Electronic Medical Records Knowledge Worker

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Introduction to Electronic Medical Records

V2 Instructor Edition

V2 Student Edition

Produced By Direct Mercantile, Inc.

Version 2
Revised & Enhanced
Up-to-date with current healthcare technology.

Perfect for:
- Colleges & Universities
- Community Colleges & Technical Schools
- Nursing & Medical Assistant Programs
- Allied Health Training
- Career Retraining Programs
- High School Advanced Placement Programs
- Association Member Training Programs
- Health Information Technology Programs

ABOUT THE CURRICULUM

Upon completion of this curriculum, the student will know the components of an electronic medical record and have the required skills to use that technology in the medical office workplace. Included exercises facilitate hands-on learning and can be done in a classroom or self-paced setting.

MANUAL SPECS

- Professional, full color, perfect bound manuals
- Separate instructor (222 pages) & student (182 pages) manuals
- Practical examples used to introduce basic EMR concepts
- 13 sections for organized instruction
- Learning objectives & instructor's notes in every section
- Review exercises with answers and grading guides
- Glossary of terms

Paired with EMR Software

Aprima Patient Relationship Manager™ (PRM)

Educational institution or provider software license required.

This courseware is designed as a self-paced class that can be used in any number of academic institutions including colleges, universities, community colleges, technical schools, nursing and medical assistant programs as well as in career retraining programs.

The manuals include general information about medical records software as well as step-by-step instructions that provide first-hand exposure to an electronic medical records system. No endorsement of particular products is included. The class is intended to present the general functionality that an electronic medical records system provides.

The Instructor Edition includes additional information for the Instructor including a detailed overview of each section, answers to all Review Exercises, grading criteria for each exercise, and information on how each learning objective is being accomplished.

An audio/video component for each section of the class is also available.

In this packet of information you will find the following:

Sample Documentation from the Instructor Edition of the **Introduction to Electronic Medical Records** which includes:

Copyright Page

Acknowledgements Page

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Sample Section (Section 6, pages 6-1 through 6-8) for your review. It includes:

Overview
Learning Objectives
Presentation of Information about Creating a Procedure Note
Exercise
Review Exercises to be submitted to the Instructor
Instructor's Notes, including:
Section Content Overview
Review Exercises with suggested point allocation for grading purposes and also information on which learning objectives are being accomplished with each review exercise
Illustrations of what the complete course work should include when submitted by student

Pricing information for the products used in this class.

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Acknowledgements

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M. Jill Jaunty
Direct Mercantile, Inc.

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Section Six Overview

Aprima PRM has a feature called a Procedure Note that allows you to add details about a procedure (i.e., details regarding a surgical procedure or additional information about an injection). These details are required to thoroughly describe the procedure done by the provider. A procedure note appears very much like any KDB you use in the FNC. You have the ability to edit the note (add new fields) during data entry. Just as with the KDB, permissions must be granted to make these database changes.

Health Maintenance Rules will also be addressed. The health maintenance rule in Aprima PRM is used to alert office staff of procedures that are due for this patient. These alerts might be related to the patient's age, gender, medications or medical history.

Aprima PRM allows the option to create and edit procedure notes and health maintenance rules. Creating new procedure notes and health maintenance rules are an administrative function and are not covered in this class.

Section Six Learning Objectives

1.   You will use a procedure note to document additional information related to a procedure.

2.   You will respond to a health maintenance alert for a patient.

Procedure Note

This is an abbreviated exercise specifically designed to demonstrate the ability to record additional information about a procedure. In this example, procedure notes are used to provide information about a minor surgical procedure and an injection. Note also, the ability to document two unrelated symptoms in one visit.

☐   Make an appointment for **Robert Runner** using the following information:

Appointment Date:	*(current date)*
Time Span:	*(15 minutes)*
Provider:	**DMI**
Reason:	**lesion removal**
Service Site:	**Classroom Medical Clinic**

CC:
Dermatologic:	**new lesion**
Orthopedics:	**knee pain**

HPI:
   new lesion:
      Location-Extremities: **on the left leg**
   knee pain:
      Location: **on the right**

SP:

   Immunization/Injection: **J1020, Inj Depo-Medrol 20 mg**
   Dermatology: **11400, Tr-Ext B9+Marg 0.5< cm**
   X-Rays/MRIs: **73560, X-Ray Exam of Knee**

Both the injection and the excision procedure notes are used to document additional information about the related procedure. If a procedure note is attached to a procedure, a ☐ displays to the right of the CPT code displayed on the SP screen *(CN.PcdrNt.01).*

□ Click on the ☐ associated with *J1020* and click on OK.

