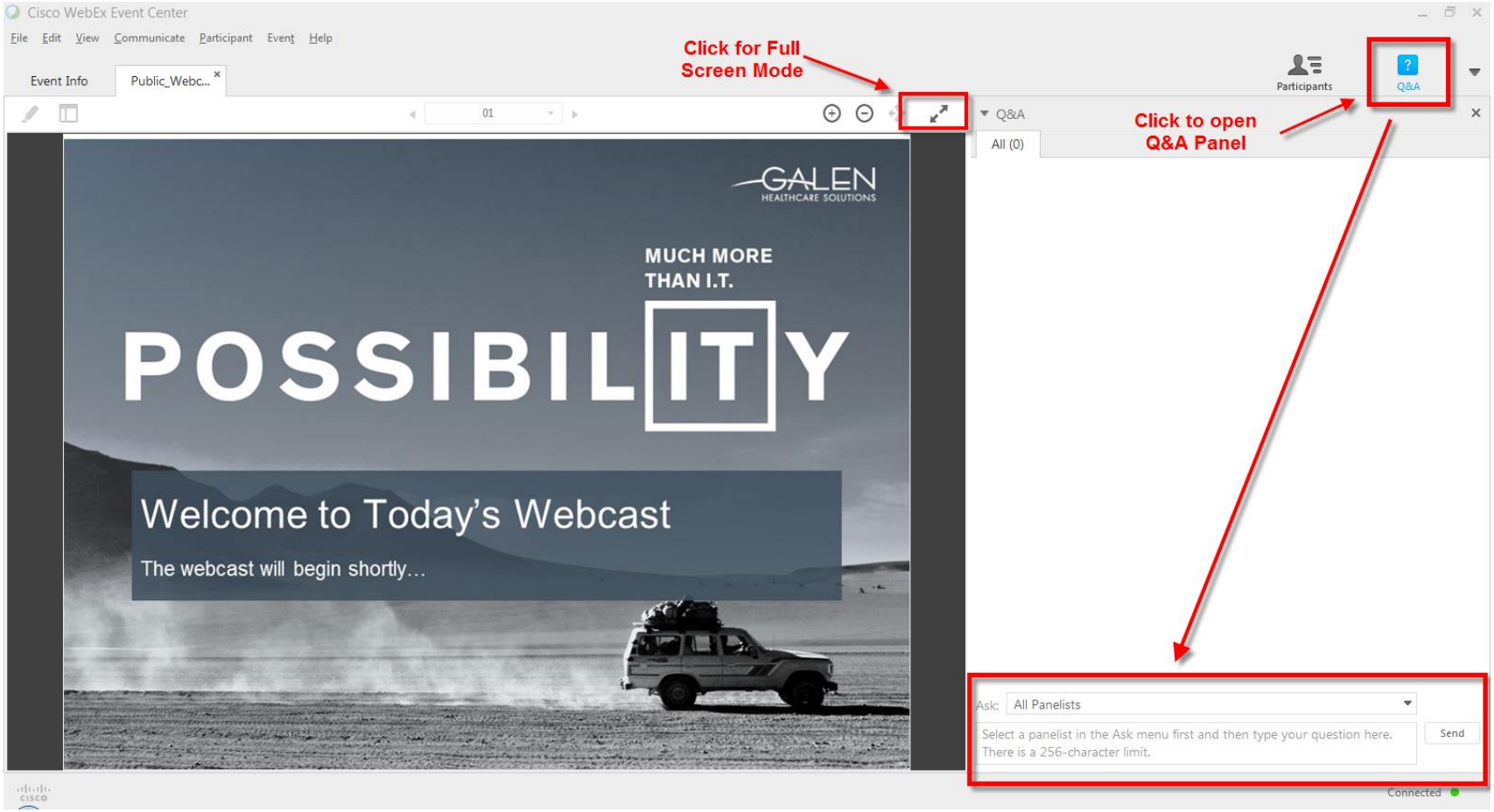
15.1 NOTE UPDATES - BIG CHANGES

January 29, 2016

Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!



Presenters:

- Kathryn Halliwill – Galen Consultant
  - Over 20 years of experience in Healthcare
    - EHR Implementations
    - Practice Management Systems Implementation
    - Practice Workflow Analysis
    - Management of After Hours Clinics

- Ellen Thomas – Galen Clinical Consultant
  - 20 years of Healthcare Experience
  - 7 years of Allscripts Software Experience
    - End User Training
    - EHR Implementation
    - Configuration
    - Documentation Improvement

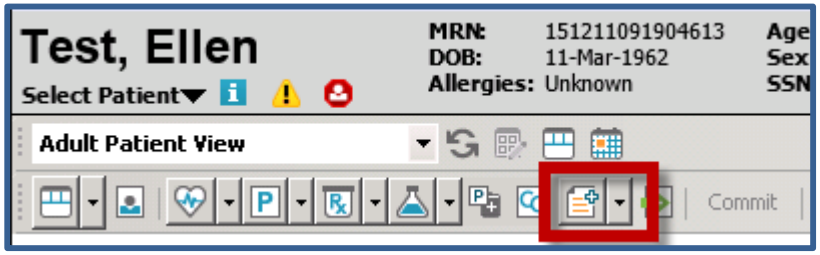
AGENDA

- Overview of Updates to V11 Note
- Demonstration in Application
  - Functionality and Configuration
    - Recommended Orders and Required Items
    - Note Output Progress Checks
    - Text Macros
    - Text Templates

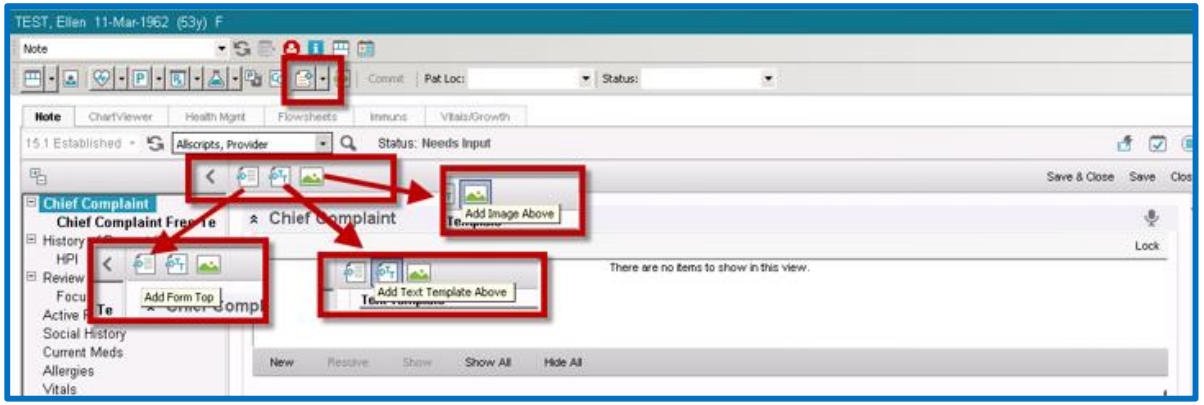
This webcast will be conducted from within the application. The following Slides contain screenshots and configuration steps for your future reference and will be posted to the Galen Wiki soon after this webcast.

Solving for Today. Preparing for Tomorrow.

