Allscripts™

Allscripts Enterprise EHR™ Version 11.2

Encounter Clinical Summary Enhancements

www.allscripts.com

Table of Contents

Encounter Clinical Summary Enhancements

About Providing Encounter Clinical Summaries 6

Installation and upgrade considerations 7

Mark a document type as a Clinical Summary 7

Indicate whether or not to generate the Clinical Summary before the note is finalized 8

EncounterSummaryAlwaysProvide ClinicalSummary preference 9

EnableCSOnScheduleDaily preference 10

EnableCSOnScheduleDaily preference 10

Set auto-print defaults for the Clinical Summary 11

Personalize the Daily and Provider Schedule to display the Clinical Summary (CS) icon 12

Document a patient's preferred method of communication for Clinical Summaries 13

Security considerations when providing the Clinical Summary 14

What the Clinical Summary (CS) icon indicates 15

Table of Contents

How a Clinical Summary is generated based on the patient's Clinical Summary preference 16

Saving a Clinical Summary to file 17

Provide a Clinical Summary from the Encounter Summary 18

Provide a Clinical Summary from the Daily or Provider Schedule 19

Add a Chart Alert to indicate the Clinical Summary should not be provided 20

For more information 23

Contact us 24

Encounter Clinical Summary Enhancements

About Providing Encounter Clinical Summaries

The Meaningful Use criteria defined by the EHR Stimulus program require that Electronic Health Record applications be able to provide a Clinical Summary for at least 50% of all patients your organization sees. To meet this requirement, Allscripts Enterprise EHR™ enables you to provide patients with a Clinical Summary on request each time you see them.

NOTE: *The Meaningful Use Rules define a Clinical Summary as an after-visit summary that provides a patient with relevant and actionable information and instructions containing, but not limited to, the following:*

> *The patient name*
> *The provider's office contact information*
> *The date and location of visit*
> *An updated medication list and summary of current medications*
> *Updated vitals*
> *The reason or reasons for visit*
> *Procedures and other instructions based on clinical discussions that took place during the office visit*
> *Any updates to a problem list*
> *Immunizations or medications administered during visit*
> *A summary of topics covered or considered during visit*
> *The time and location of next appointment or testing if scheduled or a recommended appointment time if not scheduled*
> *A list of other appointments and testing patient needs to schedule with contact information*
> *Recommended patient decision aids*
> *Laboratory and other diagnostic test orders*
> *Test or laboratory results (if received before 24 hours after visit)*
> *Symptoms*

On the Daily and Provider Schedules, a new column, **CS**, appears. For each "arrived" appointment, an icon appears in the CS column indicating whether or not a Clinical Summary has been or needs to be generated for the patient. Depending on your workflow, providers or clinical/office staff can generate the Clinical Summary as part of completing the patient visit—either as part of the clinical encounter or during the checkout process.

Before you can take advantage of this functionality, there are a few setup steps that must be completed.

> (Admins) Ensure the EnableCSOnScheduleDaily and EnableCSOnScheduleProvider preferences are set to **Y** if you want to enable users to personalize their Daily and Provider Schedules to include the Clinical Summary (CS) column. You must also

select the **User Can Override** option for each preference. These preferences are set from **TWAdmin > Preferences** and are in the **General** preference set.

> (Admins) Set the EncounterSummaryAlwaysProvideClinicalSummary preference as required by your organization. See “EncounterSummaryAlwaysProvideClinicalSummary preference.”

> (Admins) In the Document Type Dictionary, mark each appropriate document type as a Clinical Summary.

> (Admins) In the General preferences, set the AllowClinicalSummaryWhenNoteUnFinal preference appropriately.

> (Users) Use the **Personalize** option off of the clinical toolbar to include the Clinical Summary (CS) column on the Daily or Provider schedules.

> (Admins) Set the auto-print defaults for the Clinical Summary.

> (Users) Ensure the patient’s preference for receiving Clinical Summaries is set in the Patient Profile.

For reporting, the application reports on the percentage of all arrived appointments whose the Clinical Summary Icon has been set to provided.

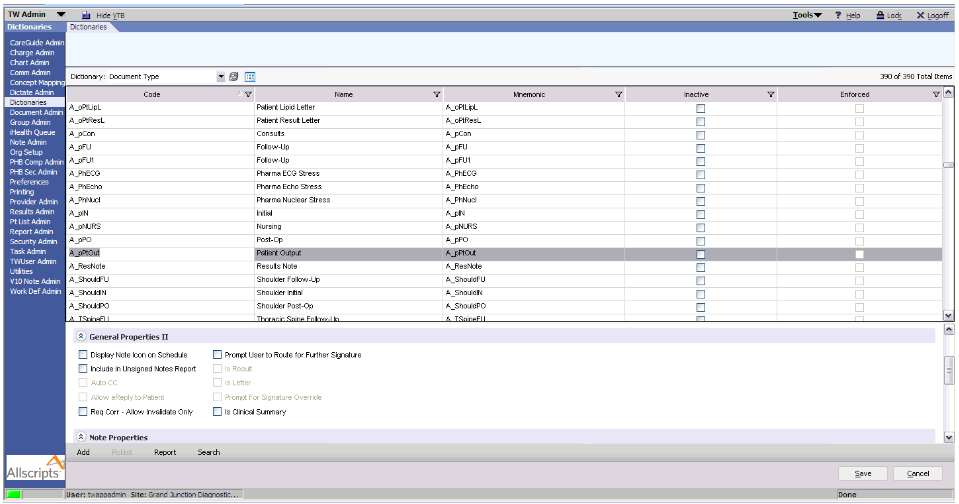
Installation and upgrade considerations

If you are a v11 Note client, Allscripts will apply upgrade scripts for this functionality. If you already have a Note output to be used as a Clinical Summary, but this output is not a default Note output, Allscripts will provide a script to make it a default. A script will also be provided to add the output (as Clinical Summary) to as a default to any Note input.

