for upcoming appointments for clinicians.
2. Reduce the number of errors and omissions.
3. Create continuity with labeling and processing.
4. Improve the quality of work within the practice.
5. Increase the ease for clinician to review labs and paperwork prior to the appointment.

PROCEDURE:

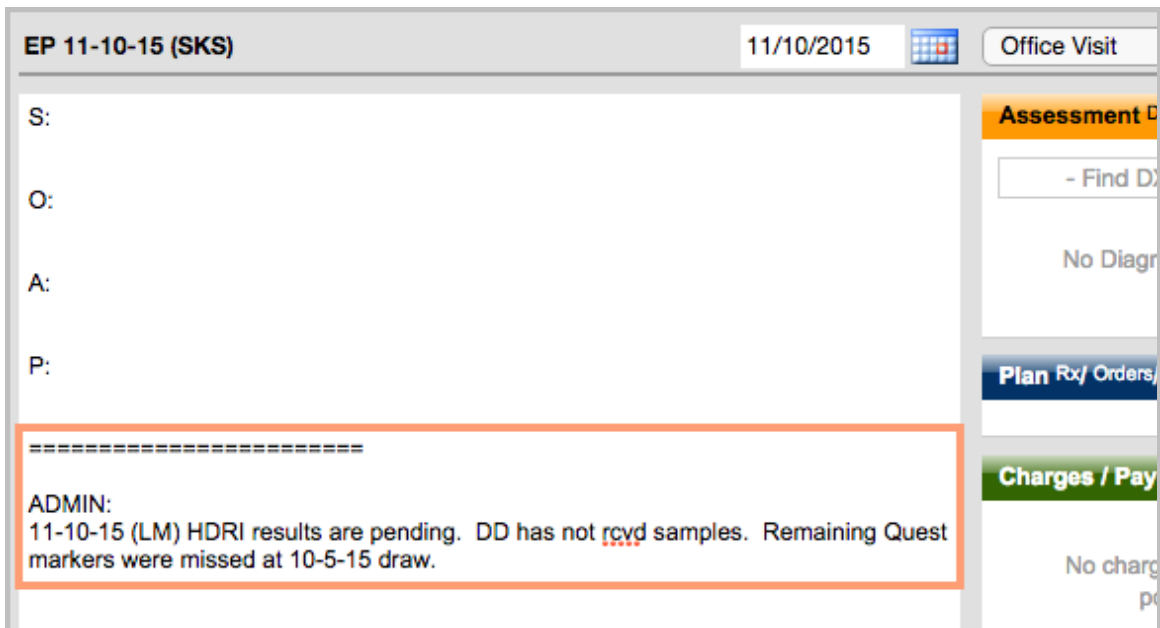
Below are two examples of the procedure, based on the individual clinician's needs and preferences.

Prepare Charts for Appointments, Example 1

Expected Time Frame: Completed in the morning for all the appointments of the day to allow maximum lab time for processing test results.

1. From the Scheduling page in MD HQ, look at the first appointment to see what type of appointment it is (office, phone, or video).
2. Click on the patient's name for the first appointment of the day to open the patient's chart.
3. In the green SOAP/Encounter Notes section, make sure there is not already an open encounter for this appointment. Note: this typically happens when the patient has sent a message into the PPQ with notes they have for the clinician for their upcoming appointment, so whoever processes this message from the PPQ creates an appointment encounter so that they can put the notes in a subnote. Nothing else will have been done to prep the chart or the note.
4. If no encounter note already exists, click the "+" to start a new encounter note.
5. Title: EP [*appt date in mm-dd-yy format*] (*clinician's initials*).
6. Note categorization: based on the appointment type. Examples below:
 - a. Office Visit: For all office visits.
 - b. Phone Call: For all phone appointments.
 - c. Video Consult: For all Chiron video appointments.
7. Click the "+" to add the appropriate charge ("30 Consult (Phone-[*clinician's initials*])" or "45 Consult (Office-[*clinician's initials*])") to the Charges box. Be sure to choose the charge with the initials of the clinician who will be doing the appointment.
8. Save and close note (do not "save & sign").

9. In the black Open Orders section, look to see if there are any remaining open orders. If not, skip to step #12.
10. If there are any outstanding lab orders, log in to each lab with the credentials listed on the Vendor List & Credentials spreadsheet and check to see if the patient's results are available.
 - a. If yes: download the result to your temporary patient files folder, then upload them to the patient's chart. See the "Upload Lab Results into the EHR" working procedure.
 - b. If no: call the lab. If the lab has the results, request that they are faxed to your office and upload them to the chart. Skip to step 10. See the "Accept Faxes" working procedure.
 - c. If the lab does not have the results, click to open the encounter you created. In the ADMIN section, date/initial stamp and document each outstanding lab and what is going on. Example below:



11. Close the chart.
12. Repeat for all of the day's appointments.

Prepare Charts for Appointments, Example 2

Expected Time Frame: Completed in the morning for all the appointments of the day to allow maximum lab time for processing test results.

1. From the Scheduling page in MD HQ, look at the first appointment to see what type of appointment it is (office, phone, or video).
2. Click on the patient's name for the first appointment of the day to open the patient's chart.
3. In the green SOAP/Encounter Notes section, make sure there is not already an open encounter for this appointment. Note: this typically happens when the patient has sent a message into the PPQ with notes they have for the clinician for their upcoming appointment, so whoever processes this message from the PPQ creates an appointment

encounter so that they can put the notes in a subnote. Nothing else will have been done to prep the chart or the note.

4. If no encounter note already exists, click the “+” to start a new encounter note.
5. Title: EP [appt date in mm-dd-yy format] ([*clinician's initials*])
6. Note categorization: based on the appointment type. Examples below:
 - a. Office Visit: For all office visits.
 - b. Phone Call: For all phone appointments.
 - c. Video Consult: For all Chiron video appointments.
7. Click the “+” to add the appropriate charge (“30 Consult (Phone-[*clinician's initials*]),” “30 Consult (Office-[*clinician's initials*]), or “30 Consult (Video-[*clinician's initials*])”) to the Charges box. Be sure to choose the charge with the initials of the clinician who will be doing the appointment.
8. Save and close note (do not “save & sign”).
9. In the black Open Orders section, look to see if there are any remaining open orders. If not, skip to step #12.
10. If there are any outstanding lab orders, log in to each lab with the credentials listed on the Vendor List & Credentials spreadsheet and check to see if the patient’s results are available.
 - a. If yes: download the result to your temporary patient files folder, then upload them to the patient’s chart. See the “Upload Lab Results into the EHR” working procedure.
 - b. If no: call the lab. If the lab has the results, request that they are faxed to your office and upload them to the chart. Skip to step 10. See the “Accept Faxes” working procedure.
 - c. If the lab does not have the results, click to open the encounter you created. In the ADMIN section, date/initial stamp and document each outstanding lab and what is going on. Example below:

EP 11-10-15 (SKS) 11/10/2015 Office Visit

S:
O:
A:
P:

=====

ADMIN:
11-10-15 (LM) HDRI results are pending. DD has not rcvd samples. Remaining Quest
markers were missed at 10-5-15 draw.

Assessment D
- Find D:
No Diagn

Plan Rx/ Orders

Charges / Pay
No charg
pc

11. Close the chart.
12. Repeat for all of the day's appointments.