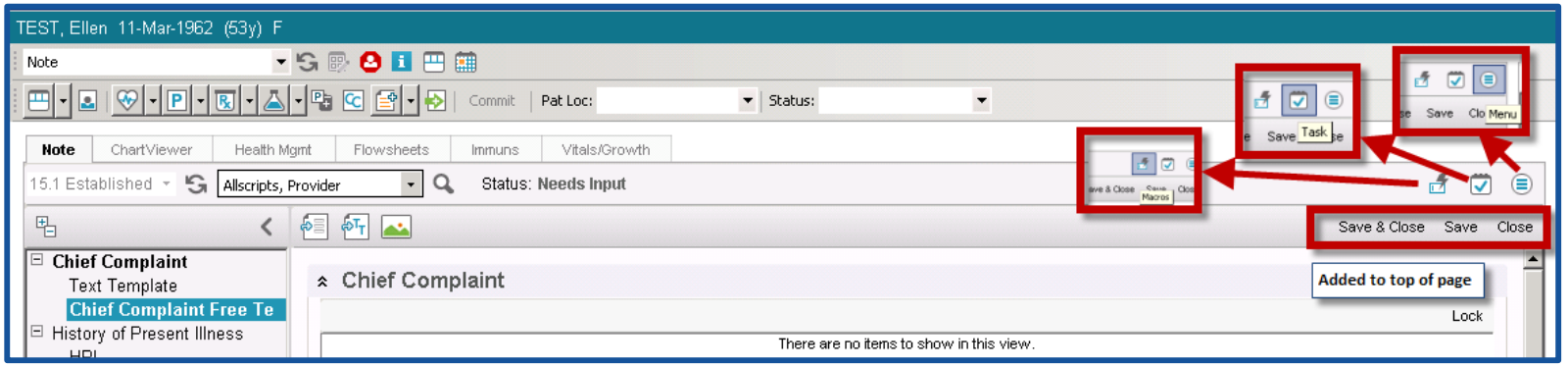
GALEN HEALTHCARE SOLUTIONS



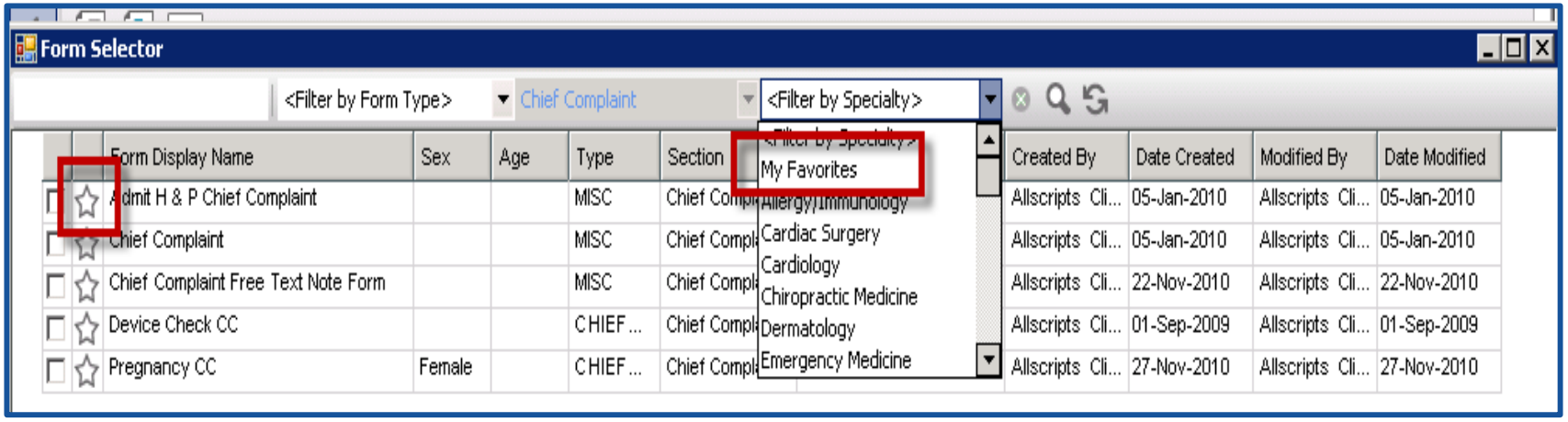
New Look



New Icons

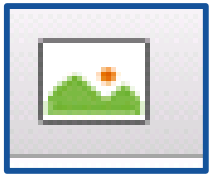


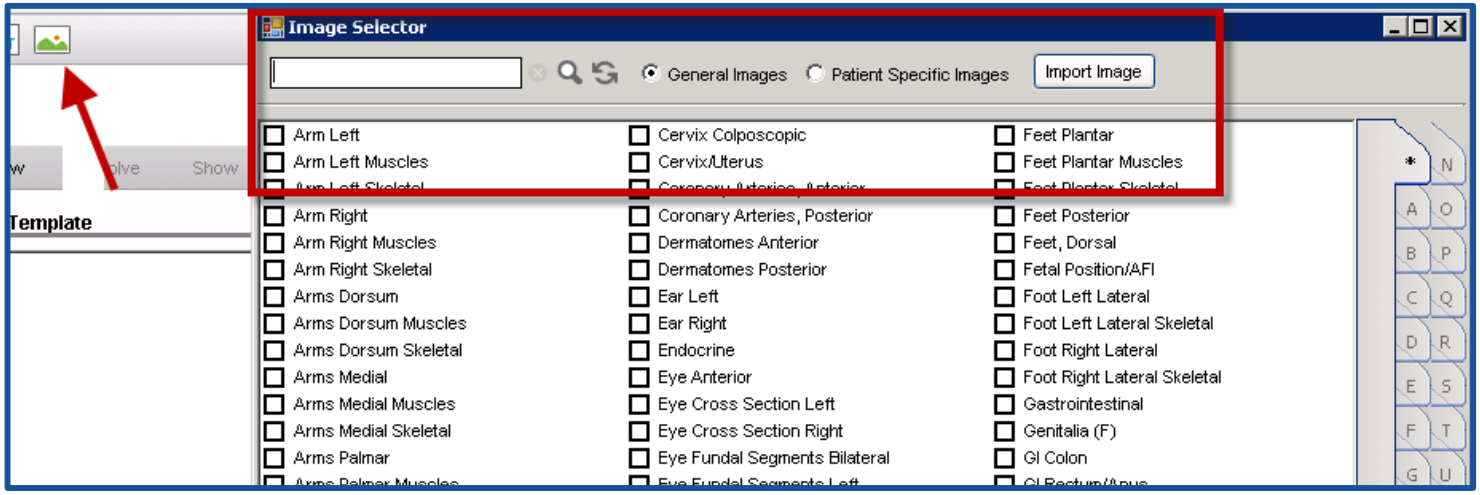
- Forms Selector Icon Changes



- Can use the new Star Icon to indicate your favorite forms
- Then you can filter forms by My Favorites
- Preference to default to My Favorites or Note Specialty renamed
  - **DefaultFilterInFormSelector**

- Add Image Icon Change



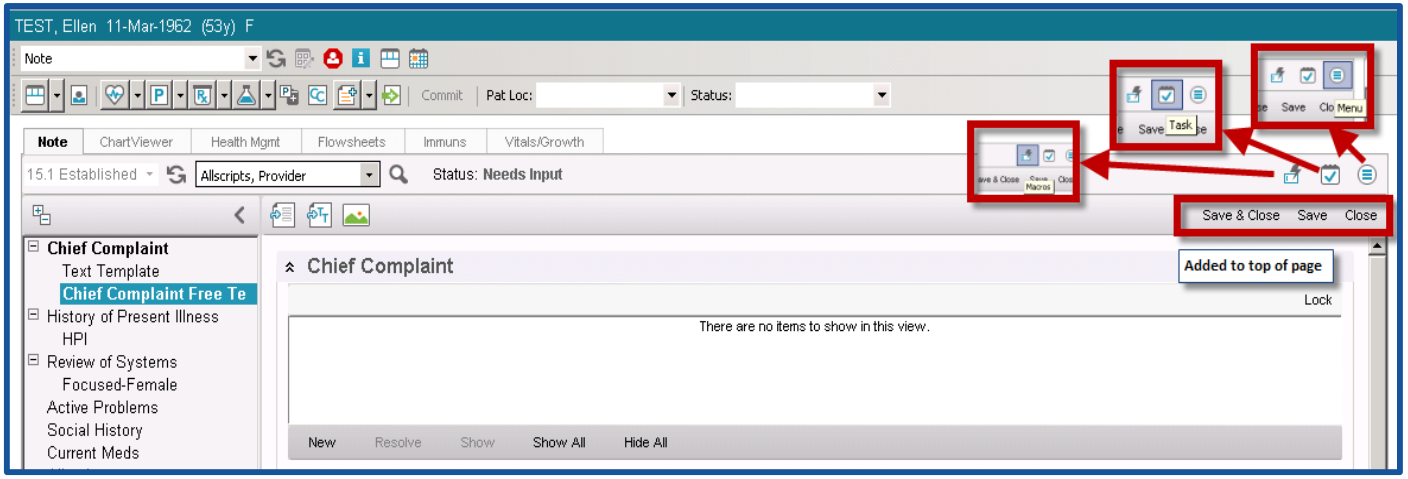


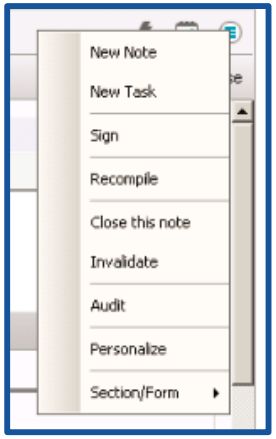
Opens **Image Selector**, enabling you to select an existing image or import a new image to add to the current note.