Mark a document type as a Clinical Summary

You can set this property in v10 Notes and v11 Notes, but you cannot create new document types for CEDs, to be used as the default Clinical Summary CED document type in this workflow. Allscripts delivers the CED document type (CED-Clinical Summary).

1. Log into Allscripts Enterprise EHR™ using the TWAdmin username and password.
2. Select **Dictionaries** from the vertical toolbar.
3. Select **Document Type** from the **Dictionary** drop-down.
4. In the grid, select the document type you want to mark as a Clinical Summary.
5. In the General Properties II section, select the **Is Clinical Summary** check box.

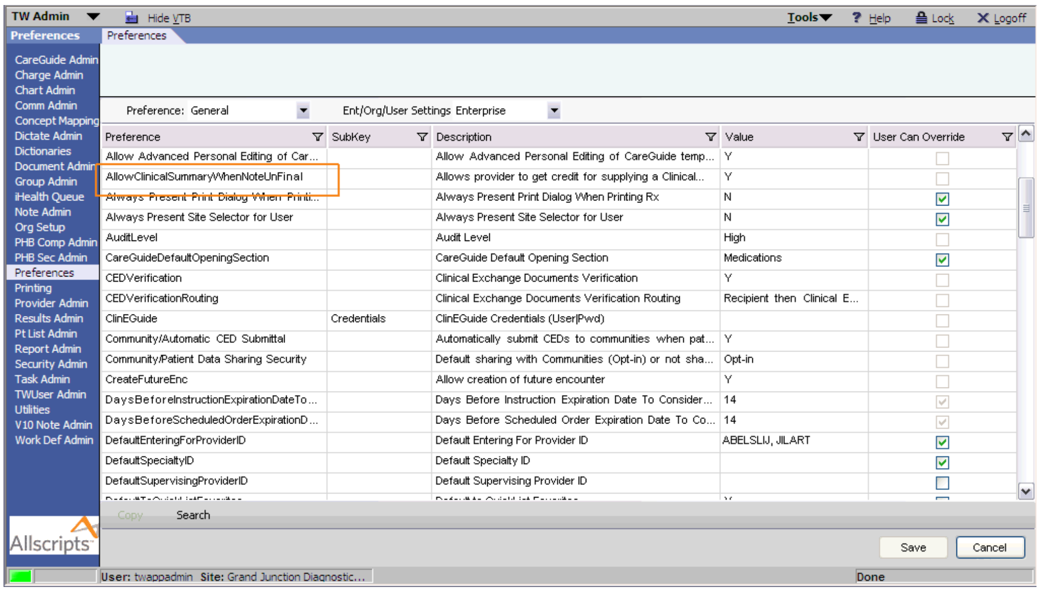


6. Click **Save**.

Indicate whether or not to generate the Clinical Summary before the note is finalized

This setting applies at the Enterprise/Organization level. Individual users cannot override this setting.

1. Log into Allscripts Enterprise EHR™ using the TWAdmin username and password.
2. Select **Preferences** from the vertical toolbar.
3. Select the **General** preference group.
4. Scroll to locate the AllowClinicalSummaryWhenNoteUnFinal preference.



5. Set the preference:
   > Enter **Y** if you want providers to be able to generate the Clinical Summary before the note is finalized.

   > Enter **N** if you do not want providers to be able to generate the Clinical Summary before the note is finalized.

6. Click **Save**.

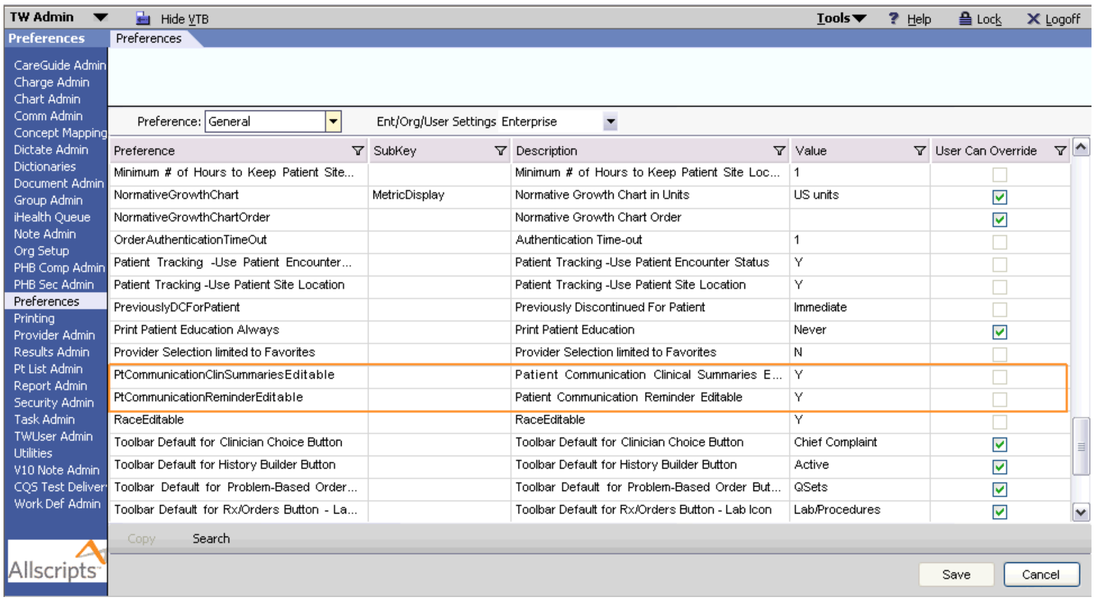
EncounterSummaryAlwaysProvide ClinicalSummary preference