□ Use the following information to record the procedure details *(CN.PcdrNt.02)*:

   Route: **IM**
   Location: **rt knee**
   Lot#:   **938**
   Mfg: **PFR**
   Exp. Date: **12/13**
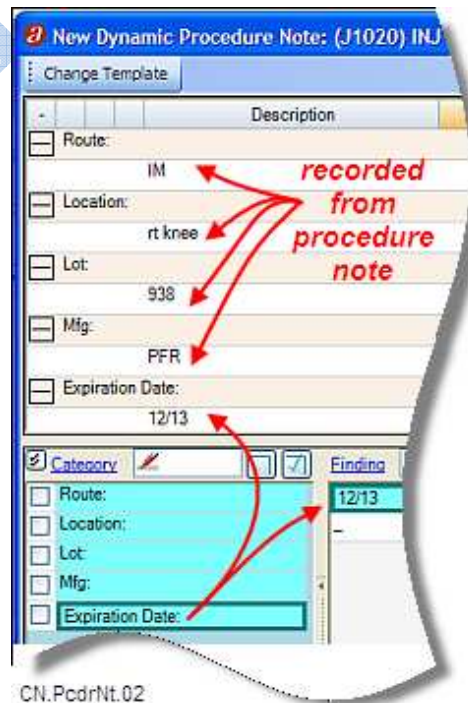
□ Click on OK to save the procedure detail.

Note: New findings can be added and findings can be moved up or down just as in any KDB list.

□ Click on the ☐ associated with 11400 and click on OK, then use the following information to complete the procedure note.

   Location: **left leg**
   Excision Size: **.25cm**
   Ointment Type: **Polysporin**

The ☑ indicates that the procedure note associated to the procedure is complete *(CN.PcdrNt.04).*

□   Click on **Visit Text** to see how this
    information is recorded in the
    patient's note *(CN.PcdrNt.05)*.

> **Services Performed:**
> J1020 INJ DEPO-MEDROL 20 MG
> Route: IM
> Location: rt knee
> Lot: 938
> Mfg: PFR
> Expiration Date: 12/13
>
> 11400 EXC TR-EXT B9+MARG 0.5 < CM
> After informed consent, prepped and draped left leg
> elliptical excision was .25cm
> area was dressed with Polysporin
>
> CN.PcdrNt.05

□   Use the following information to complete the visit:

Rx:	***Ibuprofen 400 mg Tab, 1 PO Q4-6H, 3 Days***
Plan:	
Return Visit:	***5 days***
Patient Instructions:	***stay off foot until comfortable walking***

□   Click on 🖱, click on **Ready to Discharge**, uncheck **Require Superbill** to keep this
    from transferring to the Billing department, and save as an **Incomplete Note**
    because the visit note is not complete. Discharge the patient.

Health Maintenance Rule

This is an abbreviated exercise specifically designed to demonstrate the health
maintenance rule functionality. Health maintenance rules are used to alert providers
and office staff of procedures that are due for individual patients. Health maintenance
rules are used for screening procedures that are recommended for a certain age,
gender, and or medical condition. They can also be associated with certain
medications. Health maintenance alerts display during appointment scheduling and
when charting a note. Parameters of the rule can be changed for individual patients.

When a rule is due for this patient, the slider is red *(CN.HMR.01)*:

□   Use the following
    information to make an
    appointment for **Matilda
    Mishap** using the
    following information.
    Note the **HM Rules** slider
    at the top of the screen.

> Appointment Patient - Mishap, Matilda/7/DM23/F/85 Years/Medicare Medicare
> HTN/HChol ...
> Appointment | Account | Superbill | Future Appointments | HM Rules | Service Orders
> Calendar
> Primary **procedures are due** Resource
> DMI
> CN.HMR.01
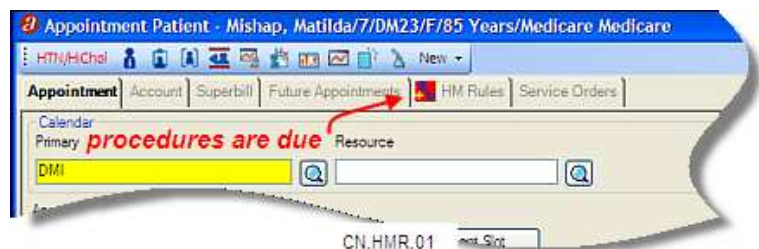
Appointment Date:	*(current date)*
Time Span:	*(15 minutes)*
Provider:	***DMI***
Reason:	***Flu Vaccine***
Service Site:	***Classroom Medical Clinic***

□   Start a visit for Matilda.