Add Text Template Top – New Icon

More on this function later in Webcast

- Button and Icon placement at top of NAW





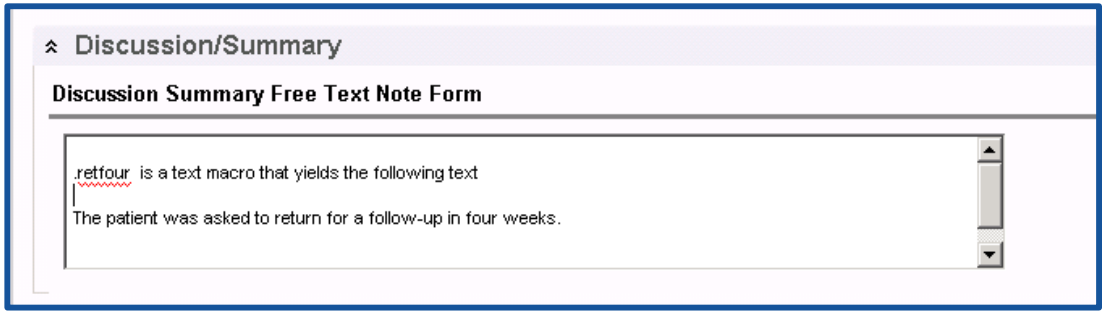
New Icon for Macros - later in webcast we will expand on this new functionality

New look Task Icon – new placement

Menu icon to access expanded menu easier

Save –Save & Close – Close buttons added at top of NAW for easier access

Text Macros and Text Template addition and functionality

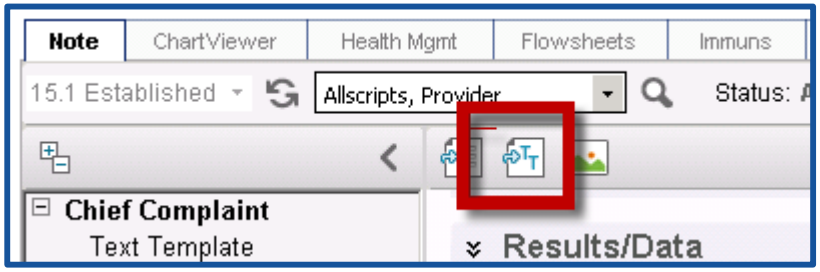


- Text macro functionality was added to V11 note in version 15.1.
- You can now create text macros and insert those macros into V11 notes

- You can also use text macros in V10 notes and in other areas of the application, including the following:
  - Tasking, Medication Details, Order Details, Verify Results, Order Selection Summary and Call Processing

More Details on these two items will be demonstrated later in the Webcast

- Improvements were made to text templates in version 15.1.
- Added the ability to insert text templates into a note by clicking the Add Text Template icon
- Inserting text templates when documenting an impression on Problem Details.
- Addition of Favorites to Text Template selector fields



Name	Pre 15.1	15.1
Refresh icon		
Edit View icon		
My Alerts icon		
Other Alerts icon		
No Active Alerts icon		
Patient Profile Dialog icon		
Quick Chart		
Quick Appointments icon		
Tile View icon		
Encounter Summary icon		
Add New Vital icon		
Add New Problem icon		
Add New Medication icon		
Add New Lab icon		
Add New Problem-Based Order icon		
Chief Complaint icon		

Name	Pre 15.1	15.1
Clinician Choice icon		
Note Authoring workspace icon		
Post to Encounter icon		
Lookup icon		
New Task icon		
Menu icon		
Insert Dictation Pointer icon		
Select Date and Time icon		
Select Date icon		

Several new icons were also added to the **Note Authoring** workspace for version 15.1.

(Add Form icon)	Opens **Form Selector**, enabling you to select a note form to insert into the selected note section of the **Note Authoring** workspace.
(Add Text Template icon)	Displays the **Text Template** pane in the selected note section of the **Note Authoring** workspace, enabling you to select text templates to insert into the current note.
(Add Image icon)	Opens **Image Selector**, enabling you to select an existing image or import a new image to add to the current note.
(Macros icon)	Opens **Manage Macros**, which you can use to view, create, and edit your personal text macros.

New Functionality in the Note Authoring Workspace

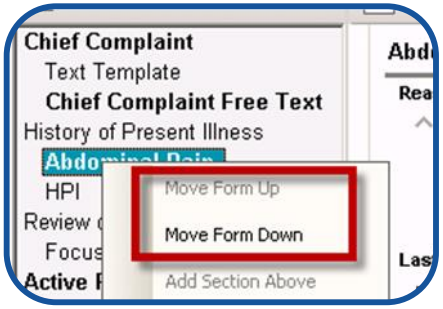
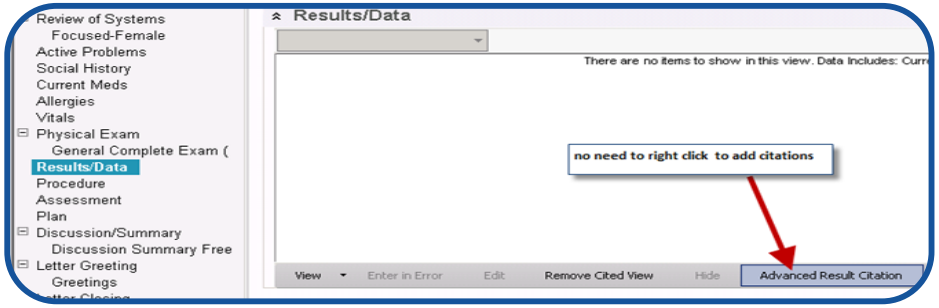
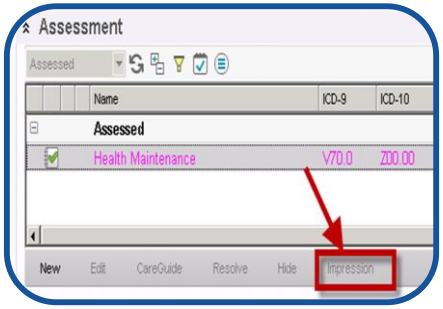


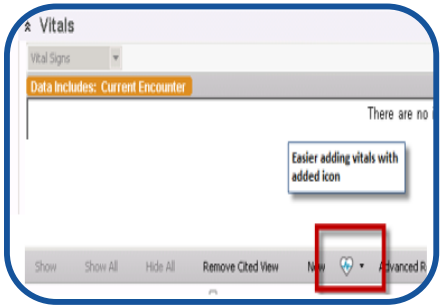
Table of Contents New ability to rearrange forms in the Note Authoring Workspace



Results Data Section –Advanced Result Citation added to tool bar



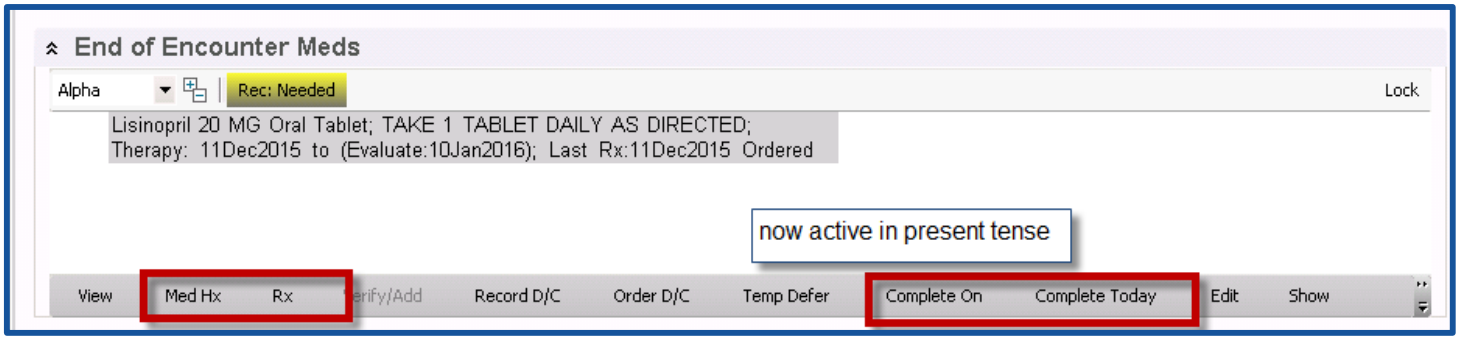
Assessment Section – Added Impressions in the tool bar



Vitals Section – New Icon added to tool bar for ease in adding vitals from within the note

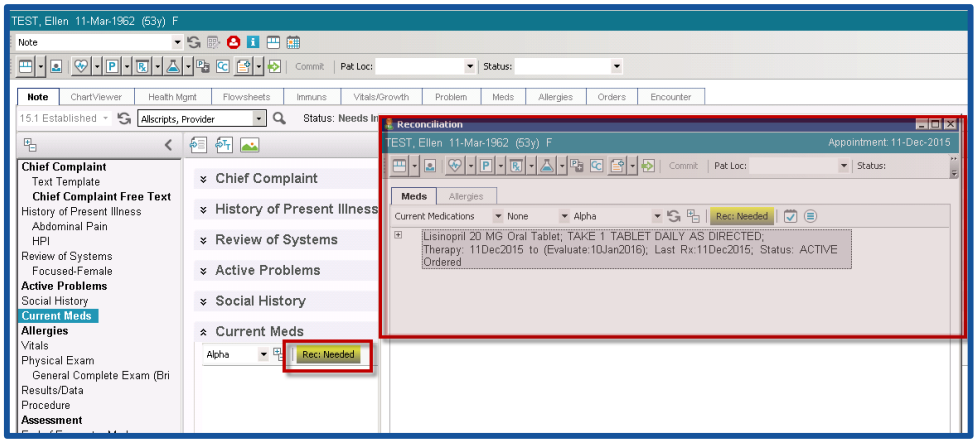
Changes and Updates to Medication Sections