The EncounterSummaryAlwaysProvideClinicalSummary preference is found on the **General** tab of Preferences in TWAdmin. You can set this preference at both the Enterprise and Organization level.

When the preference is set to **Y**, the **Provide Clinical Summary** check box on the Encounter Summary is selected by default. The provider can clear the check box if they do not want to provide a clinical summary for that encounter. If the preference is set to **N**, by default the **Provide Clinical Summary** check box is not selected. The provider can select the check box to provide a clinical summary for that encounter. If the preference is set to **Disable**, the **Provide Clinical Summary** check box is not selected and is disabled. Providers are unable to select the check box.

By default this preference is set to **Y**.

> ***IMPORTANT:*** *If you want to ensure that this preference is set to Disable for all of your users, regardless of their current settings, submit a case in SupportForce.com.*



EnableCSOnScheduleDaily preference

The EnableCSOnScheduleDaily preference is found on the **General** tab of Preferences in TWAdmin. You can set this preference at both the Enterprise and Organization level.

When the preference is set to **Y**, the Clinical Summary icon displays on the Daily Schedule, indicating whether or not a Clinical Summary has been provided or needs to be generated for the patient. If the preference is set to **N**, this icon does not display on the Daily Schedule.

By default this preference is set to **Y** and the **User Can Override** option is selected.

EnableCSOnScheduleProvider preference

The EnableCSOnScheduleProvider preference is found on the **General** tab of Preferences in TWAdmin. You can set this preference at both the Enterprise and Organization level.

When the preference is set to **Y**, the Clinical Summary icon displays on the Provider Schedule, indicating whether or not a Clinical Summary has been provided or needs to be generated for the patient. If the preference is set to **N**, this icon does not display on the Provider Schedule.

By default this preference is set to **Y** and the **User Can Override** option is selected.

Set auto-print defaults for the Clinical Summary

You can set these defaults for Providers Only and All Users. Only the **Original** copy type is available for Clinical Summaries. You can only print a Clinical Summary; faxing is not supported.

If you are printing the Clinical Summary, the application uses the auto-print defaults set up in TWAdmin to determine which printer to use and other settings. No Print dialog appears at the time of printing. If no auto-print defaults are set, the application displays a Print dialog at the time of printing.

You can print Clinical Summaries for v10 and v11 Notes and for CEDs, if there is no v10/v11 Note linked to the encounter.

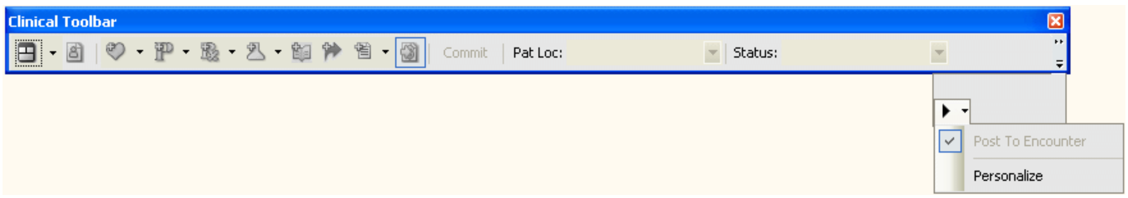
> ***NOTE:*** *These steps describe setting up the Auto-Print defaults for CED-Clinical Summary only. Auto-print defaults for v10 and v11 document types are set up separately. However, the current functionality does not differ when using these document types as Clinical Summary.*

1. Log into Allscripts Enterprise EHR™ using the TWAdmin username and password.
2. Select **Printing** from the vertical toolbar.
3. Select the **AutoPrint Defaults** tab.
4. In the **Type** drop-down, select **Clinical Exchange Document**.
5. From the list on the left, select the document you want to configure.
6. Click **Add/Edit Settings**.
7. Make the appropriate changes.