□ Click on the [HM Rules] slider.

□ Click on ⊞ to tack down the slider. You may want to drag the left edge of the slider further to the left to view all of the information available. The procedures due for this patient display in due date order *(CN.HMR.01)*.

□ To order the Comp Metabolic Panel-Lasix for the patient, click on the associated [Action] key to take action on this rule.

Note: If the [Action] key does not display on the right, pull the slider to the left until it is visible.

□ Click on the associated **SO** radiobutton to record the procedure in the [SO] screen.

□ Click on [OK]. When the procedure is recorded, it drops lower on the list with a new due date which is based on the health maintenance rule parameters.

If the procedure was to be done today, you would select the radiobutton for **SP**. There is also an area to indicate the reason a patient declined to have the service performed or ordered.

The [Edit Rules] button allows you to view the parameters of the rule. A rule can be overridden or made inactive for the patient. To do this click on the rule hyperlink or the associated ▯ to view rule details.
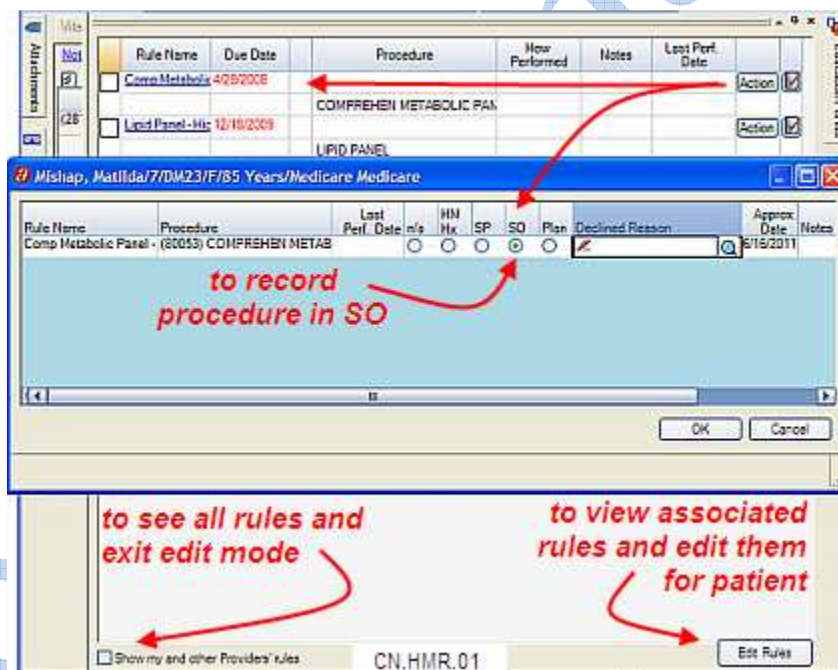
*Note: (optional) The rule details indicate the Comp Metabolic Panel is scheduled every 3 months due to Matilda's Lasix prescription and every 6 months because she takes Zetia. To make the Zetia rule inactive, click on [Edit Rules] then the associated ▯. This accesses the **Health Maintenance Rule Information** screen. Click on [Edit], and from the **New Health Maintenance Rule Information (Mishap, Matilda)** screen, click on the checkbox for the **Inactive** field. Click on [OK] to save this change. Click on [Close] to close the window and return to the rules list. This eliminates duplicate alerts for the same procedure.*

□ To exit edit mode, click on the checkbox for the **Show my and other Providers' rules**.

□ Click on ⊞ to close the slider.

□ Use the following information to continue documenting the visit:

CC:
    Health Maintenance: ***vaccination against influenza***

    HPI:
        Location: ***deltoid-Rt***
        Significant Medical Conditions: ***elderly age, cardiac disease***

    Diagnosis: ***V04.81, Vaccin for Influenza***

    SP: ***90658, Influenza Virus Vaccine***
                                           Split Virus > 3 Yrs, IM
                                           G0008, Admin Influenza Virus Vac

□   Use the following information to record the injection details:

    Route: ***IM***
    Location: ***rt arm***
    Lot#:   ***1398***
    Mfg: ***PFR***
    Exp. Date: ***12/13***

□   Click on 📖,, then click on [Ready to Discharge], uncheck **Require Superbill** to keep this from transferring to the Billing department, and save as an ***Incomplete Note*** because the visit note is not complete. Discharge the patient.

Section Six Review Exercises

1.   Describe how procedure notes are used.

2.   From the **Review Past Notes** screen, print the incomplete note for Robert Runner to a PDF file named, "Section 6 RRunner Visit". In the Reason field, select Internal Use, and for the recipient, indicate Instructor.