Current Meds, End of Encounter Meds, Past Meds

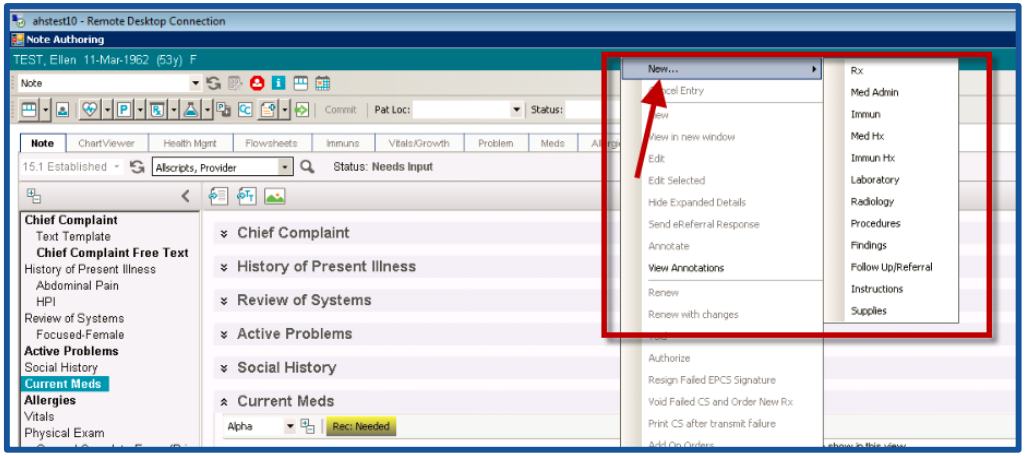


- 2 new buttons allow users to navigate to Rx or Med Hx without closing the note
- Completed On/Completed Today wording was changed to Complete On and Complete Today to reflect present tense and to be more precise
- Toolbar was cleaned up with many items removed to the context menu
  - Edit Selected, Order New RX, Print CS, Resign Failed EPCS, Void Failed EPCS were removed
- Order of buttons in Medication section toolbar was rearranged
- Medication Sections in the NAW are now larger and easier to read

Solving for Today. Preparing for Tomorrow.

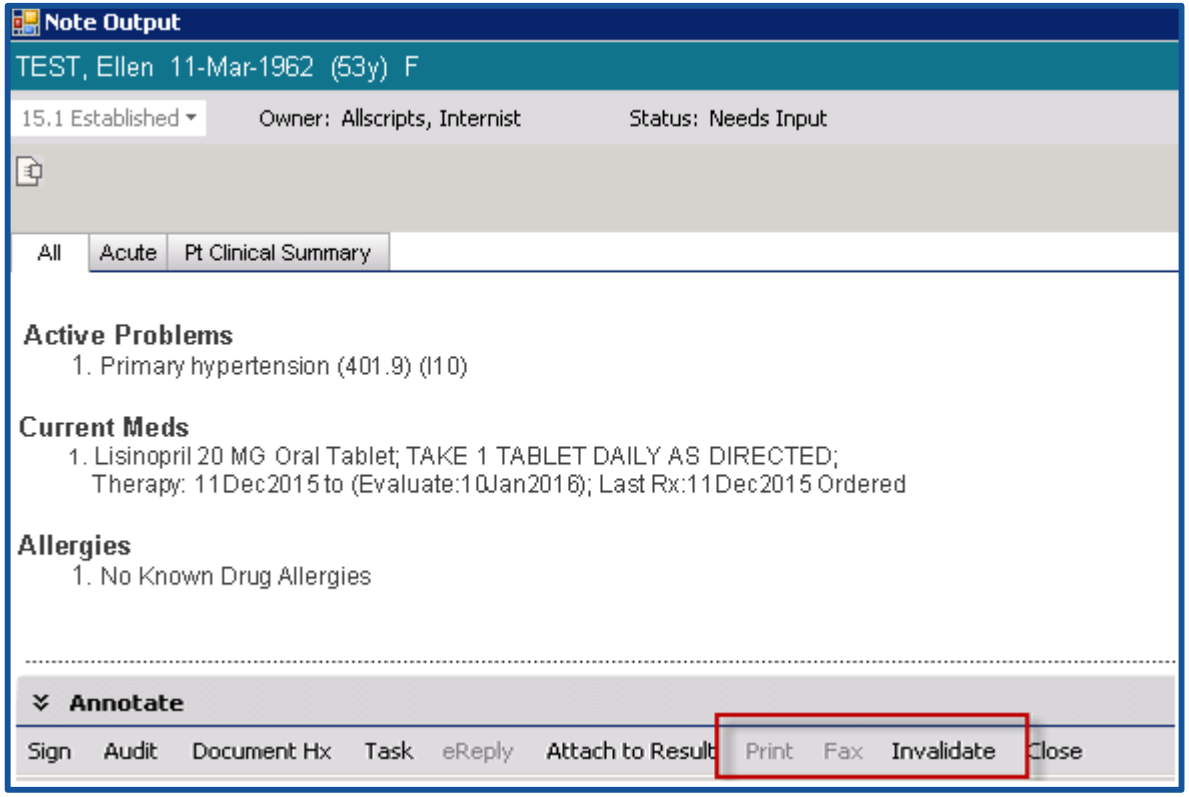


Medication Reconciliation and Allergy Reconciliation can be done without navigating out of the note



Context menu item “New” will open specific tabs on the ACI without Closing the NAW

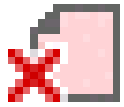
In the Note Viewer and Note Output section

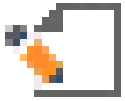


Print, Fax, and Invalidate buttons were added to the toolbar of the Note Viewer and Note Output pages for ease of use.

- **Updated Data Indicators for the Note in the Chart Viewer**

❖ Indicates a note

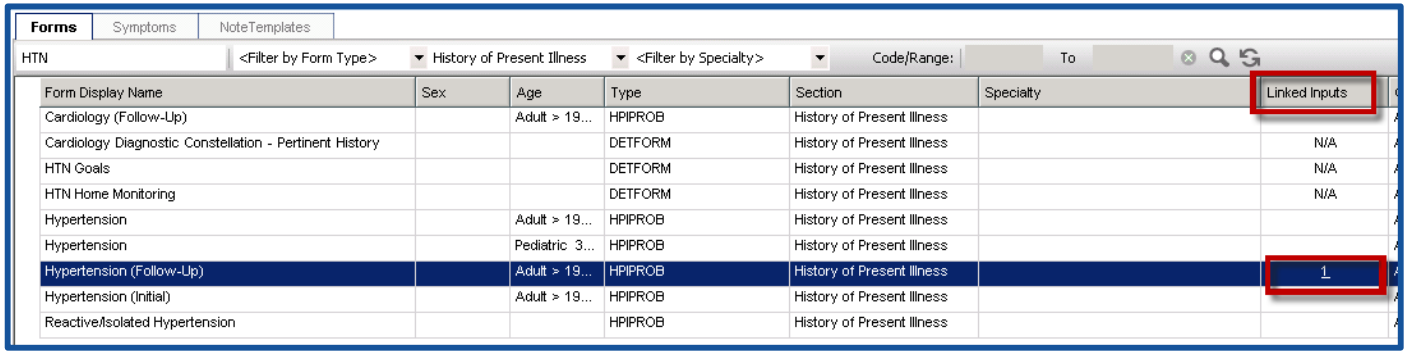
❖ Indicates an invalid note 

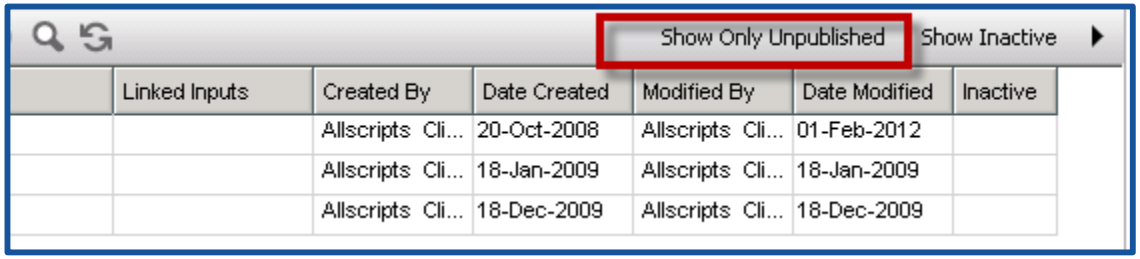
❖ Indicates that a note needs to be Signed 

❖ Indicates a scanned document or result

Note Admin Changes

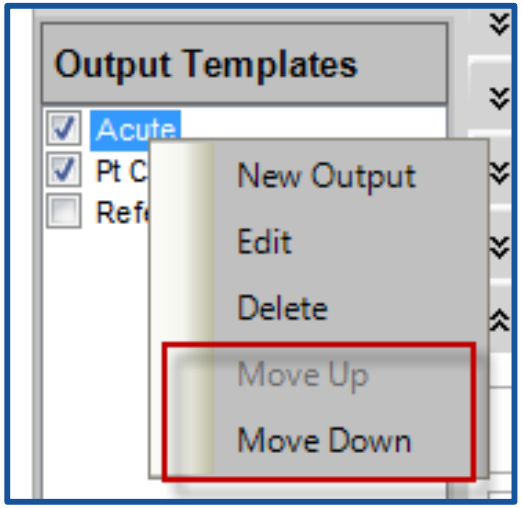
- A new column called Linked Inputs was added to the Forms component of Note Admin.
- Show Only Unpublished button – gives the ability to display only unpublished note forms on the Forms component
- Print button was also added to the Forms component, giving you the ability to print the forms that are displayed after you conduct a search