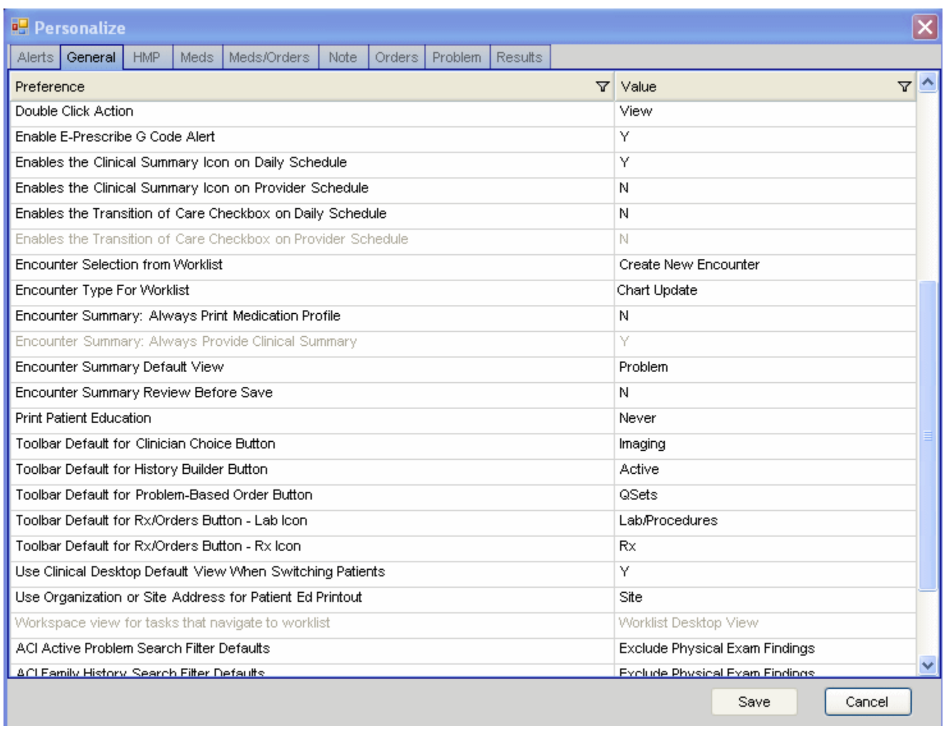
   For details on the available settings, refer to the ADBR.
8. Click **OK**.

Personalize the Daily and Provider Schedule to display the Clinical Summary (CS) icon

1. Click the **Main Menu** arrow on the Clinical Toolbar.



2. Select **Personalize**.
3. Click **General**.



4. To display the Clinical Summary icon on the Daily Schedule, select **Enables the Clinical Summary Icon on Daily Schedule** and set the Value to **Y**.

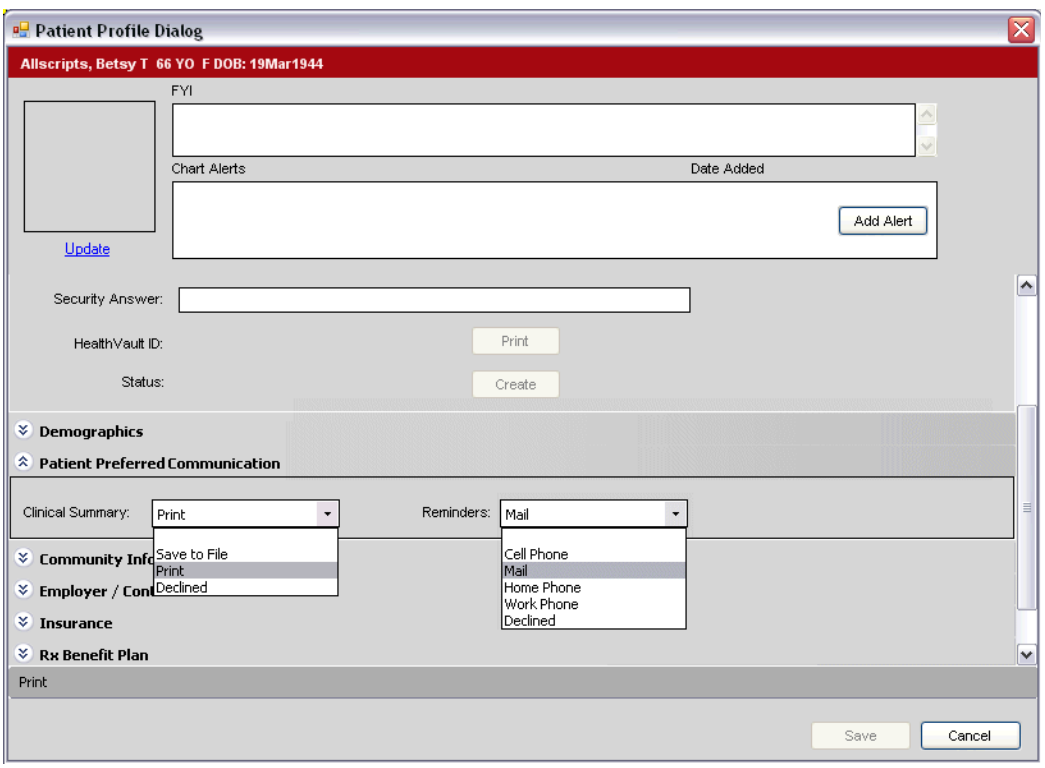
5. To display the Clinical Summary icon on the Provider Schedule, select **Enables the Clinical Summary Icon on Provider Schedule** and set the Value to **Y**.

   NOTE: *If these preferences are grayed out, then the system administrator has not selected the* **User Can Override** *check box for them in* **TWAdmin > Preferences**.