3.   From the **Review Past Notes** screen, print the note for Matilda Mishap to a PDF file named, "Section 6 MMishap Visit". In the Reason field, select Internal Use, and for the recipient, indicate Instructor.

4.   Please answer these questions and email the questions/answers and the PDF files to your instructor with a subject line: ***Section 6 Review Exercises***

This concludes Section Six of this class

Please see next page for Instructor's Notes

Instructor's Notes

Section Six Content Overview

This section addresses the process to record surgical details and injection information. Aprima PRM provides multiple ways to do this. The most common, and easiest to use is the procedure note which can be customized based on the procedure code or type of procedure. The procedure note allows additional data input to provide details about the procedure.

In the previous section we addressed immunizations and the vaccination record. Prior to the availability of the vaccination record, the procedure note was used (and can still be used) to record immunization or vaccination detail.

Another feature that works very well in a knowledge-based EMR is the ability to document two unrelated chief complaints in one visit. In a template system, you would need to load a new template to handle the unrelated chief complaint. Some systems allow you to overlay one template on another, but it is still an additional step.

Finally, this section addresses health maintenance rules alert providers and staff of procedures that are due for the patient. These alerts might be related to the patient's age, gender, medications or medical history. The alerts can be viewed from Appointment Scheduling as well as from the FNC screen.

On page 3 of this section there is information about how to discontinue an alert for a patient. This is not a required exercise but is provided for informational purposes as it is important to be able to customize these rules. Flexibility is key in any EMR system and this is another example of the type of options to look for in an EMR system.

Points assigned to these exercises are arbitrary. Use your discretion when grading the student assignments. Additional information may appear in the visit notes submitted for these exercises. Because of space restrictions, only pertinent information is displayed in the answer guides.

Section Six Review Exercises

1. Describe how procedure notes are used.

    A procedure note is used to add details about a procedure that has been performed. It is commonly used with injections to indicate injection site, route, lot#, and expiration dates. A procedure note is also used to add information about a surgical procedure. If there is a procedure note available with a procedure, a blue icon appears on the Services Performed screen to the left of the CPT code. (16 pts)

2. From the **Review Past Notes** screen, print the incomplete note for Robert Runner to a PDF file named, "Section 6 RRunner Visit". *(fulfills Obj 1 document additional info about a procedure)*

Patient: Runner, Robert R   *Section 6 RRunner Visit*

Status: Incomplete.   *5 pts*

CC / HPI: *1 pt each; maximum 4 pts*
He presented with new lesion. It is located on the left leg.
In addition, he presented with knee pain. It is located on the right.

Rx: *2 pt*
ibuprofen 400 mg Tab, 1 Tablet(s), PO, Q4-6H, 3 days, start on July 07, 2011 and end on July 09, 2011.

Services Performed:
J1020 INJ DEPO-MEDROL 20 MG
Route: IM
Location: rt knee   *15 pts*
Lot: 938
Mfg: Pfizer
Expiration Date: 12/13

11400 EXC TR-EXT B9+MARG 0.5 < CM
After informed consent, prepped and draped left leg   *15 pts*
elliptical excision was .25cm
area was dressed with Polysporin

73560 X-RAY EXAM OF KNEE 1 OR 2 - Routine   *1 pt*

Plan:
A return visit is indicated in 5 days.   *1 pt*

Patient Instruction:
stay off foot until comfortable walking   *1 pt*   *maximum 44 pts possible*

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3. From the **Review Past Notes** screen, print the note for Matilda Mishap to a PDF file named, "Section 6 MMishap Visit". *(fulfills Obj 1 and 2 document additional info about a procedure; respond to health maintenance rule)*

Section 6 MMishap Visit

Patient: Mishap, Matilda

Status: Incomplete.   *5 pts*

CC / HPI: *1 pt each; maximum 4 pts*
She presented with vaccination against influenza. It is located deltoid-Rt. Pertinent medical conditions include elderly age and cardiac disease.

Services Performed:
90658 Influenza Virus Vaccine, Split Virus, >3 Yrs, IM
Route: IM
Location: rt arm
Lot: 1398
Mfg: Pfizer
Expiration Date: 12/13   *15 pts*

G0008 ADMIN INFLUENZA VIRUS VAC   *1 pt*

Services Ordered:
80053 COMPREHEN METABOLIC PANEL - Routine   *15 pts*

maximum 40 pts possible

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4. Please answer these questions and email the questions/answers and the PDF files to your instructor with a subject line: ***Section 6 Review Exercises***