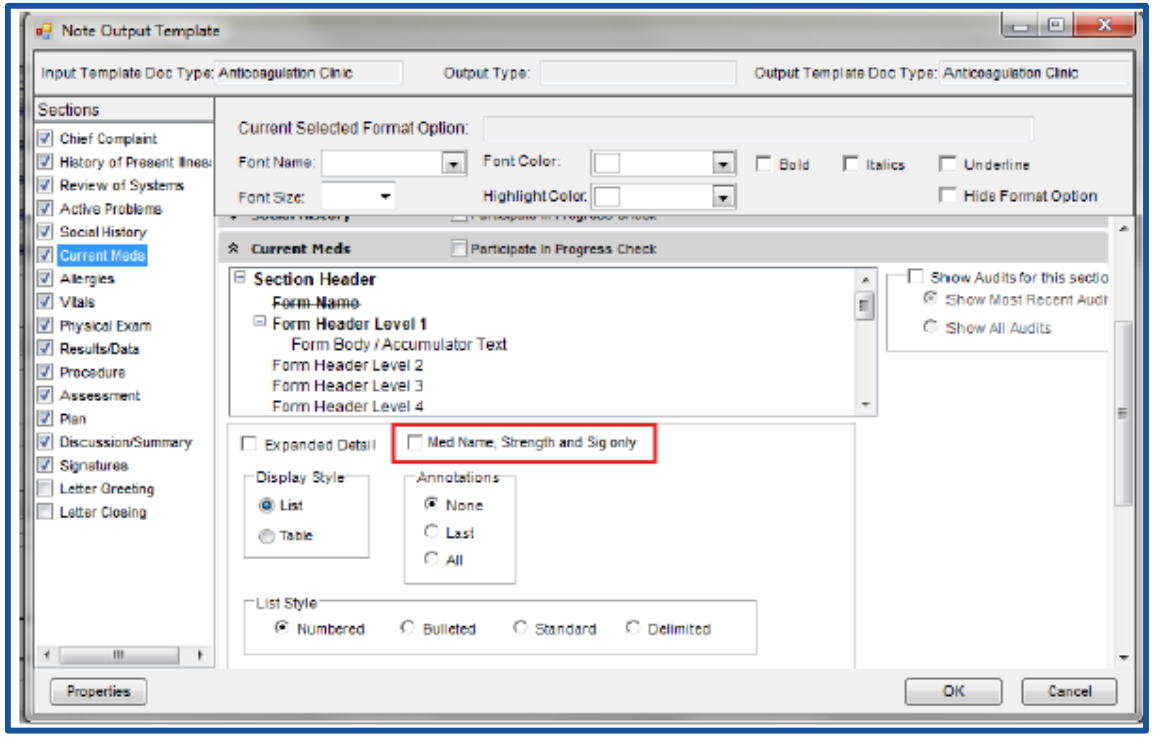


Note Admin Changes – Output section

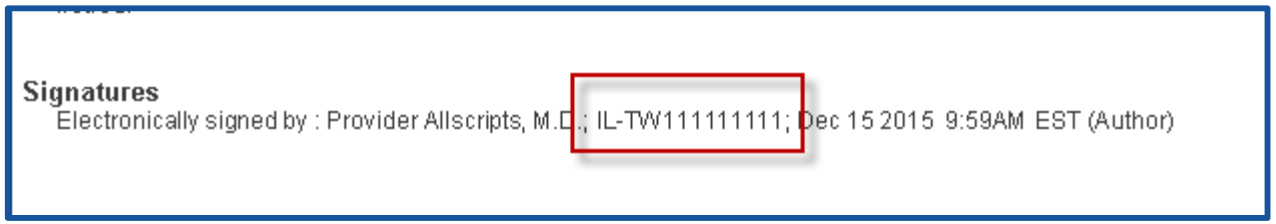
- You can now easily rearrange the order of the Outputs. No need to remove and add back in to change the order.



Solving for Today. Preparing for Tomorrow.



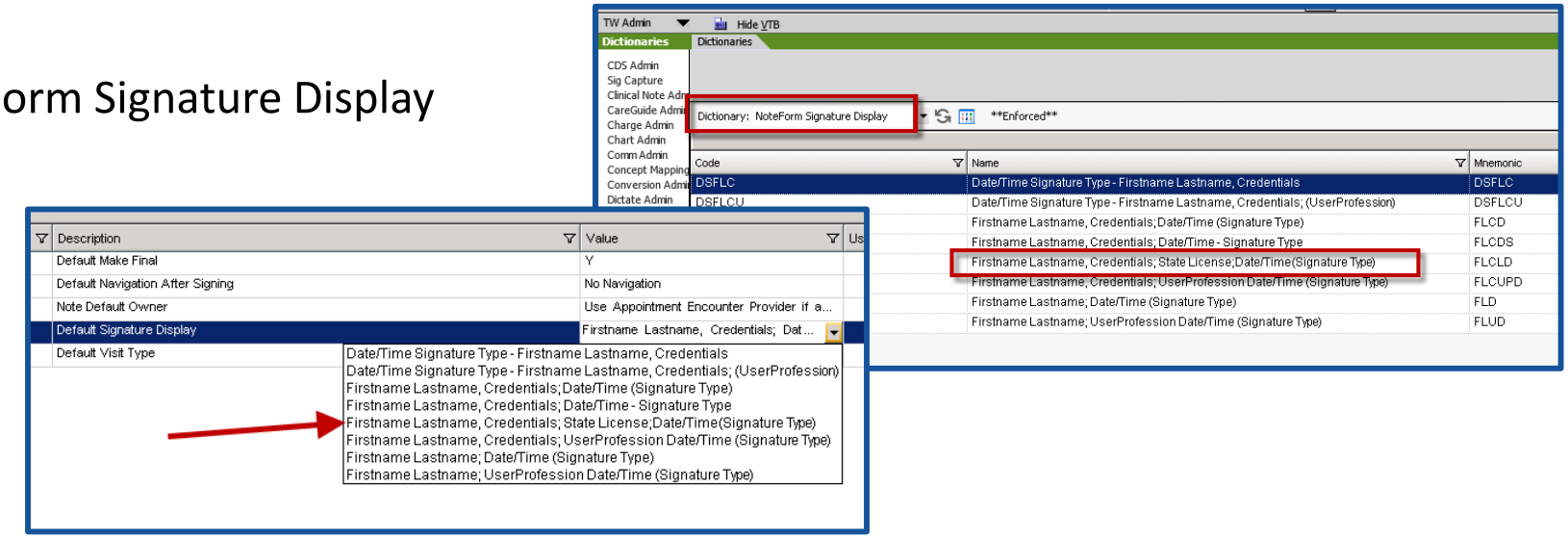
When configuring the Note Output sections you can now choose to show Medication name, strength and Sig using the new control shown here



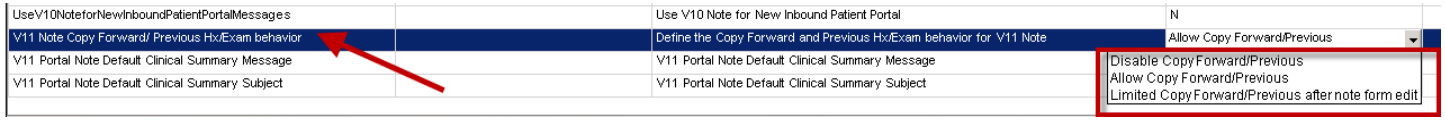
State License numbers can now be included in Electronic Signatures. We will discuss the set up for this later in the demonstration

New Note Preferences

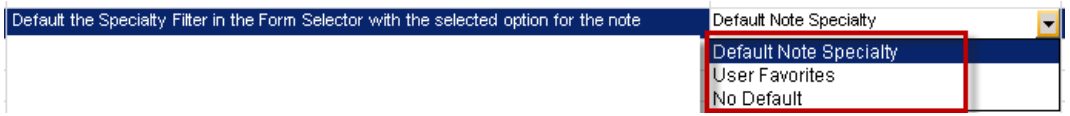
NoteForm Signature Display



V11 Note Copy Forward/Previous Hx/Exam behavior added

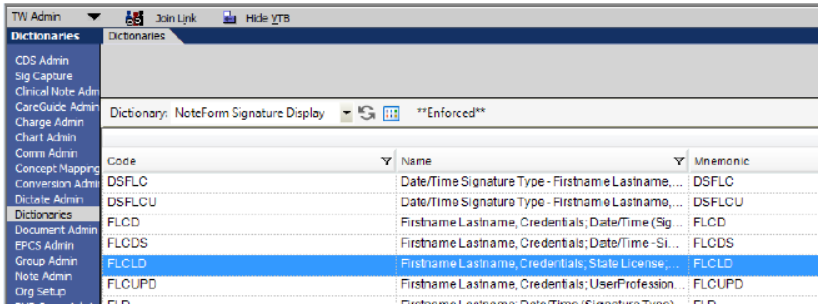


DefaultSpecialtyInFormSelector preference was renamed to DefaultFilterInFormSelector



Configuration of State License in Electronic Signature

- Note: New enforced dictionary item in Note Default Signature Display dictionary has been added with the 15.1 upgrade. This addition (Firstname Lastname, Credentials; State License; Date/Time (Signature Type) is available to choose in preferences



CONFIGURATION STEPS

1. Log on to Allscripts TouchWorks® EHR.
2. Access TW Admin > Preferences.
3. From Preferences, select Note.
4. In the Preference column, select Note Default Signature Display.
5. For Value, select Firstname Lastname, Credentials; State License; Date/Time (Signature Type).
6. Click Save.