Document a patient's preferred method of communication for Clinical Summaries

You must have the Patient Profile Edit security class in TWAdmin to make changes to the Patient Profile. The PtCommunicationClinSummariesEditable preference (part of the General group) must be set to **Y**.

1. In Allscripts Enterprise EHR™, with a patient in context, click the **i** icon on the Patient Banner or highlight a patient on the schedule and click **Patient Profile**.



2. In the **Patient Preferred Communication** section, select the appropriate communication method from the **Clinical Summary** drop-down.

   The default is **Print** unless the patient is enrolled in Patient Portal. The choices in this field come from the Clinical Summary picklist in the Patient Communication dictionary.

   For details on how the application sends or prints Clinical Summaries, refer to the Provide Clinical Summaries documentation.

   > **NOTE:** *If the patient is enrolled in Patient Portal, the default is* **Patient Portal**. *This option and* **Patient Portal & Print** *are available only if the patient is enrolled in Patient Portal.*

3. Click **Save**.

Changes to the patient's preferred communication method are recorded in the Audit Log and appear on the Patient Profile printout.

If a patient is later enrolled in Patient Portal, and the default settings for Clinical Summary have never been changed (that is, it is still **Print**), the application automatically updates the settings to the Patient Portal defaults described above. If the settings have been changed, you must manually update them to the Patient Portal defaults (if appropriate).

> **NOTE:** *If the portal is MS HealthVault, the application leaves the default set to* **Mail**.

Security considerations when providing the Clinical Summary

You must have Chart View and Chart Print security in order to provide the Clinical Summary to patients. If you do not have Chart View and Chart Print security, the application displays a message, `You do not have privileges to provide Clinical Summary`.

If you do have Chart View and Chart Print security, the application next checks to see if there are Clinical Summary documents linked to the Arrived Appointment encounter. If so, then based on the security of those documents we find, the application verifies if you have adequate security to view them. If not, the application displays a message, `You do not have privileges to view one or more Clinical Summary Notes` and does not allow you to provide the Clinical Summary.

What the Clinical Summary (CS) icon indicates

The **CS** column on the Daily and Provider Schedule displays an icon indicating whether or not the Clinical Summary has been provided for the appointment. This icon appears only for arrived appointments. (If you change the status of the appointment to something other than arrived, the icon no longer appears.)

> **NOTE:** *The CS column appears only if the EnableCSOnScheduleDaily and EnableCSOnScheduleProvider preferences are set to* **Y** *at both the system and your individual user level, and you have added the CS column to your Daily or Provider Schedule. These preferences are set from* **TWAdmin > Preferences** *and are in the* **General** *preference set.*

There are two appearances of this icon.

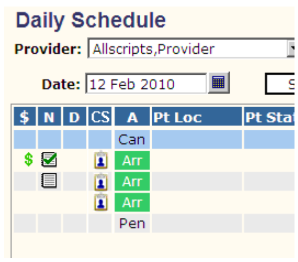
This icon indicates the Clinical Summary has **not** been provided and that action is required.

This icon indicates the Clinical Summary has been printed, sent to the patient portal, printed and sent to the portal, or saved to a file. (The tooltip indicates exactly which action was performed, based on the patient preference.) This icon can also indicate that no action is required.

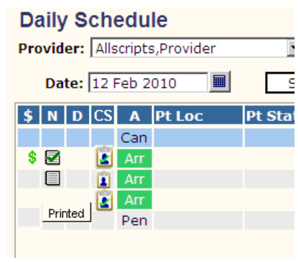
The CS column can also indicate **N/A**, which means that the patient preference for Clinical Summaries is set to **Declined**.

When you click the icon in its “action required” state, Allscripts Enterprise EHR™ provides the Clinical Summary in whatever format the patient has indicated as his or her preference in the **Patient Profile** (Print, Patient Portal, Save to File and Patient Portal & Print).

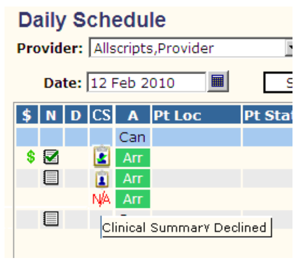
The following examples show how the CS icon appears on the Daily Schedule.



Initial state - action required



Clinical Summary provided - tooltip indicates method



Clinical Summary declined by patient

How a Clinical Summary is generated based on the patient's Clinical Summary preference

Based on the patient's Clinical Summary preference in his or her Patient Profile, Allscripts Enterprise EHR™ generates the Clinical Summary in different ways.

If the patient's Clinical Summary preference is...

> **Print**, the application prints the Clinical Summary using the auto-print defaults set up in TWAdmin. Auto-print defaults are not required, but can be used to automate as with printing any document. If auto-print defaults are not defined, the application displays the Print dialog so you can choose the printer.

> **Save to File**, the application saves the Clinical Summary to any drive that you specify (typically a Flash/USB drive that the patient has provided). You can save the Clinical Summary for a CED, or v10/v11 Note to file as a PDF.

> **Patient Portal**, the application sends the Clinical Summary to the portal (only for v10 Notes and CEDs).

> **Declined**, the application does not generate the Clinical Summary and the Provider or Daily Schedule displays N/A for the appointment. You receive credit for attempting to provide the Clinical Summary.

