

# Best Practices with Protocols/Templates

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July 2013



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## Goals of this Course

- To gain an understanding of component attributes and how appropriate use can improve the charting experience.
- How using chart-wide components provide quick access to information for review and updates while charting a visit.



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## What is a Component?

- The “building blocks” of a protocol to enter data gathered during an encounter



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## Component Examples

The screenshot shows three distinct UI components. The first is a dropdown menu labeled 'Informant/Relationship'. The second is a 'Physical Exam' section containing radio buttons for 'ABN', 'NL', and 'N/E', followed by radio buttons for 'General Appearance', 'Skin', and 'Head', each with an associated text input field. The third is a large empty text area labeled 'Consult Notes'.

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## Best Protocol Practices

- Use the same component across protocols
- Use smart memory answers to your advantage
- Set anchors and anchor titles
- Embed Medical Summary and Demographic components in your protocols

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The screenshot shows a window titled 'Protocol (2 Mo Well - (client v. II) Bright Futures) - ROS'. It features a section for 'Anchor' with radio buttons for 'Yes' and 'No', and a text field for 'Anchor Text'. Below this is a 'Filter' section with a dropdown menu for 'Provider'. A list of items is shown below, including 'Elimination', 'Sleep', 'Behavior', and 'Activity (tummy time, no TV)'. Buttons for 'Add Items', 'Delete', 'Save', and 'Close' are at the bottom.

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## Turn on “Last Saved Answer”

- The last response entered for a patient, date it was entered and the user who made the entry
- Enable this feature now for immediate benefit
- Available for : Text Box, Q&A, Check Box

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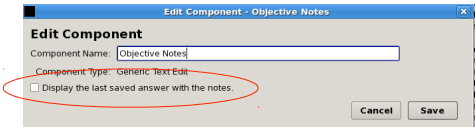
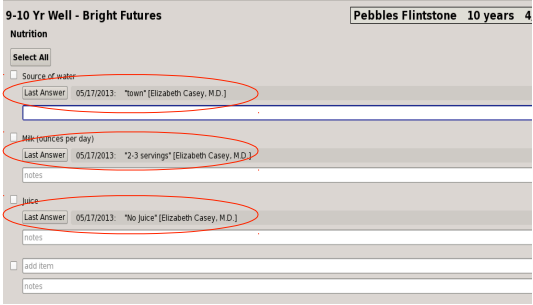
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## Embedding Chart-wide Components in Protocols

- Medical Summary components
- Demographic components
- Save time and gain efficiency
- Document “last reviewed”

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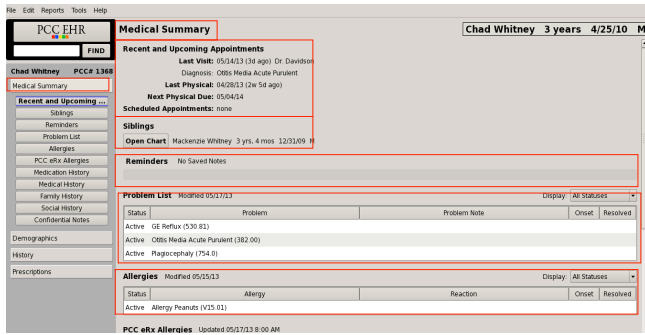
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## Medical Summary



**Medical Summary** Chad Whitney 3 years 4/25/10 M  
**Recent and Upcoming Appointments**  
 Last Visit: 05/24/13 (3d ago) Dr. Davitson  
 Diagnosis: Otitis Media Acute Purulent  
 Last Physical: 04/26/13 (2w 5d ago)  
 Next Physical Due: 05/04/14  
 Scheduled Appointments: none  
**Siblings**  
 Open Chart Mackenzie Whitney 3 yrs. 4 mos. 12/31/09 M  
**Reminders** No Saved Notes  
**Problem List** Modified 05/27/13 Display All Statuses  

Status	Problem	Problem Note	Onset	Resolved
Active	GI Reflux (530 #1)			
Active	Otitis Media Acute Purulent (382.00)			
Active	Pharyngitis (754.01)			

**Allergies** Modified 05/25/13 Display All Statuses  

Status	Allergy	Reaction	Onset	Resolved
Active	Allergy Peanuts (V15.01)			

**PCC eRx Allergies** Updated 05/27/13 8:00 AM

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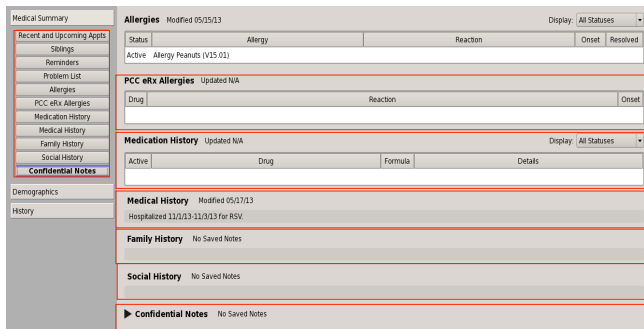
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## Medical Summary



**Medical Summary** Chad Whitney 3 years 4/25/10 M  
**Allergies** Modified 05/25/13 Display All Statuses  

Status	Allergy	Reaction	Onset	Resolved
Active	Allergy Peanuts (V15.01)			