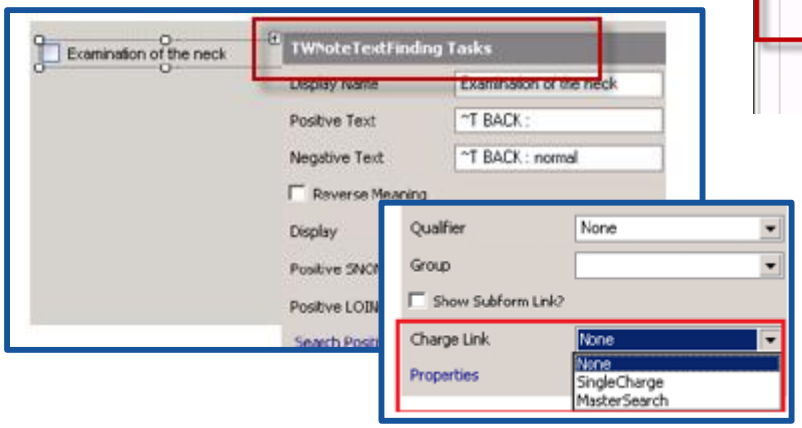
Results of this task

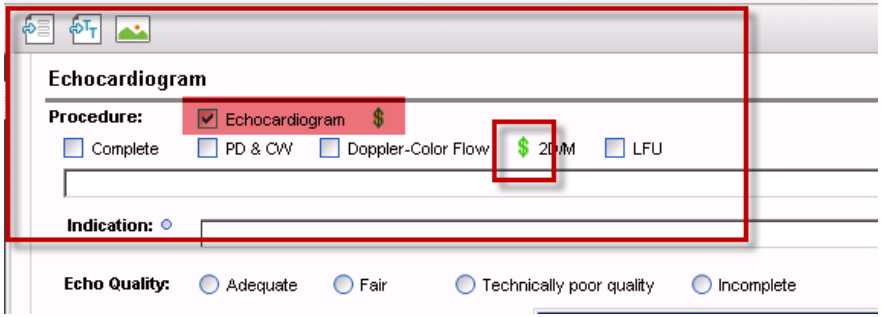
The Note Default Signature Display preference is set to include state license. The license information comes from the Licenses/IDs section in TWUser.

Charge from the Note Authoring Workspace

- When you document clinical services in the V11 Note Authoring workspace, you can now select charge codes to associate to the documentation in the note form. Charges are automatically filled into the charge summary from the note. You only need to submit the charges from the charges workspace.
- Charge Link can be set up on Text Finding Controls or Note Medcin Finding Controls by an Admin in Note Admin or enable the user to select charges from Note Authoring workspace for V11 note.
- The dollar sign ( ) is displayed next to note form controls that are enabled for charging

- **Details for full configuration for preference setting, noteform configuration, and charge section configuration as well as the personize section updates can be found in the Feature guide *Charge_from_Note_Authoring_Workspace_Feature_Guide_15.1_TouchWorksEHR***





Recommended Orders and Required Items

- 15.1 enables organizations to recommend orders or require providers or staff to complete specific items when documenting clinical services.

- Recommended orders and required items are identified and configured at the noteform build level and are specific to the organization.

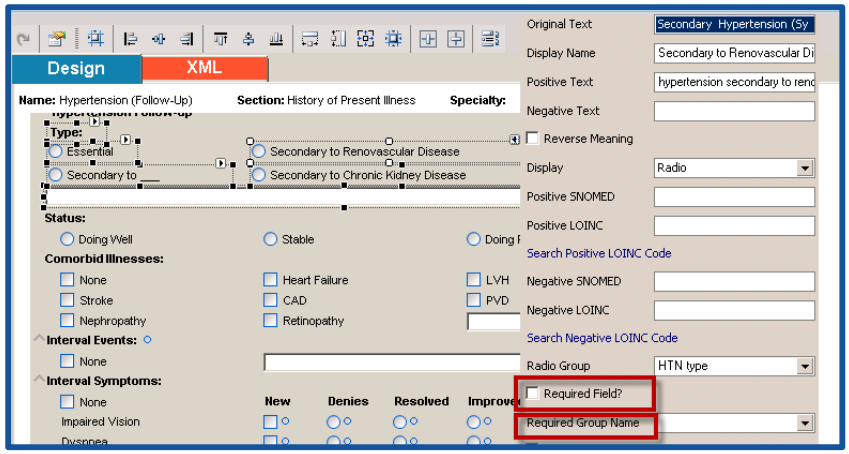
Caution: If you define an order to be required, the control must be selected in Note Authoring workspace (that is, the order must be ordered to finalize the note). You might not want to define order controls as required if the order does not need to be placed for every patient visit. If an order is required but the provider does not want to place the order, they would have to select the order and finalize the note, and then manually remove it by cancelling it or permanently deferring it (not recommended).

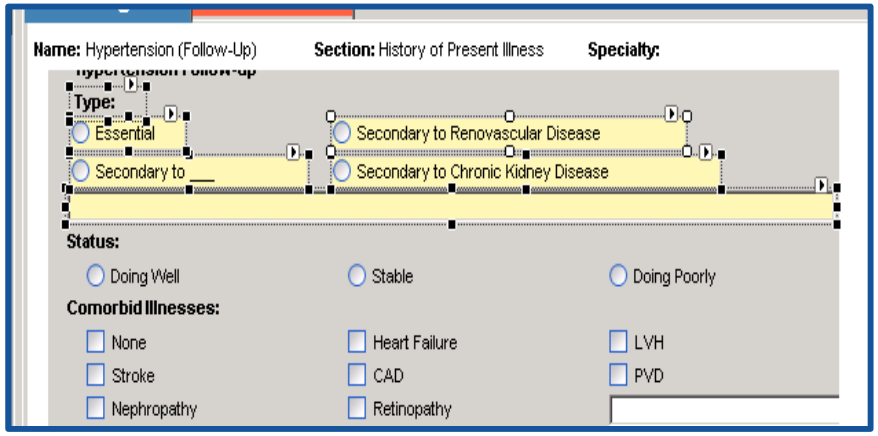
More Details and configuration will be demonstrated in the Webcast

(Screenshots on the following pages display the areas that will be demonstrated)