> **Patient Portal & Print**, the application prints the Clinical Summary and also sends it to the portal.

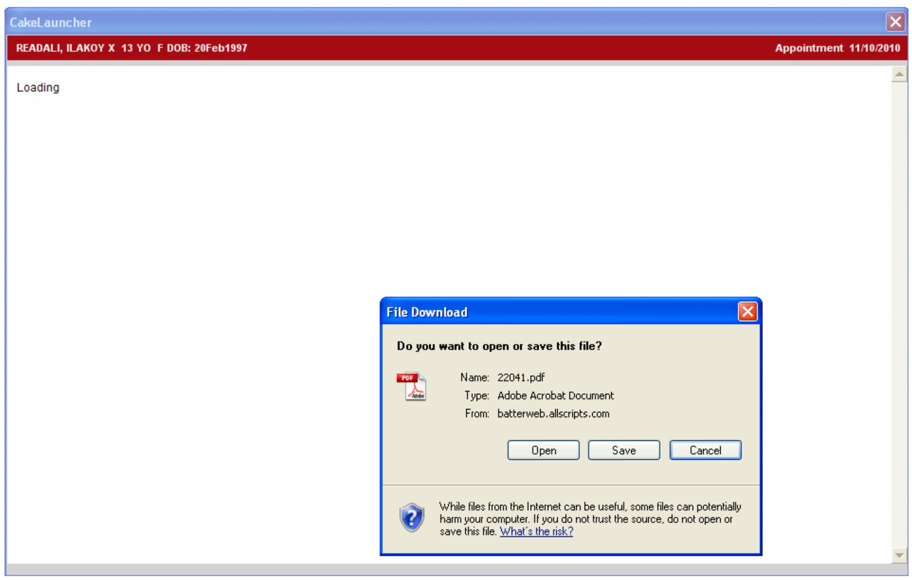
NOTE: If a v10 or v11 Note is linked to the encounter, that document is printed, but the CED is sent to Portal. The one exception is if the portal is Intuit Health and the

Note is v10 Note. In that case the application can send the v10 Note to Portal, as well as print for the patient.

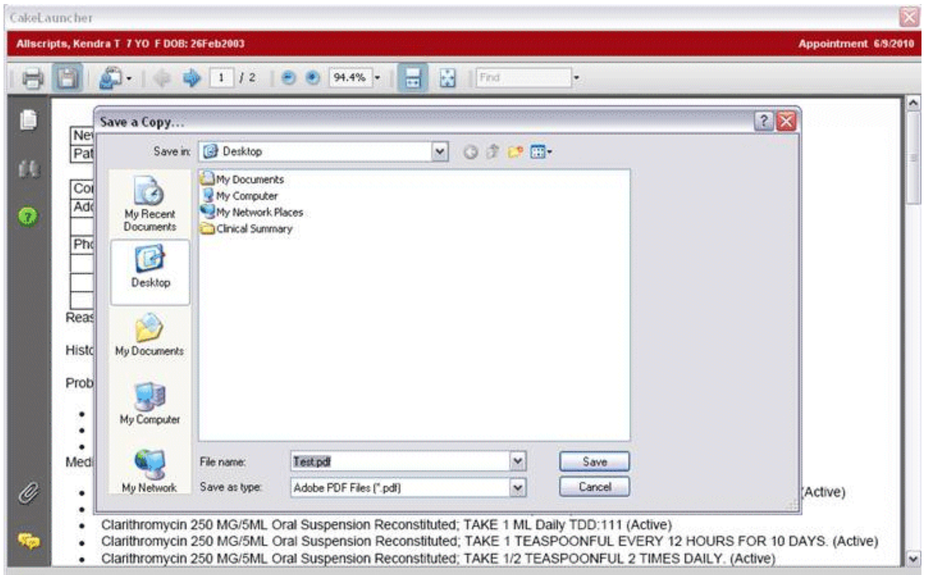
NOTE: *If the patient does not have a preference set, the application behaves as if the preference were Print.*

Saving a Clinical Summary to file

When the patient Clinical Summary preference is set to Save to File, when you generate the Clinical Summary, the CakeLauncher page displays, along with a prompt to Open or Save the file.



If you click **Open**, you can preview the PDF file. You can then save the file from the preview page. If you click **Save**, you are immediately prompted to select the location to which you want to save the file based on the electronic media (for example, a USB drive) presented by the patient.



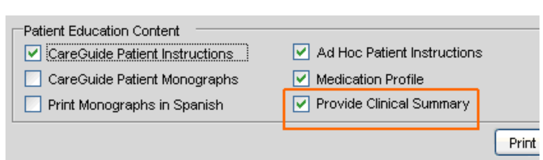
Provide a Clinical Summary from the Encounter Summary

These steps assume you have completed the chart note, committed the encounter and are viewing the **Encounter Summary**.

These steps also assume that the chart note or other document linked to the encounter is set up to be a Clinical Summary document type.

> ***NOTE:*** *You must have Chart-View security enabled to provide the Clinical Summary. If you do not, the application displays the standard Document Security warning and you cannot provide the Clinical Summary.*

1. Review the **Encounter Summary** to verify you are ready to provide the Clinical Summary.
2. Select the **Provide Clinical Summary** check box.