**PCC eRx Allergies** Updated N/A  

Drug	Reaction	Onset

**Medication History** Updated N/A Display All Statuses  

Active	Drug	Formula	Details

**Medical History** Modified 05/27/13  
 Hospitalized 11/01/13-11/03/13 For RSV  
**Family History** No Saved Notes  
**Social History** No Saved Notes  
**Confidential Notes** No Saved Notes

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# Demographics

PCC EHR  
Chad Whitney 3 years 4/27/10

Medical Summary  
Demographics  
Patient Demographics  
Contact Information  
Policies  
Settings  
History

**Demographics**

**Patient Demographics**

Chad Whitney PCC# 1388  
Date of Birth: 04/27/10  
Sex: Male  
Race: Ethnicity and Preferred Language  
Race: Ethnicity  
Prof. Language

**Patient Information**

Patient Flags: None  
SOS  
School  
Alt Name: Chart #: 0950

**Contact Information**

Patient's Confidential Communication Preference  
No Preference

**Home and Billing Address**

Daniel Whitney  
5188 Breasted Drive  
Norwich, VT 05855

**Phone**

Home Phone: 802-555-8258  
Work Phone: 802-555-8219  
Cell Phone: 802-555-9383  
Emerg Phone: 802-555-8275  
E-mail

**Account Flags:**

**Relation to Bill Payer:** Son



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# Demographics

**Policies**

**Primary Insurance**

INS Policy: Highmark PPO Blue 820 (Copy 820)  
Contract: 20801045078002  
Group: 512209  
INS Phone: 1-800-345-3800  
Subscriber: Daniel Whitney (DOB 08/21/77)  
Relationship: Son

**Secondary Insurance**

None

**Siblings**

**Open Chart** | Mackenzie Whitney 3 yrs, 4 mos 01/02/10 M



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# Protocol Examples

PCC EHR  
Chad Whitney PCC# 1388

Medical Summary  
Demographics  
History  
Prescriptions  
Sick Visit  
Appointment Details  
Chief Complaint  
HPI  
Review of Systems  
Physical Exam  
LAB  
Diagnoses  
Plan  
Immunizations

**Sick Visit**

**Appointment Details**

Visit Status: Arrived  
Appt Time: 01/14/13 9:51am  
Arrival Time: 01/14/13 9:52am  
Visit Reason: Sick Call  
Patient Age: 3 years  
Location: PCC Pediatrics Main Office  
Provider: Elizabeth Casey, M.D.  
Appt Note

**Intake**

**Siblings (Demographics)**

**Open Chart** | Mackenzie Whitney 3 yrs, 4 mos 01/02/10 M

**Informant/Relationship**

**Chief Complaint**



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## Protocol Examples

**Sick Visit** Chad Whitney 3 years 5/23/10 M

**Medical History (Medical Summary)** Modified 06/12/13 **Edit**  
Hospitalized 11/2/13-11/30/13 for RSV. Last reviewed Medical History appears in the Visit history.  
**Mark as Reviewed**

**Social History (Medical Summary)** No Saved Notes **Edit**  
Last reviewed Social History appears in the Visit history.  
**Mark as Reviewed**

**Family History (Medical Summary)** No Saved Notes **Edit**  
Last reviewed Family History appears in the Visit history.  
**Mark as Reviewed**

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## Protocol Examples

**Confidential Notes (Medical Summary)** No Saved Notes **Edit**

**Reminders (Medical Summary)** No Saved Notes **Edit**

**Confidential Notes (Medical Summary)** Modified 06/14/13 **Edit**

**Confidential Notes (Medical Summary)** Modified 06/14/13 **Edit**  
This is a confidential note.

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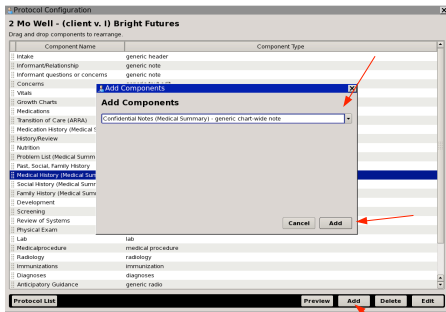
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## Adding Chart-wide Components to Protocols



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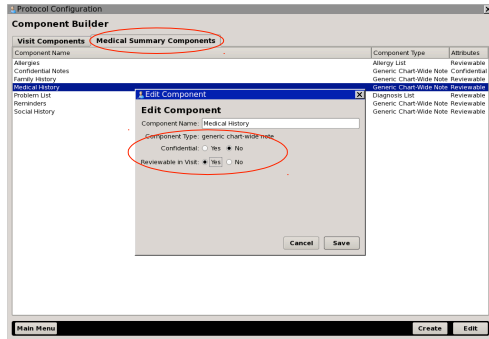
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## Edit/Create Chart-Wide Components



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## Summary

- Share components across protocols whenever possible
- Confirm component attributes are set correctly:
  - patient vs user
  - last saved answer
  - anchor and anchor text
- Use chart-wide components (Medical Summary and Demographics) liberally in protocols
- For more information on all these features at [learn.pcc.com](http://learn.pcc.com)

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Thanks!

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