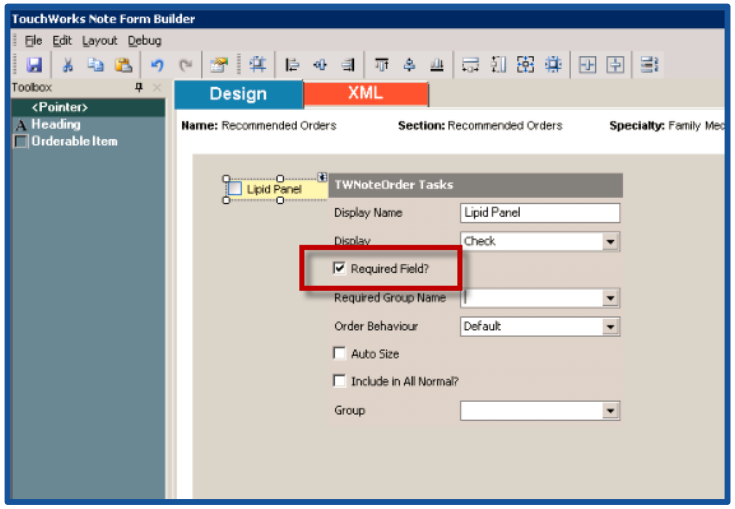
Note Admin Workspace >>Noteforms

Make Noteform Controls Required

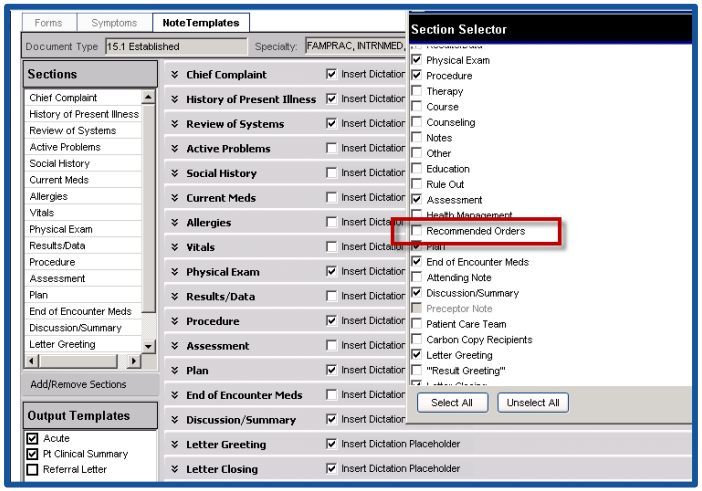


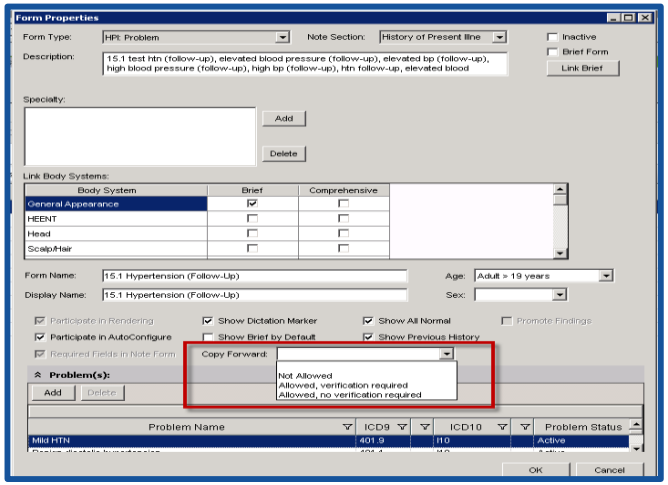


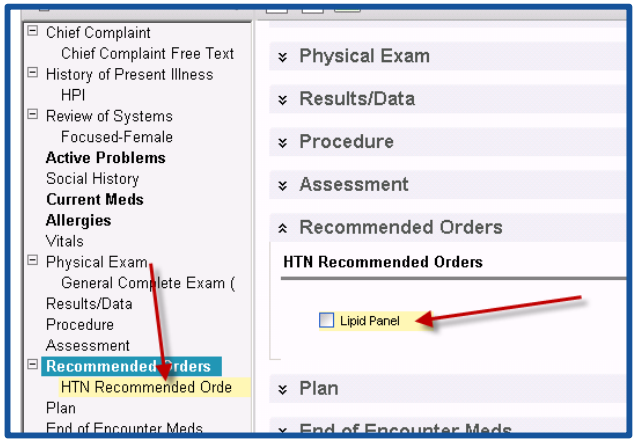
Creating Required Orders in Noteform



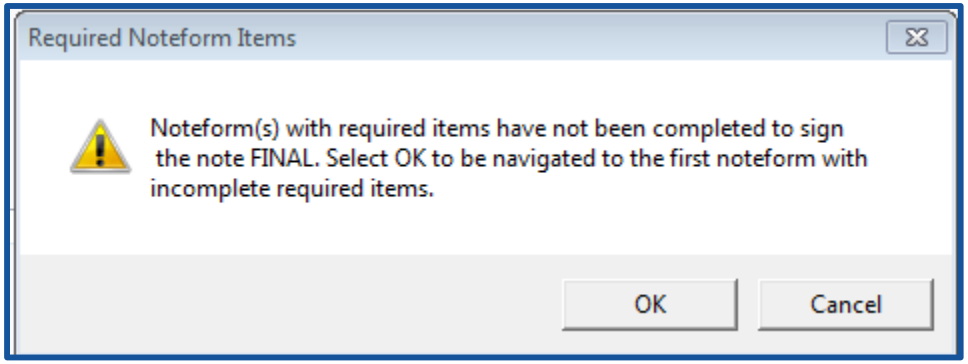
Add a Recommended Orders Section to a Note







Warning pop-up if required fields not satisfied



Demo Outline: Making a Noteform Control Required

- You must be logged on to Allscripts TouchWorks® EHR with administrative credentials.
- You should have already added the **Y/N**, **+/-**, **Checkbox**, **Radio Button**, and **Text Box** control types to the note form that you want to make required.

1. With the note form open in Note Form Builder, click the small arrow at the top of item that you want to make required.
    a. Depending on the type of control on the form, either TWNoteText Finding Tasks, TWNoteMedcin Finding Tasks, or TWNoteOrder Tasks page is displayed.
2. Select Required Field?.
3. If multiple controls should comprise a required group, select Required Field? in the properties for each item on the form, and enter the same value for Required Group Name for each item.
    a. When a required item is part of a required group, satisfying the requirement for 1 of the items satisfies the required status for all of the items in the group. The controls can be of different types.
4. Close the control properties page and save your changes.
5. Access Form Properties and select a setting for Copy Forward for required controls for that note form.
    a. When you enable copy forward for required fields, you can specify if verification is required on copied-forward data to meet the requirement.
6. Click OK.
7. To make the changes available to users, click Publish.

- Results of this task
  When the required field is displayed on a primary note form (not used as a detail form), it is displayed as yellow on **Note Form Builder**, and also in the note form or section on **Note Authoring** until the requirement is satisfied. Additionally, the note form or section name in the outline on the **Note Authoring** workspace outline is also displayed in yellow until the requirement is satisfied.

Demo Outline: Creating Required Orders in Noteform

1. Go to Note Admin> Forms Tab> New Button> Forms Properties screen opens
2. Form Type = "Recommended Orders"
3. Add a description per your conventions
4. Add Specialty
5. Personalize Name and Display Name
6. Add Age and Sex if Appropriate
7. Default Problems > Add
    a. If added the order will auto default as linked to this problem
8. Recommended Problem(s)> Add
    a. If added will supply the problem or list of problems in the problem linkage area "For"
9. OK > Noteform Builder screen will open
10. Check mark Orderable Item in the Toolbox
11. Drag/Expand/Create a Control Field > Select Orderable Item screen will open
12. Search for the needed Orderable Item
13. Select/Highlight needed item and use down arrow to move item > OK
14. Complete set up of Orderable Item as a noteform control
15. Check mark "Required Fields"
    a. If the added item is not check marked it will be added to the form as "Recommended" but not required (not in yellow) and will not hamper finalization of the note)
16. Set up Required Group if appropriate
17. Save changes> Publish

Demo Outline: Add a Recommended Orders section to a note

- You must be logged on to Allscripts TouchWorks® EHR with provider credentials.
- A note form of type **Recommended Orders** must be configured.

1. Create a new V11 note or select an existing to add section to.
2. At bottom of Sections click Add/Remove Section > Section Selector page opens
3. Select "Recommended Orders" > OK
4. Depending on where you want Recommended Orders to display in the workspace, right-click on the new "Recommended Orders" section in the table of contents and Move Up or Move Down until section is in the desired section order.
5. Form Selector is displayed in the new "Recommended Orders".
6. On Form Selector, enter the necessary search criteria so that the configured note form of type Recommended Orders is displayed in the list.
7. Using the check box, select the form, and click OK.
8. Your new form is displayed in the Recommended Orders section.
9. In Output Template section Right Click and Edit an output
10. In Sections List right click on the new "Recommended Orders" section in the table of contents and Move Up or Move Down until section is in the desired section order.
11. OK > Save

Note Output Progress Check

- You can now perform a check while working in the **Note Authoring** workspace to determine if a minimum level of documentation has been recorded for specific note outputs.
- By default, this feature is not enabled.
- Highlights of the note output progress check feature include:
  - A new check box, Participate In Progress Check, was added to each section on Note Output Template, except for Signatures.
  - When you select Participate In Progress Check, the section is included in the note output progress check.
  - There is also a All Sections Participate In Progress Check check box in the Format Defaults for All Sections section to include or exclude all sections (except for Signatures).

Demo Outine: Note Output Progress Check - Note Template Configuration

TWAdmin > Note Admin > Note Admin Tab >

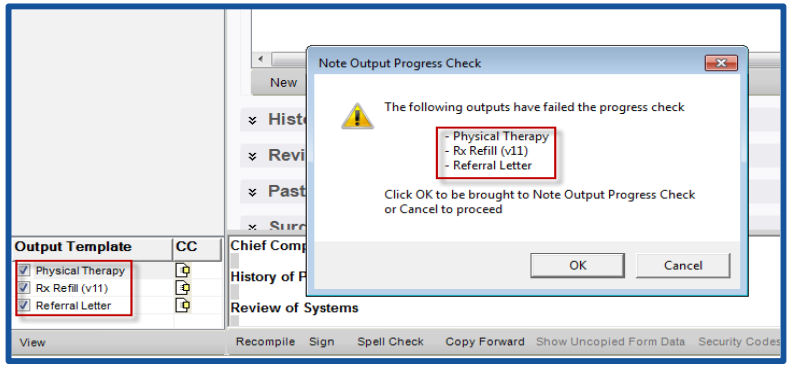
1. Use an existing note template or create a new note template
2. In the left pane, navigate to the note output template
3. Right click and edit the output template you would like to participate in the progress check
4. Check the box in the Format Defaults for All Sections if you want all sections to participate in the progress check
5. If you only want certain sections to participate, you will navigate to each section and check the box for that section

Demo Outine: Note Output Progress Check - NoteOutputProgressCheckWarningTiming Preference