3. Click **Save & Continue** or **Print Pt. Ed**.

   One of the following happens.

   > If the note has been finalized, the application generates the Clinical Summary according to the patient's Clinical Summary preference in the **Patient Profile**.

   > If the note has not been finalized and the AllowClinicalSummaryWhenNoteUnFinal preference is set to **Y**, the application generates the Clinical Summary according to the patient's Clinical Summary preference in the **Patient Profile**.

   > If the note has not been finalized and the AllowClinicalSummaryWhenNoteUnFinal preference is set to **N**, a message appears: `The document that you are trying to print as a Clinical Summary has not been finalized. This document must be final in order to provide as a Clinical Summary.`

   > If there is no v10 or v11 document linked to the encounter, the application generates a CCD according to the patient's Clinical Summary preference in the **Patient Profile**.

   For details on how the Clinical Summary is generated, refer to "How a Clinical Summary is generated based on the patient's Clinical Summary preference."

   After the Clinical Summary is generated, the application updates the icon in the **CS** column of the Provider or Daily Schedule to reflect that the Clinical Summary has either been provided or declined. The tooltip associated with the icon reflects exactly what action was performed. You can click it again and generate another Clinical Summary if further updates are made to the encounter. If a note was used as the Clinical Summary the first time, the most recent version of the note is retrieved when you click the icon again. If a CCD was used as the Clinical Summary the first time, the CCD is regenerated when you click the icon again.

Provide a Clinical Summary from the Daily or Provider Schedule

These steps assume the provider has completed the patient encounter.

These steps also assume that the chart note or other document linked to the encounter is set up to be a Clinical Summary document type.

NOTE: You must have Chart-View security enabled to provide the Clinical Summary. If you do not, the application displays the standard Document Security warning and you cannot provide the Clinical Summary.

1. On the Schedule, click the icon in the **CS** column beside the appointment.

   One of the following happens.

   > If the note has been finalized, the application generates the Clinical Summary according to the patient's Clinical Summary preference in the **Patient Profile**.

   > If the note has not been finalized and the AllowClinicalSummaryWhenNoteUnFinal preference is set to **Y**, the application generates the Clinical Summary according to the patient's Clinical Summary preference in the **Patient Profile**.

   > If the note has not been finalized and the AllowClinicalSummaryWhenNoteUnFinal preference is set to **N**, a message appears: `The document that you are trying to print as a Clinical Summary has not been finalized. This document must be final in order to provide as a Clinical Summary.`

   > If there is no v10 or v11 document linked to the encounter, the application generates a CCD according to the patient's Clinical Summary preference in the **Patient Profile**.

   For details about how the Clinical Summary is generated, refer to "How a Clinical Summary is generated based on the patient's Clinical Summary preference."

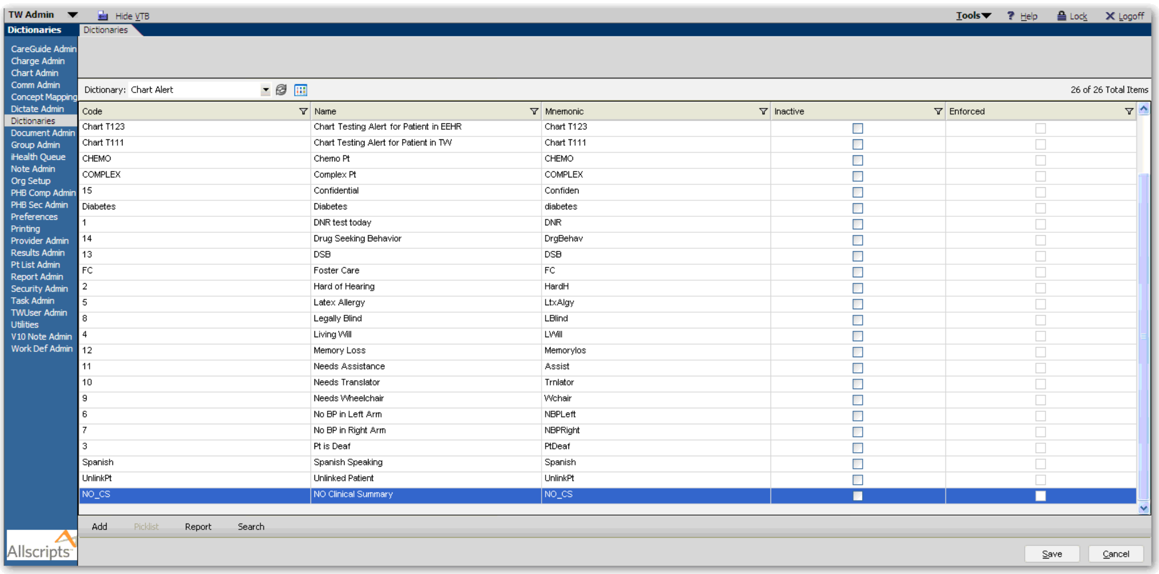
   After the Clinical Summary is generated, the application updates the icon in the **CS** column of the Provider or Daily Schedule to reflect that the Clinical Summary has either been provided or declined. The tooltip associated with the icon reflects exactly what action was performed. You can click it again and generate another Clinical Summary if further updates are made to the encounter. If a note was used as the Clinical Summary the first time, the most recent version of the note is retrieved when you click the icon again. If a CCD was used as the Clinical Summary the first time, the CCD is regenerated when you click the icon again.