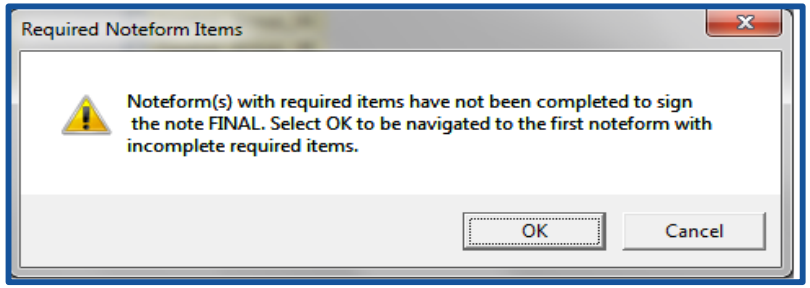
TW Admin > Preferences > Preferences tab > Note

1. The preference is available at the enterprise, organization, and user levels. The user cannot override the preference
2. Options Available
   - Never – The Progress Check warning box will not appear and user will be allowed to proceed without the knowledge of any failed sections
   - On Closing – Progress check warning box will appear on closing, signing, or finalizing the note if there are sections that participate in Progress Check and have not been completed
   - On Signing – Progress check warning box will appear if signing the note and sections that participate in Progress check are incomplete
   - On Finalization - Progress check warning box will appear if finalizing the note and sections that participate in Progress check are incomplete

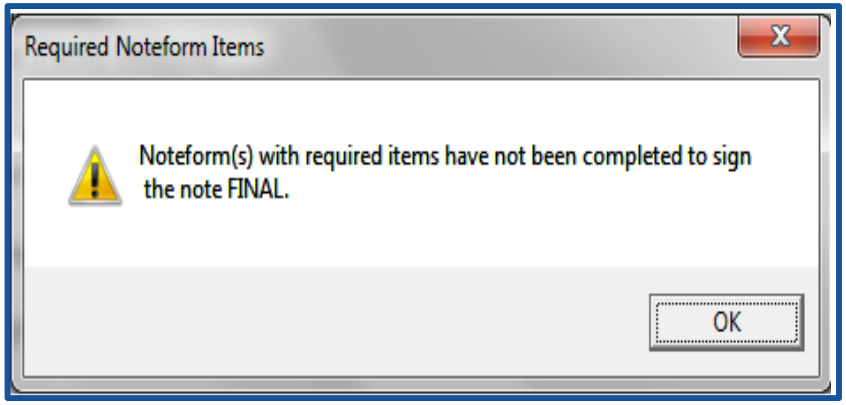
3. The Progress Warning message will display:



4. Other Warnings – these will display in different situations for the required controls
5. If you try to sign and finalize the note from **Note Authoring** workspace, and the note contains forms with required items that have not been completed, the following message will display:



6. If you try to sign and finalize the note from **Note Viewer** or **Note Output**, and the note contains forms with required items that have not been completed, the following message will display:



Running a Note Output Progress Check in NAW

- The progress check is optional and is for information only
- Requires at least one note section to participate or the Progress Check option is not available
- Progress Check is not available for outputs that have been invalidated

<u>Demo Outine: Steps to Run Note Output Progress Check</u>

There are two ways to run a Progress Check:

From the Note Authoring Workspace

1. Right click on the note output template you want to check
2. Click on Progress Check
3. The Progress Check window will open
    a. Sections that have a green happy face have passed the Progress Check
    b. Sections that have a red sad face have failed the Progress Check
    c. Sections that have N/A do not participate in the Progress Check
4. Click close to continue working and complete the failed sections of the note

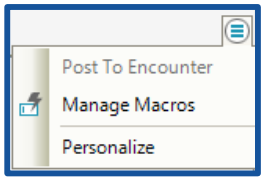
From the Patient Summary Tab of Note Output

1. Click on the output Summary tab
2. Click on Progress Check
3. The Progress Check window will open for review of the sections
4. Click close to continue working

Text Macros

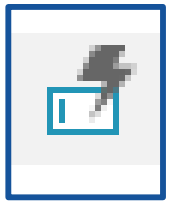
Text macros can now be created/managed in Touchworks in the following areas:

Clinical Toolbar – click on the Main Menu icon



Clinical Desktop – click on the Main Menu icon

Note – click on the Text Macros icon



Call Processing – click on the Text Macros icon

Phys Admin – Manage Macros Workspace

Demo Outine: Creating Personal Text Macros in the NAW

1. In the note authoring workspace, click on the text macro icon to open the Manage Macros box
2. Click the Create button
3. Create the shortcut name (ex. .text)
4. Enter a brief description of the text macro
5. Enter the entire text in the text box (merge fields can be used)
6. Click Spell Check to validate the text is entered correctly
7. Click Save
8. Click Close
9. Click on the section of the note where you want to insert the text macro
10. Type the shortcut name (.retfour)
11. The complete text will render

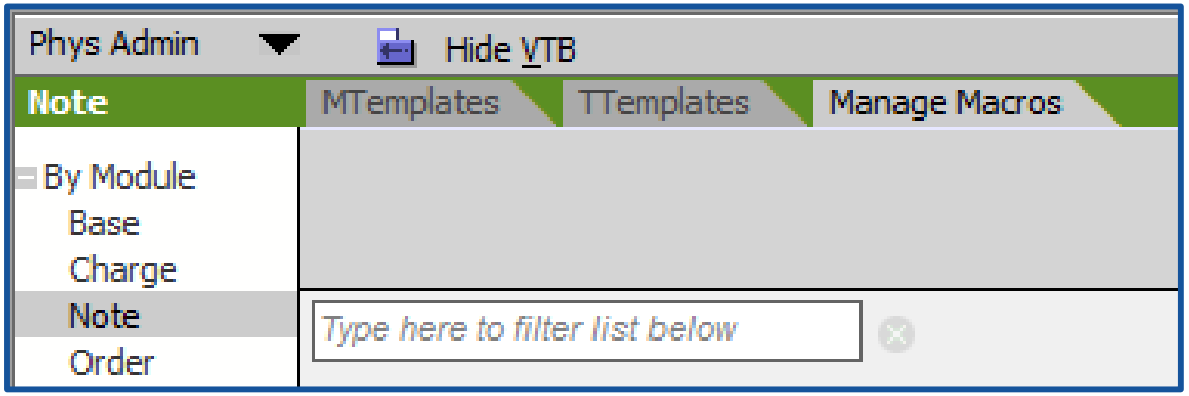
Personal Text Macros

A user/provider can use text macros in the following areas:

- Any free text areas in the note
- Within text templates
- Description, annotation and comment fields of problems, allergies, and medications.
- Call processing
- Tasking

Demo Outine: Creating Text Macros at the Enterprise Level

Phys Admin > By Module > Note > Manage Macros



- View, create, edit, copy, and activate or inactivate your organization's text macros (User must have Admin privileges)
- Copy and make changes to enterprise-level macros
- Can assign macros to individual users
- Track Macro Usage and last date used

Text Templates Improvements

- Improvements were made to text template version 15.1.
- Added the ability to insert text templates into a note by clicking the Add Text Template icon
- Inserting text templates when documenting an impression on Problem Details.
- Addition of Favorites to Text Template selector fields

More Details and configuration will be demonstrated in the Webcast

(Screenshots on the following pages display the areas that will be demonstrated)

Demo Outine: Steps to add a Text Template to Current Impression

1. Highlight section where text template is desired
2. Click on Add Text template Button
3. Template now appears in the correct section
4. Templates can be selected by specialty
5. Once the text template has been personalized click the apply button to add the template to the note output.

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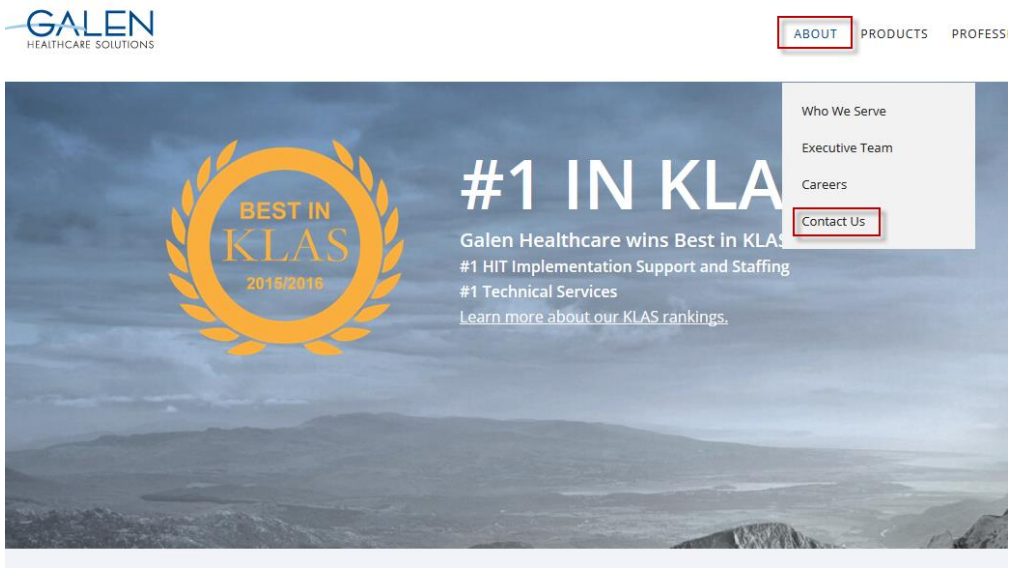

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