Add a Chart Alert to indicate the Clinical Summary should not be provided

Sometimes a provider might not want the Clinical Summary provided to the patient. The patient's chart or encounter may contain clinical items that should be withheld from such a summary, or that require direct provider follow-up with the patient.

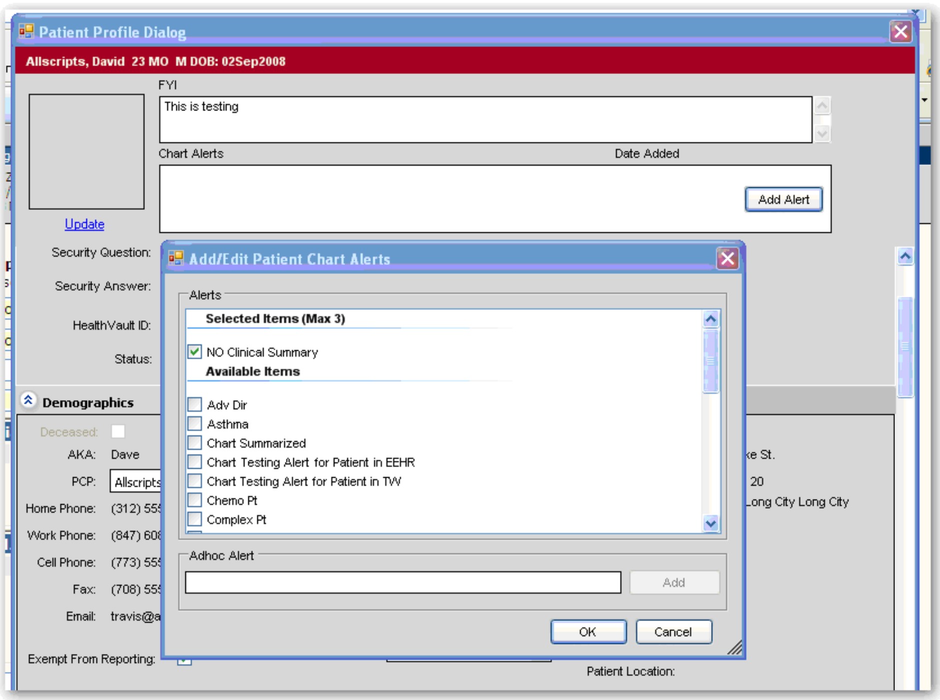
1. In the **Chart Alerts Dictionary**, add a new chart alert to notify users that Clinical Summary should not be provided.

   Refer to the ADBR for detailed instructions on using the Chart Alerts Dictionary.



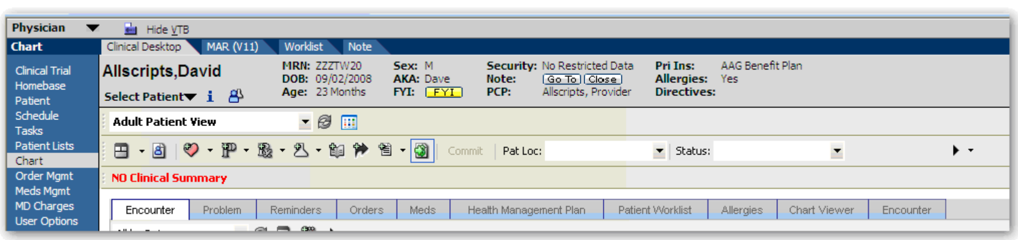
2. In **Patient Demographics**, select the Chart Alert that indicates not to provide a Clinical Summary.

Add a Chart Alert to indicate the Clinical Summary should not be provided



3. Click **OK** to apply the Chart Alert.

When a provider or clinical staff views the patient's chart he or she now knows that the Clinical Summary should not be provided to the patient, and the action on the Schedule can be ignored.



For more information

For more information, go to the Allscripts™ Client Support page at **http://www.allscripts.com/client-login.asp**. From that page, complete the following steps to access the product documentation library:

1. Select your product.

   For example, **Allscripts Professional EHR**.

2. Type your login credentials in the **User ID** and **Password** boxes.

   NOTE: *If you do not have a User ID and Password for the Allscripts Client Support page, click the link on the right side of the page to register for an account.*

3. Click **Log in**.
4. Select the **Product Documentation** tab.
5. Select your product from the **Select Product** drop-down list.

   For example, **Allscripts Professional EHR**.

6. Select a product release from the **Select Release Name** drop-down list.

   For example, **9.0**.

7. Select the type of documentation you want to access from the **Select Documentation Type** drop-down list.

   For example, **Release Notes**.

8. Click the link for the document you want to access.

Contact us

We welcome your feedback. To submit a question, comment, or suggestion regarding product documentation, send an e-mail to **techpubsteam@allscripts.com**.

Please include as much of the following information in your e-mail as possible so that we are better able to address your comments:

> The product name and release
> The title of the document you are referring to (PDF only)
> The title of the section you are referring to (PDF only)
> The date that appears on the bottom of the page in the document (PDF only)
> The version and build number of the Help system you are referring to (online Help only)
> The title of the Help topic you are referring to (online Help only)